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Activities

Items scheduled on the calendar in TeleMagic that you may opt to include in synchronization.

Batch File

A text file containing a series of commands used to automate repetitive tasks. You can include program names, operating system commands, batch language commands and other variables in your batch files. May be used with Data Synchronization in Scripting.

Central Installation

See: Central Site

Central Site

The main installation of TeleMagic used in synchronization. All other sites are synchronized with this installation, with the exception of remote sites that are attached to a satellite. All settings and configurations for the remote and satellite sites are made and maintained at this central location.
Compare: Remote Site and Satellite Site

Central User List

The list of users who belong at each site maintained at the central installation. The Main Central User List is a complete list of all users at all sites. Additionally, each remote site will have a site-specific central user list that will be synchronized to the list of users actually at the remote installation of TeleMagic.

Communications Server

An application, such as an e-mail system, that allows you to transfer files to locations outside of your current network using a modem. See also: Modem

Database Files

In Database Preferences in Data Synchronization Server, this pertains to the files that contain structural information for a database (i.e., the database template). It includes all fields and their layout, filters, indexes, list boxes, and preferences. (Within TeleMagic, Database Files also include contact data.)

DB Preferences

Global Database Preference settings which allow you to select defaults for what data is to be synchronized from each database. These settings can control the exchange of data from as broad a spectrum as an entire database level, or as restrictive as individual fields. See also: Site DB Preferences

E-mail Transfer

Automated file transfer of your Data Synchronization packets via TeleMagic Internet Mail.

Everyone Security Group

A security group that can be created in the remote sites and used as a default when adding new users to a site during synchronization. See also: Security Group

Expression

A string of characters which, when evaluated, generates a new or specific piece of information. Used in Data Synchronization Server in field rules to control when a field gets replaced. See also: Field Rules

Field Level Synchronization

The type of synchronization performed by Data Synchronization Server. During synchronization, each changed field is analyzed individually and replaced according to rules established for that field.
Compare: Record Level Synchronization   See also: Field Rules

Field Rules

Rules which allow you to control how and when information in the central installation is replaced with information from a remote site for any field.

File Set

A selected group of files that can be transferred to a remote site during synchronization.

FTP Site

An FTP site is a special address on the Internet that is used for file transfer. To set up an FTP site, contact your Internet Service Provider. (This is required to use FTP Transfer .)

FTP Transfer

Automated file transfer of your Data Synchronization packets via the Internet. It allows you to automatically establish an Internet connection and send outbox packets to an FTP site. You may also retrieve packets that have been sent from other sites to the FTP site and copy them to your inbox.

FTP Transfer will work with existing connections. If you are already connected, DSS will bypass the dial-up steps and transfer the packet to the FTP site.

See also: [FTP Site](#)

Global

Any setting that is universally referenced. In Data Synchronization Server, any setting that will be used as a default for all sites, unless otherwise specified. See also: [Linked Remote Site](#)

Global Directory

The main directory for your installation of TeleMagic. This directory is named \TM4 by default.

Global Options

Options within the Data Synchronization Server program that allow you to create scripts and file sets, and establish default security and preferences. Items defined in the Global Options area are used in various other areas throughout Data Synchronization Server.

Global Preferences

See: [DB Preferences](#)

Inbound Synchronization

The process of synchronizing incoming information into the current installation of TeleMagic. Compare: Outbound Synchronization   See also: Synchronization

Inbox

A directory created by the Data Synchronization Server program to contain the incoming packets of information to be synchronized to the local installation. The packets in an inbox contain changes transferred from another site that need to be incorporated into the current installation. Compare: Outbox   See also: Packets

Initialization

A special type of synchronization that allows you to prepare the databases and certain areas of security of a remote installation for synchronization. It also allows you to transfer data to your remote sites that would not ordinarily be a part of standard synchronization (such as scripts and file sets).

Initialization Preferences

Settings which allow you to specify exactly what structural and other changes should be included in an initialization packet. See also: Initialization

Installation

A unique copy of TeleMagic. Each installation of TeleMagic used with Data Synchronization Server is a site. (Also used to refer to the process of installing software.)   See also: Site

Laptop

A portable computer that can contain a remote installation of TeleMagic that may need to be synchronized with the central installation or a satellite site. See also: Central Site, Remote Site and Satellite Site

Linked Remote Site

A site that uses the Global Preference settings. Compare: [Unlinked Remote Site](#) See also: [Global](#) and [DB Preferences](#)

Master Template User

A user created in TeleMagic and assigned a full set of preferences. You can select a Master Template User for the purpose of using those preferences as defaults for new users being added through Data Synchronization Server.

Modem

A peripheral device that can link your computer to other computers using telephone lines. In reference to Data Synchronization Server, a modem can be used to transfer packets to other sites. See also: Packet Transfer and FTP Site

OLE Fields

Object Linking and Embedding. The ability to access data (such as spreadsheets or graphics) in an application other than the one in which it was created.

Options

See   [Global Options](#)

Outbound Synchronization

The procedure of processing changes made to the current installation of TeleMagic for distribution to additional sites. Compare: Inbound Synchronization   See also: Synchronization

Outbox

The directory created by the Data Synchronization Server program where outgoing packets of transaction records and other changes are placed. The packets in an outbox contain the latest changes made to a database. Compare: Inbox

Packet Transfer

The procedure of transferring packets using one of the methods built into Data Synchronization Server.
See also: FTP Transfer and E-mail Transfer

Packets

Compressed files containing all of the information that needs to be synchronized into a site. Packets can include transactions, database files, contact information, activities, etc. See also: Transaction File

Process Mode

The mode Data Synchronization Server enters during the synchronization procedure. During processing, information from other sites can be synchronized to the current installation, and changes to the current installation can be placed into packets to be sent to other sites. (Only the central installation and satellite sites process multiple sites. Remote sites synchronize with the central installation or a satellite site.)   See also: Synchronization

Record Level Synchronization

A type of synchronization performed by many database synchronization programs. If any field in a record has changed, the entire record is overwritten, potentially resulting in unwanted changes. Data Synchronization Server *does not* use record level synchronization. Compare: Field Level Synchronization

Remote 'Everyone' Group

See: Everyone Security Group

Remote Site

Any installation, other than the central site, included in synchronization. Compare: [Central Site](#) and [Satellite Site](#)

Remote Site's Central User List

See: Central User List

Remote User

A user at a remote site. Remote users may or may not also exist at the central site. See also: Remote Site, Central Site and Satellite Site

Satellite Site

A satellite site functions as both a server and a remote, synchronizing with the central site as well as the satellite's own remote sites. The central views and treats the satellite just like any of its other remote sites. The remote sites which are attached to the satellite do not communicate directly with the central site, but view the satellite site as their central installation. See also: Central Site and Remote Site

Script

A series of instructions allowing you to automatically perform various types of functions related to synchronization. Each part of a script will proceed automatically at a specified time once the script has been launched.

Security Group

A defined group of users with specific security settings. Used in Data Synchronization Server to refer to the actual security settings.

Server

A device used by the central site and satellite sites to process packets during synchronization. Can also be used to refer to the installation of Data Synchronization Server that contains the server (e.g., the satellite that synchronizes with a remote is that remote's server).

Server ID

A three-character code identifying a particular server. The central site can have multiple servers, each with a unique ID.

Site

A location where a TeleMagic installation has been set up and is used with Data Synchronization Server. See also: Remote Site, Central Site and Satellite Site

Site Database

A setup option in the central site that allows you to select specific databases to be included in synchronization for a particular site, bypassing the databases that have been set up as global defaults.
See also: Global, Site DB Preferences and Unlinked Remote Site

Site DB Preferences

Preference settings which allow you to control what information from each database is synchronized for a particular site. Sites for which site specific preferences have been set will no longer read the global defaults. See also: Global and Site Database

Site ID

A three-character code used to identify a site in Data Synchronization Server. Data Synchronization Server will synchronize this Site ID to the installation's System ID on initialization, if the two do not already match. See also: System ID

Site Initialization

See: Initialization

Site Preferences

A set of preferences that controls how a site is synchronized. Site preferences include such things as the date format in use at the site and whether or not e-mail and activities are synchronized to the site.

Source Field

The field in which an edit was originally made. This edit can then be sent out from the source to other sites through synchronization. Compare: Target Field

Supervisor Group

A security group that has full access to all areas of TeleMagic.

Synchronization

The process of updating changes made in one installation of TeleMagic to another installation. In Data Synchronization Server, synchronization consists of processing incoming packets and creating outgoing packets of changes for distribution to sites. See also: Packets, Process Mode and Site

System ID

A three-character code identifying and distinguishing the installation of TeleMagic at a site. See also:
Site ID

Target Field

A field for which there is a transaction record created from a change in another installation. Data Synchronization Server will locate this target field during synchronization and determine if the updated information should be placed into it (according to the validations you have set up). See also: Transaction Record, Field Rules and Source Field

Transaction Cutoff Date

The date and time of the last transactions received by a site. When you create a packet, Data Synchronization keeps a record of the date and time of the last transactions included in the packet. The next packet you create will only include transactions after that date and time. See also: Process Mode, and Transaction Record

Transaction File

A file which holds all of the transaction records created for a specific site. This file will be condensed into a packet during the processing of the site's outbox. See also: Transaction Record

Transaction Record

A record of a change made to a contact field, an activity, or e-mail that needs to be synchronized. The transaction records will be placed into a transaction file and included in the outgoing packet(s) when the site is processed. See also: Transaction File

Unlinked Remote Site

A site that has been set up with its own database preferences and does not use the Global settings.
Compare: Global and Linked Remote Site

User List

A list of users belonging to a certain site.

Variable

A named storage location for specific information. Used in Data Synchronization Server to create expressions for field rules. See also: Field Rules and Expression

Central Site Setup

Remote Site Setup

Satellite Site Setup

Performing Synchronization

Maintenance

[Maintaining Your Central Location](#)
[Maintaining Your Remote Sites](#)

Troubleshooting

[Common Questions and Answers](#)
[How Data Gets Synchronized](#)
[Packet Compression Error Messages](#)
[Viewing the Server Log Maintenance](#)
[Viewing Site Logs](#)
[Server Setup Report](#)
[Log Maintenance Report](#)

Transferring Packets

Tips, Tricks, & Technical Notes

These are last-minute notes and tips, not included in your *Data Synchronization Server* guide, which will be of interest to most TeleMagic users. We urge you to read these notes for future reference. Click here if you would like to print them out as one long topic.

Errata

The Data Synchronization Server manual contains the following errors:

Page ii

The telephone number above the Sage logo should be 972-818-3900.

Central Setup Options

The following list includes all setup options available at the central installation. Some of these features are mandatory to setup, others are optional (either the feature itself is optional, or defaults have been provided that do not need to be adjusted unless desired). The mandatory options are preceded by an asterisk on the list.

[*Setting Up the Site Lists](#)
[*Assigning Users to Your Remote Sites](#)
[*Choosing the Databases to Synchronize](#)
[Choosing the Data from Each Database](#)
[Global Options](#)
[Site Preferences](#)
[Initialization](#)
[Setting Field Rules](#)
[Setting Up Your Server(s)](#)
[Establishing Server Options](#)

Packet Compression Error Messages

If you receive an error message while compressing or decompressing a Data Synchronization packet, use the following list to determine the cause of the problem:

Error Number	Meaning
1, 6 or 7	Out Of Memory
2	Unable To Open Input File
3, 8	Out Of Disk Space
4	Bad Zip Data
5	Zip Aborted

Apply to All Sites

The Apply these settings to all sites option in Global Database Preferences will apply the current settings to all sites that are *unlinked* from the global preferences. This option is not necessary for sites that are currently linked to the global database preferences, as they will read the settings automatically.

Rejected Packets

If a packet is rejected during processing, it will be placed in the \BACKUP sub-directory under the \TMSYNC directory in the TeleMagic global directory path. This will be applied if a site is set to Do not accept packets from this site in Site Preferences, or if the date of the packet is older than the date set in Server Options under Reject incoming packets older than. If you want to use a packet that has been rejected, temporarily adjust the setting that caused the packet to be rejected, move the packet from the \BACKUP directory to the \INBOX directory (or whatever directory has been assigned as an inbox in Server Options), and re-process.

Nothing to Process Message

If you select to process and receive a message stating that there is nothing to process, one of the following has occurred at the central installation:

●   You have no users established for the site. (This will be reflected in the Log Maintenance screen.)

●   You have no sites set up in your site lists.

●   Your server is not set to process at the current time.

●   All of your sites are waiting for a response to an initialization packet or are on hold. (This will be reflected in the Log Maintenance screen.)

●   Your server is set to process the inbox only and there are no packets in the inbox.

●   Your server is set to process the outbox only, there are existing outbox packets for all of your sites, and it is either not yet time to update any of the packets existing in the outbox, or you have set the server to not update existing packets (according to the Update existing outbox packets every setting in Server Maintenance).

One of the following has occurred at the remote installation:

●   You have marked Process Inbox only and do not have a packet in the inbox.

●   You have attempted to process an initialization packet that will affect security with the Do not assign security to users option selected in the Security and Preferences screen off the Options dialog box.

If you receive a Nothing to Process message, check the Log maintenance screen and/or review your setup to determine which of these options is causing the message.

Field Rule Exception

Field rules will be applied to all field types with the exception of Unique Number fields.

/TD= Parameter Requirement

If you are using the /TD=*date* parameter at a remote site, you must use a hyphen "-" as your date separator character in the parameter.

m.cSITEID Variable Requirement

If you are using the m.cSITEID variable in an expression in field rules, you may only select the field for which the rule is being created from the Fields list in the Expression Builder. Disregard the other fields on the list.

Database Specific List Boxes

If you are synchronizing list boxes, Data Synchronization Server will synchronize list boxes that are stored in a database directory.

Password Prompt with Setup Report

If you select to print or view a Setup report, you will only be prompted for a password if the user currently logged into Data Synchronization Server has a password.

Field Level Date/Time Validation Issues

● If you have Validate contact record revisions at field level marked in site preferences, this will be applied to all field types with the exception of memo fields.

● Be aware that date and time validation will only be performed for sites that have the Validate contact record revisions at field level check box selected in Site Preferences. If a change to a field comes into the central site from a remote site that uses field level validation, then another change comes in from a site that does not use it, the incoming change will overwrite the original change (according to field rules), regardless of which is more recent. It will not reference the fact that the original change was created with validation on. If you set some sites to validate and others to not validate, make sure you want changes from the sites not set to validate to have precedence.

● If the Validate contact record revisions at field level check box has been unmarked, then is later marked, the date and time validation will not be effected for changes made to the central installation from the remote site until an inbox packet has been processed at the remote site.

Initializing Single Sites

Selecting any of the database or contact record related options in Initialization Settings will affect *all* databases selected for that site. If you want to only affect a single database, you can either temporarily remove all but that database from the site's list of databases and perform the initialization; or access the Site's Database Preferences for that database and use the Select all records, ignore transaction radio button and/or the options in the Database Files to Transfer dialog box and perform a standard synchronization. Be sure to return the options to their original settings after the synchronization has been performed.

Log Maintenance Filters

The filtering options used in the Log Maintenance screen will also be used in the Log Maintenance Report, and vice versa. If you change the settings in one dialog box, be aware that it will also be changed in the other.

Century Format in Start and Last Revision Fields

If an installation of TeleMagic is being used as a site with Data Synchronization Server, the century will be used in the dates in the Start and Last Revision fields. If you are using the Start or Last Revision fields in any expressions that reference the length of the date, you may need to update the expressions to reflect the two extra characters. All other date fields will continue to use your Display Preference setting for century.

Duplicate Notes

If a note is duplicated in a memo field during synchronization, it is probable that the original note was entered at the top of the memo field with no date and time stamp. It is highly recommended that you encourage all users at all sites to use the Notepad Stamp feature (ALT+N) when placing notes in memo fields.

Creating Empty Databases

Be aware that if you access the Database Files to Transfer dialog box in Database Preferences and mark only the Create database if not found check box, if the database is not found a blank database will be created (without any of the fields, structure, filters, etc.).

Hint for Initialization with Multiple Laptops

Once an initialization packet has been created, the site will be placed on hold until a response packet is received from the site. If you have performed a first time initialization on a large number of laptop installations prior to distributing them, you may consider processing the outboxes at the sites immediately after processing the initialization packets. Although there will be no transactions in the outbox packets if no edits have been made to the sites, creating the outbox packets immediately and synchronizing them into the central installation will change the each site's status to active, allowing the central installation to adjust any of the sites' settings as necessary.

Data Synchronization and Node Installations

If you are running TeleMagic from a node installation, be aware that the executable files for Data Synchronization must be run from the global directory, not your local TeleMagic directory.

Inbox Processing Order

If there are multiple packets in the central installation's inbox, Data Synchronization Server will process the packets for each site in the order that the sites were originally added. If a field is edited at more than one site and you are not performing any validation on contact record revisions, the change made to the most recently added site will be retained.

Update Central User List and Activity Permissions

Update central user list must be marked in Site Preferences for changes to activity permissions made at a remote site to be synchronized. If you do not want to have the central user list updated on a regular basis, mark it when there are activity permissions that need to be synchronized, then unmark it immediately after. (This is not an issue for permissions assigned at the central site.)

TeleMagic Status Bar

The status bar in TeleMagic will display information about whether or not a site is being used in database synchronization. If the database is used by Data Synchronization, the word Sync will appear on the status bar. If it is not, the word Sys will appear. In synchronized databases, the Sync will be followed by -O if you have selected to synchronize OLE fields for this database.

Date/Time Validation with All Records

If you have the Validate contact record revisions at field level check box marked in Site Preferences, the time needed for processing an incoming packet that contains all records at the remote site will be dramatically increased. In the case of a first time initialization packet, or in any case where you want the remote site to exactly match the central site, you should consider turning off date/time validation. Leave it marked if you have been working in the remote database and do not want recent edits overwritten with older data; however take into account the increased processing time.

Using the /TD= Parameter

If you have placed the /TD= parameter into the command line attached to the Data Synchronization icon at a remote site, make sure you edit the command line to remove this parameter after you have processed the outbox. If you do not, this transaction cutoff date will continue to be used with every packet.

Changing Default Security Settings at a Site

If you have selected a default security group in Security and Preferences off the Options screen with the same name as a group already existing at the remote site, the group at the remote will be overwritten with the group from central. All of the users previously assigned to the group at the remote will be assigned to the new group from central. If you want to use the other settings at the remote site, change the group's name before synchronizing from the central site.

Multiple Packets in a Site's Inbox

If you receive a message at your remote site that it cannot be processed because there are multiple packets in the site's inbox, one of two things has happened. Either you have inadvertently moved another site's packet into the inbox along with your own, or you have your site's inbox pointed to the central site's outbox. If you have copied too many packets, return the extra packet to the site to which it belongs. If you have your path set to the central site's outbox, you must select another path. Unless you have only one remote site, you will not be able to process with this arrangement.

Reassigning Child Records Issues

●   If you use the Reassign feature in TeleMagic to move a child record from one parent to another, make sure that the new parent exists at the remote sites. If it does not, the child record will be deleted.

●   If multiple sites reassign the same record to different parents, the child record will be added to each parent. The multiple child records will be treated as different records.

●   If you do not have Synchronize deleted contact records marked in Database Preferences for a site, records that have been reassigned will be added to the new parent, but will not be deleted from the original parent.

Tips, Tricks, and Technical Notes

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If you have placed the /TD= parameter into the command line attached to the Data Synchronization icon at a remote site, make sure you edit the command line to remove this parameter after you have processed the outbox. If you do not, this transaction cutoff date will continue to be used with every packet.

/TD= Parameter Requirement

If you are using the /TD=*date* parameter at a remote site, you must use a hyphen "-" as your date separator character in the parameter.

Changing Default Security Settings at a Site

If you have selected a default security group in Security and Preferences off the Options screen with the same name as a group already existing at the remote site, the group at the remote will be overwritten with the group from central. All of the users previously assigned to the group at the remote will be assigned to the new group from central. If you want to use the other settings at the remote site, change the group's name before synchronizing from the central site.

Multiple Packets in a Site's Inbox

If you receive a message at your remote site that it cannot be processed because there are multiple packets in the site's inbox, one of two things has happened. Either you have inadvertently moved another site's packet into the inbox along with your own, or you have your site's inbox pointed to the central site's outbox. If you have copied too many packets, return the extra packet to the site to which it belongs. If you have your path set to the central site's outbox, you must select another path. Unless you have only one remote site, you will not be able to process with this arrangement.

Reassigning Child Records Issues

● If you use the Reassign feature in TeleMagic to move a child record from one parent to another, make sure that the new parent exists at the remote sites. If it does not, the child record will be deleted.

● If multiple sites reassign the same record to different parents, the child record will be added to each parent. The multiple child records will be treated as different records.

● If you do not have Synchronize deleted contact records marked in Database Preferences for a site, records that have been reassigned will be added to the new parent, but will not be deleted from the original parent.

OLE Fields

OLE fields will not appear on the list of fields to be included in synchronization in Database Preferences. Synchronizing OLE fields is controlled through the Synchronize embedded OLE fields option in Database Preferences. If this is marked, all OLE fields in the database will be included.

User Directory Preferences

When you select a default user in the Security and Preferences screen off the Data Synchronization Options screen, that user's TeleMagic preferences will be given to all new users added through Data Synchronization. Any Function Keys or Toolbar Configurations that are stored in the user's User Directory in TeleMagic will also be transferred to the site.

If the default user's Directory Preference settings within TeleMagic are set to use list boxes stored in the user's directory at the central site, and the user receiving those preferences at the remote site does not have list boxes in his or her user directory, Data Synchronization will copy the global list boxes at the remote site to the user's directory. The user can then edit the list boxes as necessary without affecting the global list boxes.

Restoring Deleted Records

If you have Synchronize deleted contact records selected in Data Synchronization's Database Preferences, and you delete a record then restore it using the Group Restore option, the record will be deleted at other sites on synchronization. Restoring deleted records is not supported in Data Synchronization. This will also apply to undoing the deletion of activities if you have Synchronize activities which have been deleted selected as an activity filter criteria in Site Preferences. (As long as the database has not been rebuilt and packed, deleted contact records can be restored at the target site after synchronization using the Group Restore feature.)

TeleMagic Rebuild

If you are synchronizing any structural changes or indexes to remote sites, a TeleMagic rebuild will be performed at the site during synchronization. If you have deleted any records at the site that you want to recover, you should do so before synchronizing a packet that will perform a rebuild. Once the database has been packed during rebuild, you will not be able to recover your deleted records.

Duplicate System IDs

When setting up your sites you were advised to use a site's System ID as the Site ID. If you do not, you should keep a list of the old System IDs and make sure you never assign them to any site as a Site ID. (Contact records are identified by a unique ID that includes the System ID. If an old System ID

is later used as a Site ID in Data Synchronization, you may experience data conflicts.)

Deleting Activities through Initialization

When you choose Delete existing activities in Initialization Settings, extended activities will not be affected.

Global Extended Activities

Global Extended Activities will only be synchronized to sites at which the user who created them exists.

Place original data into memo field check box

The Place original data into memo field for this level check box on the Field Rules dialog box will be dimmed if there are no memo fields existing on the current level of the selected database. It will also be unavailable if you are creating a field rule for an OLE field.

Be aware that this check box only applies to the currently selected field. If you want to have the original contents of every field placed in the memo field, you must select each field and mark this check box.

Transactions with Initialization

If you perform an initialization without the Transfer contact and activity records check box selected, your contact records will be synchronized according to Data Synchronization's Database Preferences for that database (it will reference whether you are synchronizing transactions only, or all records in the selected filter). If you select the Transfer contact and activity records check box, Data Synchronization will ignore transactions when synchronizing contact records.

Synchronizing TeleMagic Database Preference

Be aware that the option to synchronize TeleMagic Database Preferences will be marked by default in the Database Files to Transfer dialog box off of Data Synchronization's Database Preferences screen. These preferences will overwrite any database specific preferences at the site. These preferences include the Database and Key Fields preferences. Careful consideration should be given when deciding whether you would like the site to be able to define their own key fields, or whether you would like to continue to overwrite any edits to Key Fields on synchronization. If you do not want to overwrite the site's TeleMagic Database Preferences, unmark the Transfer Database Preferences check box.

Password Security with New Users

When adding new users through synchronization, Data Synchronization Server will check to see if the user currently exists in the central installation of TeleMagic. If it does, the user's TeleMagic password will be given to the user at the remote site. If it does not, the user will be added at the remote site without a password.

Login

Logging into Data Synchronization server does not affect the number of users able to access TeleMagic concurrently. If you have a five user network, you can have three workstations running Data

Synchronization Server at the central installation, and still be able to have up to five users logged into TeleMagic.

Changing the Site ID

If you want to change the Site ID of a remote installation of TeleMagic, you should make sure that you have processed the most recent incoming packet from the site before making the change. If the remote site creates a packet after its Site ID has been changed at the central installation, but before the initialization packet containing the change has been received at the site, the packet will contain the old Site ID and Data Synchronization not recognize it. When you attempt to process the inbox at the central installation, the packet with the invalid Site ID will be deleted. If you change a Site ID, alert the users at the site that they should not process the outbox before receiving the initialization packet. If you receive an initialization packet at the remote site and are processing from a script, make sure that your script is set to process the inbox before processing the outbox.

Disk Space Requirements

When a packet is created, the data in the packet is compressed. When the packet is later synchronized into a site, it is decompressed and a temporary file is created containing all of the changes that will be synchronized into TeleMagic. Be aware that these temporary files can be quite large, especially if you are synchronizing entire databases and contact records (not based on transactions). You should make sure that you have sufficient disk space at the remote site before processing the packet.

Records with No Contact ID

If a record has no Contact ID, it will not be synchronized. (Records without a Contact ID may be created by some third party applications that add records to TeleMagic.)

E-mail for Deleted Users

When a user is deleted through synchronization, all of that user's e-mail will also be deleted at the site. A transaction will not be written when e-mail is deleted in this fashion. (If the e-mail exists at other sites, it will be retained unless the user is also deleted at those sites.)

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Introduction to Database Synchronization

{ewc rhgbtn32.dll, BlueSkyHelpButton, g<RELAUP01.BMP|
RELADN01.BMP<Klink(Synchronizationï¿½ ï¿½ ï¿½)<<1}

Users who work on a network are used to being able to share information with other members of their workgroup through the network connection. Database synchronization is based on the fact that not all members of a given workgroup necessarily work at the same location. You may have satellite offices sharing a database with your central location; or you may have users out in the field who need to be able to access their activities, e-mail, and contact records.

If you have remote installations of TeleMagic, you can use Data Synchronization Server with these installations wherever users need to be able to access and edit data away from the main office. Using Data Synchronization Server, changes to your records made in remote sites can be updated in the central location, and vice versa, as often as necessary to ensure that all users are working with the most up-to-date data.

Users who are accustomed to standard database synchronization programs are used to being able to use synchronization to share basic contact data. TeleMagic Data Synchronization Server offers power features in addition to standard synchronization of contact data. Using Data Synchronization Server you can also synchronize embedded OLE fields, activities, e-mail, filters, indexes, list boxes, users, security, preferences, and even changes to your screens and fields.

Continue…

{ewl rhgbtn32.dll, BlueSkyHelpButton, g<_____153.BMP|
_____154.BMP<JumpId(DS.HLPï¿½DS2_How_Database_Synchronization_Works)<<1} How Database Synchronization Works

{ewl rhgbtn32.dll, BlueSkyHelpButton, g<_____153.BMP|
_____154.BMP<JumpId(DS.HLPï¿½DS_Central_Site_Setup)<<1} Central Site Setup

{ewl rhgbtn32.dll, BlueSkyHelpButton, g<_____153.BMP|
_____154.BMP<JumpId(DS.HLPï¿½DS_Remote_Site_Setup)<<1} Remote Site Setup

{ewl rhgbtn32.dll, BlueSkyHelpButton, g<_____153.BMP|
_____154.BMP<JumpId(DS.HLPï¿½DS_Satellite_Site_Setup)<<1} Satellite Site Setup

How Database Synchronization Works

{ewc rhgbtn32.dll, BlueSkyHelpButton, g<RELAUP01.BMP|
RELADN01.BMP<Klink(Synchronizationï¿½ ï¿½ ï¿½)<<1}

Using Data Synchronization Server entails simple setup where your central and remote sites are established. When setting up the central site, you establish what information should be outgoing. You have total control—down to which fields of contact data should and should not be synchronized. When setting up the satellite and remote sites you give each site a unique name and ID, then establish the user(s) working at each site, and what information should be received by each.

Once setup is completed, TeleMagic will create a file to contain transaction records. As you make changes in TeleMagic, transactions are created for any changes made in databases included in synchronization. When you go into process mode in Data Synchronization Server, these transaction records are condensed into packets and placed in a directory created by the Data Synchronization Server program called by default \TMSYNC\OUTBOX. Users can then retrieve these packets and place them in the inboxes at the remote sites (\TMSYNC\INBOX by default). When a packet in an inbox is processed, Data Synchronization Server will update the remote site with the changes. At the same time, each remote site is creating transaction records which will end up as packets in their outboxes for eventual synchronization with the central location. In this way, the database synchronization process comes full circle and all users are working with the most current, up-to-date information.

Continue…

{ewl rhgbtn32.dll, BlueSkyHelpButton, g<_____153.BMP|
_____154.BMP<JumpId(DS.HLPï¿½DS2_Before_Setup)<<1} Before Setup

{ewl rhgbtn32.dll, BlueSkyHelpButton, g<_____153.BMP|
_____154.BMP<JumpId(DS.HLPï¿½DS_Central_Site_Setup)<<1} Central Site Setup

{ewl rhgbtn32.dll, BlueSkyHelpButton, g<_____153.BMP|
_____154.BMP<JumpId(DS.HLPï¿½DS_Remote_Site_Setup)<<1} Remote Site Setup

{ewl rhgbtn32.dll, BlueSkyHelpButton, g<_____153.BMP|
_____154.BMP<JumpId(DS.HLPï¿½DS_Satellite_Site_Setup)<<1} Satellite Site Setup

Before Setup

{ewc rhgbtn32.dll, BlueSkyHelpButton, g<RELAUP01.BMP|RELADN01.BMP<Klink(Setupï¿½ ï¿½ ï¿½)<<1}

Before you perform database synchronization setup, you must have installed TeleMagic Enterprise V4 and Data Synchronization Server on your central location and any remote sites and/or satellite sites you want to synchronize. *Do not* install TeleMagic on the remote sites by copying your central installation. Each remote site must be a separate installation of TeleMagic Enterprise with a unique System ID. All sites (central, satellite and remote) must be registered copies of TeleMagic Enterprise. (Attempting to install over a demo version will render it unusable.)

You should also know how each remote site will be used. Some points to examine in advance include:

How many remote sites will you be using?

> Creating a remote site is a two part process: installing Data Synchronization Server on the remote and/or satellite installations of TeleMagic, and establishing those sites in Data Synchronization Server at the central installation. You can install Data Synchronization Server on as many remote installations of TeleMagic as you have.

> You must establish a separate installation of TeleMagic Enterprise V4 for each site. (Each site must have a unique serial number and site ID.) Since you will be creating a list of your sites in Data Synchronization Server and giving each a name, it may be helpful if you have listed them in advance.

Who will be using each remote site?

> You will be creating a list of users who may be working at each site. If an installation of TeleMagic is on a user's laptop, and that user is the only one who will be accessing TeleMagic, that is the only user with whom you need to concern yourself for that site. If the installation is at a satellite office, or a laptop used by multiple users at different times, you need to think about who may possibly need to access TeleMagic on that installation and include all of those individuals in the list.

Which databases will the site(s) be using?

> Not all of your sites will necessarily be working with the same information. If you consider who will be working at a site, you may have a better idea of what information they are likely to need to access.

Does the site need to work with all records in the database, or only a filtered group of records?

> If users at a site only work with a filtered group of records in a database, you should think about which group of records in which databases need to go to each site. If you do require filters, they must be created in the central installation of TeleMagic prior to setting up the site in Data Synchronization Server. (For information on creating filters, open TeleMagic's online help and search on *Creating Filters.)*

Are there any fields in the database that should not be synchronized to the site?

> You can selectively exclude any fields from any database for each site if you desire. It will be helpful if you have created a list of fields you do not want included prior to accessing Data Synchronization Server setup.

Consider creating a reference table to contain this information prior to proceeding. An example of this

may be as follows:

Site Name	Users	Databases	Records	Fields
Dale's Laptop	Dale Canopy	Company/Contact	Contacts in California (Company/Contact)	All Fields (both databases)
		Suppliers	All Records (Suppliers)	
Sonoma Office	Dale Canopy	All Databases	All Records	All Fields
	Dan Prey			
	Jennifer Cram			
	Lucy Johnson			

If you have several sites to set up you may find that pre-planning your selections will help to avoid possibly confusing your settings between sites.

Continue…

{ewl rhgbtn32.dll, BlueSkyHelpButton, g<_____153.BMP| _____154.BMP<JumpId(DS.HLPï¿½DS2_Basic_Setup)<<1} Basic Central Setup

{ewl rhgbtn32.dll, BlueSkyHelpButton, g<_____153.BMP| _____154.BMP<JumpId(DS.HLPï¿½DS2_Setting_Up_the_Central_Site)<<1} Complete Central Setup

{ewl rhgbtn32.dll, BlueSkyHelpButton, g<_____153.BMP| _____154.BMP<JumpId(DS.HLPï¿½DS_Central_Setup_Options)<<1} List of All Central Setup Options

{ewl rhgbtn32.dll, BlueSkyHelpButton, g<_____153.BMP| _____154.BMP<JumpId(DS.HLPï¿½DS_Remote_Site_Setup)<<1} Remote Site Setup

{ewl rhgbtn32.dll, BlueSkyHelpButton, g<_____153.BMP| _____154.BMP<JumpId(DS.HLPï¿½DS_Satellite_Site_Setup)<<1} Satellite Site Setup

Setting Up the Central Site

{ewc rhgbtn32.dll, BlueSkyHelpButton, g<RELAUP01.BMP|RELADN01.BMP<Klink(Setupï¿½ ï¿½ ï¿½)<<1} {ewc rhgbtn32.dll, BlueSkyHelpButton, g<NOTEUP01.BMP| NOTEDN01.BMP<JumpId(ds.hlpï¿½ds2x_Hint_for_Setting_Up_the_Central_Site)<<1}

Data Synchronization Server is designed to synchronize multiple installations of TeleMagic Enterprise V4. Each installation used in synchronization is called a site. The site that contains the primary installation of TeleMagic is called the central site. The central site uses a server to perform synchronization with other sites. These other installations that are synchronized with the central installation are called remote sites and/or satellite offices.

Basic setup of your central site entails setting up your server(s) in the central site, identifying your remote locations, creating the user list for each site, establishing the databases you would like synchronized, and deciding exactly what information from each of the databases should be included for each site.

Continue…

{ewl rhgbtn32.dll, BlueSkyHelpButton, g<_____153.BMP| _____154.BMP<JumpId(DS.HLPï¿½DS2_Setting_Up_Your_Server_s)<<1} Setting Up Your Server(s)

{ewl rhgbtn32.dll, BlueSkyHelpButton, g<_____153.BMP| _____154.BMP<JumpId(DS.HLPï¿½DS2_Setting_Up_Your_Sites)<<1} Setting Up Your Sites

Setting Up Your Server(s)

{ewc rhgbtn32.dll, BlueSkyHelpButton, g<RELAUP01.BMP|RELADN01.BMP<Klink(Setupï¿½ ï¿½ ï¿½)<<1}

Each remote site is only required to synchronize with the central installation. Depending on how often you need to update your data, you may only need to process any one site once a day (possibly even less frequently). At the remote sites, processing is a simple matter of clicking a button when you are ready to begin. The central site, on the other hand, is required to process incoming and outgoing packets for every remote and satellite with which it is synchronized. Note that the Central site does not directly process the satellite office's remote sites. Depending upon the number of remote and satellite locations, this could be a full time job. To accommodate this, the central installation uses a server. The server allows you to define how and when processing occurs: you can have one server that processes continuously or only during a specified time each day; multiple servers performing specific synchronization tasks; or any other combination of settings to handle your specific synchronization requirements. This allows you the option of automating processing at the central installation; you can establish your server, start it processing, and leave it in process mode with the confidence that it will process exactly when and what you have specified.

To Set Up the Server:

1. Open Data Synchronization Server. From the **Maintenance** menu, select **Server Maintenance**.

   The Server Maintenance dialog box will open.

   Data Synchronization Server comes with one default server already set up named DS1. With the default settings, whenever you process the central installation, the inbox and outbox will both be processed, then Data Synchronization Server will automatically exit process mode. If you use database synchronization infrequently and do not have any remote locations outside of your time zone, these settings will probably be adequate for your synchronization needs.

2. If you would like to edit the existing server, use the `Server ID` drop-down list to highlight the server's three character ID (if it is not already selected) and click **Edit**.

or If you would like to add a new server click **Add**.

   The settings will become active and your cursor will appear in the `Server ID` field.

3. Edit the existing Server ID, if necessary.

or Add a new, unique three character Server ID.

4. Under Process Type, select the operation to be performed by this server when it processes:

   - Select `Process Packets` to prepare outgoing packets for transfer and process incoming packets.
   - Select `Transfer Packets` to send outgoing packets and receive incoming packets.

- Select `Both` to process and transfer packets.

5. Under `Frequency`, specify what you would like this server to do when it goes into Process mode:

   - Select `Process one time` to perform one processing cycle. DSS will remain active on the workstation.

   - Select `Process continuously` if you would like to place this server in Process mode and leave it. If you have a large number of remote sites, or need to process throughout the day, you may need to devote a workstation to acting as a server. If this is the case, select this option.

   - Select `Process one time, then exit DSS` if this workstation will not be used exclusively for processing packets for database synchronization. If you do not have a large number of remote sites, or do not process frequently, you may not need to devote a workstation to acting as a server. If this is the case, select this option. When this is selected, after processing the inbox and/or outbox, process mode will shut down and you will be returned to the main TeleMagic Data Synchronization Server dialog box where you can exit Data Synchronization Server if necessary.

6. Select the Server's time zone from the `Server Time Zone` drop-down list.

7. If the server is located in a time zone where Daylight Savings Time is used, mark the `Server time zone uses daylight savings time` check box.

8. Use the `This server processes` options to select what the server processes. If you are establishing multiple servers that will be processing continuously you may want to devote different servers to performing different tasks. If you would like the server to process the inbox (packets coming from the remote sites) exclusively, select `Inbox`. If you would like the server to process the outbox (packets to be distributed to the remote sites) exclusively, choose `Outbox`. If you would like the server to process both the inbox and outbox, choose `Both Boxes`. (Use this option if this is your only server.)

   If a server will be processing outboxes, you can control how often the packets are updated with changes from the transaction records.

9. If you have set this server to process inboxes, you may want to limit the time that the server is available for processing the inbox. If so, unmark `Always process inbox` (if necessary) and enter the time span during which it should process the inbox in the `Process Inbox from` and `to` fields in 12-hour format, followed by an *a* for a.m. or *p* for p.m. (If you enter a time in 24-

hour format, Data Synchronization Server will convert it to 12-hour format.) If you do not want to limit the processing time, mark `Always process Inbox`.

If the server is set to `Process one time, then exit` and you try to process at a time not included in the `Process Inbox from` and `to` times, the inbox will not be processed.

During continuous processing, Data Synchronization Server will check the inbox for packets and process and delete the group of packets existing when it performed the check. If the server is not set to process outboxes, it will then check the inbox again for packets and repeat the process continuously during the time specified in the `from` and `to` fields. If the server is set to process outboxes, it will process the outbox, if necessary, then return to the inbox.

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If the server is set to `Process one time, then exit` and you try to process at a time not included in the `Process Outbox from` and `to` times, the outbox will not be processed.

During continuous processing, after the server processes the inbox (if applicable), it will then check the time in the `Process Outbox from` and `to` fields to determine if the outbox should be processed. If so, it will check the packet in the outbox for each site in turn and compare the last time each was processed to the time specified under `Update existing outbox packets every`. If an outgoing packet has not been processed in the specified time, it will be updated. If there is no existing packet for a site in the outbox, one will be created. When all sites have been checked and updated (if necessary), Data Synchronization Server will return to the inbox.

12. Use the `Update existing outbox packets every` spinner arrows to set how often you would like existing packets in the outbox updated. This option allows you to update outgoing packets in the central location without overwriting them. Packets will be updated with the following: transactions for linked activities, e-mail, contact record changes, system information, file sets, database files (including indexes, filters, views, field structure, and list boxes), security

changes, and unlinked activities.(Initialization packets will not be updated.)

13. To save this server, click **Save**.

14. If you want to add or edit another server, repeat steps 3 through 12.

or Click **Close** to close this dialog box and return to the TeleMagic Data Synchronization Server Maintenance dialog box.

{ewc rhgbtn32.dll, BlueSkyHelpButton, g<CONTUP01.BMP| CONTDN01.BMP<JumpId(DS.HLPï¿½DS2_Establishing_Server_Options)<<1}

Establishing Server Options

{ewc rhgbtn32.dll, BlueSkyHelpButton, g<NOTEUP01.BMP|
NOTEDN01.BMP<JumpId(DS.HLP>thirdï¿½ds2x_Hint_for_Establishing_Server_Options)<<1} {ewc
rhgbtn32.dll, BlueSkyHelpButton, g<RELAUP01.BMP|RELADN01.BMP<Klink(Setupï¿½ ï¿½
ï¿½)<<1}

Server Options allow you to configure inbox and outbox settings that will apply to all of the servers you
have set up.

To Establish Server Options:

1. From the Data Synchronization Server **Setup** menu,
    select **Options**.

    The Options dialog box will open.

2. If you would like to change the date format in use at the
    central installation of TeleMagic, select the appropriate
    date format from the drop-down list.

    WARNING!
    If you have been using the installation of TeleMagic with a different date format, changing the date
    format could result in inconsistent dates. This can especially be an issue in memo and Last Revision
    fields.

3. Unmark the `Display century on dates` check box
    if you want to refer to dates by the last two digits only.
    (Leave this check box marked if you have dates that
    extend beyond the year 1999.)

    There will be occasions when Data Synchronization
    Server will need to notify someone about an event
    pertaining to synchronization. Establishing server
    operators allows you to specify who should receive e-
    mail notification when necessary.

4. Enter the three-character User ID of the user who should
    receive notification on server activity, when necessary. If
    you would like to have more than one operator, enter
    each User ID separated by a comma.

or Select each User ID from the drop-down list. They will be
    added to the field.

    When synchronization is performed, you can view a log
    detailing what was processed. (If you would like more
    information on the log, see the Viewing the Server Log
    Maintenance section of the Server Maintenance topic.)
    You can control the amount of detail included in your
    logs.

5. Select `Log Summary` if you would only like to include
    summary detail in the log, or select `Log Detail` if you
    would like to include full details. (It is recommended that

you view full details at first, or if you are experiencing any problems.)

6. To set the inbox options, click **Inbox Options**.

   The Server Options - Inbox Options dialog box will open. This dialog box will display the default path to the existing \INBOX directory for the server. If you are using a communications program other than DSS to transfer packets, you may need to change the path to the inbox to a location accessible by that communications program.

7. If necessary, edit the path to your inbox in the `Inbox` field.

or Use the **Inbox** button to select the path from a Windows Select Directory dialog box.

8. Use the `Reject incoming packets older than` spinner arrows to set the number of days old a packet can be before it will be rejected (not processed).

9. Click **OK** to save the Inbox Options and return to the main Server Options - All Servers screen.

   Outbox options allow you to control settings that relate to outgoing packets created by the central site.

10. To set the outbox options, click **Outbox Options**.

    The Server Options - Outbox Options dialog box will open.

    The Server Options - Outbox Options dialog box will display the default path to the existing \OUTBOX directory for the server. If you are using a communications program other than DSS to transfer packets, you may need to change the path to the outbox to a location accessible by that communications program.

11. If necessary, edit the path to your outbox in the `Outbox` field.

or Use the **Outbox** button to select the path from a Windows Select Directory dialog box.

12. Select `Delete Packet at start of Processing session` if you would like Data Synchronization Server to delete any existing packets from a previous processing session. (This will only apply to servers that are set to process one time only. Packets will not be deleted for servers that are set to perform continuous processing.) When this is selected, if there is a packet remaining in the outbox, the next time you open Data Synchronization Server and select to process, it will be deleted before proceeding. Use caution when making this setting. If a packet is deleted that has not been received by the remote site, the information will not be synchronized. Only mark this if you have some system to ensure that

packets are retrieved in a timely fashion.

Processing packets for multiple remote sites requires a significant amount of disk space. You can have Data Synchronization Server warn you if your available disk space falls below what is required for processing.

13. Use the spinner arrows to set the minimum free space required in the `Warn me when less than` field. You should allow approximately 50 MB of disk space, plus an additional 5 MB for each remote site for which the server will be required to create packets. If your free disk space goes below the specified minimum, Data Synchronization Server will stop processing.

14. Click **OK** to save the Outbox options and return to the main Server Options - All Servers screen.

    Once Data Synchronization Server is installed on an installation of TeleMagic, the date preferences will no longer be available in TeleMagic's Preferences. Setting the date preferences for remote sites is handled in each site's preferences. Setting the date preferences for the central site is handled in Server Options.

15. If you want to delete transactions based on age, click the **Misc.** tab.

    The Misc. page will open.

17. Mark the `Delete transactions older than` check box.

18. Enter the age, in days, above which transactions are to be deleted in the `days` field. This can be entered directly, or by using the spinner arrows.

WARNING!

If you have selected the `Validate contact record revisions at field level` option in Site Preferences for any of the sites, the date and time of each incoming transaction record is compared to the date and time of the last transaction for that field at the site to determine which has been edited more recently. If transactions have been deleted, it will appear that the field has not been edited at the remote site. Make sure you set the number of days back far enough that it will not interfere with validation at the site.

19. When satisfied with your selections, click **OK**.

or Continue to the other pages to set more server options.

Continue…

{ewl rhgbtn32.dll, BlueSkyHelpButton, g<_____153.BMP|
_____154.BMP<JumpId(DS.HLPï¿½DS2_Setting_Up_Your_Server_s)<<1} Setting Up Your Server(s)
{ewl rhgbtn32.dll, BlueSkyHelpButton, g<_____153.BMP|
_____154.BMP<JumpId(DS.HLPï¿½DS2_Setting_Up_Your_Sites)<<1} Setting Up Your Sites

Setting Up Your Sites

{ewc rhgbtn32.dll, BlueSkyHelpButton, g<NOTEUP01.BMP|
NOTEDN01.BMP<JumpId(DS.HLP>thirdï¿½ds2x_Note_for_Setting_up_Your_Sites)<<1} {ewc
rhgbtn32.dll, BlueSkyHelpButton, g<RELAUP01.BMP|RELADN01.BMP<Klink(Setupï¿½ ï¿½
ï¿½)<<1}

So that the central location always remains in control of the synchronization process, remote sites are
set up at the central installation. Basic setup of the remote sites involves naming and assigning an ID
for each site. Before proceeding, decide which remote installations of TeleMagic will be used in
synchronization and note the System ID of each.

To Set Up Your Sites:

1. From the **Setup** menu, select **Site Maintenance**.

   The Remote Site Maintenance dialog box will open.

2. Click **Add**.

3. Enter a unique name for your remote location in the
   `Site Name:` field.

4. Enter the System ID for the remote installation in the
   `Site ID:` field.

5. Click **Save** to save the remote site.

   Your new site will be added to the list.

6. Repeat steps 2 through 5 for each remote site you would
   like to set up and skip to step 10.

   or If you want to create a site for each user in your central
   location, click **Auto Create**.

   A message will appear informing you that only those
   users for whom you have not previously auto created a
   site will appear on this list.

7. Click **OK** to proceed.

   A Select Central Users dialog box will appear listing all of
   the users in your central site whose User IDs have not
   previously been used as a Site ID.

   A remote site will be added for each user you select at
   this dialog box. The site will be named after the user and
   the Site ID will be the user's TeleMagic User ID.

8. Select the user for whom you want to create a site in the
   `Central Users` list and click **Add**. The user will
   appear on the `Sites to Be Created` list on the
   right.

   or If you want to create a site for each of the users at the
   central site, click **Add All**. All of the central users will
   move to the `Sites to Be Created` list on the right.

If you find you have added a user in error, highlight that user in the `Sites to Be Created` list and click **Remove**. If you want to clear the `Sites to Be Created` list and start over, click **Remove All**.

9. Click **OK**.

    You will be returned to the Remote Site Maintenance dialog box and the sites will be added.

10. When finished adding all of your remote sites, click **Close**.

    You will be returned to the TeleMagic Data Synchronization Server main screen.

Continue…

{ewl rhgbtn32.dll, BlueSkyHelpButton, g<_____153.BMP|
_____154.BMP<JumpId(DS.HLPï¿½DS2_Assigning_Users_to_Your_Remote_Sites)<<1} Assigning Users to Your Remote Sites

{ewl rhgbtn32.dll, BlueSkyHelpButton, g<_____153.BMP|
_____154.BMP<JumpId(DS.HLPï¿½DS_Central_Site_Setup)<<1} Central Site Setup

Assigning Users to Your Remote Sites

{ewc rhgbtn32.dll, BlueSkyHelpButton, g<NOTEUP01.BMP|
NOTEDN01.BMP<JumpId(DS.HLP>thirdï¿½ds2x_Note_for_Assigning_Users_to_Your_Remote_Sites)
<<1} {ewc rhgbtn32.dll, BlueSkyHelpButton, g<RELAUP01.BMP|RELADN01.BMP<Klink(Adding
Usersï¿½ ï¿½ ï¿½)<<1}

Once you have established your remote sites, you need to set up user lists for each site. This list lets Data Synchronization Server know who belongs at each site. Whenever you perform synchronization from the central location to your remote sites, Data Synchronization Server will update the users existing at the remote site from this list. It will add users who do not exist and delete users who have been removed. (You have the option of instructing Data Synchronization Server not to delete users at the remote sites. See the topic Delete users at this site who don't exist on Data Synchronization's user list for this site for more information on this setting.) In this way, the central installation maintains total control over the users existing in each installation of TeleMagic. When creating the user list, give consideration to the users who are regularly at the site, as well as those who may only occasionally need access to the site. If there is a chance that a user will be opening TeleMagic at that site, that user needs to be on the site's user list.

To Create the User List:

1. From the **Setup** menu, select **User Maintenance**.

    The Remote User Maintenance dialog box will open displaying all of the users in your central location.

2. From the `Site:` drop-down list box, select the first remote site you want to set up.

    The Remote User Maintenance dialog box will empty.

3. If you want to add users who exist at the central location or have been set up for other sites, click **Auto Add**.

    An Auto Add dialog box will open.

4. Select **Central Only** to select users who exist in the central location.

or Select **All Sites** to select from users who exist in the central location, as well as any who have been added in Data Synchronization to any other sites. (This list will not necessarily include all users at the remote installations of TeleMagic. Only those users who have been added to the site's central user list in Data Synchronization will be included.)

    A Select Central Users or a Select Central and Remote Users dialog box will appear. The `Central Users` (or `Source Users`) list will display all users at your central location.

5. Highlight the first user in the list on the left who you would like in the remote site and click **Add**. The user will appear in the `Remote Users` list. (If you find you have added a user in error and want to delete him or her from

the list, highlight the user in the `Remote Users` list and click **Remove**.)

6. Repeat this process for each user you would like in the remote site.

or Click **Add All** to add all users from the central installation into the remote site.

7. When satisfied with your selections, click **OK**.

You will be returned to the Remote User Maintenance dialog box.

8. If you would like to add a user who does not already exist in another location, click **Add**.

9. Enter the first user's ID as it is entered in TeleMagic in the `User ID:` field.

10. Enter the user's name in the `User Name:` field.

11. Click **Save**.

12. Repeat steps 8 through 11 for each user at that site.

13. Select each site in turn from the `Site:` drop-down list and repeat steps 3 through 12.

14. When finished setting up your lists for all sites, click **OK**.

(If you are following the steps in the *Basic Setup* section, <u>click here</u> to return.)

Continue…

{ewl rhgbtn32.dll, BlueSkyHelpButton, g<_____153.BMP|
_____154.BMP<JumpId(DS.HLPï¿½DS2_Choosing_the_Databases_to_Synchronize)<<1} <u>Choosing the Databases to Synchronize</u>

{ewl rhgbtn32.dll, BlueSkyHelpButton, g<_____153.BMP|
_____154.BMP<JumpId(DS.HLPï¿½DS2_Setting_Up_Your_Sites)<<1} <u>Setting Up Your Sites</u>

{ewl rhgbtn32.dll, BlueSkyHelpButton, g<_____153.BMP|
_____154.BMP<JumpId(DS.HLPï¿½DS_Central_Site_Setup)<<1} <u>Central Site Setup</u>

Choosing the Databases to Synchronize

{ewc rhgbtn32.dll, BlueSkyHelpButton, g<NOTEUP01.BMP|
NOTEDN01.BMP<JumpId(DS.HLP>thirdï¿½ds2x_Note_for_Choosing_Databases_to_Synchronize)<<
1} {ewc rhgbtn32.dll, BlueSkyHelpButton, g<RELAUP01.BMP|RELADN01.BMP<Klink(Databasesï¿½
ï¿½ ï¿½)<<1}

Once you have established your sites and selected the users for each, you are ready to decide what information should be synchronized. The first step in this process is selecting databases.

To Select Databases for Synchronization:

1. From the **Setup** menu, select **Databases to synchronize**.

   The Select Databases To Be Synchronized dialog box will open with a list of all databases in your central installation.

2. From the `Available` list, highlight each database that you would like included in turn and click **Add**.

   or Click **Add All** to include all databases.

   The database(s) will appear in the `Selected` list.

3. If you select a database in error, highlight it in the `Selected` list and click **Remove**.

   or Click **Remove All** to clear the `Selected` list and start over.

4. When satisfied with your selections, click **OK**.

(If you are following the steps in the *Basic Setup* section, <u>click here</u> to return.)

Continue…

{ewl rhgbtn32.dll, BlueSkyHelpButton, g<_____153.BMP|
_____154.BMP<JumpId(DS.HLPï¿½DS2_Controlling_What_is_Synchronized)<<1} <u>Controlling What is Synchronized</u>

{ewl rhgbtn32.dll, BlueSkyHelpButton, g<_____153.BMP|
_____154.BMP<JumpId(DS.HLPï¿½DS_Central_Site_Setup)<<1} <u>Central Site Setup</u>

Controlling What is Synchronized

{ewc rhgbtn32.dll, BlueSkyHelpButton, g<RELAUP01.BMP|RELADN01.BMP<Klink(Databasesï¿½ ï¿½ ï¿½)<<1}

Once you have your databases selected, you can select what data is to be synchronized to those databases by establishing Database Preferences. Database Preferences allow you to control what information is passed, from an entire level down to individual fields. Setting preferences is a two-step process involving creating the general settings, then (optionally) establishing any needed exceptions to these settings for individual remote sites.

To Set Database Preferences:

1. From the **Setup** menu, select **Database Preferences**.

   The Global Preferences dialog box will open. This dialog box will display all of the databases which were selected for synchronization in the [Choosing the Databases to Synchronize](#) topic.

2. Highlight the first database whose preferences you would like to set and click **Edit**.

   The right side of the screen will become active.

3. If you would like to synchronize only a select group of records, select a filter from the `Include these records:` drop-down list. Only records in that filter will be included in the outgoing packets for this database.

4. The radio buttons allow you to control the degree of your synchronization.

   - If you choose `Select records based on new transactions`, the outgoing packet will only include fields that have changed since the last synchronization.

   - If you choose `Select all records, ignore transactions`, the outgoing packet will include all records in the specified filter, regardless of whether or not they have been changed since the last synchronization. (This is only applicable when synchronizing from the central installation to the remote sites. Synchronization from the remote sites or satellite offices to the central installation will always respect transactions, unless the /notrans parameter is used. This parameter will cause the site to ignore transactions when synchronizing to the central.) When the database is synchronized, Data Synchronization Server will compare the record in the database to the record in the incoming packet, and any differences will be treated like new transactions.

   When synchronizing from the remote sites to the central installation, you have the choice of only synchronizing records that are in the filter selected in step 4 (if

applicable), or synchronizing all records, whether in the filter or not.

5. Mark the `Only accept records from site which are in this filter` check box to apply the selected filter both to records going from the central site to the remote sites, and to records coming from the remote sites to the central.

or Unmark this check box if you would like the filter to only apply to changes going from the central site to the remote sites. Any changes made at the remote site will be synchronized to the central site, whether or not the records are in the filter.

WARNING!

Use caution when unmarking this setting, especially if you are not using date and time validation for the site(s). If this is not marked, the central site will be updated with changes to records that are not in the filter, but the remote site(s) will not be updated with changes made in central to these records. This could cause data in the central site to be overwritten. The ideal setup to avoid any possible confusion is to only have records at the remote site that are in the filter being synchronized, and to reinitialize the site if you ever change the filter.

If you have selected a filter and are synchronizing based on new transactions, there is a possibility that records could be created with data in only one or two fields. This occurs when a change is made to a record at the central site that moves the record into the filter being synchronized. If the record does not already exist at the remote site it will be added, but only the fields for which there were transactions (the changed fields) would be available for synchronization into the new record.

For example, you may have several sales representatives working with TeleMagic on laptops. You may assign records to each sales representative using a Rep ID field and filter on that field for synchronization. When a record is first added, if it has not been assigned to a representative, it may be added with no data in that field. It would not at first be included in any of the filters being used at any sites, and the initial creation of the record would not be synchronized. When the field is later changed to assign the record to a representative, a transaction will only be written for the change to that field. The representative would receive the record, but there would be no data aside from his or her ID in the Rep ID field.

You have the option to send the entire record, along with its parent record(s), any time a change is made to a field referenced in the synchronization filter.

6. If you would like to initialize records when the information in the filter fields changes, mark the `Initialize records when filter data changes` check box. Be aware that this will cause a transaction to be written for every field in the record. If you are using date and time validation, these transactions will not be distinguished from transactions written as a result of a change to the field. If an edit is made to the record at a remote site just prior to the record being initialized at the central, the transaction for the edit will appear older and the change will be rejected.

or If you do not want to automatically initialize records when the data in filter fields changes, unmark this check box.

7. From the `Level` radio buttons, select the lowest database level you would like included in the synchronization. All higher levels will also be included. For example, selecting `Level 2` will include Levels 1 and 2, but not 3.

8. Mark the `Accept new contact records` check box if you would like contact records added in one installation also added to the others. Unmark this if you would like users to manually add new contact records at each installation.

9. Mark the `Synchronize deleted contact records` check box if you would like contact records deleted in one installation also deleted in the others. Unmark this if you would like users to manually delete contact records that need to be removed from each installation.

10. Select `Synchronize embedded OLE fields` if you would like to be able to include changes to your embedded OLE objects in the synchronization. Be aware that due to the amount of data contained in an OLE object, synchronizing these objects can significantly increase your packet size. (If you select this option, all OLE fields in this database will be included.)

11. If you would like to include activities linked to contact records in this database, mark the `Include linked activities for this database` check box.

12. Click **Select database files to transfer** to select which structural changes you would like synchronized from the central installation to the remote sites.

The Database Files To Transfer dialog box will open.

WARNING
Most of the options selected from this dialog box will totally overwrite existing data in the remote location. Consider your selections carefully. Remember, you can always select an option when needed, such as for the first synchronization or if significant changes have been made to a database, then de-select it for routine synchronization.

13. Mark `Database Structure/Views` to synchronize structural changes made to the database in the central installation out to the remote locations. This will include any changes to your field list and changes made with the screen designer, such as new and changed pages and screens, for all three levels. (Any changes users have made to the database at the remote site will be lost if this option is selected.)

14. Mark the `Filters` check box if you would like the list of filters in the central installation synchronized with the list of filters in the remote sites. Filters from the central

site will be added to those already existing at the remote site. (If two filters have the same name, the filter at the remote site will be overwritten.) Unmark this check box if you do not want to synchronize filters. (If this is not marked, remote sites will not receive any filters created in the central installation.)

15. Mark the `Indexes` check box if you would like the list of indexes in the central installation to overwrite the list of indexes in the remote sites. Leave this unmarked if you would like the remote users to be able to create their own indexes without them getting overwritten. (If this is not marked, remote sites will not receive any indexes created in the central installation.)

16. Mark the `Listboxes` check box if you would like this database's list boxes from the central installation to overwrite any database specific list boxes in the remote site. Leave this unmarked if you would like the remote users to be able to create their own database specific list boxes without them getting overwritten. (If this is not marked, remote sites will not receive any edits to this database's list boxes from the central installation.)

17. Mark `Create database if not found` if you would like Data Synchronization Server to add the database to the remote sites if it does not exist there. (TeleMagic Preferences for this database, such as key fields and level names, will also be added.) Unmark this if you do not want databases added through synchronization. (If you select this option, you should also select the `Database Structure/Screens` check box. If you do not, a blank database will be added with no fields or contact related information.)

18. Mark `Transfer Database Preferences` if you would like to overwrite internal TeleMagic Database Preferences with the Database Preferences in the central location. This relates to options found in the `For the Current Database` section of the Choose a Topic to Edit list in Preferences. (This includes the Database and Key Fields options. Because moving Toolbar and Function Keys into Database Preferences is user specific, these options will not be included.)

19. Click **OK** to save your settings.

    You will be returned to the Global Preferences dialog box.

    By default, all fields in the selected levels of the specified database will be included in the synchronization. It is possible to exclude specific fields if necessary.

20. If you want to exclude a field from the list of fields to be synchronized, click the level button on which the field(s) is located in the `Export Field Selection` section.

The Select Fields To Export dialog box will open for the selected level. The `Selected Fields` list will default with all fields for the selected database level. (Synchronizing OLE fields is controlled through the `Synchronize embedded OLE fields` option discussed in step 11. OLE fields will not be included on this list.)

21. Highlight the field(s) you would like to exclude and click **Remove**. To clear the `Selected Fields` list, click **Remove All**.

    If you remove a field in error, highlight it in the `Source Fields` list and click **Add**. To include all fields, click **Add All**.

22. When satisfied with your selections, click **OK**.

or   Click **Cancel** to discard your selections.

    You will be returned to the Global Preferences dialog box.

23. Repeat steps 20 through 22 for the remaining levels in your database, if necessary.

    It is possible to establish separate database preferences for your sites (for more information, see the Creating Unique Settings for Sites topic). If this occurs, any edits you make to the global preferences will no longer be automatically received by those sites. If you are creating settings that need to be received by all sites, including those no longer recognizing the global preferences, you can apply the current settings to all sites.

24. If you have previously set separate site database preferences for any of your installations and would like to apply any edits you are making to the global preferences to these sites, click `Apply these settings to all sites`. (If this is a first-time setup, you should not have to use this check box. This is also not necessary if you have not unlinked any sites from the global settings.)

25. When satisfied with your selections, click **Save**.

or   Click **Cancel** to discard your changes.

26. Repeat steps 2 through 25 for each database whose preferences you would like to set.

or   Click **Close** to close this dialog box.

Continue…

{ewl rhgbtn32.dll, BlueSkyHelpButton, g<_____153.BMP|
_____154.BMP<JumpId(DS.HLPï¿½DS2_Creating_Unique_Settings_for_Sites)<<1} Creating Unique Settings for Sites
{ewl rhgbtn32.dll, BlueSkyHelpButton, g<_____153.BMP|
_____154.BMP<JumpId(DS.HLPï¿½DS2_Global_Options)<<1} Global Options

{ewl rhgbtn32.dll, BlueSkyHelpButton, g<_____153.BMP|
_____154.BMP<JumpId(DS.HLPï¿½DS2_Site_Preferences)<<1} Site Preferences

{ewl rhgbtn32.dll, BlueSkyHelpButton, g<_____153.BMP|
_____154.BMP<JumpId(DS.HLPï¿½DS2_Initialization)<<1} Initialization

{ewl rhgbtn32.dll, BlueSkyHelpButton, g<_____153.BMP|
_____154.BMP<JumpId(DS.HLPï¿½DS2_Setting_Field_Rules)<<1} Setting Field Rules

{ewl rhgbtn32.dll, BlueSkyHelpButton, g<_____153.BMP|
_____154.BMP<JumpId(DS.HLPï¿½DS2_Command_Line_Parameters)<<1} Command Line Parameters

{ewl rhgbtn32.dll, BlueSkyHelpButton, g<_____153.BMP|
_____154.BMP<JumpId(DS.HLPï¿½DS_Central_Site_Setup)<<1} Central Site Setup

Synchronizing Using a Filtered Index

{ewc rhgbtn32.dll, BlueSkyHelpButton, g<RELAUP01.BMP|
RELADN01.BMP<Klink(Synchronizationï¿½ ï¿½ ï¿½)<<1}

A filtered index is used to dramatically speed up working with very large databases. Normally, when you set a filter, TeleMagic must look at each record in the database to determine whether or not it is in the filter. A filtered index automatically establishes a built-in filter as soon as you choose the index, and manages those filtered records as if they were the only records that existed in the database.

Using a filtered index with Data Synchronization dramatically decreases processing times when synchronizing all records in large databases. (If you are synchronizing based on transactions only, there will be no advantage to using a filtered index.)

If you would like to create a filtered index for use with Data Synchronization, add an index in TeleMagic following the guidelines under *Creating Indexes* in the *Feature Setup* chapter of the *System Administrator Guide*, or search on *Indexes* in TeleMagic's on-line help. At the Add Index dialog box, select a filter for use with the new index from the `Index Filter` list. Click **Edit** to open the Expression Builder. In the expression box (the text area where expressions are written) type **contactid** and save the expression. At the Add Index dialog box, mark the `Case Sensitive` check box and save the index. In Data Synchronization, when you select a filter that was is used with a case sensitive filtered index on the Contact ID, Data Synchronization will apply the filtered index instead of just using the filter.

Creating Unique Settings for Sites

{ewc rhgbtn32.dll, BlueSkyHelpButton, g<NOTEUP01.BMP|
NOTEDN01.BMP<JumpId(DS.HLP>thirdï¿½ds2x_Note_for_Creating_Unique_Settings_for_Sites)<<1}
{ewc rhgbtn32.dll, BlueSkyHelpButton, g<RELAUP01.BMP|RELADN01.BMP<Klink(Site Settingsï¿½
ï¿½ï¿½)<<1}

Depending on your setup, not all sites will necessarily need to receive the same information. For example, you may want to limit the information synchronized to your dozen remote laptop users, but need complete synchronization with your satellite office. Once you have established defaults for the information that should be synchronized to most of your sites, you can establish unique settings for individual sites. The `Site setup` options on the TeleMagic Data Synchronization Server Setup screen allow you to create exceptions to your global settings which get applied to an individual site.

To Set Site Database Preferences:

1. From the **Setup** menu, select **Site Specific Setup…**, **Databases to Synchronize**.

    A message will appear advising you that any sites that have been unlinked and no longer reference the Global Database Preferences will be preceded by an asterisk on the list.

2. Click **OK** to acknowledge the message.

    A Choose Site dialog box will open with a list of your sites.

3. Highlight the site you would like to set up and click **Select**.

    The Databases To Be Synchronized dialog box will open with the name of the site you selected in the title bar. This dialog box will display the list of databases available for synchronization in the `Available` field, and the databases selected for global use in the `Selected` field.

4. To select a database, highlight it in the `Available` column and click **Add**.

or To remove a database from the synchronization process, highlight it in the `Selected` column and click **Remove**.

5. When satisfied with your selections, click **OK**.

    A message will appear notifying you that this action will unlink the site from the Global Database Preferences and ask if you would like to proceed.

6. Click **Yes** and the site will be unlinked.

or Click **No** to cancel.

    The Choose Site dialog box will re-open.

7. Select another site and repeat steps 3 through 6.

or Click **Close** to exit this dialog box.

You will be returned to the TeleMagic Data Synchronization Server main screen.

8. From the **Setup** menu, select **Site Specific Setup…**, **Database Preferences**.

A message will appear advising you that any sites that have been unlinked and no longer reference the Global Database Preferences will be preceded by an asterisk on the list.

9. Click **OK** to acknowledge the message.

The Choose Database dialog box will open.

10. Highlight the site whose preferences you would like to set and click **Select**.

The Site Database Preferences dialog box will open with the name of the site whose settings you are establishing in the title bar. This dialog box will default to the Global Preferences settings.

11. Highlight the database whose settings you would like to edit and click **Edit**.

12. Edit these preference settings following the instructions detailed in the To Set Database Preferences topic.

13. When satisfied with your selections, click **Save**.

14. Select the next database and repeat steps 11 through 13.

or Click **Close** to return to the Choose Site dialog box.

15. Select another site and repeat steps 11 through 14.

or Click **Close** to return to the TeleMagic Data Synchronization Server Setup screen.

Continue…

{ewl rhgbtn32.dll, BlueSkyHelpButton, g<_____153.BMP|
_____154.BMP<JumpId(DS.HLPï¿½DS2_Global_Options)<<1} Global Options

{ewl rhgbtn32.dll, BlueSkyHelpButton, g<_____153.BMP|
_____154.BMP<JumpId(DS.HLPï¿½DS2_Site_Preferences)<<1} Site Preferences

{ewl rhgbtn32.dll, BlueSkyHelpButton, g<_____153.BMP|
_____154.BMP<JumpId(DS.HLPï¿½DS2_Initialization)<<1} Initialization

{ewl rhgbtn32.dll, BlueSkyHelpButton, g<_____153.BMP|
_____154.BMP<JumpId(DS.HLPï¿½DS2_Setting_Field_Rules)<<1} Setting Field Rules

{ewl rhgbtn32.dll, BlueSkyHelpButton, g<_____153.BMP|
_____154.BMP<JumpId(DS.HLPï¿½DS2_Global_Options)<<1} Command Line Parameters

{ewl rhgbtn32.dll, BlueSkyHelpButton, g<_____153.BMP|
_____154.BMP<JumpId(DS.HLPï¿½DS_Central_Site_Setup)<<1} Central Site Setup

Setting Up the Remote Installation

{ewc rhgbtn32.dll, BlueSkyHelpButton, g<NOTEUP01.BMP|
NOTEDN01.BMP<JumpId(DS.HLP>thirdï¿½ds2x_Note_for_Setting_up_the_Remote_Installation)<<1}
{ewc rhgbtn32.dll, BlueSkyHelpButton, g<RELAUP01.BMP|RELADN01.BMP<Klink(Setupï¿½ ï¿½ ï¿½
)<<1}

Data Synchronization Server is designed to keep primary control over all sites at the central
location. During basic setup of your central site, you should already have performed much of the
setup required for your sites, such as giving each site a unique Site ID, setting up your user lists,
and deciding what information should go to each site.

There is additionally some basic setup required at the installations containing the remote sites
that is not handled through the central installation.

Continue…

{ewl rhgbtn32.dll, BlueSkyHelpButton, g<_____153.BMP|
_____154.BMP<JumpId(DS.HLPï¿½DS2_Establishing_the_Inbox_and_Outbox)<<1} Establishing the
Inbox and Outbox

{ewl rhgbtn32.dll, BlueSkyHelpButton, g<_____153.BMP|
_____154.BMP<JumpId(DS.HLPï¿½DS2_Setting_Time_Zones)<<1} Setting Time Zones

{ewl rhgbtn32.dll, BlueSkyHelpButton, g<_____153.BMP|
_____154.BMP<JumpId(DS.HLPï¿½DS2_Creating_Scripts_at_the_Remote_Sites)<<1} Creating
Scripts

Establishing the Inbox and Outbox

{ewc rhgbtn32.dll, BlueSkyHelpButton, g<RELAUP01.BMP|RELADN01.BMP<Klink(Setupï¿½ ï¿½ ï¿½)<<1}

Data Synchronization Server comes with default directories for use as an inbox and outbox. Packets containing changes made to the remote installation are created in the outbox. Packets containing changes that need to be synchronized into the remote installation are placed into the inbox. If you are using a communications program other than DSS to transfer packets via modem, you may need to change the paths to the inbox and outbox to a location accessible by that communications program. DSS will automatically reference these paths.

To Set File Paths at the Remote Installations:

1. From the **Setup** menu, select **File Paths**.

    The Remote Path Entry dialog box will open.

    This dialog box will offer a default of the paths to the existing \INBOX and \OUTBOX directories off the \TMSYNC directory.

2. If necessary, edit the path to your inbox and/or outbox.

or Use the **Inbox** and/or **Outbox** buttons to select the path(s) from a Windows Select Directory dialog box.

3. When satisfied with your selections, click **OK**.

    You will be returned to the Remote Site main screen.

4. Open Data Synchronization Server at each remote site and repeat steps 1 through 3, if necessary.

Continue…

{ewl rhgbtn32.dll, BlueSkyHelpButton, g<_____153.BMP|
_____154.BMP<JumpId(DS.HLPï¿½DS2_Site_Time_Zone)<<1} Setting Time Zones
{ewl rhgbtn32.dll, BlueSkyHelpButton, g<_____153.BMP|
_____154.BMP<JumpId(DS.HLPï¿½DS2_Creating_Scripts_at_the_Remote_Sites)<<1} Creating Scripts

Setting Time Zones

{ewc rhgbtn32.dll, BlueSkyHelpButton, g<RELAUP01.BMP|RELADN01.BMP<Klink(Setupï¿½ ï¿½ ï¿½)<<1}

If a particular field in a record was changed in multiple sites, Data Synchronization Server can use transaction dates to determine which change is most recent. (This is only applicable if the site is set to validate changes at the field level in Site Preferences. If you would like more information on this setting, see the Validate Contact Record Revisions at Field Level topic.) If some of your sites are in different time zones, this will affect Data Synchronization Server's ability to determine when a change was made in relation to other sites. To accommodate this eventuality, Data Synchronization Server allows you to specify the time zone in which your sites are located, and even allows you to indicate whether your time zone recognizes daylight savings time.

To Set the Time Zone:

1. From the Data Synchronization Remote **Setup** menu, select **Time Zone**.

    The Select Your Time Zone dialog box will open. The time zone will default to Pacific Time.

2. Use the `Remote Site Time Zone` drop-down list to select the time zone in which the remote installation of TeleMagic will be located.

3. If the time zone selected in step 2 uses daylight savings time, mark the `Use Daylight Savings Time?` check box.

4. When satisfied with your selections, click **OK**.

5. Open Data Synchronization Server at each remote site and repeat steps 1 through 4, if necessary.

Continue…

{ewl rhgbtn32.dll, BlueSkyHelpButton, g<_____153.BMP| _____154.BMP<JumpId(DS.HLPï¿½DS2_Establishing_the_Inbox_and_Outbox)<<1} Establishing the Inbox and Outbox

{ewl rhgbtn32.dll, BlueSkyHelpButton, g<_____153.BMP| _____154.BMP<JumpId(DS.HLPï¿½DS2_Creating_Scripts_at_the_Remote_Sites)<<1} Creating Scripts

What Are Power Features?

{ewc rhgbtn32.dll, BlueSkyHelpButton, g<RELAUP01.BMP|RELADN01.BMP<Klink(Setupï¿½ ï¿½ ï¿½)<<1}

Standard database synchronization does just that—it synchronizes the data stored in databases. This covers changes to your contact records and usually includes changes to your activity database.

The term "power features" describes the technology that has been built into Data Synchronization Server that allows you to go above and beyond this standard. You will have already encountered some of these features when performing your basic setup, including the degree of control you have over how data gets synchronized (unlimited databases, field level filtration, unique settings for each site, and more); the ability to actually synchronize database structure; and the ability to synchronize users. In addition to these already covered power features, there are several optional power features that further strengthen your synchronization potential.

Select a Topic:

{ewl rhgbtn32.dll, BlueSkyHelpButton, g<_____153.BMP|
_____154.BMP<JumpId(DS.HLPï¿½DS2_Global_Options)<<1} Global Options

{ewl rhgbtn32.dll, BlueSkyHelpButton, g<_____153.BMP|
_____154.BMP<JumpId(DS.HLPï¿½DS2_Site_Preferences)<<1} Site Preferences

{ewl rhgbtn32.dll, BlueSkyHelpButton, g<_____153.BMP|
_____154.BMP<JumpId(DS.HLPï¿½DS2_Initialization)<<1} Initialization

{ewl rhgbtn32.dll, BlueSkyHelpButton, g<_____153.BMP|
_____154.BMP<JumpId(DS.HLPï¿½DS2_Setting_Field_Rules)<<1} Setting Field Rules

{ewl rhgbtn32.dll, BlueSkyHelpButton, g<_____153.BMP|
_____154.BMP<JumpId(DS.HLPï¿½DS2_Command_Line_Parameters)<<1} Command Line Parameters

{ewl rhgbtn32.dll, BlueSkyHelpButton, g<_____153.BMP|
_____154.BMP<JumpId(DS.HLPï¿½DS2_Creating_Scripts_at_the_Remote_Sites)<<1} Creating Scripts at the Remote Sites

Global Options

{ewc rhgbtn32.dll, BlueSkyHelpButton, g<RELAUP01.BMP|RELADN01.BMP<Klink(Setupï¿½ ï¿½ ï¿½)<<1}

Before accessing the advanced areas of Data Synchronization Server, it is a good idea to establish your Global Options. Global Options allow you to create defaults that can be used in other areas of Data Synchronization Server. As you set up your central installation, you may encounter options for synchronizing file sets, scripts, user preferences, and security. The Global Options feature is used to establish what file sets, scripts, preferences, and security to use.

To Access Global Options:

1. From the Data Synchronization Server **Setup** menu, select **Options**.

    The Options dialog box will open.

2. Follow the guidelines in the following topics when using this dialog box:

    > Security
    > Global File Sets
    > Attach Global File Set
    > Scripting

3. When satisfied with your settings, click **Close**.

Continue…

{ewl rhgbtn32.dll, BlueSkyHelpButton, g<_____153.BMP|
_____154.BMP<JumpId(DS.HLPï¿½DS2_Site_Preferences)<<1} Site Preferences

{ewl rhgbtn32.dll, BlueSkyHelpButton, g<_____153.BMP|
_____154.BMP<JumpId(DS.HLPï¿½DS2_Initialization)<<1} Initialization

{ewl rhgbtn32.dll, BlueSkyHelpButton, g<_____153.BMP|
_____154.BMP<JumpId(DS.HLPï¿½DS2_Setting_Field_Rules)<<1} Setting Field Rules

{ewl rhgbtn32.dll, BlueSkyHelpButton, g<_____153.BMP|
_____154.BMP<JumpId(DS.HLPï¿½DS2_Command_Line_Parameters)<<1} Command Line Parameters

{ewl rhgbtn32.dll, BlueSkyHelpButton, g<_____153.BMP|
_____154.BMP<JumpId(DS.HLPï¿½DS_Central_Site_Setup)<<1} Central Site Setup

Default Security/Prefs

{ewc rhgbtn32.dll, BlueSkyHelpButton, g<NOTEUP01.BMP|
NOTEDN01.BMP<JumpId(DS.HLP>thirdï¿½ds2x_Note_for_Default_Security_Prefs)<<1}

Default Security/Prefs allows you to select the default security and preferences that will be applied to all new users being added to a remote site of TeleMagic through Data Synchronization Server, as well as the default security group for use in initialization.

Clicking the **Default Security/Prefs** tab will open the Security page. The following options are available at this dialog box:

Assign default security from local user

Assign default Security from

{ewc rhgbtn32.dll, BlueSkyHelpButton, g<CONTUP01.BMP|
CONTDN01.BMP<JumpId(DS.HLPï¿½DS2_Global_Options)<<1}

User Preferences

{ewc rhgbtn32.dll, BlueSkyHelpButton, g<NOTEUP01.BMP|
NOTEDN01.BMP<JumpId(DS.HLP>thirdï¿½ds2x_Note_for_User_Preferences)<<1} {ewc rhgbtn32.dll,
BlueSkyHelpButton, g<RELAUP01.BMP|RELADN01.BMP<Klink(User Preferencesï¿½ ï¿½ ï¿½)<<1}

User Preferences are the User Configuration Option settings created in TeleMagic. These settings
are used to customize areas of the program for individual users. (If you would like more
information, search on *User Preferences* in TeleMagic's on-line help.) User Preferences apply to
Data Synchronization Server in two areas: when adding new users and during initialization. (For
more information, see the <u>User Preference Option</u> topic dealing with preferences in initialization
and the <u>Assigning Users to Your Remote Sites</u> topic.)

Users are generally added in TeleMagic by copying an existing user. This copies that user's
preferences, saving the necessity of having to manually enter every preference for the new user.
(The new user can later personalize these settings if necessary.) Selecting a default set of user
preferences in Data Synchronization Server's Options dialog box will perform a similar function.
The `Assign default preferences from local user` drop-down list contains all users
in the central installation. It allows you to select a user whose preferences will be used as a
default for all new users being added to remote sites through synchronization. Additionally, if you
are performing an initialization, you have the option of copying this set of preferences to every
existing user at the remote site. (This can be used to ensure that all users have the same date
preferences for consistency in synchronizing notepad entries.)

To Select a Default User Preference Set:

1. From within TeleMagic, make sure that a user exists with
   the set of preferences you would like to use.

2. Exit TeleMagic and open the Options dialog box in Data
   Synchronization Server. (From the main TeleMagic Data
   Synchronization Server **Setup** menu, select **Options**.)

3. Click on the **Security** tab.

   The Security page will open.

4. From the `Assign default preferences from local user` drop-down list, select the user whose
   preferences you would like to use.

Continue…

{ewl rhgbtn32.dll, BlueSkyHelpButton, g<_____153.BMP|
_____154.BMP<JumpId(DS.HLPï¿½DS2_Global_Options)<<1} <u>Global Options</u>

{ewl rhgbtn32.dll, BlueSkyHelpButton, g<_____153.BMP|
_____154.BMP<JumpId(DS.HLPï¿½DS2_User_Preference_Options)<<1} <u>User Preference
Initialization Option</u>

Security

{ewc rhgbtn32.dll, BlueSkyHelpButton, g<NOTEUP01.BMP| NOTEDN01.BMP<JumpId(DS.HLP>thirdï¿½ds2x_Note_for_Security)<<1} {ewc rhgbtn32.dll, BlueSkyHelpButton, g<RELAUP01.BMP|RELADN01.BMP<Klink(Securityï¿½ ï¿½ ï¿½)<<1}

Data Synchronization Server allows you to keep control of your remote site users' security at the central installation. Security is used by Data Synchronization Server in two areas: when adding new users and during initialization. (For more information, see the <u>Security</u> topic dealing with security in initialization and the <u>Assigning Users to Your Remote Sites</u> topic.)

When new users are added to a remote site during synchronization, Data Synchronization Server needs to know what security to assign to them. While users could be added with no security and security assigned by the site's system administrator later, it will save time and effort to allow Data Synchronization Server to assign the users' security. (This security can later be edited by the system administrator if necessary.) This is accomplished by either selecting a security group from the central site as a default for use with all new users added through synchronization, or creating a group named Everyone at the remote site and selecting it as the default. (If a security group selected from the central site does not exist in the remote location, it will be added.) Additionally, during initialization you will have the option of assigning all existing users to this default security group. This will allow you control over users' access to TeleMagic at the remote site.

To Select Default Security:

1. Open the Options dialog box. (From the Data Synchronization Server **Setup** menu, select **Options**.)

2. Click on the **Security** tab

    The Security page will open.

3. In the `Assign default security from:` section, select a default security radio button using the following guidelines:

    *   Select `Remote "Everyone" group` to use a security group named Everyone existing at the remote sites. (This group should be created at the remote sites in advance.) If selected, Data Synchronization Server will search for a security group at the remote site named Everyone and use it when assigning security.

    WARNING!
    If you select this option, make sure that you have created a security group named Everyone at *all* of your remote sites.

    *   Select `Central security group` to use the security from a group existing in the central installation. When this radio button is selected, the list box next to it will become active. Select the appropriate group from the list. (If this security group does not exist in the remote site, it will be added during synchronization.)
    *   Select `Do not assign security to users` if you do not want to have a default security. If

selected, users will be added without security and will have to be manually assigned to a security group at the remote sites.

Continue…

{ewl rhgbtn32.dll, BlueSkyHelpButton, g<_____153.BMP| _____154.BMP<JumpId(DS.HLPï¿½DS2_Global_Options)<<1} Global Options

{ewl rhgbtn32.dll, BlueSkyHelpButton, g<_____153.BMP| _____154.BMP<JumpId(DS.HLPï¿½DS2_Initialization_Security_Settings)<<1} Initialization Security Settings

Edit Global File Sets

{ewc rhgbtn32.dll, BlueSkyHelpButton, g<NOTEUP01.BMP|
NOTEDN01.BMP<JumpId(DS.HLP>thirdï¿½ds2x_Note_for_Edit_Global_File_Sets)<<1} {ewc
rhgbtn32.dll, BlueSkyHelpButton, g<RELAUP01.BMP|RELADN01.BMP<Klink(Global Optionsï¿½ ï¿½
ï¿½)<<1}

File sets allow you to define groups of files to transfer to the remote sites during synchronization.
This can be used to send documents (or document templates), reports, spreadsheets, and any
other type of file that needs to be received by the sites. Additionally, you can use this option to
transfer TeleMagic program updates directly to the sites to cut back on the system administration
entailed in updating multiple installations.

The **Edit Global File Sets** option allows you to create the groups of files that should be
transferred, specify exactly which file should go where, and specify what should occur if the
selected file already exists at the remote site.

To Create File Sets:

1. From the **Setup** menu, select **Options**.

    The Options dialog box will open.

2. Click the **Global File Sets** tab.

    The Global File Sets page will open.

3. Click **Add Set**.

    An Add New File Set dialog box will open. The `File
    Set Name:` field will default to New File Set.

4. Enter a unique name in the `File Set Name:` field for
    this file set.

5. To add a file to this set, click **Add**.

    The right side of the screen will become active. The **Save
    Set** button will change to **Save File**.

6. In the `Describe this file:` field, enter a
    descriptive name for this file.

7. Enter the actual name under which this file is stored in
    the **File is named** field.

    or Click the **File is named** button to bring up a Windows
    Open dialog box where you can select the file name.

    If you selected the file name from an Open dialog box,
    the directory will automatically be entered in the **File is in
    this directory** field. If you entered the file name
    manually, you must enter the path to the file.

8. Enter the path to the file in the **File is in this directory**
    field.

    or Click the **File is in this directory** button to bring up a
    Windows Select Directory dialog box where you can

select the path.

9. If you want to have this file placed into a specific directory in the remote installation, enter the path in the **Put in Remote directory** field. If you leave this field blank, the file will be placed in the remote installation's \COMMON directory.

• **or** Click **Put in Remote directory** to open a Windows Select Directory dialog box with a list of all drives and directories in the central installation. If your directory structure in the remote installation is the same or similar to the directory structure of the central, you can select the target path from the Select Directory dialog box. Edit the path as necessary.

10. Use the radio buttons to specify what occurs if the file already exists at the remote site:

   • Selecting `Overwrite file` will cause the file to be replaced in the remote site with the file from the central installation.

   • Selecting `Overwrite if Remote is older` will cause the file in the remote site to be replaced only if the file from the central installation is more recent.

   • Selecting `Do not overwrite file` will cause this file to only be copied to the remote site if it does not already exist.

   • Selecting `Ask Remote user` will cause a pop-up to appear during synchronization allowing the user processing at the remote site to decide if the file should be overwritten or not. (It is recommended that you alert the users at the remote sites if you will be selecting this option.)

11. Click **Save File**.

   The file description will appear in the list below the file set name.

12. Repeat steps 5 through 11 for each file you would like to include in this set.

13. If you would like to edit any of the file selections, highlight it in the list and click **Change**.

   The **Save Set** button will toggle to a **Save File** button.

14. Make any necessary changes on the right side of the dialog box and click **Save File**.

15. If you would like to remove a file from this set, highlight it in the list and click **Delete**.

   You will be asked to confirm your decision to delete.

16. Click **Yes** to delete the file from the set.

17. When satisfied with the set, click **Save Set**.

You will be returned to the Options dialog box.

18. Repeat steps 3 through 17 to add another set.

or   Click **OK** to exit the Options dialog box.

● You will be returned to the Data Synchronization Server main screen.

Continue…

{ewl rhgbtn32.dll, BlueSkyHelpButton, g<_____153.BMP|
_____154.BMP<JumpId(DS.HLPï¿½DS2_Attach_Global_File_Set)<<1} Attach Global File Set

{ewl rhgbtn32.dll, BlueSkyHelpButton, g<_____153.BMP|
_____154.BMP<JumpId(DS.HLPï¿½DS2_Attach_File_Sets)<<1} Attach Site Specific File Set

{ewl rhgbtn32.dll, BlueSkyHelpButton, g<_____153.BMP|
_____154.BMP<JumpId(DS.HLPï¿½DS2_Global_Options)<<1} Global Options

Attach Global File Set

{ewc rhgbtn32.dll, BlueSkyHelpButton, g<NOTEUP01.BMP| NOTEDN01.BMP<JumpId(DS.HLP>thirdï¿½ds2x_Notes_for_Attach_Global_File_Sets)<<1} {ewc rhgbtn32.dll, BlueSkyHelpButton, g<RELAUP01.BMP|RELADN01.BMP<Klink(Global Optionsï¿½ ï¿½ ï¿½)<<1}

At any given time, you can transfer two file sets to a site during synchronization: one global set, and one site specific set. Selecting a global file set is done at the Options dialog box.

To Select a Global File Set:

1. From the Data Synchronization Server **Setup** menu, select **Options**.

   The Options dialog box will open.

2. Click the **Global File Sets** tab.

   The Global File Sets page will open.

3. Click the `Attach Global File Set:` list arrow to open a drop-down list of file sets.

4. Highlight the file set you would like to use.

   When satisfied with your selection, click **OK**.

•   The selected file set will be transferred to all sites with the next synchronization.

{ewc rhgbtn32.dll, BlueSkyHelpButton, g<CONTUP01.BMP| CONTDN01.BMP<JumpId(DS.HLPï¿½DS2_Global_Options)<<1}

Edit Global Scripts

{ewc rhgbtn32.dll, BlueSkyHelpButton, g<NOTEUP01.BMP|
NOTEDN01.BMP<JumpId(DS.HLP>thirdï¿½ds2x_Note_for_Edit_Global_Scripts)<<1} {ewc
rhgbtn32.dll, BlueSkyHelpButton, g<RELAUP01.BMP|RELADN01.BMP<Klink(Global Optionsï¿½ ï¿½
ï¿½)<<1}

Scripts are used at the remote sites to automate processing. Most of the time, synchronization at the remote sites will follow a consistent set of steps, such as 1) processing the outbox; 2) using a communication program to dial the central location and transfer the packet; 3) waiting a specified time for a response packet to be returned from the central location; 4) then processing the inbox. A script is composed of a set of such steps that can be executed automatically, one after the other, by simply launching the script. (For more on processing, see the Synchronizing Data topic.) Although scripts can be set up at the remote sites, if most or all of your sites will be using the same script, you can avoid duplicate work by creating a global script at your central site and transferring it to the remote sites during initialization.

To Create Global Scripts:

1. From the Data Synchronization Server **Setup** menu, select **Options**.

    The Options dialog box will open.

2. Click the **Scripting** tab.

    The Scripting page will open.

3. Click **Add Script**.

    The Central Script Setup dialog box will open.

    The `Script name:` field will default to New Script.

4. Click in the `Script name:` field and enter a unique name for this script.

5. Click **Add** to add the first step in this script.

    The right side of the screen will become active and the **Save Script** button will toggle to a **Save** button. (**Save** will only save the step, not the entire script.)

6. In the `Describe this step:` field, enter a description of the step.

    Example: Process Inbox

7. Under `Run this step at,` choose one of the following options:

    - `Absolute Time` allows you to set a time for the step to begin in 12-hour format, followed by an *a* for a.m. or a *p* for p.m. (If you enter a time in 24-hour format, it will be translated into 12-hour format.)

    - `Relative Time` allows you to set the time in minutes for this step to begin, relative to the time

established for the previous step (or to launching the script if this is the first step).

8. Use the `and do the following` list box to define what should occur in this step:

   - `Process Inbox` will process any packet from the central installation currently in the site's inbox.

   - `Process Outbox` will process existing transaction records into an outgoing packet and place it in the site's outbox.

   - `Delete Outbox Packet` will delete any packet currently existing in the site's outbox. This can be used to clear the outbox of old packets before processing. Alternatively, if a program is run that copies a packet to another location and leaves the original packet in the outbox, this option can be used to remove the original packet. Care should be exercised not to delete a packet that has not been received by the server.

   - `Send Packet Via Transport` will send any existing outbox packet by the method determined in Transport Options. (Consider using this step after the outbox has been processed.)

   - `Retrieve Packet Via Transport` will retrieve any incoming packet using the method selected in Transport Options. (Consider using this step before processing the inbox.)

   - `Send/Retrieve Via Transport` will retrieve any incoming packet for the site, then post any existing outbox packet. The method selected under Transport Options will be used.

   - `Run a program` allows you to run another program to perform such functions as executing a batch file to transfer the contents of your outbox over modem to the central installation.

9. If you chose `Run a program` in step 8, above, enter the path and executable name for the program; or, if your directory structures at the remote sites are the same or similar to the central installation, click the **Program To Run** button to locate the file using a Windows Open dialog box. Edit the path as necessary. (If the file is not in the same path at all sites, the script will have to be edited at each site. See the topic Script Maintenance for instructions.)

10. When satisfied with this step, click **Save**.

    The step name will appear beneath the script name.

11. Repeat steps 5 through 10 for each step you would like to add to the script.

12. If you would like to change the order in which any step in

the script is executed, click and hold the mover box next to the step description while dragging the step to the appropriate position. Repeat this until all steps are in the desired order.

13. If you would like to change the details of any step, highlight it on the list and click **Change**.

    The step details will become available and the **Save Script** button will toggle to a **Save** button.

14. Make any necessary changes to the step and click **Save**.

15. If you would like to remove any step from the script, highlight it and click **Delete**.

    A message will appear asking you to confirm your decision to delete.

16. Click **Yes** and the step will be deleted.

or Click **No** to retain the step.

17. When you are satisfied with your script, click **Save Script**.

    Your new script will appear in the Scripting dialog box.

18. If you would like to create another script, repeat steps 3 through 17.

or Click **Close**.

    You will return to the Options dialog box.

Continue…

{ewl rhgbtn32.dll, BlueSkyHelpButton, g<_____153.BMP|
_____154.BMP<JumpId(DS.HLPï¿½DS2_Creating_Scripts_at_the_Remote_Sites)<<1} Creating Scripts at the Remote Sites

{ewl rhgbtn32.dll, BlueSkyHelpButton, g<_____153.BMP|
_____154.BMP<JumpId(DS.HLPï¿½DS2_Transfer_Scripts)<<1} Transfer Scripts

{ewl rhgbtn32.dll, BlueSkyHelpButton, g<_____153.BMP|
_____154.BMP<JumpId(DS.HLPï¿½DS2_Global_Options)<<1} Global Options

Site Preferences

{ewc rhgbtn32.dll, BlueSkyHelpButton, g<RELAUP01.BMP|RELADN01.BMP<Klink(Site Settingsï¿½ ï¿½ ï¿½)<<1}

Site Preferences allow you to create site specific settings to control the synchronization of such things as activities and e-mail, as well as allowing you to further configure the site for synchronization, if desired.

To Open Site Preferences:

1. From the Data Synchronization Server **Setup** menu, select **Site Preferences**.

    The Remote Site Maintenance dialog box will open. It will contain a list of all of your sites.

2. Highlight the site for which you would like to set preferences and click **Edit**.

    The **Site preferences** button will become available.

3. Click **Site preferences**.

4. If the site is a Satellite Server, mark the `This site is a satellite server` check box.

    Mark the `Do not transport packets to this site` check box to bypass packet transport.

    For the remaining settings, use the guidelines in the following topics when selecting your Site Preference settings:

    > [Date Format](#)
    > [E-Mail](#)
    > [Activities](#)
    > [Linked Activities](#)
    > [Unlinked Activities](#)
    > [Updating the Central User List](#)
    > [Delete users at this site who dont exist on Data Synchronizations user list for this site](#)
    > [Validate Contact Record Revisions at Field Level](#)
    > [Send TeleMagic Update](#)
    > [Apply Settings to All Sites](#)
    > [Do Not Create/Accept Packets](#)
    > [Activity Filters](#)
    > [Initialization/Initialization Opts](#)
    > [Attach File Sets](#)
    > [Transaction Date](#)

6. Click **OK** when you are satisfied with your selections.

Continue…

{ewl rhgbtn32.dll, BlueSkyHelpButton, g<_____153.BMP|
_____154.BMP<JumpId(DS.HLPï¿½DS2_Global_Options)<<1} Global Options

{ewl rhgbtn32.dll, BlueSkyHelpButton, g<_____153.BMP|
_____154.BMP<JumpId(DS.HLPï¿½DS2_Initialization)<<1} Initialization

{ewl rhgbtn32.dll, BlueSkyHelpButton, g<_____153.BMP|
_____154.BMP<JumpId(DS.HLPï¿½DS2_Setting_Field_Rules)<<1} Setting Field Rules

{ewl rhgbtn32.dll, BlueSkyHelpButton, g<_____153.BMP|
_____154.BMP<JumpId(DS.HLPï¿½DS2_Command_Line_Parameters)<<1} Command Line Parameters

{ewl rhgbtn32.dll, BlueSkyHelpButton, g<_____153.BMP|
_____154.BMP<JumpId(DS.HLPï¿½DS_Central_Site_Setup)<<1} Central Site Setup

Date Format

{ewc rhgbtn32.dll, BlueSkyHelpButton, g<NOTEUP01.BMP|
NOTEDN01.BMP<JumpId(DS.HLP>thirdï¿½ds2x_Note_for_Date_Format)<<1} {ewc rhgbtn32.dll,
BlueSkyHelpButton, g<RELAUP01.BMP|RELADN01.BMP<Klink(Site Preferencesï¿½ ï¿½ ï¿½)<<1}

Once Data Synchronization Server is installed, users will no longer be able to access the Date
Format preferences on the System Preferences screen in TeleMagic. If you would like to change the
date format in use at the site, you must use the `Set this site's date format to:` drop-down
list to change the date format in use at the site. The Date Format options in Server Options will not
be available at the satellite offices. The date format for satellites is set at the central site.

{ewc rhgbtn32.dll, BlueSkyHelpButton, g<contup01.bmp|
contdn01.BMP<JumpId(DS.HLPï¿½DS2_Site_Preferences)<<1}

E-mail

{ewc rhgbtn32.dll, BlueSkyHelpButton, g<NOTEUP01.BMP|
NOTEDN01.BMP<JumpId(DS.HLPï¿½ds2x_Notes_for_E_mail)<<1} {ewc rhgbtn32.dll,
BlueSkyHelpButton, g<RELAUP01.BMP|RELADN01.BMP<Klink(Synchronizationï¿½ ï¿½ ï¿½)<<1}

You have the option of including e-mail in your synchronization packet. If a user exists at multiple sites, that user's e-mail messages can be sent to every site at which he or she may possibly be. Additionally, you will be able to access all users' names when writing e-mail messages at any site, regardless of whether those users actually exist in the current installation of TeleMagic. Mark the `Synchronize E-mail` check box if users work at multiple sites and need to be able to access their e-mail regardless of where they are, or need to communicate with users at other sites using e-mail. (Data Synchronization Server will use the user list you have established at each site when determining where to send the e-mail.) If users are only set up at a single site and do not use e-mail to communicate with users at other sites, e-mail may not need to be sent to multiple sites. If you unmark this check box, e-mail messages will not be synchronized to or from this site.

{ewc rhgbtn32.dll, BlueSkyHelpButton, g<contup01.bmp|
contdn01.BMP<JumpId(DS.HLPï¿½DS2_Site_Preferences)<<1}

Activities

{ewc rhgbtn32.dll, BlueSkyHelpButton, g<NOTEUP01.BMP|
NOTEDN01.BMP<JumpId(DS.HLP>thirdï¿½ds2x_Notes_for_Activities)<<1} {ewc rhgbtn32.dll,
BlueSkyHelpButton, g<RELAUP01.BMP|RELADN01.BMP<Klink(Activitiesï¿½ ï¿½ ï¿½)<<1}

If users exist at multiple locations, you can synchronize their calendars to all of those locations. In this way, users can be assured of receiving all of their scheduled activities and To-Dos, no matter where they happen to be.

Additionally all users from all sites will be available when assigning activities and activity permissions. Depending on your Activity Filter Criteria users may be able to receive activities from users to whom they have granted activity permissions who do not actually exist in the current installation. They can also assign activities to users who have granted them activity permissions who do not exist in the current installation. In this way, users at different sites can share activities. Activity permissions can also be assigned across sites using Data Synchronization Server. Users will be able to grant activity permissions, regardless of whether or not the other user actually exists in the current installation. (Activity permissions are stored with other user specific information and will only get synchronized from sites that have Update central user list marked in Site Preferences.)

Continue…

{ewl rhgbtn32.dll, BlueSkyHelpButton, g<_____153.BMP|
_____154.BMP<JumpId(DS.HLPï¿½DS2_Linked_Activities)<<1} Linked Activities

{ewl rhgbtn32.dll, BlueSkyHelpButton, g<_____153.BMP|
_____154.BMP<JumpId(DS.HLPï¿½DS2_Unlinked_Activities)<<1} Unlinked Activities

{ewl rhgbtn32.dll, BlueSkyHelpButton, g<_____153.BMP|
_____154.BMP<JumpId(DS.HLPï¿½DS2_Activity_Filters)<<1} Activity Filters

{ewl rhgbtn32.dll, BlueSkyHelpButton, g<_____153.BMP|
_____154.BMP<JumpId(DS.HLPï¿½DS2_Site_Preferences)<<1} Site Preferences

Linked Activities

{ewc rhgbtn32.dll, BlueSkyHelpButton, g<NOTEUP01.BMP| NOTEDN01.BMP<JumpId(DS.HLP>thirdï¿½ds2x_Notes_for_Linked_Activities)<<1} {ewc rhgbtn32.dll, BlueSkyHelpButton, g<RELAUP01.BMP|RELADN01.BMP<Klink(Activitiesï¿½ ï¿½ ï¿½)<<1}

Mark the `Synchronize linked activities` check box if you would like to synchronize activities for this site that are linked to a contact. Unmark it if you do not want to synchronize activities for this site, or only want to include users' personal activities (those not related to a record in the contact database).

Activities that are linked to a contact are only synchronized if the contact to which they are linked is synchronized. If you assign a linked activity to another user who does not exist in your current installation, that user will only receive the activity if the contact record is synchronized to the other installation.

When you assign an activity to a user who does not exist in the current installation, TeleMagic will now check to see if it is a linked activity. If it is linked, TeleMagic will then check to see if the database is synchronized. If it is not, you will receive a message informing you that the activity will not reach the intended user. You will be asked if you would like to save it as an unlinked activity.

If you select **Yes**, the activity will be unlinked from the contact record and saved. If you select **No**, you will be returned to the `Assigned To` field where you can assign the activity to a user in the current installation.

Continue…

{ewl rhgbtn32.dll, BlueSkyHelpButton, g<_____153.BMP| _____154.BMP<JumpId(DS.HLPï¿½DS2_Activities)<<1} Activities

{ewl rhgbtn32.dll, BlueSkyHelpButton, g<_____153.BMP| _____154.BMP<JumpId(DS.HLPï¿½DS2_Unlinked_Activities)<<1} Unlinked Activities

{ewl rhgbtn32.dll, BlueSkyHelpButton, g<_____153.BMP| _____154.BMP<JumpId(DS.HLPï¿½DS2_Site_Preferences)<<1} Site Preferences

Unlinked Activities

{ewc rhgbtn32.dll, BlueSkyHelpButton, g<NOTEUP01.BMP|
NOTEDN01.BMP<JumpId(DS.HLP>thirdï¿½ds2x_Note_for_Unlinked_Activities)<<1} {ewc rhgbtn32.dll,
BlueSkyHelpButton, g<RELAUP01.BMP|RELADN01.BMP<Klink(Activitiesï½ ï¿½ ï¿½)<<1}

Select `Synchronize unlinked activities` if you would like users' personal activities (those
not related to a contact) synchronized. Unmark it if you do not want these activities synchronized.

Continue…

{ewl rhgbtn32.dll, BlueSkyHelpButton, g<_____153.BMP|
_____154.BMP<JumpId(DS.HLPï¿½DS2_Activities)<<1} <u>Activities</u>

{ewl rhgbtn32.dll, BlueSkyHelpButton, g<_____153.BMP|
_____154.BMP<JumpId(DS.HLPï¿½DS2_Linked_Activities)<<1} <u>Linked Activities</u>

{ewl rhgbtn32.dll, BlueSkyHelpButton, g<_____153.BMP|
_____154.BMP<JumpId(DS.HLPï¿½DS2_Activity_Filters)<<1} <u>Activity Filters</u>

{ewl rhgbtn32.dll, BlueSkyHelpButton, g<_____153.BMP|
_____154.BMP<JumpId(DS.HLPï¿½DS2_Site_Preferences)<<1} <u>Site Preferences</u>

Activity Filters

{ewc rhgbtn32.dll, BlueSkyHelpButton, g<NOTEUP01.BMP|
NOTEDN01.BMP<JumpId(DS.HLP>thirdï¿½ds2x_Note_for_Activity_Filters)<<1} {ewc rhgbtn32.dll,
BlueSkyHelpButton, g<RELAUP01.BMP|RELADN01.BMP<Klink(Activitiesï¿½ ï¿½ ï¿½)<<1}

If you have selected `Synchronize unlinked activities` and/or `Synchronize linked activities`, you can further filter what activities should be included by selecting activity filters.

To Set Activity Filter Criteria:

1. At the Site Preferences page, click **Activity Filter Criteria**.

    The Choose Activities dialog box will open.

2. Choose `Select activities based on new transactions` if you would like to only include activities that have been changed since the last synchronization of the outgoing packet.

or Choose `Select all activities, ignore transactions` if you would like to include all activities in the outgoing packet. This option will only be applied when synchronizing from the central to the remote. Synchronization from the remote site or satellite office to central always respects transactions, unless the /notrans parameter is used. This parameter will cause the remote site to ignore transactions and include all contact and activity records when preparing a packet for the central.

3. Mark the `Include activities assigned to users at site` check box to include all activities normally appearing on the calendars of users at the remote sites.

4. Mark `Include activities assigned by users at site` to synchronize activities created by users at the current site that have been assigned to users at other locations.

    If you have marked either `Include activities assigned to users at site` or `Include activities assigned by users at site,` the `Include activities which are completed` and `Synchronize activities which have been deleted` check boxes will become available.

5. Mark `Include activities which are completed` if you would like completed activities assigned to and/or by users synchronized. Unmark it if you would only like pending activities included.

6. Mark `Synchronize activities which have been deleted` if you would like to synchronize the

deletion of activities assigned to and/or by users. When marked, if an activity has been deleted from any other site that has this check box marked, it will also be deleted at this site. At the same time, a transaction for activities that have been deleted at this site will be included in the outgoing packet and synchronized to any other sites that also have this check box marked.

7. When satisfied with your selections, click **OK**.

Continue…

{ewl rhgbtn32.dll, BlueSkyHelpButton, g<_____153.BMP|
_____154.BMP<JumpId(DS.HLPï¿½DS2_Activities)<<1} Activities

{ewl rhgbtn32.dll, BlueSkyHelpButton, g<_____153.BMP|
_____154.BMP<JumpId(DS.HLPï¿½DS2_Linked_Activities)<<1} Linked Activities

{ewl rhgbtn32.dll, BlueSkyHelpButton, g<_____153.BMP|
_____154.BMP<JumpId(DS.HLPï¿½DS2_Unlinked_Activities)<<1} Unlinked Activities

{ewl rhgbtn32.dll, BlueSkyHelpButton, g<_____153.BMP|
_____154.BMP<JumpId(DS.HLPï¿½DS2_Site_Preferences)<<1} Site Preferences

Updating the Central User List

{ewc rhgbtn32.dll, BlueSkyHelpButton, g<NOTEUP01.BMP|
NOTEDN01.BMP<JumpId(DS.HLPï¿½ds2x_Notes_for_Updating_the_Central_User_List)<<1} {ewc
rhgbtn32.dll, BlueSkyHelpButton, g<RELAUP01.BMP|RELADN01.BMP<Klink(Site Preferencesï¿½ ï¿½
ï¿½)<<1}

When setting up your site, you must create a central user list for the site containing every user who
may need to access TeleMagic at the site. When Data Synchronization Server performs a
synchronization from the central installation, it will reference this site's central user list and make sure
that the list of users actually existing at the remote site matches. If it finds a user at the remote site who
is not on the list, that user may be deleted. (Deleting users is subject to your Delete users at
this site who don't exist on Data Synchronization's user list for this site
selection. This will be marked by default.) If it does not find a user at the remote site who is on the list,
that user will be added. (This allows you to maintain TeleMagic with changes to personnel from a
central location.)

You can opt to have this synchronization of user lists performed both ways. If you want to enable
supervisors at the remote site to perform maintenance on the users directly at the remote site (without
their changes getting overwritten during synchronization), mark the Update central user list
check box. If marked, when synchronization is performed from the remote to the central, Data
Synchronization will make sure the remote site's central user list matches the list of users at the
remote site, adding and deleting users from the list as necessary.

The central site will keep a master list of the users at remote sites that are attached to satellite offices.
The central site, however, cannot make changes to the users at those remote sites. It can only change
the users at remote sites and satellite offices directly attached to it. The satellite offices will maintain
the users at their sites. If there are any changes made in the user list at a satellite office for a remote
site, the changes will be updated on the central site's master user list. (This will occur whether or not
Update central user list is selected for the satellite office.)

Continue…

{ewl rhgbtn32.dll, BlueSkyHelpButton, g<_____153.BMP|
_____154.BMP<JumpId(DS.HLPï¿½DS2_Assigning_Users_to_Your_Remote_Sites)<<1} Assigning
Users to Your Remote Sites
{ewl rhgbtn32.dll, BlueSkyHelpButton, g<_____153.BMP|
_____154.BMP<JumpId(DS.HLPï¿½DS2_Site_Preferences)<<1} Site Preferences

Delete users at this site who don't exist on Data Synchronization's user list for this site

{ewc rhgbtn32.dll, BlueSkyHelpButton, g<NOTEUP01.BMP| NOTEDN01.BMP<JumpId(DS.HLP>thirdï¿½ds2x_Note_for_Delete_users_at_this_site_who_don_t_exis t_on_Data_Synchronization_s_user_list_for_this_site)<<1} {ewc rhgbtn32.dll, BlueSkyHelpButton, g<RELAUP01.BMP|RELADN01.BMP<Klink(Usersï¿½ ï¿½ ï¿½)<<1}

This option allows you to control whether users are deleted automatically through synchronization. When marked, users existing at the remote installation of TeleMagic who are not on the site's user list will be deleted on synchronization.

You can use this check box in conjunction with the Update central user list check box to control the users who exist both at the site and on the site's user list. These check boxes work together using the following guidelines:

- If both check boxes are marked, users at a remote site who have been deleted from the central user list will be deleted at the site unless the site performs synchronization to the central installation before it receives the packet deleting the user. In this case, the user will be added back to the central user list. If a user is deleted at the site, that user will also be deleted from the site's user list.

- If neither check box is marked, users added to the central user list will be added to the site. If a user is deleted from the central user list, the user will remain at the site, but will not be included in synchronization. (That user will not receive activities or e-mail created at other sites.) If a user is deleted at the remote site, that user will be re-added on the next synchronization.

- If the `Delete users at this site who don't exist on Data Synchronization's user list for this site` check box is not marked and `Update central user list` is marked, any users who have been removed from the site's central user list will be re-added the next time an incoming packet is received from the site.

- If the `Delete users at this site who don't exist on Data Synchronization's user list for this site` check box is marked and `Update central user list` is not marked, the central installation will retain total control over the remote installation. On each synchronization to the remote site, Data Synchronization Server will make sure that the list of users existing at the site exactly matches the central user list, adding users who do not exist and deleting users who have been added to the site who are not valid for the site.

Continue…

{ewl rhgbtn32.dll, BlueSkyHelpButton, g<_____153.BMP| _____154.BMP<JumpId(DS.HLPï¿½DS2_Assigning_Users_to_Your_Remote_Sites)<<1} <ins>Assigning Users to Your Remote Sites</ins>

{ewl rhgbtn32.dll, BlueSkyHelpButton, g<_____153.BMP| _____154.BMP<JumpId(DS.HLPï¿½DS2_Site_Preferences)<<1} <ins>Site Preferences</ins>

Validate Contact Record Revisions at Field Level

{ewc rhgbtn32.dll, BlueSkyHelpButton, g<NOTEUP01.BMP| NOTEDN01.BMP<JumpId(DS.HLP>thirdï¿½ds2x_Notes_for_Validate_Contact_Record_Revisions_at_F ield_Level)<<1} {ewc rhgbtn32.dll, BlueSkyHelpButton, g<RELAUP01.BMP|RELADN01.BMP<Klink(Site Preferencesï¿½ ï¿½ ï¿½)<<1}

Generally speaking, if multiple changes have been made to the same field you will want the most recent change retained. Mark the `Validate contact record revisions at field level` check box if you would like Data Synchronization Server to compare the transaction date and time of an incoming change to the last date and time a transaction was created for the target field and retain the most recent edit. (This is not applicable with memo fields.) Unmark it if you do not want this to be a criterion when determining replacement precedence.

{ewc rhgbtn32.dll, BlueSkyHelpButton, g<contup01.bmp| contdn01.BMP<JumpId(DS.HLPï¿½DS2_Site_Preferences)<<1}

Send TeleMagic Update

{ewc rhgbtn32.dll, BlueSkyHelpButton, g<NOTEUP01.BMP|
NOTEDN01.BMP<JumpId(DS.HLP>thirdï¿½ds2x_Notes_Hints_for_Send_TeleMagic_Update)<<1} {ewc
rhgbtn32.dll, BlueSkyHelpButton, g<RELAUP01.BMP|RELADN01.BMP<Klink(Synchronizationï¿½ ï¿½
ï¿½)<<1}

This option allows you to quickly update synchronized installations with new TeleMagic files. Having
this check box marked will cause Data Synchronization Server to search for new TeleMagic files in
your central installation each time you synchronize the site. Any new files that are located will be
included in the outbox packet and copied to your remote installation.

Files From

When an update file is synchronized, Data Synchronization Server notes the date on which it
was sent. With each subsequent synchronization, it compares the date of the TeleMagic files at
the central installation to that date. If any are dated later than the date recorded the last time an
update was sent, those files will be included in the outbox packet. If you have files that are dated
earlier than the date the last update was sent, or if for any reason the site did not receive an
update, you can specify a date in the `Files From` field. If there is an entry in this field, Data
Synchronization Server will take all files from that date forward.

{ewc rhgbtn32.dll, BlueSkyHelpButton, g<contup01.bmp|
contdn01.BMP<JumpId(DS.HLPï¿½DS2_Site_Preferences)<<1}

Apply Settings to All Sites

{ewc rhgbtn32.dll, BlueSkyHelpButton, g<NOTEUP01.BMP|
NOTEDN01.BMP<JumpId(DS.HLP>thirdï¿½ds2x_Note_Hint_for_Apply_Settings_to_All_Sites)<<1}
{ewc rhgbtn32.dll, BlueSkyHelpButton, g<RELAUP01.BMP|RELADN01.BMP<Klink(Site Settingsï¿½
ï¿½ ï¿½)<<1}

This option allows you to quickly transfer settings to other sites. If you will be using the same settings for most or all of your remote sites, you can save duplicate setup by marking the `Apply these settings to all sites` check box. (This check box pertains only to the settings preceding it.) When marked, these settings will overwrite any settings for these options at your other sites.

{ewc rhgbtn32.dll, BlueSkyHelpButton, g<contup01.bmp|
contdn01.BMP<JumpId(DS.HLPï¿½DS2_Site_Preferences)<<1}

Do Not Create/Accept Packets

{ewc rhgbtn32.dll, BlueSkyHelpButton, g<NOTEUP01.BMP|
NOTEDN01.BMP<JumpId(DS.HLP>thirdï¿½ds2x_Note_Hint_for_Do_Not_Accept_Create_Packet)<<1}
{ewc rhgbtn32.dll, BlueSkyHelpButton, g<RELAUP01.BMP|RELADN01.BMP<Klink(Site Preferencesï¿½
ï¿½ ï¿½)<<1}

You may want to temporarily take a site out of the synchronization process. If so, you can use the `Do not create packets for this site` and the `Do not accept packets from this site` options to place the site on hold. If `Do not create packets for this site` is selected, the server will not create an outbox packet for the site. When `Do not accept packets from this site` is selected, if a packet is received from this site it will not be processed. (The rejected packet will be placed in the \BACKUP sub-directory of the \TMSYNC directory.

{ewc rhgbtn32.dll, BlueSkyHelpButton, g<contup01.bmp|
contdn01.BMP<JumpId(DS.HLPï¿½DS2_Site_Preferences)<<1}

Attach File Sets

{ewc rhgbtn32.dll, BlueSkyHelpButton, g<NOTEUP01.BMP|
NOTEDN01.BMP<JumpId(DS.HLP>thirdï¿½ds2x_Note_for_Attach_File_Sets)<<1} {ewc rhgbtn32.dll,
BlueSkyHelpButton, g<RELAUP01.BMP|RELADN01.BMP<Klink(File Setsï¿½ ï¿½ ï¿½)<<1}

Instructions for creating and selecting global file sets are given in the Edit Global File Sets and Attach Global File Set topics. In addition to a global file set which can be sent out to all sites, it is possible to select a file set that will only be sent to this site. (It is therefore possible to send two file sets out with any synchronization packet.)

To Attach a Site Specific File Set:

1. At the Site Preferences dialog box, click the **File Set** tab.

    The File Set page will open.

2. In the `Attach File Set:` list box, select a previously defined file set that will be sent to the remote site during synchronization.

3. When satisfied with your selections, click **OK**.

Continue…

{ewl rhgbtn32.dll, BlueSkyHelpButton, g<_____153.BMP|
_____154.BMP<JumpId(DS.HLPï¿½DS2_Edit_Global_File_Sets)<<1} Creating File Sets
{ewl rhgbtn32.dll, BlueSkyHelpButton, g<_____153.BMP|
_____154.BMP<JumpId(DS.HLPï¿½DS2_Site_Preferences)<<1} Site Preferences

Transaction Cutoff Date

{ewc rhgbtn32.dll, BlueSkyHelpButton, g<NOTEUP01.BMP|
NOTEDN01.BMP<JumpId(DS.HLP>thirdï¿½ds2x_Notes_for_Transaction_Cutoff_Date)<<1} {ewc
rhgbtn32.dll, BlueSkyHelpButton, g<RELAUP01.BMP|RELADN01.BMP<Klink(Site Preferencesï¿½ ï¿½
ï¿½)<<1}

Data Synchronization Server keeps all changes to your central installation in transaction files. If you
are synchronizing based on transactions, each time the server processes a site it looks for the date
and time that a packet was last created for that site, and only includes transactions entered after that
date/time in the current packet. If you need to include transactions prior to this, you can do so by
specifying the transaction cutoff date and time. Be aware that if you set a transaction cutoff date and
do not have the site set to only accept more recent edits, newer data could get overwritten at the
remote site. (See the topic Validate Contact Record Revisions at Field Level for details on only
accepting newer edits.)

To Set a Transaction Cutoff Date:

1. At the Site Preferences dialog box, click the **Transaction
Date** tab.

   The Transaction Date page will open.

2. Enter the earliest date and time for transactions to be
included in the packet in the `Include transactions
created after` date and time fields. Leave these
fields blank to only include transactions following the
most recent packet.

● **or** Click the **Output Previous** button. Clicking this button
● will allow you to automatically set the transaction cutoff
date to include the transactions that were used the last
time the site was processed.

3. If you would like to output the previous packet, click
Output previous.

● A message will appear displaying the date and time of
the earliest transactions included in the last packet and
asking if you would like to send these transactions again.

or Click **OK** when satisfied with your selections.

4. Click **Yes** to output the previous transactions.

or Click **No** to cancel.

   If you click **Yes**, the specified date and time will appear in
the `Include transactions created after` fields.

5. Edit these fields if necessary and click **OK** to save the
transaction cutoff date.

{ewc rhgbtn32.dll, BlueSkyHelpButton, g<contup01.bmp|
contdn01.BMP<JumpId(DS.HLPï¿½DS2_Site_Preferences)<<1}

Initialization

{ewc rhgbtn32.dll, BlueSkyHelpButton, g<NOTEUP01.BMP| NOTEDN01.BMP<JumpId(DS.HLPï¿½ds2x_Note_for_Initialization)<<1} {ewc rhgbtn32.dll, BlueSkyHelpButton, g<RELAUP01.BMP|RELADN01.BMP<Klink(Initializationï¿½ ï¿½ ï¿½)<<1}

Site initialization allows you to use synchronization to prepare the databases and certain areas of security in your remote installation for synchronization. Initialization also allows you to transfer data to your remote sites that would not ordinarily be a part of synchronization, such as scripts and file sets. Initialization can be performed as often as you desire, and you can control exactly what is included each time.

When you first add a site, Data Synchronization Server will select default initialization settings that will copy the database structure and contact records from the central installation to the remote site, ensuring that they match. After this first initialization, the site will automatically be set to not initialize, unless you specify otherwise. It is possible to edit these settings for first time synchronization, or to elect to perform initialization at other times.

To Access a Site's Initialization Settings:

1. From the **Setup** menu, select **Site Maintenance**.

   The Remote Site Maintenance dialog box will open with a list of all of your sites.

2. Highlight the site for which you would like to create initialization settings and click **Edit**.

   The **Site preferences** button will become available.

3. Click **Site preferences**.

   The Site Preferences dialog box will open.

4. Click the **Initialization** tab.

   The Initialization page will open.

5. Choose from the following `Initialization Settings` to specify when to perform an initialization when synchronizing:

   - Select `Do not initialize this site` if you do not want to perform initialization.
   - `Initialize this site one time only` will perform the initialization the first time you synchronize, and a standard synchronization each time thereafter. (This setting is the default for all new sites.)
   - `Initialize this site continuously` will perform initialization each time you synchronize.

6. Mark the `Apply these settings to all sites` check box if you would like the initialization performed for all sites following the above selected criterion.

7. Click the **Initialization Opts** tab.

The Initialization Opts page will open.

8. Use the guidelines in the following topics to make your selections on this page:

> [Rename Synchronized Databases](#)
> [Complete Database File Transfer](#)
> [Transfer Contact and Activity Records](#)
> [Delete Contact Records](#)
> [Delete Activity Records](#)
> [Override existing user preferences with defaults](#)
> [Transfer Scripts](#)
> [Add Supervisor](#)
> [Site Time Zone](#)
> [Daylight Savings Time](#)
> [Remote Security Settings](#)
> [Apply these Settings to All Sites](#)

9. When satisfied with your selections, click **OK**.

You will be returned to the Site Preferences dialog box.

10. Click **OK** at the Site Preferences dialog box to save your initialization settings and any Site Preferences.

You will be returned to the Remote Site Maintenance dialog box. A display on this dialog box will indicate whether:

- `Site is set for one time initialization` This site is set to initialize on the next synchronization, then perform a standard synchronization thereafter.
- `Site is set for continuous initialization` This site is set to initialize every time synchronization is performed.
- `Site is active` This is an active site, but has not been set up for initialization.
- `Site is being added` This site is currently being added and has not yet been set up for initialization. Once you have accessed Site Preferences or saved a new site, this will be changed to `Site is set for one time initialization`. (You must perform initialization on all new sites, or any time a site's Site ID is changed.)

Continue…

{ewl rhgbtn32.dll, BlueSkyHelpButton, g<_____153.BMP|
_____154.BMP<JumpId(DS.HLPï¿½DS2_Global_Options)<<1} [Global Options](#)
{ewl rhgbtn32.dll, BlueSkyHelpButton, g<_____153.BMP|
_____154.BMP<JumpId(DS.HLPï¿½DS2_Site_Preferences)<<1} [Site Preferences](#)
{ewl rhgbtn32.dll, BlueSkyHelpButton, g<_____153.BMP|
_____154.BMP<JumpId(DS.HLPï¿½DS2_Setting_Field_Rules)<<1} [Setting Field Rules](#)

{ewl rhgbtn32.dll, BlueSkyHelpButton, g<_____153.BMP|
_____154.BMP<JumpId(DS.HLPï¿½DS2_Command_Line_Parameters)<<1} [Command Line Parameters](#)

{ewl rhgbtn32.dll, BlueSkyHelpButton, g<_____153.BMP|
_____154.BMP<JumpId(DS.HLPï¿½DS_Central_Site_Setup)<<1} [Central Site Setup](#)

Rename Synchronized Databases

{ewc rhgbtn32.dll, BlueSkyHelpButton, g<NOTEUP01.BMP|
NOTEDN01.BMP<JumpId(DS.HLP>thirdï¿½ds2x_Notes_for_Rename_Synchronized_Databases)<<1}
{ewc rhgbtn32.dll, BlueSkyHelpButton, g<RELAUP01.BMP|RELADN01.BMP<Klink(Databasesï¿½ ï¿½
ï¿½)<<1}

When synchronization is performed, Data Synchronization Server recognizes the databases by their names; if a database has been selected for synchronization in the central installation and a database of the same name exists in the remote installation, those two databases will be synchronized. If no matching database name is found in the remote installation, you have the option of adding the database from the central installation.

If you would like to synchronize databases from the central location, but want them synchronized to new databases (created by Data Synchronization Server at the remote site), not to the databases of the same names in the remote installation, mark `Rename synchronized databases which already exist`. When marked, Data Synchronization Server will look for matching databases, but instead of synchronizing them, it will rename the databases in the remote installation. When the databases have been renamed, you can select to have Data Synchronization Server add new databases based on the copies existing in the central installation. (You must have either `Complete database file transfer (No contact records)` marked on this screen or `Create database if not found` marked in the Database Files to Transfer dialog box off the Database Preferences screen for the databases to be added.)

Example: You have a satellite office that has been using the Company/Contact database to contain sales leads. You have changed the field structure and added list boxes, indexes, and filters. You use the Company/Contact database in the central location to contain existing customers. Again, you have customized this database to fit your purposes. You need to synchronize the Company/Contact database existing in the central location to the remote installation, but you do not want to overwrite the information that is already there. By renaming Company/Contact in the remote installation, you can keep the database that is already there, and transfer a new copy of the database as it is used in the central installation.

{ewc rhgbtn32.dll, BlueSkyHelpButton, g<contup01.bmp|
contdn01.BMP<JumpId(DS.HLPï¿½DS2_Initialization)<<1}

Complete Database File Transfer

{ewc rhgbtn32.dll, BlueSkyHelpButton, g<NOTEUP01.BMP|
NOTEDN01.BMP<JumpId(DS.HLP>thirdï¿½ds2x_Notes_and_Hints_for_Complete_Database_File_Tra
nsfer)<<1} {ewc rhgbtn32.dll, BlueSkyHelpButton, g<RELAUP01.BMP|
RELADN01.BMP<Klink(Databasesï¿½ ï¿½ ï¿½ ï¿½)<<1}

This option will allow you to transfer database templates to the remote site, adjusting existing databases to match the database in the central installation and adding databases that do not exist.

When you set up database preferences for a database, you have the option of including database structure options. When performing standard synchronization, you can pick and choose which structural changes you would like to make. (If you would like more information on the individual options involved, see <u>To Set Database Preferences,</u>) Marking the `Complete database file transfer (No contact records)` option will override any individual settings you may use and perform a transfer of the entire structure.

Example: Your central location and your remote site both contain a copy of a database called Customers. Users at the remote site have made changes to the database, deleting fields they did not really use, and adding others. They have also created indexes and list boxes. You are going to begin synchronizing these databases, and for consistency, would like all users working with the same database structure. Using this option, you can easily change the remote site to exactly match the central installation. (Users can make individual changes at the remote site after initialization has been performed, if necessary.)

Continue…

{ewl rhgbtn32.dll, BlueSkyHelpButton, g<_____153.BMP|
_____154.BMP<JumpId(DS.HLPï¿½DS2_Transfer_All_Contact_and_Activity_Records)<<1} <u>Transfer Contact and Activity Records</u>

{ewl rhgbtn32.dll, BlueSkyHelpButton, g<_____153.BMP|
_____154.BMP<JumpId(DS.HLPï¿½DS2_Initialization)<<1} <u>Initialization</u>

Transfer Contact and Activity Records

{ewc rhgbtn32.dll, BlueSkyHelpButton, g<NOTEUP01.BMP|
NOTEDN01.BMP<JumpId(DS.HLP>thirdï¿½ds2x_Notes_and_Hints_for_Transfer_Contact_and_Activity
_Records)<<1} {ewc rhgbtn32.dll, BlueSkyHelpButton, g<RELAUP01.BMP|
RELADN01.BMP<Klink(Activitiesï¿½ ï¿½ ï¿½)<<1}

Selecting `Transfer contact and activity records` will cause all contact and activity records
in the applicable filters to be included in the outgoing packet, whether there are transactions for them
or not. This is useful when preparing a database for the first synchronization as it allows you to
synchronize differences in fields for which there are no transaction records. This option is a default for
first time synchronization.

Continue…

{ewl rhgbtn32.dll, BlueSkyHelpButton, g<_____153.BMP|
_____154.BMP<JumpId(DS.HLPï¿½DS2_Complete_Database_File_Transfer)<<1} Complete Database
File Transfer
{ewl rhgbtn32.dll, BlueSkyHelpButton, g<_____153.BMP|
_____154.BMP<JumpId(DS.HLPï¿½DS2_Initialization)<<1} Initialization

Delete Contact Records

{ewc rhgbtn32.dll, BlueSkyHelpButton, g<NOTEUP01.BMP|
NOTEDN01.BMP<JumpId(DS.HLP>thirdï¿½ds2x_Note_for_Delete_Contact_Records)<<1} {ewc
rhgbtn32.dll, BlueSkyHelpButton, g<RELAUP01.BMP|RELADN01.BMP<Klink(Initializationï¿½ ï¿½
ï¿½)<<1}

Mark `Delete existing contact records from existing databases` if you would like to
empty the existing databases in preparation for importing records from the central installation on
synchronization.

Continue…

{ewl rhgbtn32.dll, BlueSkyHelpButton, g<_____153.BMP|
_____154.BMP<JumpId(DS.HLPï¿½DS2_Transfer_All_Contact_and_Activity_Records)<<1} Transfer
Contact and Activity Records

{ewl rhgbtn32.dll, BlueSkyHelpButton, g<_____153.BMP|
_____154.BMP<JumpId(DS.HLPï¿½DS2_Initialization)<<1} Initialization

Delete Activity Records

{ewc rhgbtn32.dll, BlueSkyHelpButton, g<NOTEUP01.BMP|
NOTEDN01.BMP<JumpId(DS.HLP>thirdï¿½ds2x_Note_for_Delete_Activity_Records)<<1} {ewc
rhgbtn32.dll, BlueSkyHelpButton, g<RELAUP01.BMP|RELADN01.BMP<Klink(Activitiesï¿½ ï¿½
ï¿½)<<1}

Mark `Delete existing activity records` if you would like to empty the activity database (the
database that stores the activities and To-Dos that appear on your schedule) in preparation for
importing activities and To-Dos from the central installation on synchronization.

Continue…

{ewl rhgbtn32.dll, BlueSkyHelpButton, g<_____153.BMP|
_____154.BMP<JumpId(DS.HLPï¿½DS2_Transfer_All_Contact_and_Activity_Records)<<1} Transfer
Contact and Activity Records

{ewl rhgbtn32.dll, BlueSkyHelpButton, g<_____153.BMP|
_____154.BMP<JumpId(DS.HLPï¿½DS2_Initialization)<<1} Initialization

User Preference Option

{ewc rhgbtn32.dll, BlueSkyHelpButton, g<NOTEUP01.BMP|
NOTEDN01.BMP<JumpId(DS.HLP>thirdï¿½ds2x_Note_for_User_Preference_Option)<<1} {ewc
rhgbtn32.dll, BlueSkyHelpButton, g<RELAUP01.BMP|RELADN01.BMP<Klink(Initializationï¿½ ï¿½
ï¿½)<<1}

In the topic User Preferences you were given instructions on creating and selecting a default set of
user preferences. You now have the option of assigning these preferences to all existing users at the
remote site. Mark `Override existing users preferences with defaults` to force all
existing users to the preference settings of the user selected in Options. (These preferences can be
later edited by users at the remote site if necessary.)

{ewc rhgbtn32.dll, BlueSkyHelpButton, g<contup01.bmp|
contdn01.BMP<JumpId(DS.HLPï¿½DS2_Initialization)<<1}

Transfer Scripts

{ewc rhgbtn32.dll, BlueSkyHelpButton, g<NOTEUP01.BMP|
NOTEDN01.BMP<JumpId(DS.HLP>thirdï¿½ds2x_Notes_for_Transfer_Scripts)<<1} {ewc rhgbtn32.dll,
BlueSkyHelpButton, g<RELAUP01.BMP|RELADN01.BMP<Klink(Scriptsï¿½ ï¿½ ï¿½)<<1}

In the topic Edit Global Scripts you were given instructions on creating scripts in the central installation
for use at the remote site. You now have the option of sending these scripts to the remote site. Mark
`Transfer Scripts` to send a copy of all of the scripts created in Options to the remote site.

{ewc rhgbtn32.dll, BlueSkyHelpButton, g<contup01.bmp|
contdn01.BMP<JumpId(DS.HLPï¿½DS2_Initialization)<<1}

Add Supervisor

{ewc rhgbtn32.dll, BlueSkyHelpButton, g<NOTEUP01.BMP|
NOTEDN01.BMP<JumpId(DS.HLP>thirdï¿½ds2x_Notes_for_Add_Supervisor)<<1} {ewc rhgbtn32.dll,
BlueSkyHelpButton, g<RELAUP01.BMP|RELADN01.BMP<Klink(Securityï¿½ ï¿½ ï¿½)<<1}

You can create a new supervisor user at the remote site by marking `Add supervisor user`
`(SUP)`. When selected, a new supervisor user will be added with the User ID SUP and a default
password SUPERVISOR. (If you would like to change this password, enter a new one in the
`Password:` field.) Selecting this option will cause this user to be added to the remote site's central
user list and the user will be added at the site with the next synchronization. Be aware that if you have
previously removed your Supervisor security group by selecting `Remove existing security`
`groups` during initialization (or are currently removing this group), selecting this option will put the
Supervisor security group back in. (Removing security groups is discussed in the Initialization Security
Settings topic.)

WARNING!
Be aware when using this option that if you already have a user existing at the remote site with the
User ID SUP, that user will be granted supervisor access to TeleMagic.

{ewc rhgbtn32.dll, BlueSkyHelpButton, g<contup01.bmp|
contdn01.BMP<JumpId(DS.HLPï¿½DS2_Initialization)<<1}

Site Time Zone

{ewc rhgbtn32.dll, BlueSkyHelpButton, g<NOTEUP01.BMP|
NOTEDN01.BMP<JumpId(DS.HLP>thirdï¿½ds2x_Notes_for_Site_Time_Zone)<<1} {ewc rhgbtn32.dll,
BlueSkyHelpButton, g<RELAUP01.BMP|RELADN01.BMP<Klink(Initializationï¿½ ï¿½ ï¿½)<<1}

In the Setting Time Zones topic, you were given instruction on setting the time zone for your sites on
the installation containing the site. It is also possible to set this time zone during initialization and have
it transferred to the site during synchronization. Use the `Site Time Zone:` drop-down list to select
the appropriate time zone. This option will default to Pacific Time.

Continue…

{ewl rhgbtn32.dll, BlueSkyHelpButton, g<_____153.BMP|
_____154.BMP<JumpId(DS.HLPï¿½DS2_Daylight_Savings_Time)<<1} Daylight Savings Time
{ewl rhgbtn32.dll, BlueSkyHelpButton, g<_____153.BMP|
_____154.BMP<JumpId(DS.HLPï¿½DS2_Initialization)<<1} Initialization

Daylight Savings Time

{ewc rhgbtn32.dll, BlueSkyHelpButton, g<NOTEUP01.BMP| NOTEDN01.BMP<JumpId(DS.HLP>thirdï¿½ds2x_Note_for_Daylight_Savings_Time)<<1} {ewc rhgbtn32.dll, BlueSkyHelpButton, g<RELAUP01.BMP|RELADN01.BMP<Klink(Initializationï¿½ ï¿½ ï¿½)<<1}

If the time zone being used observes daylight savings time, mark the `Use Daylight Savings Time` check box. Data Synchronization Server will automatically adjust the time when appropriate.

Continue…

{ewl rhgbtn32.dll, BlueSkyHelpButton, g<_____153.BMP| _____154.BMP<JumpId(DS.HLPï¿½DS2_Site_Time_Zone)<<1} <u>Site Time Zone</u>

{ewl rhgbtn32.dll, BlueSkyHelpButton, g<_____153.BMP| _____154.BMP<JumpId(DS.HLPï¿½DS2_Initialization)<<1} <u>Initialization</u>

Initialization Security Settings

{ewc rhgbtn32.dll, BlueSkyHelpButton, g<NOTEUP01.BMP|
NOTEDN01.BMP<JumpId(DS.HLP>thirdï¿½ds2x_Note_for_Initialization_Security_Settings)<<1} {ewc
rhgbtn32.dll, BlueSkyHelpButton, g<RELAUP01.BMP|RELADN01.BMP<Klink(Securityï¿½ ï¿½
ï¿½)<<1}

The Security page of the Options dialog box allows you to select a default security for use when adding
new users through synchronization and with initialization. (See the Global Options Security topic for
more information.) Initialization Security Settings allow you to use these defaults during initialization to
control the security available to your remote users. You have the option of leaving all users in their
current groups, assigning all users to the default group and removing all but the default security group,
or assigning all users to that group while retaining existing security groups.

To Access Initialization Security Settings:

●   ☞ From the Site Preferences dialog box, click the
          Initialization Opts page.

          The Initialization Security Settings dialog box will open.

          This dialog box will display the currently selected default security. If this is not the security you
          want to use, you can change the default in Global Options. (If you need to change your
          default security, refer to the Security topic for more information.) Bear in mind that changing
          the default security will affect all sites.

Continue…

{ewl rhgbtn32.dll, BlueSkyHelpButton, g<_____153.BMP|
_____154.BMP<JumpId(DS.HLPï¿½DS2_Remove_Security_Groups)<<1} Remove Security
Groups
{ewl rhgbtn32.dll, BlueSkyHelpButton, g<_____153.BMP|
_____154.BMP<JumpId(DS.HLPï¿½DS2_Apply_Default_Security_to_All_Users_at_Site)<<1} Apply
Default Security to All Users at Site
{ewl rhgbtn32.dll, BlueSkyHelpButton, g<_____153.BMP|
_____154.BMP<JumpId(DS.HLPï¿½DS2_Initialization)<<1} Initialization

Remove Security Groups

{ewc rhgbtn32.dll, BlueSkyHelpButton, g<NOTEUP01.BMP|
NOTEDN01.BMP<JumpId(DS.HLP>thirdï¿½ds2x_Notes_for_Remove_Security_Group)<<1} {ewc
rhgbtn32.dll, BlueSkyHelpButton, g<RELAUP01.BMP|RELADN01.BMP<Klink(Securityï¿½ ï¿½
ï¿½)<<1}

In the Security topic under Global Options you were given instructions on creating and selecting a default security group. You now have the option of overwriting the security groups existing at the remote site with this group. (This is useful if you want to control access to TeleMagic at the remote site. It is also the only way to remove the Supervisor security group from TeleMagic.) Mark `Remove existing security groups` to delete all existing security groups from your remote site and replace them with the group selected in Global Options. (When this option is selected, the `Apply default security to all users at site` option will be automatically selected.)

Continue…

{ewl rhgbtn32.dll, BlueSkyHelpButton, g<_____153.BMP|
_____154.BMP<JumpId(DS.HLPï¿½DS2_Initialization)<<1} Initialization

{ewl rhgbtn32.dll, BlueSkyHelpButton, g<_____153.BMP|
_____154.BMP<JumpId(DS.HLPï¿½DS2_Apply_Default_Security_to_All_Users_at_Site)<<1} Apply Default Security to All Users at Site

Apply Default Security to All Users at Site

{ewc rhgbtn32.dll, BlueSkyHelpButton, g<NOTEUP01.BMP|
NOTEDN01.BMP<JumpId(DS.HLP>thirdï¿½ds2x_Notes_and_Hints_for_Apply_Default_Security_to_All
_Users_at_Site)<<1} {ewc rhgbtn32.dll, BlueSkyHelpButton, g<RELAUP01.BMP|
RELADN01.BMP<Klink(Securityï¿½ ï¿½ ï¿½)<<1}

In the Security topic under Global Options you were given instructions on creating and selecting a default security group. You now have the option of assigning all users existing at the remote site to this security group. Mark `Apply default security group to all users at site` to transfer all existing users to the group selected in Global Options. If you select this option without selecting `Remove existing security groups,` all of your current security groups will be retained with no users in them.

Continue…

{ewl rhgbtn32.dll, BlueSkyHelpButton, g<_____153.BMP|
_____154.BMP<JumpId(DS.HLPï¿½DS2_Remove_Security_Groups)<<1} Remove Security Groups

{ewl rhgbtn32.dll, BlueSkyHelpButton, g<_____153.BMP|
_____154.BMP<JumpId(DS.HLPï¿½DS2_Initialization)<<1} Initialization

Apply these Settings to All Sites

{ewc rhgbtn32.dll, BlueSkyHelpButton, g<NOTEUP01.BMP|
NOTEDN01.BMP<JumpId(DS.HLP>thirdï¿½ds2x_Notes_and_Hints_for_Apply_these_Settings_to_All_
Sites)<<1} {ewc rhgbtn32.dll, BlueSkyHelpButton, g<RELAUP01.BMP|
RELADN01.BMP<Klink(Initializationï¿½ ï¿½ ï¿½)<<1}

This option pertains to the `Initialization Options` settings and allows you to quickly transfer these settings to other sites that are performing initialization. If you will be using the same settings for most or all of your remote sites, you can save time duplicating the setup by marking the `Apply these settings to all sites` check box. When marked, these settings will overwrite any settings for these options at your other sites. If a site is not being initialized, these settings will be offered as defaults the next time you access Initialization for that site.

WARNING!

If you have set up Initialization Security Settings be very cautious in assigning these settings to all sites. If you have the remote "Everyone" group as your default security and select to remove existing security at a site, the security changes will be ignored during synchronization if that site does not have an Everyone group. Additionally if you remove existing security at a site that is not currently set to initialize, and later change your default security group to use no security and attempt to perform an initialization for that site, the initialization packet will not be processed. If your initialization packet fails to process, you must edit your default security in Global Options to select a security group that exists in the central site and resend your packet. (To resend a packet, access the Remote Site Maintenance dialog box, highlight the site, and click **Edit**. The **Site preferences** button will change to a **Resend packet** button. Click this button to give Data Synchronization Server instructions to re-process this initialization packet. Optionally, you can reset this site using the Reset option in Server Options. If you would like more information, see the Establishing Server Options topic.)

{ewc rhgbtn32.dll, BlueSkyHelpButton, g<contup01.bmp|
contdn01.BMP<JumpId(DS.HLPï¿½DS2_Initialization)<<1}

Setting Field Rules

{ewc rhgbtn32.dll, BlueSkyHelpButton, g<NOTEUP01.BMP|
NOTEDN01.BMP<JumpId(DS.HLP>thirdï¿½ds2x_Note_for_Setting_Field_Rules)<<1} {ewc
rhgbtn32.dll, BlueSkyHelpButton, g<RELAUP01.BMP|RELADN01.BMP<Klink(Field Rulesï¿½ ï¿½
ï¿½)<<1}

If you were required to manually synchronize your databases—that is, update changed information
from one site to another manually—you would probably make decisions about what to change and
when. For example, you might decide not to replace the contents of a field with an empty field; or you
may decide that the data coming in for a particular numeric field should be added to the existing
information instead of replacing it.

Field rules allow you to give instructions to Data Synchronization Server to do this for you whenever
you synchronize to the central location from your remote sites. Rules can be established for every field
that has been set up for synchronization. You can literally control how each individual field will behave
when a change comes in from a remote site—and you are not limited in this (such as by being forced
to have all fields in a particular level, or all fields of the same type, behave a certain way); every field
can have its own rule, if you desire.

Using field rules, you choose from among a selection of pre-defined rules to control how and when a
field in the central installation is synchronized, then have the option of creating an expression to control
exactly when that rule is applied.

In addition to setting replacement rules for your fields, you have the option of controlling what happens
to data that is getting replaced. If you have a field that contains crucial information, you may want to be
able to compare the incoming information to the data already existing in the field. The field rules
feature allows you the option of moving the data that is being replaced to a memo field where you can
retain it or review it. Before establishing field rules you need to let Data Synchronization Server know
which memo field you would like to use for each level of each database.

To Select the Memo Fields:

1. From the **Setup** menu, select **Field Rules.**

   The Choose Database dialog box will open.

2. Highlight the database you would like to use and click
   Select.

   The Field Rules dialog box will open.

3. If you would like to be able to review the data that has
   been replaced during synchronization, click **Memo
   Fields**.

   The Choose Memo Fields dialog box will open. The drop-
   down lists will contain a listing of all memo fields on each
   level of the current database.

4. Choose a memo field for each level to contain data that
   has been replaced during synchronization.

WARNING!

If you establish a field rule for this memo field that replaces the contents with the data from the field
in the remote sites, your retained edits will get overwritten. It is best to devote a memo field solely to
the purpose of containing overwritten data. If you are unable to do this, make sure you select a rule

for this field that merges data instead of replacing it. (See *To Establish Field Rules*, below.)

5. When satisfied with your selections, click **OK**.

To Establish Field Rules:

1. From the **Setup** menu, select **Field Rules**.

   A Choose Database dialog box will open.

2. Highlight the database you would like to use and click **Select**.

   The Field Rules dialog box will open.

3. From the `Level` radio buttons, choose the database level containing the field for which you want to establish field rules.

   All fields (with the exception of unique number fields) for the specified level will appear in the list beneath the radio buttons.

4. Highlight the field on the list and click **Change**.

   The right side of the screen will become active and the **Change** button will toggle to **Save**. The field name will appear in the `Replace [field] using this rule` prompt. The selections on the drop-down list will vary depending on the type of field selected.

5. Make a selection from the drop-down list to specify under what circumstance the field will be updated from the remote sites.

WARNING!

If you are working with a memo field, be aware that if you synchronize an empty memo field to the central site with `Always Merge in Central with data from Remote` selected, any existing data in the memo field in central will be deleted. This option should only be used if you intentionally want to clear the memo field in the central installation if it has been cleared in the remote.

6. If you want to retain replaced data for the current field in the memo field selected for use with this level, mark the `Place original data into memo field` check box. (If you have not yet selected a memo field, you will be given the opportunity to do so as soon as you place a mark in this check box. Follow the instructions under *To Select the Memo Fields*, above, when making your selections.)

7. Mark the `Synchronize this memo field as a character field` check box to specify that a memo field should be synchronized as a character field. For example, you may be using a memo field to contain directions to a customer's site. If a change is made to

this data, you would probably not want the updated address merged as a separate entry in the field. You would most likely want it to replace the current entry. You would also probably not need to stamp the memo field with the standard notepad stamp.

- When this option is selected for a memo field, that field will be treated as a character field—any changes to the field will overwrite the old data on synchronization and the notepad stamp will not be used.

  The `Advanced` section allows you to further qualify this field rule. If the expression is left at the default `TRUE` the field will always be replaced according to the rule selected in step 6. If an expression is entered in this section, the field will only be replaced according to the rule selected in step 6 if the expression is also applicable.

8. To create an expression, click the **Edit Expression** button.

   The Expression Builder dialog box will open.

9. Create the desired expression. (If you need help on creating expressions, search on *Expression Builder* in TeleMagic's on-line help.)

10. When satisfied with your expression, click **OK**.

   You will return to the Field Rules dialog box with the expression appearing in the `Advanced` section.

11. When satisfied with your selections, click **Save**.

12. Repeat steps 5 through 11 for each field you would like to change.

13. When all desired fields in this database have been completed, click **Close**.

   You will be returned to the Choose Database dialog box.

14. Select another database and click **Select**.

or Click **Close** to return to the TeleMagic Data Synchronization Server Setup dialog box.

Continue…

{ewl rhgbtn32.dll, BlueSkyHelpButton, g<_____153.BMP|
_____154.BMP<JumpId(DS.HLPï¿½DS2_Creating_Unique_Settings_for_Sites)<<1} Creating Unique Settings for Sites

{ewl rhgbtn32.dll, BlueSkyHelpButton, g<_____153.BMP|
_____154.BMP<JumpId(DS.HLPï¿½DS2_Global_Options)<<1} Global Options

{ewl rhgbtn32.dll, BlueSkyHelpButton, g<_____153.BMP|
_____154.BMP<JumpId(DS.HLPï¿½DS2_Site_Preferences)<<1} Site Preferences

{ewl rhgbtn32.dll, BlueSkyHelpButton, g<_____153.BMP|
_____154.BMP<JumpId(DS.HLPï¿½DS2_Initialization)<<1} Initialization

{ewl rhgbtn32.dll, BlueSkyHelpButton, g<_____153.BMP|
_____154.BMP<JumpId(DS.HLPï¿½DS2_Command_Line_Parameters)<<1} Command Line Parameters

{ewl rhgbtn32.dll, BlueSkyHelpButton, g<_____153.BMP|
_____154.BMP<JumpId(DS.HLPï¿½DS_Central_Site_Setup)<<1} Central Site Setup

Expression Builder

Expressions are created using the Expression Builder dialog box. Expressions are a powerful customization tool that allows you to use current field contents and other variable information instead of "constant" information. An expression can be as simple as a field name, a single variable or a number, or it can be very complex.

The Expression Builder dialog box is discussed in detail in the main TeleMagic program help. To access this help external to TeleMagic, open the file TM.HLP in the TeleMagic global directory path and search on *Expression Builder*.

Command Line Parameters

A command line is the information used to launch a program, usually consisting of the path and executable file name for the program. (An example of a command line would be F: \TM4\PROGRAMS\DSSERVER.EXE.) A command line parameter is an additional instruction entered at the end of the path. Command line parameters can either be attached to an icon, which will cause the parameter to be effected every time the icon is used, or added to the end of the command line in a Run dialog box.

To Attach Command Line Parameters to a Shortcut:

1. Right-click the shortcut on your desktop, select **Properties** from the menu, and select the `Shortcut` tab.

2. In the `Target:` field, type a space after the existing text and enter the parameter(s).

3. Click **OK**.

    The command line parameter will be used (until it is changed or removed) each time you launch Data Synchronization Server using the shortcut.

To Use Command Line Parameters with the Run Dialog Box:

1. Click **Start** on the Taskbar and select **Run…** from the Start menu.

    The Run dialog box will open.

2. In the `Open:` field, type a space after the existing text and enter the parameter(s).

You can use the following command line parameters with the central, satellite and remote installations of Data Synchronization Server:

/U=**user ID**	This parameter will fill in the specified User ID at the Login dialog box when Data Synchronization Server opens. Enter a valid TeleMagic three character User ID after the equal "=" sign.
/PW=**user password**	This parameter will fill in the specified password at the Login dialog box. (It must be used with the User ID parameter.) Enter the TeleMagic password for the user selected with the /U= parameter after the equal "=" sign. If both the User ID and password are valid, the program will bypass the Login dialog box.
/R	This will launch Data Synchronization Server and perform a rebuild. (If you would like more information, see the Rebuilding the Server and Rebuilding Your Sites topics.)
/NDAYS=**# of days**	If you are performing a rebuild, this parameter will cause all transactions older than the specified number of days to be deleted. Enter the number following the equal "=" sign. (This parameter must be used with the /R parameter.)
/Notitle	This can be used to load Data Synchronization Server with no opening title (the logo that appears when the program first launches) . This should be used

on systems that have experienced video driver conflicts when opening Data Synchronization Server.

You can use the following parameters at the central installation of Data Synchronization Server only:

/S=**server ID**	This parameter will launch Data Synchronization Server with the specified server already selected. Enter a valid three character Server ID for a server previously set up in Data Synchronization Server after the equal "=" sign. (If you would like more information, see the Setting Up Your Server(s) topic.)
/P	This parameter will cause Data Synchronization Server to be launched directly in process mode. (If you would like more information on process mode see the Synchronizing Data topic.) This parameter can be used with the /S= parameter, but if you do not specify a server, it will use the last server selected at that workstation.
/Site=**site ID**	This parameter will specify that only the listed sites should be processed. Enter the three character Site ID for each site that you would like processed after the equal "=" sign, separated by commas. (e.g., /Site=xxx,yyy.)

You can use the following parameter at the satellite and remote installations of Data Synchronization Server only:

/NOTRANS	If you process the outbox after launching a remote site or a Satellite Office with this parameter, Data Synchronization Server will ignore transactions and send all contact and activity records to the server. (If this is used on a Satellite, it will only be applied to synchronization to the central site. Synchronization with the Satellite's remotes will follow the Database Preferences established for those sites.) This parameter can be used when setting up synchronization with a remote site that already contains records. It will allow you to quickly transfer the records to the new server.
	WARNING!
	If you are not using field rules or validating by date and time at the server, this will completely overwrite the records at the server with the records from the remote. Even if you are using date and time validation, remember that this compares the last transaction dates. If there is no transaction for a field at the server (for example, if you have deleted transactions on rebuild), the field will be overwritten from the remote. Only use this option if it is your intention to replace the data at the server with the data from the remote. It is *not recommended* that you attach this parameter to the remote site's icon.
/TD=**date**	This sets a transaction cutoff date at a remote site. All transactions from the specified date and later will be included in the outgoing packet. The date entered must be in the same format as the site's date format, and the date separator must be the hyphen (-) character.

You can use the following parameters at the remote installations of Data Synchronization Server only:

/REMDETACH	Each remote site knows to what server it is attached. It will only accept packets created by that server. If you have selected to detach a remote site from its server, a final packet must be created for that remote at the server to instruct the site that it is now detached and may accept an initialization packet from a different server. Once another server claims the remote site, the site will automatically be deleted from the list of sites at its original server. If the detachment packet does not reach the site, and the site has been taken off the

	site list at the original server, you will need to manually detach the site from the server by launching DSREMOTE.EXE with the /DETACH parameter.
/Script=**script_name**	This parameter is used to launch scripts at the remote site. When used, the specified script will run. Enter the desired script name after the equal "=" sign. If there are spaces in the script name, use an underscore "_" character in place of the space. **Example:** *remote_script_1*.
/ScriptX=**Script_name**	Similar to the /Script= parameter, this parameter will launch the specified script, then exit Data Synchronization when the script has finished running.
/O	If there is a packet existing in the outbox at the remote site, when you process the site you will receive a message giving you the option of overwriting this packet or appending to it. If you know there is a packet in the outbox, you can bypass this message. This parameter will cause the packet in the outbox to be overwritten with the new packet created during processing.
/U	This parameter is similar to the /O parameter, except that it will cause the packet to be updated with new changes without overwriting the existing data in the packet.
/REPLMEMO	Use this parameter to cause memo fields at the remote sites to be replaced by memo fields at the central site on synchronization. If this parameter is not used, memo field entries will be merged.
/X	Exits the program at remote sites after processing.

Sample command line with parameters:

C:\TM4\PROGRAMS\DSSERVER.EXE /U=JRC /S=DS1 /P

(This will launch Data Synchronization Server, log in the user JRC, select the server DS1, and begin processing.)

Continue…

{ewl rhgbtn32.dll, BlueSkyHelpButton, g<_____153.BMP|
_____154.BMP<JumpId(DS.HLPï¿½DS2_Creating_Unique_Settings_for_Sites)<<1} Creating Unique Settings for Sites

{ewl rhgbtn32.dll, BlueSkyHelpButton, g<_____153.BMP|
_____154.BMP<JumpId(DS.HLPï¿½DS2_Global_Options)<<1} Global Options

{ewl rhgbtn32.dll, BlueSkyHelpButton, g<_____153.BMP|
_____154.BMP<JumpId(DS.HLPï¿½DS2_Site_Preferences)<<1} Site Preferences

{ewl rhgbtn32.dll, BlueSkyHelpButton, g<_____153.BMP|
_____154.BMP<JumpId(DS.HLPï¿½DS2_Initialization)<<1} Initialization

{ewl rhgbtn32.dll, BlueSkyHelpButton, g<_____153.BMP|
_____154.BMP<JumpId(DS.HLPï¿½DS2_Setting_Field_Rules)<<1} Setting Field Rules

{ewl rhgbtn32.dll, BlueSkyHelpButton, g<_____153.BMP|
_____154.BMP<JumpId(DS.HLPï¿½DS_Central_Site_Setup)<<1} Central Site Setup

Creating Scripts at the Remote Sites

Scripts are used to automate processing at the remote sites. Most of the time, synchronization will follow a consistent set of steps, such as 1) processing the outbox; 2) using a communication program to dial the central location and transfer the packet; 3) waiting a specified time for a response packet to be returned from the central location, then processing the inbox. A script is composed of a set of such steps that can be executed automatically, one after the other, by simply launching the script. (For more on processing, see the Synchronizing Data topic. For instructions on launching your scripts, see the Processing a Remote Site Using a Script topic.)

Scripts can also be created at the central installation and copied to the remote sites. See the topic Edit Global Scripts for details.

To Create a Script:

1. From the **Setup** menu, select **Script Setup**.

   The Scripting dialog box will open.

2. Click **Add Script**.

   The Remote Script Setup dialog box will open. The name of the script will default to New Script.

3. Click in the `Script Name` field and type a unique name for your script.

4. Click **Add** to add the first step in this script.

   The right side of the dialog box will become active and your cursor will appear in the `Describe this step:` field. The **Save Script** button will toggle to **Save**.

5. Enter a description of the first step of the script.

   Example: Process Inbox.

6. Under `Run this step at,` choose one of the following options:

   - `Absolute Time` allows you to set a time for the step to begin in 12-hour format, followed by an *a* for a.m. or a *p* for p.m. (If you enter a time in 24-hour format, it will be translated into 12-hour format.)

   - `Relative Time` allows you to set the time in minutes for this step to begin, relative to the time established for the previous step (or to launching the script if this is the first step).

7. Use the `and do the following` list box to define what should occur in this step:

   - `Process Inbox` will process any packet from the central installation currently in the site's inbox.

   - `Process Outbox` will process existing transaction records into an outgoing packet and place it in the site's outbox.

   - `Delete Outbox Packet` will delete any

packet currently existing in the site's outbox. This can be used to clear the outbox of old packets before processing. Alternatively, if a program is run that copies a packet to another location and leaves the original packet in the outbox, this option can be used to remove the original packet. Care should be exercised not to delete a packet that has not been received by the server.

- `Send Packet Via Transport` will send any existing outbox packet according to your selected Transport Option. (Consider using this step after the outbox has been processed.)

- `Retrieve Packet Via Transport` will retrieve any incoming packet that has been posted for this site. (Consider using this step before processing the inbox.)

- `Send/Retrieve Via Transport` will retrieve any incoming packet on the FTP server for the site then post any existing outbox packet using the selected Transport Option.

- `Run a program` allows you to run another program to perform such functions as executing a batch file to transfer the contents of your outbox over modem to the central installation.

8. If you chose `Run a program` in step 8, above, enter the path and executable name for the program or click the **Program To Run** button to locate the file using a Windows Open dialog box.

9. When satisfied with this step, click **Save**.

   The step name will appear beneath the script name.

10. Repeat steps 5 through 10 for each step you would like to add to the script.

11. If you would like to change the order in which any step in the script is executed, use the mover box next to the step description to drag the steps into the appropriate order.

12. If you would like to change the details of any step, highlight it on the list and click **Change**.

    The step details will become available and the **Save Script** button will toggle to **Save**.

13. Make any necessary changes to the step and click **Save**.

14. If you would like to remove any step from the script, click **Delete**.

    A message will appear asking you to confirm your decision to delete.

15. Click **Yes** and the step will be deleted.

16. When you are satisfied with your script, click **Save Script**.

Your new script will appear in the Scripting dialog box.

Continue…

{ewl rhgbtn32.dll, BlueSkyHelpButton, g<_____153.BMP| _____154.BMP<JumpId(DS.HLPï¿½DS2_Establishing_the_Inbox_and_Outbox)<<1} Establishing the Inbox and Outbox

{ewl rhgbtn32.dll, BlueSkyHelpButton, g<_____153.BMP| _____154.BMP<JumpId(DS.HLPï¿½DS2_Setting_Time_Zones)<<1} Setting Time Zones

Basic Setup

Basic setup is the bare minimum setup that is required to perform synchronization.

Data Synchronization Server has been designed to allow you to use synchronization to perform functions above and beyond the simple sharing of data between two installations of TeleMagic. Many of these features will only be used in special circumstances and do not need to be accessed during basic setup. Additionally, defaults have been provided where possible for many of the more standard options to facilitate the setup process. These defaults do not need to be edited unless you desire different settings.

The following topics will allow you to complete basic setup of the central site:

1) Add your sites to the site list
2) Add users to your sites
3) Select what databases should be synchronized

After performing each step, return to this topic for the next step.

Note

Installing the remote version of Data Synchronization Server is the minimum setup required at remote installations.

Click here for details on the default settings.

Defaults

Continue…

{ewl rhgbtn32.dll, BlueSkyHelpButton, g<_____153.BMP|
_____154.BMP<JumpId(DS.HLPï¿½DS2_Basic_Setup)<<1} [Basic Setup](#)

{ewl rhgbtn32.dll, BlueSkyHelpButton, g<_____153.BMP|
_____154.BMP<JumpId(DS.HLPï¿½DS2_Setting_Up_the_Central_Site)<<1} [Complete Setup](#)

{ewl rhgbtn32.dll, BlueSkyHelpButton, g<_____153.BMP|
_____154.BMP<JumpId(DS.HLPï¿½DS_Central_Site_Setup)<<1} [Central Site Setup](#)

Default Server

One server has been provided, named DS1 by default. When placed in process mode it will process the inbox and outbox (with no time restrictions), then exit process mode. Any packets already existing in the outbox at the start of processing will not get updated with new transactions. (New transactions will be held until the packet is removed from the outbox.) The time zone will default to Pacific Time, with daylight savings time set on.

Click here for full details on the Server Maintenance dialog box.

Continue…

{ewl rhgbtn32.dll, BlueSkyHelpButton, g<_____153.BMP|
_____154.BMP<JumpId(DS.HLPï¿½DS2_Basic_Setup)<<1} Basic Setup

{ewl rhgbtn32.dll, BlueSkyHelpButton, g<_____153.BMP|
_____154.BMP<JumpId(DS.HLPï¿½DS2_Setting_Up_the_Central_Site)<<1} Complete Setup

{ewl rhgbtn32.dll, BlueSkyHelpButton, g<_____153.BMP|
_____154.BMP<JumpId(DS.HLPï¿½DS_Central_Site_Setup)<<1} Central Site Setup

Server Options Defaults

Server Options will be used with all servers and sites. The inbox and outbox will be located in the \TM4\TMSYNC directory by default. You will be warned if your free disk space falls below 50 MB during processing. Packets existing in the outbox at the start of processing will not be automatically deleted before proceeding. Incoming packets will not be rejected, regardless of how old they are.

Click here for full details on the Server Options dialog box.

Continue…

{ewl rhgbtn32.dll, BlueSkyHelpButton, g<_____153.BMP|
_____154.BMP<JumpId(DS.HLPï¿½DS2_Basic_Setup)<<1} Basic Setup

{ewl rhgbtn32.dll, BlueSkyHelpButton, g<_____153.BMP|
_____154.BMP<JumpId(DS.HLPï¿½DS2_Setting_Up_the_Central_Site)<<1} Complete Setup

{ewl rhgbtn32.dll, BlueSkyHelpButton, g<_____153.BMP|
_____154.BMP<JumpId(DS.HLPï¿½DS_Central_Site_Setup)<<1} Central Site Setup

Site Preference Defaults

By default sites will be active and will receive all activities and e-mail. When synchronizing memo fields, Data Synchronization will look for dates following the format mm/dd/yy. When placing dates into memo fields, the slash "/" character will be used as a date separator character. If a field has been edited in multiple sites, by default date and time validation will be performed at the field level and the most recent edit will be retained. The user lists maintained at the central location for each site will not be updated with changes to the users made at the sites. Users deleted from the user list will automatically be deleted at the site.

Click here for full details on the Site Preferences dialog box.

Continue…

{ewl rhgbtn32.dll, BlueSkyHelpButton, g<_____153.BMP|
_____154.BMP<JumpId(DS.HLPï¿½DS2_Basic_Setup)<<1} Basic Setup

{ewl rhgbtn32.dll, BlueSkyHelpButton, g<_____153.BMP|
_____154.BMP<JumpId(DS.HLPï¿½DS2_Setting_Up_the_Central_Site)<<1} Complete Setup

{ewl rhgbtn32.dll, BlueSkyHelpButton, g<_____153.BMP|
_____154.BMP<JumpId(DS.HLPï¿½DS_Central_Site_Setup)<<1} Central Site Setup

Initialization Defaults

By default an initialization will be performed the first time a site is processed, then a standard synchronization will be performed each time thereafter. The default initialization will transfer database files and contact and activity records. No other initialization settings will be active.

Click here for full details on the Initialization Settings dialog box.

Continue…

{ewl rhgbtn32.dll, BlueSkyHelpButton, g<_____153.BMP|
_____154.BMP<JumpId(DS.HLPï¿½DS2_Basic_Setup)<<1} Basic Setup

{ewl rhgbtn32.dll, BlueSkyHelpButton, g<_____153.BMP|
_____154.BMP<JumpId(DS.HLPï¿½DS2_Setting_Up_the_Central_Site)<<1} Complete Setup

{ewl rhgbtn32.dll, BlueSkyHelpButton, g<_____153.BMP|
_____154.BMP<JumpId(DS.HLPï¿½DS_Central_Site_Setup)<<1} Central Site Setup

Database Preference Defaults

By default new transactions for all fields from all records from the lowest level in each database will be synchronized. This will include new records, deleted records, and activities linked to records. (OLE fields will not be synchronized by default.) TeleMagic Database Preferences will be synchronized by default and will overwrite the TeleMagic Database Preferences at the site. No other structural changes will be transferred by default.

Click here for full details on the Database Preferences dialog box.

Continue…

{ewl rhgbtn32.dll, BlueSkyHelpButton, g<_____153.BMP|
_____154.BMP<JumpId(DS.HLPï¿½DS2_Basic_Setup)<<1} Basic Setup

{ewl rhgbtn32.dll, BlueSkyHelpButton, g<_____153.BMP|
_____154.BMP<JumpId(DS.HLPï¿½DS2_Setting_Up_the_Central_Site)<<1} Complete Setup

{ewl rhgbtn32.dll, BlueSkyHelpButton, g<_____153.BMP|
_____154.BMP<JumpId(DS.HLPï¿½DS_Central_Site_Setup)<<1} Central Site Setup

Default Security and Preferences

The settings in the Security and Preferences dialog box (accessed off the Options dialog box) will default to no preferences (which will use the TeleMagic defaults) and the Supervisor Security Group.

Click here for full details on the Security and Preferences dialog box.

Continue…

{ewl rhgbtn32.dll, BlueSkyHelpButton, g<_____153.BMP|
_____154.BMP<JumpId(DS.HLPï¿½DS2_Basic_Setup)<<1} Basic Setup

{ewl rhgbtn32.dll, BlueSkyHelpButton, g<_____153.BMP|
_____154.BMP<JumpId(DS.HLPï¿½DS2_Setting_Up_the_Central_Site)<<1} Complete Setup

{ewl rhgbtn32.dll, BlueSkyHelpButton, g<_____153.BMP|
_____154.BMP<JumpId(DS.HLPï¿½DS_Central_Site_Setup)<<1} Central Site Setup

Default Field Rules

Field rules can be set for all types of fields with the exception of unique number fields. By default, `Always replace in central with data from remote` will be selected as the rule for all field types except memo fields. Memo fields will default to `Merge in central if field from remote is not blank`. (This will prevent the existing data in a memo field at central from being deleted if an empty memo field is brought in from the remote.) The default expression for all field types is TRUE, which will cause the field to always be replaced according the selected rule.

Click here for full details on the Field Rules dialog box.

Continue…

{ewl rhgbtn32.dll, BlueSkyHelpButton, g<_____153.BMP|
_____154.BMP<JumpId(DS.HLPï¿½DS2_Basic_Setup)<<1} Basic Setup

{ewl rhgbtn32.dll, BlueSkyHelpButton, g<_____153.BMP|
_____154.BMP<JumpId(DS.HLPï¿½DS2_Setting_Up_the_Central_Site)<<1} Complete Setup

{ewl rhgbtn32.dll, BlueSkyHelpButton, g<_____153.BMP|
_____154.BMP<JumpId(DS.HLPï¿½DS_Central_Site_Setup)<<1} Central Site Setup

Synchronizing Data

{ewc rhgbtn32.dll, BlueSkyHelpButton, g<RELAUP01.BMP|
RELADN01.BMP<Klink(Synchronizationï¿½ ï¿½ ï¿½)<<1}

This section assumes that you have completed setup of the central and remote sites. Setup must be complete before attempting to synchronize.

Once setup is complete, you are ready to begin the synchronization cycle. There are two phases to synchronization: outbound and inbound. Outbound synchronization entails creating a packet containing recent changes to the installation for distribution to other installations. Inbound synchronization entails taking packets received from other installations and synchronizing the changes into the current installation.

This procedure is all controlled from the central installation. The central installation keeps track of what changes were received from which remote installation. It then distributes those changes to the remaining remote installations. In this way, remote installations are synchronized with each other through the central installation.

This makes it quite easy to keep track of what information goes where. Data Synchronization Server even names each packet with the Site ID of the installation to which it should go, so you can be assured that every installation has the correct information.

Before proceeding it is important that you establish a procedure for distributing and retrieving packets. If you are using a communications program to distribute packets via modem, you should know at what times the packets will be transferred and arrange your processing times accordingly. You should also know who is to be responsible for initiating processing and distributing the packets.

Whether you make the system administrator at the central location responsible for obtaining the packets, or make a user at each remote site responsible for providing the packets, it is highly recommended that you establish a firm procedure, and that all users are aware of their responsibility toward ensuring that all installations have the most current and up-to-date information.

Continue…

{ewl rhgbtn32.dll, BlueSkyHelpButton, g<_____153.BMP|
_____154.BMP<JumpId(DS.HLPï¿½DS3_How_Data_Gets_Synchronized)<<1} How Data Gets Synchronized

{ewl rhgbtn32.dll, BlueSkyHelpButton, g<_____153.BMP|
_____154.BMP<JumpId(DS.HLPï¿½DS3_Processing_the_Central_Installation)<<1} Processing the Central Installation

{ewl rhgbtn32.dll, BlueSkyHelpButton, g<_____153.BMP|
_____154.BMP<JumpId(DS.HLPï¿½DS3_Processing_the_Remote_Sites)<<1} Processing the Remote Sites

How Data Gets Synchronized

{ewc rhgbtn32.dll, BlueSkyHelpButton, g<RELAUP01.BMP|
RELADN01.BMP<Klink(Synchronizationï¿½ ï¿½ ï¿½)<<1}

Before performing synchronization, you should be aware of what to expect. Following is a list of rules that Data Synchronization Server will follow when processing your sites:

● Data Synchronization Server observes field level synchronization. If a field in a record has been changed, only that field will be considered when performing synchronization. The remaining fields in the record will not be affected by the change to that field.

● If a source field (incoming data) is different from a target field (existing data), by default the target field will be overwritten with the new information. If you have marked `Validate contact record revisions at field level` in Site Preferences, Data Synchronization Server will check to make sure the date and time of the incoming transaction record is more recent than the last transaction for the target field before replacing. When synchronizing to the central site you have the additional option of setting field rules. If you have set a field rule for the target field, Data Synchronization Server will replace the field according to the rule established for it. If you also have `Validate contact record revisions at field level` selected, Data Synchronization Server will only apply the field rule if the incoming data is more recent. (If you would like more information on Field rules, see the Setting Field Rules topic.)

● If a packet is copied to a site from the central installation, leaving the original in the outbox, it is possible that new transactions could be appended to this packet. If the updated packet is later copied to the site again, only those transactions that were not previously processed will be synchronized. To include earlier transactions, you must set a transaction cutoff date for the site. This is only applicable if you are transferring packets manually between sites. If you are transferring packets via FTP or e-mail, the packets will be automatically deleted after transfer.

● Transactions will not be written for changes made to data in embedded OLE fields using the Edit feature in Contact Browse. If you want to have your changes to OLE fields synchronized, edit them when not in Browse view.

● If you have selected one of the merge options for memo fields in field rules (applied by default), data in memo (notepad) fields are merged and sorted by date and time, starting with the most recent. If an old note that was originally in both notepads has been changed in either notepad, it is treated as if it were two separate notes. Notes that have been deleted in one installation will not automatically be deleted in the other (unless the entire notepad has been deleted). Notes with no User ID, with no time stamp, and/or notes in which it is not clear whether the time is a.m. or p.m. will be placed at the top of the group of notes for that particular day. There is no need to be concerned about having dates in the middle of notes. Unless the date starts off a paragraph, Data Synchronization Server will ignore it. Data Synchronization Server will not integrate notepad (memo) fields properly unless certain rules are observed in every database/installation: Users should stamp every memo field entry and the format of the notepad stamp should be consistent (use the notepad stamp feature using the key combination ALT+N to ensure consistency).

● Be aware that when synchronizing from the central site to the remote sites, if all data in a memo field has been deleted in the central site, the memo field in the remote sites will also be emptied.

● If an attempt is made to process a transaction to a record that is currently being edited, the transaction will be skipped. The Log Maintenance screen will provide information on what (if anything) did not get processed. It is a good idea to regularly review this screen to verify that all transactions were received. (If transactions have been skipped, you can either hand enter the edit or use the /TD= parameter to resend the transaction.)

● If activities were included in an outgoing packet, activity `Comment` fields will not be merged in the same manner as a notepad field: a newer comment field will overwrite an older one.

● Only activities stored in the TeleMagic global directory will be included in synchronization. If users

have opted to store their activities in another location, they should be made aware of the fact that these activities will not be synchronized. Consider encouraging all users to keep their activities in the default path.

● Extended Activities will only get synchronized if you have marked the `Include activities assigned by users at site` check box in the Choose Activities dialog box. (See the Activity Filters topic.) A Personal Extended Activity will only be synchronized if the user who created it stores his or her activities in the TeleMagic global directory. (This is not an issue with Global Extended Activities.)

● Structural changes (e.g., filters, indexes, fields, layout, etc.) to your database are transferred from your central site to your remote sites according to your selections in the Database Files to Transfer dialog box in Database Preferences and the `Complete database file transfer (No contact records)` check box in the Initialization Settings dialog box. If you perform an initialization with `Complete database file transfer (No contact records)` marked, this option will override any individual selections you have made in Database Preferences and send all structural changes. When any of these options is transferred (with the exception of filters), it will overwrite the corresponding option in the remote database. When filters are transferred, Data Synchronization Server will check the names of the filters existing in the remote site. If a filter from the central site does not already exist in the remote site, it will be added. If a filter of the same name does exist in the remote, it will be replaced with the filter from central. (See the Controlling What is Synchronized topic.)

● If you find Data Synchronization Server has created a record with data in only one field, it is probable that either the packet containing the transaction in which the record was actually added was not received by the site, or a change was made to a record that was not previously being synchronized that moved it into the synchronization filter for the site. If a record does not exist at a site, either because the site did not receive the packet that added the record, or because the record was previously not in the filter being synchronized, the record will not be created at the site until a transaction is synchronized from an edit made to one of the fields in the original record. In this instance, the record will be added, but only the field for which there was a transaction (the field that has been changed) will contain data. Additionally, if a field rule keeps the data in this field from getting synchronized, a blank record will be added. If this occurs, you should initialize that record at the site where it originally existed. This will write a transaction for every field in the record, thus synchronizing the entire record. (Single record initialization is performed from within TeleMagic. If you would like more information on ignoring transactions during synchronization, see the Controlling What is Synchronized topic.)

● When a site receives a packet via TeleMagic Internet Mail, it will be copied to the \TMSYNC\PACKETS directory. Packets placed in this directory are numbered according to the order in which they are received, and an entry is made in a table with each packet's file name and creation date. This table is used by DSS to determine which packet should be processed first. This packet is then given a TMZ extension and transferred to the inbox.

Continue…

Selecting Servers

{ewc rhgbtn32.dll, BlueSkyHelpButton, g<RELAUP01.BMP|
RELADN01.BMP<Klink(Synchronizationï¿½ ï¿½ ï¿½)<<1}

It is not necessary to select a server. Data Synchronization Server will offer the last server used on this workstation as a default. If you have never selected a server from the current workstation, the first server on the list will be selected. If you do not want to use the default server, you may use the instructions in this help topic to change to a different server.

The default is workstation specific, not installation specific. If you have multiple installations of DSS installed on the same network the default server will be the last one selected on that workstation, regardless of which installation. For example, assume you have two satellite installations on the same network. You perform synchronization on your workstation from installation 'A' using server 'DS1'. When you open installation 'B' from this workstation, the default server will be 'DS1'. If it does not find it in the current installation, you will be informed that the server does not exist and the **Process** menu selection will be dimmed.

It is possible to select a default server for use with this workstation using a command line parameter. If you would like more information, see the Command Line Parameters topic.

To Select a Server:

1. From the Data Synchronization Server **Maintenance** menu, select **Server Maintenance**.

   The Server Maintenance dialog box will open.

2. From the `Server ID` drop-down list in the Server Maintenance dialog box, select the server you would like to use and click **Select**.

   The server will be selected for this work session.

Continue…

{ewl rhgbtn32.dll, BlueSkyHelpButton, g<_____153.BMP|
_____154.BMP<JumpId(DS.HLPï¿½DS2_Setting_Up_Your_Server_s)<<1} Setting Up Your Server(s)

{ewl rhgbtn32.dll, BlueSkyHelpButton, g<_____153.BMP|
_____154.BMP<JumpId(DS.HLPï¿½DS3_Processing_the_Central_Installation)<<1} Processing the Central Installation

Processing the Central Installation

{ewc rhgbtn32.dll, BlueSkyHelpButton, g<RELAUP01.BMP|
RELADN01.BMP<Klink(Synchronizationï¿½ ï¿½ ï¿½)<<1}

It is highly recommended that you read this entire section before beginning.

Make sure that the most current packets from all remote sites have been placed in the central installation's inbox. (The inbox is located by default in the directory \TMSYNC\INBOX off the TeleMagic root directory.)   Additionally, you should make sure a server has been selected for the workstation from which you want to process. (See the topic Selecting Servers for instructions.)

As packets are processed, a log will be kept of what occurred. (See Viewing the Server Log Maintenance for details.)   Until you are familiar with processing and are comfortable with your setup, it is a very good idea to have your servers set to view full log detail on the Maintenance Log. If you want to set your log to view full details, you should do so before processing. (See the topic Setting Up Your Server(s) for instructions.)

Click here for information on creating a template packet that can be distributed to multiple sites.

To Process the Central Installation:

1. Make sure that the most current packets from all remote sites have been placed in the central installation's inbox. (The inbox is located by default in the directory \TMSYNC\INBOX off the TeleMagic root directory.)

2. Open Data Synchronization Server.

3. If you have not already done so, select a server.

4. From the Data Synchronization Server **File** menu, select **Process**.

   Click here if you receive a message that there is nothing to process.

   When setting up your central installation, you had the option to set the server for continuous or for one time processing. (See the topic Setting Up Your Server(s) for details on your server settings.)   You also had options to control what is synchronized by this server at what times. Depending upon your options, one of several things could happen when you select **Process**.

   If the server is set to process one time, Data Synchronization Server will see if your server is set to process the inbox. If it is, it will then see if it is restricted from processing at the current time. If it is not, all packets in the inbox will be processed and changes will be synchronized to the central installation of TeleMagic. It will then follow the same procedure in creating and/or updating packets for the outbox. If neither the inbox nor the outbox may be processed at the current time, you will receive a message informing you that there is nothing to

process.

If this server is set for continuous processing, when you initiate processing Data Synchronization Server will verify that the server is set to process the inbox at the current time. If so, it will check for packets in the inbox and process and delete the group of packets existing at that time. (If a packet is added to the inbox while this is occurring, it will be processed with the next group of packets.) If the server is not set to process the outbox, it will then check the inbox again for packets and repeat the process continuously during the time specified for processing the inbox in Server Maintenance. If the server is set to process the outbox, it will verify that it may process the outbox at the current time. If not, it will return to the inbox; if so, it will check each existing packet in the outbox in turn and compare the time it was created to the current time. If this exceeds the time specified in Server Maintenance in the Update existing outbox packets every field, the outgoing packet will be updated with new transactions (without overwriting existing transactions). If there is no outgoing packet for a site, one will be created. When Data Synchronization Server has finished processing the outbox, it will return to the inbox, if applicable.

As the server processes the transaction records into packets and/or synchronizes any existing packets in its inbox into the installation, a message box will appear apprising you of its status.

When it is completed, Data Synchronization Server will either move onto the next phase of processing, or exit process mode, depending on whether it is set to process continuously or one time.

When processing is completed, if the outbox was processed, packets will be created for distribution to the remote installations and placed in the central installation's outbox. Each packet will be named TMSRV (for standard synchronization) or TMINI (for an initialization) followed by the Site ID to which it should go and the file extension .TMZ. (For example, if the Site ID is 500, the packet will be named TMSRV500.TMZ for a standard synchronization, or TMINI500.TMZ for an initialization.)

Processing using packet transfer at the central or a satellite site is simply a matter of processing the server. Once it is processing, Data Synchronization Server will refer to your Transport Options settings and automatically transfer packets via FTP or e-mail at the appropriate times.

WARNING!

When a packet is posted to the FTP site, the other installation of TeleMagic knows to pick it up based

on the Site ID. If you are posting an initialization packet for a new site, the Site ID must match the site's System ID. If it does not, the site will not know that packet belongs to it. If you are assigning a Site ID that is different than the site's System ID, you will need to transfer the first initialization packet manually. (This is not an issue if you change the Site ID of an existing site. The initialization packet will retain a reference to the previous Site ID.)

DSS will begin processing according to your setup selections. Any packets in the server's outbox will be transferred, then any packets from the FTP site will be retrieved and placed in the server's inbox.

If you have selected to process one time then exit, the program will close when this process is completed. If you have selected to continuously process, the program will go idle when it is completed. It will remain idle until the processing pause time elapses, then it will repeat the process.

Continue…

{ewl rhgbtn32.dll, BlueSkyHelpButton, g<_____153.BMP|
_____154.BMP<JumpId(DS.HLPï¿½DS_Troubleshooting)<<1} Troubleshooting
{ewl rhgbtn32.dll, BlueSkyHelpButton, g<_____153.BMP|
_____154.BMP<JumpId(DS.HLPï¿½DS3_Processing_the_Remote_Sites)<<1} Processing the Remote Sites

Creating a Template Packet

There may be occasions when you want to synchronize the exact same information to multiple sites. For example, you may be synchronizing the exact same records in the same databases to 30 sites. Rather than generating 30 files with the same contents, you can create a template packet. Simply create a packet for one of the sites, then change the name to TMSRV~~~.TMZ. This packet can then be copied and distributed to all of the sites.

Processing the Remote Sites

{ewc rhgbtn32.dll, BlueSkyHelpButton, g<RELAUP01.BMP|
RELADN01.BMP<Klink(Synchronizationï¿½ ï¿½ ï¿½)<<1}

Processing a remote site is a relatively straightforward procedure. Because the remote sites only need to deal with a single synchronization cycle—retrieving an incoming packet from the central or satellite installation and providing an outgoing packet to the central or satellite installation—you were not required to set up a server for your remote site. Rather, you can simply open Data Synchronization Server and process whenever synchronization needs to be performed.

This procedure can be further automated by the use of scripts. See the Processing a Remote Site Using a Script topic for more information.

If you will not be using FTP transfer or TeleMagic Internet Mail to transfer packets, you will need to do so manually or use another communications program.

To Transfer a Packet Manually:

Processing an initialization packet containing entire databases can take a significant amount of time. Consider processing the first initialization packet after-hours.

1. At your central installation, locate the packet for the remote installation in the central site's outbox. The packet belonging to the remote installation will be named TMSRV or TMINI followed by the Site ID and the file extension .TMZ.

2. Move the file to the inbox of the remote installation. Packets can be moved in the same manner as any other file. You may use whatever file transfer method is usually employed in your company. Make sure that you only transfer that site's packet to the inbox. Data Synchronization Server will not process if there are multiple packets for different sites in the inbox. (If you use a communications server to transfer packets via modem, steps 1 and 2 may have been accomplished automatically. Consult your system administrator if you are unsure how packets are distributed.)

WARNING!

Be very careful not to transfer a packet belonging to another site, especially if it is an initialization packet.

To Process the Remote Sites:

1. On the computer containing the remote installation of TeleMagic, open Data Synchronization Server.

The TeleMagic Data Synchronization Remote dialog box

will open.

2. If you are using FTP to transfer packets, mark the `Send via FTP` and `Retrieve via FTP` check boxes.

   or If you are using   TeleMagic Internet Mail to transfer packets, mark the `Send via E-mail` and `Retrieve via E-mail check boxes.`

3. If you want to process the inbox, mark the `Process Inbox` check box.

4. If you want to create packets from your transaction records and have them placed in your outbox, mark the Create Outbox Packet check box.

5. If you do not want to begin processing until a specified time, enter that time in the `Start Processing At:` field in 12 hour format followed by *a* for a.m., or *p* for p.m. (If you enter a time in 24 hour format, it will be automatically converted to 12 hour format.)

6. When satisfied with your selections, click **Begin Process**.

   Processing will commence immediately, or at the time specified in the `Start Processing At:` field.

   A message box will appear apprising you of the status of the procedure.

   When finished processing, you will be returned to the Data Synchronization Site dialog box. If you chose to process the inbox, the changes from the central installation will be incorporated into your remote installation. If you chose to process the outbox, a packet containing the transaction records of all changes to the remote installation since the last time you processed will be placed in the installation's outbox. If you are using packet transfer, this packet will be moved to the central or satellite installation's inbox for processing.

Continue…

{ewl rhgbtn32.dll, BlueSkyHelpButton, g<_____153.BMP|
_____154.BMP<JumpId(DS.HLPï¿½DS3_Processing_a_Remote_Site_Using_a_Script)<<1}
Processing a Remote Site Using a Script
{ewl rhgbtn32.dll, BlueSkyHelpButton, g<_____153.BMP|
_____154.BMP<JumpId(DS.HLPï¿½DS_Troubleshooting)<<1} Troubleshooting
{ewl rhgbtn32.dll, BlueSkyHelpButton, g<_____153.BMP|
_____154.BMP<JumpId(DS.HLPï¿½DS3_Processing_the_Central_Installation)<<1} Processing the Central Installation

Processing Remote Sites when TeleMagic is Open

Although it is recommended that all users exit the remote installation of TeleMagic before processing, it is possible to process while users continue to work with the following restrictions:

- All users must be out of TeleMagic if you are processing an initialization packet.
- Any changes to the list of users or security will not be processed.
- If the packet includes changes to the database structure,   Data Synchronization will attempt to get an exclusive lock on the related files. If it cannot, the packet will not be processed. If it is able to lock the files, it will retain the locks until the changes have been processed. (Users will not be able to edit those items.)

Processing a Remote Site Using a Script

{ewc rhgbtn32.dll, BlueSkyHelpButton, g<RELAUP01.BMP|
RELADN01.BMP<Klink(Synchronizationï¿½ ï¿½ ï¿½)<<1}

If you have created a script for use when processing a remote site, you can automate processing the site using a command line parameter. (If you would like more information on this and other Command Line Parameters, see the Command Line Parameters topic.)   Additionally, Data Synchronization Server provides a shortcut that has been set up to launch the default script that has been provided to process the inbox and outbox. You can also run a script from within the Data Synchronization Server program.

The default script has been provided initially at the central location and must be sent to the sites during initialization. (Sending scripts to the remote installations is done in initialization. See the topic Transfer Scripts for details.)   If you need to process the site, but have not received the default script and have not created any scripts at the site, open Data Synchronization and use the **Process** button to process the site. (See the topic Processing the Remote Sites for instructions.)   If you have received the script from the central site and would like to edit this default script, see the Script Maintenance topic.

To Run the Default Script:

1. Locate and double-click the Data Synchronization script
    icon:

    A login dialog box will appear.

2. Enter your TeleMagic User ID and password.

    The script will begin processing the inbox and outbox.

To Run a Script from within Data Synchronization Server:

1. Open Data Synchronization Server at the remote site.

    The TeleMagic Data Synchronization - Remote main
    screen will open.

2. Click **Run Script**.

    The Select Script dialog box will open.

3. Highlight the script you would like to run and click **Run**.

or   Click **Cancel** to return to the main screen without
    launching the script.

    If you select to run, the script will launch and begin
    processing the site.

To Run a Script from the Data Synchronization Server Icon:

1. On the computer containing the remote installation of

TeleMagic, highlight the Data Synchronization Server icon.

2. Right-click the icon on your desktop, select **Properties** from the menu, and select the `Shortcut` tab.

    The path and file name for Data Synchronization Server will appear in the `Target` field.

3. After the path, type a space and */Script=* then type the script name. If the script name contains multiple words, type an underscore character "_" in place of the space.

    Example:
    C:\TM4\PROGRAMS\DSREMOTE.EXE
    /Script=Remote_Script_1.

4. Click **OK**.

5. Double-click the Data Synchronization Server icon to launch the script.

    A Data Synchronization Server login dialog box will appear.

6. Enter your TeleMagic User ID and password and click **OK**.

    The script will begin at the time specified under `Run this step at` for the first step.

    Every time you select this icon this script will be run until you change your Properties.

To Run a Script from a Run Dialog Box:

1. Click **Start** on the Taskbar and select **Run…** from the menu.

    The Run dialog box will open.

2. In the `Open:` field, enter the path to the file DSREMOTE.EXE in the TeleMagic programs directory.

    Example: If the TeleMagic root directory is in the path C:\TM4 you would enter *C:\TM4\PROGRAMS\DSREMOTE.EXE*.

3. At the end of this path, type a space and enter */Script=* then type the script name. If the script name contains multiple words, type an underscore character "_" in place of the space.

    Example: /Script=*Remote_Script_1*.

4. Click **OK**.

5. A Data Synchronization Server login dialog box will

appear.

6. Enter your TeleMagic User ID and password and click **OK**.

The script will begin at the time specified under `Run this step at` for the first step.

Continue…

{ewl rhgbtn32.dll, BlueSkyHelpButton, g<_____153.BMP|_____154.BMP<JumpId(DS.HLPï¿½DS_Troubleshooting)<<1} Troubleshooting

{ewl rhgbtn32.dll, BlueSkyHelpButton, g<_____153.BMP|_____154.BMP<JumpId(DS.HLPï¿½DS3_Processing_the_Remote_Sites)<<1} Processing the Remote Sites

{ewl rhgbtn32.dll, BlueSkyHelpButton, g<_____153.BMP|_____154.BMP<JumpId(DS.HLPï¿½DS3_Processing_the_Central_Installation)<<1} Processing the Central Installation

Maintaining Your Central Location

{ewc rhgbtn32.dll, BlueSkyHelpButton, g<RELAUP01.BMP|RELADN01.BMP<Klink(Maintenanceï¿½ ï¿½ ï¿½)<<1}

Maintaining your central location consists of two parts: setup maintenance and server maintenance. Maintaining your settings mostly entails adjusting your setup options to reflect your current needs. Server maintenance consists of monitoring and troubleshooting the synchronization process and optimizing the server through rebuild. Reports have been provided to facilitate your maintenance needs.

Continue…

{ewl rhgbtn32.dll, BlueSkyHelpButton, g<_____153.BMP| _____154.BMP<JumpId(DS.HLPï¿½DS3_Setup_Maintenance)<<1} Central Setup Maintenance

{ewl rhgbtn32.dll, BlueSkyHelpButton, g<_____153.BMP| _____154.BMP<JumpId(DS.HLPï¿½DS3_Server_Maintenace)<<1} Central Server Maintenance Reports

{ewl rhgbtn32.dll, BlueSkyHelpButton, g<_____153.BMP| _____154.BMP<JumpId(DS.HLPï¿½DS3_Maintaining_Your_Remote_Sites)<<1} Maintaining Your Remote Sites

Setup Maintenance

{ewc rhgbtn32.dll, BlueSkyHelpButton, g<RELAUP01.BMP|RELADN01.BMP<Klink(Maintenanceï¿½ ï¿½ ï¿½)<<1}

If you have carefully followed the setup instructions detailed in this help system, your setup should require very little maintenance. Most of the required maintenance will entail adjusting your initial settings to reflect your current needs. For the most part, this is simply a matter of following the same setup instructions used when first making these settings and adjusting the settings as necessary. There are a few points of which you should be aware when editing your settings that are detailed in the following topics:

[Database Preferences Maintenance](#)
[File Sets Maintenance](#)
[Global Options Maintenance](#)
[Initialization Maintenance](#)
[Global Scripts Maintenance](#)
[Security Maintenance](#)
[Server Options Maintenance](#)
[Server Setup Maintenance](#)
[Site List Maintenance](#)
[Site Preference Maintenance](#)
[User List Maintenance](#)
[User Preferences Maintenance](#)

Continue…

{ewl rhgbtn32.dll, BlueSkyHelpButton, g<_____153.BMP| _____154.BMP<JumpId(DS.HLPï¿½DS3_Server_Setup_Report)<<1} [Server Setup Report](#)

{ewl rhgbtn32.dll, BlueSkyHelpButton, g<_____153.BMP| _____154.BMP<JumpId(DS.HLPï¿½DS3_Maintaining_Your_Central_Location)<<1} [Maintaining Your Central Location](#)

{ewl rhgbtn32.dll, BlueSkyHelpButton, g<_____153.BMP| _____154.BMP<JumpId(DS.HLPï¿½DS3_Maintaining_Your_Remote_Sites)<<1} [Maintaining Your Remote Sites](#)

Server Setup Maintenance

{ewc rhgbtn32.dll, BlueSkyHelpButton, g<RELAUP01.BMP|RELADN01.BMP<Klink(Maintenanceï¿½ ï¿½ ï¿½)<<1}

The number and types of servers you need depends largely on your processing requirements. If you do a lot of processing you may find that you need more than one server performing different functions. If a single server can easily handle your processing needs, you may decide to only devote one workstation to this task; or even to only devote a workstation part time. While you were probably able to make a good guess at your processing requirements during initial setup, you may find that you need to adjust these settings when you actually begin processing.

To Edit a Server:

1. From the Data Synchronization Server **Maintenance** menu, select **Server Maintenance**.

   The Server Maintenance dialog box will open.

2. Select a server from the `Server ID` drop-down list and click **Edit**.

3. Adjust the settings as necessary.

4. Click **Save** to save your edits.

5. Click **Close** to exit the Server Maintenance dialog box.

To Delete a Server:

1. From the Data Synchronization Server **Maintenance** menu, select **Server Maintenance**.

   The Server Maintenance dialog box will open.

2. Select a server from the `Server ID` drop-down list and click **Delete**.

   A message will appear asking you to confirm your decision to delete.

3. Click **Yes** to delete the server.

   or Click **No** to cancel.

4. Click **Close** to close the Server Maintenance dialog box.

Continue…

{ewl rhgbtn32.dll, BlueSkyHelpButton, g<_____153.BMP| _____154.BMP<JumpId(DS.HLPï¿½DS3_Setup_Maintenance)<<1} Setup Maintenance

{ewl rhgbtn32.dll, BlueSkyHelpButton, g<_____153.BMP| _____154.BMP<JumpId(DS.HLPï¿½DS3_Maintaining_Your_Central_Location)<<1} Maintaining Your Central Location

{ewl rhgbtn32.dll, BlueSkyHelpButton, g<_____153.BMP| _____154.BMP<JumpId(DS.HLPï¿½DS3_Maintaining_Your_Remote_Sites)<<1} Maintaining Your

Server Options Maintenance

{ewc rhgbtn32.dll, BlueSkyHelpButton, g<RELAUP01.BMP|RELADN01.BMP<Klink(Maintenanceï¿½ ï¿½ ï¿½)<<1}

Server Options control key functions such as how Data Synchronization Server deals with outdated packets and setting the path for the inbox and outbox at the central location. Once these settings are established, you will probably not need to adjust them. Should you desire to adjust these settings, follow the guidelines in the Establishing Server Options topic. If you change any of these settings, it is very important that you notify the users responsible for performing synchronization at your remote sites. Caution is particularly required if you change the settings dealing with providing or receiving packets (the Inbox and Outbox Options), as packets could be deleted or rejected without getting processed if users are unaware of the updated time limits.

Continue…

{ewl rhgbtn32.dll, BlueSkyHelpButton, g<_____153.BMP| _____154.BMP<JumpId(DS.HLPï¿½DS3_Setup_Maintenance)<<1} Setup Maintenance

{ewl rhgbtn32.dll, BlueSkyHelpButton, g<_____153.BMP| _____154.BMP<JumpId(DS.HLPï¿½DS3_Maintaining_Your_Central_Location)<<1} Maintaining Your Central Location

{ewl rhgbtn32.dll, BlueSkyHelpButton, g<_____153.BMP| _____154.BMP<JumpId(DS.HLPï¿½DS3_Maintaining_Your_Remote_Sites)<<1} Maintaining Your Remote Sites

Site Maintenance

{ewc rhgbtn32.dll, BlueSkyHelpButton, g<RELAUP01.BMP|RELADN01.BMP<Klink(Maintenanceï¿½ï¿½ï¿½ï¿½)<<1}

As you add or remove installations of TeleMagic as remote sites, you should update your list of sites to reflect these changes.

If you are unclear on the settings available in site setup, see the <u>Setting Up Your Sites</u> topic.

To Edit the Site List:

1. From the Data Synchronization Server **Setup** menu, select **Site Maintenance**.

   The Remote Site Maintenance dialog box will open.

2. Highlight the site whose settings you want to change and click **Edit**.

3. Use the following guidelines when editing the Site ID:

   * You will only be able to edit the name of the central and satellite sites. The Site ID is display only for the central and satellite sites.

   * If you want to change the Site ID once you have saved a remote site, at least one synchronization must be performed with the current Site ID and a return packet must be received before the Site ID can be changed.

   * If you do change a Site ID, you must perform an initialization with the next synchronization. You will not be able to save a changed Site ID if you are not set to perform an initialization. (If you would like more information, see the <u>Initialization</u> topic.)

   * If you were using your installations of TeleMagic prior to installing Data Synchronization, be very careful that you do not change a site's ID to any System IDs that were in use at any site prior to using Data Synchronization.

4. Click **Save** when satisfied with your changes.

5. Click **Close** to exit.

To Delete a Site:

1. From the Data Synchronization Server **Setup** menu, select **Site Maintenance**.

   The Remote Site Maintenance dialog box will open.

2. Highlight the site in the list and click **Delete**.

You will be asked to confirm your decision to delete.

3. Click **Yes** to delete the site.

• **or** Click **No** to retain the site.

4. Click **Save** when satisfied with your changes.

5. When finished, click **Close** to exit the Remote Site Maintenance dialog box.

   If you have deleted any sites, those site licenses will be available for other installations of TeleMagic.

Continue…

{ewl rhgbtn32.dll, BlueSkyHelpButton, g<_____153.BMP|
_____154.BMP<JumpId(DS.HLPï¿½DS3_Setup_Maintenance)<<1} <u>Setup Maintenance</u>

{ewl rhgbtn32.dll, BlueSkyHelpButton, g<_____153.BMP|
_____154.BMP<JumpId(DS.HLPï¿½DS3_Maintaining_Your_Central_Location)<<1} <u>Maintaining Your Central Location</u>

{ewl rhgbtn32.dll, BlueSkyHelpButton, g<_____153.BMP|
_____154.BMP<JumpId(DS.HLPï¿½DS3_Maintaining_Your_Remote_Sites)<<1} <u>Maintaining Your Remote Sites</u>

Site Preference Maintenance

{ewc rhgbtn32.dll, BlueSkyHelpButton, g<RELAUP01.BMP|RELADN01.BMP<Klink(Maintenanceï¿½ ï¿½ ï¿½)<<1}

Editing most of the settings in Site Preferences is simply a matter of accessing the Site Preferences dialog box off the Remote Site Maintenance dialog box and adjusting the settings following the guidelines used when initially creating the settings. (See the <u>Site Preferences</u> topic if you require more information.)

Caution is warranted when editing the <u>activity</u> and <u>e-mail</u> options. If users have become used to assigning activities and writing e-mail to users at remote sites through synchronization, changing these settings could result in information not getting to the intended recipient. If you do decide to restrict this functionality, make sure you notify users at all sites.

One area of Site Preferences that you should maintain is the `Attach File Set` option. This option allows you to send any one of your existing file sets with your packet. (For instructions on creating file sets, see the <u>Edit Global File Sets</u> topic.)   The selected file set will continue to be included in the outgoing packet with every synchronization until another file set (or no file set) is selected. When a file set has been successfully sent to a site you should edit this selection.

Continue…

{ewl rhgbtn32.dll, BlueSkyHelpButton, g<_____153.BMP|
_____154.BMP<JumpId(DS.HLPï¿½DS3_Setup_Maintenance)<<1} <u>Setup Maintenance</u>

{ewl rhgbtn32.dll, BlueSkyHelpButton, g<_____153.BMP|
_____154.BMP<JumpId(DS.HLPï¿½DS3_Maintaining_Your_Central_Location)<<1} <u>Maintaining Your Central Location</u>

{ewl rhgbtn32.dll, BlueSkyHelpButton, g<_____153.BMP|
_____154.BMP<JumpId(DS.HLPï¿½DS3_Maintaining_Your_Remote_Sites)<<1} <u>Maintaining Your Remote Sites</u>

Initialization Maintenance

{ewc rhgbtn32.dll, BlueSkyHelpButton, g<RELAUP01.BMP|RELADN01.BMP<Klink(Maintenanceï¿½ ï¿½ ï¿½)<<1}

If you would like more information on Initialization, see the <u>Initialization</u> topic.

If you have selected to initialize one time only, you will likely not have to worry about maintenance for your initialization settings. If, for any reason, you need to perform an initialization again, simply adjust your settings and perform another one time initialization. If you have set your site for continuous initialization, you should pay careful attention to the settings that you are using and make sure that you intend to use each of these options on a continuous basis.

Some hints relating to initialization that you may find useful include the following:

● If you change your default security in <u>Global Options</u> to no security or the `Remote "Everyone" Group`, sites that are set up to use either of the Initialization Security options may encounter problems. (If these options are selected with no default security, the packet will fail; if they are selected with the Everyone group selected and the site does not have an Everyone group, the security changes will not be applied at the site.)   To avoid these possibilities, access **Initialization Security Settings**, unmark both check boxes, return to the main Initialization Settings screen and apply the settings to all sites.

● If you are performing continuous initialization, be aware that if you have the `Transfer Scripts` option selected, all of your scripts will be sent with each initialization. While this will not create any problems, it will add to your packet size unnecessarily. If you are not creating new scripts, consider unmarking this option.

● If you send an initialization packet that adds the user SUP, then deselect this option with the next initialization, you will be given the option of deleting the SUP user. Selecting **Yes** will remove this user from the site's central user list. This can be useful if you want to add a supervisor user to give someone at the remote site only temporary access to the supervisor options in TeleMagic.

● It is possible to duplicate the effects of selecting `Complete database file transfer (No contact records)` and `Transfer all contact and activity records` without sending an initialization packet. To do this, on the Site Preferences screen, click <u>Activity Filter Criteria</u> and select the `Select all activities, ignore transactions` radio button; access <u>Database Preferences</u> for the site (or the Global Database Preference settings if the site is <u>linked</u> to the global settings), select the `Select all records, ignore transactions` radio button, click the **Select database files to transfer** button and mark all of the check boxes. Be aware that if you only want to use these settings with one packet, you will have to access them again and deselect them.

● The time zone settings can be altered by users at the remote site. If a user accesses the time zone options at the site and changes the settings, that change will be reflected on the initialization screen. You can use this display to determine what time zone currently is in use at the site and alter it from the central site if necessary.

● If you send an initialization packet to a site that for any reason does not get used, you can create a new one with the same settings using the **Resend packet** button. (**Resend packet** replaces the **Site preferences** button on the Remote Site Maintenance dialog box when you attempt to edit a site that is waiting for a return packet after an initialization.)

● Once an initialization packet has been created, you will only be able to edit your site (including Site Preferences) after the packet has been processed at the remote site and a return packet has been received. If you discover a problem with your initialization settings after the packet has been created, using the Reset feature accessed on the Server Options screen will allow you to edit your settings and create a new packet.

To Use the Reset Feature:

1. From the Data Synchronization Server **Setup** menu, select **Server Options**. (See the topic Establishing Server Options for more information on Server Options.)

   The Server Options dialog box will open.

   (Click the **Server** tab if the Server page is not open.)

2. Click **Reset**.

   The Select Sites to Reset dialog box will open.

   The `Available` list will display all sites that are waiting for a response packet after an initialization packet has been processed.

3. Select the sites you would like to reset from the `Available` list and click **Add**, or click **Add All** to select all sites.

   If you find you have selected a site in error, click **Remove**.

4. Click **OK** and all sites in the `Selected` list will be reset.

   When a site is reset it will be as if the initialization packet was never created. You can then access Site Preferences for the site and adjust your settings as necessary.

WARNING!

This option should only be used if the remote sites have not received the initialization packet or if the packet could not be processed.

Continue…

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_____154.BMP<JumpId(DS.HLPï¿½DS3_Setup_Maintenance)<<1} Setup Maintenance
{ewl rhgbtn32.dll, BlueSkyHelpButton, g<_____153.BMP|
_____154.BMP<JumpId(DS.HLPï¿½DS3_Maintaining_Your_Central_Location)<<1} Maintaining Your Central Location
{ewl rhgbtn32.dll, BlueSkyHelpButton, g<_____153.BMP|
_____154.BMP<JumpId(DS.HLPï¿½DS3_Maintaining_Your_Remote_Sites)<<1} Maintaining Your Remote Sites

User List Maintenance

{ewc rhgbtn32.dll, BlueSkyHelpButton, g<RELAUP01.BMP|RELADN01.BMP<Klink(Maintenanceï¿½ ï¿½ ï¿½)<<1}

The user list for each site that is kept at the central installation can be used to maintain personnel changes for the all remotes and satellites that are attached to the central location. The user list for each site should be updated with any personnel changes occurring at the site.

Example: Remote Site 1 is a small satellite office manned by David Most, Lucy Johnson, and Gordon Watson. Shelley Quinn is the regional manager covering this office and spends one week a month there. The user list in Data Synchronization Server for this site would look like this:

> DRM   David Most
> GMW   Gordon Watson
> LAJ   Lucy Johnson
> SAQ   Shelley Quinn

(Shelley Quinn should also be added to the user lists for the other sites she visits.)

Down the road, Shelley is promoted and Dan Prey takes over her job as regional manager. Dan needs to be added to TeleMagic at this location and, as she will no longer be visiting this office, Shelley needs to be removed as a user in this installation. The Director of Human Resources for this company, Keith Pagioro, works from the central location. Keith can personally update the users who exist in TeleMagic at this satellite office without having to travel to the remote site. He simply accesses the user list in Data Synchronization Server for this site and adjusts it accordingly:

> DMP   Dan Prey
> DRM   David Most
> GMW   Gordon Watson
> LAJ   Lucy Johnson

The next time a synchronization is performed from the central to the remote, Data Synchronization Server can check the users at the remote site against those in the site's user list and make the necessary additions and deletions in TeleMagic. (You must have Delete users at this site who don't exist on Data Synchronization's user list for this site for users to be automatically deleted through synchronization.)

When maintaining your user list, there are two Site Preference settings of which you should be aware: `Update central user list` and `Delete users at this site who don't exist on Data Synchronization's user list for this site`. Your selections for these settings will affect how changes made to a site's user list will affect the users at the site, and vice versa. `Update central user list` allows users at the remote site to make changes to the list of users at the site and have those changes synchronized to the site's central user list. `Delete users at this site who don't exist on Data Synchronization's user list for this site` allows you to automatically remove users from the remote site by removing them from the site's central user list. This allows you to retain total control over who may access the remote installation of TeleMagic at the central site.

The results of these two settings will vary according to how they are used in conjunction with each other:

● If you have both `Delete users at this site who don't exist on Data Synchronization's user list for this site` and `Update central user list` marked, the order of synchronization from the remote site to the central site becomes important. If a user is added

at the site and synchronization is performed from the central installation to the remote site before the site has an opportunity to create an outbox packet with the new user, Data Synchronization will see that there is a user existing at the site who does not exist on the site's user list and delete it. When users are created at the remote site, an outbox packet should be generated right away to make sure the user is added to the site's user list.

* If you have `Delete users at this site who don't exist on Data Synchronization's user list for this site` marked and do not have `Update central user list` marked, users who are deleted from the site's user list will be deleted from the remote installation of TeleMagic, allowing you to retain total control of users at the central installation.

* If the site does not have `Delete users at this site who don't exist on Data Synchronization's user list for this site` marked, but does have `Update central user list` marked, users deleted from the site's user list will be re-added on synchronization from the remote installation.

* If the site does not have either `Delete users at this site who don't exist on Data Synchronization's user list for this site` or `Update central user list` marked, users deleted from the site's user list will be retained at the site. They will not be included in the synchronization process, meaning that they will not receive synchronized e-mail and activities at the site. (If they are on the user lists at other sites, they will be able to receive activities and e-mail at those sites.)

Consider periodically checking the remote site's central user list to ensure that all of the users on the list should have access to TeleMagic.

*

To Maintain a User List:

1. From the Data Synchronization Server **Setup** menu, select **User Maintenance**.

   The Remote User Maintenance dialog box will open displaying all of the users in your central location.

2. From the `Site:` drop-down list, select the first remote site you want to set up.

3. To add a user to the list, click **Add**.

4. Enter the user's ID as it is entered in TeleMagic in the `User ID:` field.

5. Enter the user's name in the `User Name:` field.

6. Click **Save**.

7. If you would like to change an existing user, highlight the user you want to change on the list and click **Edit**.

8. Make the necessary changes in the `User ID:` and `User Name:` fields.

9. When you are satisfied with your edits, click **Save**.

To Delete a User from a User List:

1. From the Data Synchronization Server **Setup** menu, select **User Maintenance**.

    The Remote User Maintenance dialog box will open displaying all of the users in your central location.

2. Select the remote site containing the user you want to delete from the `Site`: list.

    The list of users at that site will appear.

3. Highlight the user you want to remove and click **Delete**.

    You will be asked to confirm your decision to delete.

4. Click **Yes** to delete the user from the user list.

• **or** Click **No** to retain the user.

5. When you have finished making changes to the users on this list, click **OK**.

    You will be returned to the TeleMagic Data Synchronization Server Setup screen. When the installations are synchronized, Data Synchronization Server will update the users at the remote site to reflect these changes to the user list, where applicable.

Continue…

{ewl rhgbtn32.dll, BlueSkyHelpButton, g<_____153.BMP|
_____154.BMP<JumpId(DS.HLPï¿½DS3_Setup_Maintenance)<<1} <u>Setup Maintenance</u>

{ewl rhgbtn32.dll, BlueSkyHelpButton, g<_____153.BMP|
_____154.BMP<JumpId(DS.HLPï¿½DS3_Maintaining_Your_Central_Location)<<1} <u>Maintaining Your Central Location</u>

{ewl rhgbtn32.dll, BlueSkyHelpButton, g<_____153.BMP|
_____154.BMP<JumpId(DS.HLPï¿½DS3_Maintaining_Your_Remote_Sites)<<1} <u>Maintaining Your Remote Sites</u>

Database Preferences Maintenance

{ewc rhgbtn32.dll, BlueSkyHelpButton, g<RELAUP01.BMP|RELADN01.BMP<Klink(Maintenanceï¿½ ï¿½ ï¿½)<<1}

When maintaining your database preferences, it is important to keep in mind which sites are set to read the global database preferences, and which are unlinked. When you create unique settings for sites, the site is no longer linked to the global settings.

If you want to make an edit to your preferences that you want to use with all sites, whether <u>linked</u> or <u>not,</u> you will need to consider how best to copy this edit to the unlinked sites. You can use the `Apply these settings to all sites` feature in Global Preferences to quickly copy changes, but be aware that this option will apply *all* of the settings to *all* sites, not just the most recent changes. When you use this option, it does not re-link the site to the global preferences, it merely writes the current settings to the site. If you want to copy later changes to those sites, you will have to mark this check box again.

You can re-attach a site to the global settings at any time if it becomes necessary.

To Re-Link a Site to the Global Preferences:

1. From the Data Synchronization Server **Setup** menu, select **Site Specific Setup…**

   The Site Specific Setup options will open.

2. Click **Databases to Synchronize**.

   A message will appear informing you that sites that do not read the Global Database Preferences are preceded by an asterisk on the list of sites.

3. Click **OK** to acknowledge the message.

   A Choose Site dialog box will open with a list of your sites. Sites that have been unlinked from the global database preferences will be preceded by an asterisk on this list.

4. Highlight the site you would like to re-link and click **Select**.

   The Databases To Be Synchronized dialog box will open with the name of the site you selected in the title bar.

5. At the Databases To Be Synchronized dialog box, click **Remove All**.

6. Click **OK**.

   A message will appear asking if you want to reset the site to the global preferences.

7. Click **Yes**.

   You will be returned to the Choose Site dialog box.

8. If you want to change another site, highlight it and repeat steps 5 through 8.

or Click **Close**.

9. When you are finished identifying sites to be re-linked, click **Close**.

    The site(s) will now read the Global Preferences.

Continue…

{ewl rhgbtn32.dll, BlueSkyHelpButton, g<_____153.BMP|
_____154.BMP<JumpId(DS.HLPï¿½DS3_Setup_Maintenance)<<1} <u>Setup Maintenance</u>

{ewl rhgbtn32.dll, BlueSkyHelpButton, g<_____153.BMP|
_____154.BMP<JumpId(DS.HLPï¿½DS3_Maintaining_Your_Central_Location)<<1} <u>Maintaining Your Central Location</u>

{ewl rhgbtn32.dll, BlueSkyHelpButton, g<_____153.BMP|
_____154.BMP<JumpId(DS.HLPï¿½DS3_Maintaining_Your_Remote_Sites)<<1} <u>Maintaining Your Remote Sites</u>

Global Options Maintenance

{ewc rhgbtn32.dll, BlueSkyHelpButton, g<RELAUP01.BMP|RELADN01.BMP<Klink(Maintenanceï¿½ ï¿½ ï¿½)<<1}

Global Options are settings that are referenced throughout Data Synchronization Server. Before editing any of these settings, you should carefully consider all of the places in which these settings may be currently referenced and determine how your changes will affect these areas.

Use the following topics when maintaining Global Options:

Preferences Maintenance
Security Maintenance
File Sets Maintenance
Scripts Maintenance

Continue…

{ewl rhgbtn32.dll, BlueSkyHelpButton, g<_____153.BMP| _____154.BMP<JumpId(DS.HLPï¿½DS3_Setup_Maintenance)<<1} Setup Maintenance

{ewl rhgbtn32.dll, BlueSkyHelpButton, g<_____153.BMP| _____154.BMP<JumpId(DS.HLPï¿½DS3_Maintaining_Your_Central_Location)<<1} Maintaining Your Central Location

{ewl rhgbtn32.dll, BlueSkyHelpButton, g<_____153.BMP| _____154.BMP<JumpId(DS.HLPï¿½DS3_Maintaining_Your_Remote_Sites)<<1} Maintaining Your Remote Sites

Security Maintenance

{ewc rhgbtn32.dll, BlueSkyHelpButton, g<RELAUP01.BMP|RELADN01.BMP<Klink(Maintenanceï¿½ ï¿½ ï¿½)<<1}

Extreme care should be taken before editing your security settings. You are given the option in the security section to select a default security group for use in initialization and when adding users through synchronization. Chances are you will have created site settings based on the security that was selected at the time the settings were made. Changing the default security could create conflicts with other settings. Particular caution should be exercised when selecting to use no default security. This option is provided to allow you to add users during synchronization with no security assigned to them. If you have multiple security groups with very specific settings, you will probably want to select this option as this will force the supervisor at the remote site to assign security to each new user individually. However, if you try to perform an initialization that affects security with this option selected, your initialization packet will fail. Before selecting this option for use when adding users, make sure no sites are set to perform an initialization that will affect security.

If you perform an initialization that places all of the users at a remote in the Everyone security group, you will receive a reminder to verify that there is such a group at the remote site. If a site does not have an Everyone group and receives an initialization packet that assigns all users to the Everyone group, the security changes will be ignored and the users will retain their original security. You will receive a message at the remote site informing you that there were security changes in the packet which were not implemented.

As long as you are certain that every site has a security group named Everyone, and that you are aware of any sites that are set to perform an initialization that will affect security, you can change these security defaults with confidence.

Continue…

{ewl rhgbtn32.dll, BlueSkyHelpButton, g<_____153.BMP| _____154.BMP<JumpId(DS.HLPï¿½DS3_Global_Options_Maintenance)<<1} Global Options Maintenance

{ewl rhgbtn32.dll, BlueSkyHelpButton, g<_____153.BMP| _____154.BMP<JumpId(DS.HLPï¿½DS3_Setup_Maintenance)<<1} Setup Maintenance

{ewl rhgbtn32.dll, BlueSkyHelpButton, g<_____153.BMP| _____154.BMP<JumpId(DS.HLPï¿½DS3_Maintaining_Your_Central_Location)<<1} Maintaining Your Central Location

{ewl rhgbtn32.dll, BlueSkyHelpButton, g<_____153.BMP| _____154.BMP<JumpId(DS.HLPï¿½DS3_Maintaining_Your_Remote_Sites)<<1} Maintaining Your Remote Sites

Preferences Maintenance

{ewc rhgbtn32.dll, BlueSkyHelpButton, g<RELAUP01.BMP|RELADN01.BMP<Klink(Maintenanceï¿½ï¿½ ï¿½)<<1}

Preferences are applied to users being added during synchronization and can be assigned to all users at a site during initialization.   Editing your preferences is a matter of selecting a different user whose preferences you would like to use. The main maintenance for this is performed while setting the preferences within TeleMagic. If you need more information on TeleMagic's preferences, search on *Preferences* in TeleMagic's on-line help.

Continue…

{ewl rhgbtn32.dll, BlueSkyHelpButton, g<_____153.BMP| _____154.BMP<JumpId(DS.HLPï¿½DS3_Global_Options_Maintenance)<<1} Global Options Maintenance

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{ewl rhgbtn32.dll, BlueSkyHelpButton, g<_____153.BMP| _____154.BMP<JumpId(DS.HLPï¿½DS3_Maintaining_Your_Central_Location)<<1} Maintaining Your Central Location

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File Sets Maintenance

{ewc rhgbtn32.dll, BlueSkyHelpButton, g<RELAUP01.BMP|RELADN01.BMP<Klink(Maintenanceï¿½ ï¿½ ï¿½)<<1}

Many file sets will consist of files that need to be sent to the sites one time only. Occasionally you will have a file set that consists of files that need to be continuously or periodically synchronized as the files are updated. It is for this reason that Data Synchronization Server stores the file sets so you do not have to duplicate your work. However, in instances where the set was created for a single synchronization, or files need to be added or removed from the set, you can edit your list of sets or the list of files in a set.

To Edit File Sets:

1. From the Data Synchronization Server **Setup** menu, select **Options…**.

   The Options dialog box will open. (See the topic Global Options for more information on the features available from this dialog box.)

2. Click the **Global File Sets** tab.

   The Global File Sets page will open with a list of all of the file sets you have created.

3. Highlight the set of files you want to edit and click **Change**.

   The Edit File Set dialog box will open.

4. If you would like to edit any of the file selections, highlight it in the list and click **Change**.

   The **Save Set** button will toggle to a **Save File** button.

5. Make any necessary changes on the right side of the dialog box and click **Save File**.

6. If you would like to remove a file from this set, highlight it in the list and click **Delete**.

   You will be asked to confirm your decision to delete.

7. Click **Yes** to delete the file from the set.

8. When satisfied with the set, click **Save Set**.

   You will be returned to the File Set Setup dialog box.

To Delete a File Set:

1. From the Data Synchronization Server **Setup** menu, select **Options…**.

   The Options dialog box will open.

2. Click the **Global File Sets** tab.

The File Set Setup page will open with a list of all of the file sets you have created.

3. Highlight the file set you want to delete from the list and click **Delete Set**.

You will be asked to confirm your decision to delete.

4. Click **Yes** and the set will be deleted.

or Click **No** to retain the set.

5. Click **Close** to close the File Set Setup dialog box.

Continue…

{ewl rhgbtn32.dll, BlueSkyHelpButton, g<_____153.BMP|
_____154.BMP<JumpId(DS.HLPï¿½DS3_Global_Options_Maintenance)<<1} Global Options Maintenance

{ewl rhgbtn32.dll, BlueSkyHelpButton, g<_____153.BMP|
_____154.BMP<JumpId(DS.HLPï¿½DS3_Setup_Maintenance)<<1} Setup Maintenance

{ewl rhgbtn32.dll, BlueSkyHelpButton, g<_____153.BMP|
_____154.BMP<JumpId(DS.HLPï¿½DS3_Maintaining_Your_Central_Location)<<1} Maintaining Your Central Location

{ewl rhgbtn32.dll, BlueSkyHelpButton, g<_____153.BMP|
_____154.BMP<JumpId(DS.HLPï¿½DS3_Maintaining_Your_Remote_Sites)<<1} Maintaining Your Remote Sites

Global Scripts Maintenance

{ewc rhgbtn32.dll, BlueSkyHelpButton, g<RELAUP01.BMP|RELADN01.BMP<Klink(Maintenanceï¿½ ï¿½ ï¿½)<<1}

Scripts are created in the central installation to send to the remote sites during initialization. Once a synchronization has been performed with a list of scripts, and the desired sites have received the scripts, you may want to delete them. It is also possible to edit a script to perform a slightly different function and send it again.

To Change a Global Script:

1. From the Data Synchronization Server **Setup** menu, select **Options…**..

   The Options dialog box will open. (See the topic Global Options if you would like more information on the features available from this dialog box.)

2. Click the **Scripting** tab.

   The Scripting page will open with your list of scripts.

3. Highlight a script from the list and click **Change**.

   The Central Script Setup dialog box will open.

4. To change the order in which any step in the script is executed, click and hold the mover box next to the step description while dragging the step to the appropriate position. Repeat this until all steps are in the desired order.

5. To change the details of any step, highlight it on the list and click **Change**.

   The step details will become available and the **Save Script** button will toggle to a **Save** button.

6. Make any necessary changes to the step and click **Save**.

7. If you would like to remove any step from the script, highlight it and click **Delete**.

   A message will appear asking you to confirm your decision to delete.

8. Click **Yes** and the step will be deleted.

or Click **No** to retain the step.

9. When you are satisfied with your script, click **Save Script**.

   You will return to the Scripting page.

To Delete a Global Script:

1. From the Data Synchronization Server **Setup** menu, select **Options…**.

    The Options dialog box will open.

2. Click the **Scripting** tab.

    The Scripting page will open with your list of scripts.

3. Highlight the script you want to delete from the list and click **Delete Script**.

    You will be asked to confirm your decision to delete the script.

4. Click **Yes** and the script will be deleted.

or Click **No** and the script will be retained.

Continue…

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_____154.BMP<JumpId(DS.HLPï¿½DS3_Global_Options_Maintenance)<<1} Global Options Maintenance

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_____154.BMP<JumpId(DS.HLPï¿½DS3_Setup_Maintenance)<<1} Setup Maintenance

{ewl rhgbtn32.dll, BlueSkyHelpButton, g<_____153.BMP|
_____154.BMP<JumpId(DS.HLPï¿½DS3_Maintaining_Your_Central_Location)<<1} Maintaining Your Central Location

{ewl rhgbtn32.dll, BlueSkyHelpButton, g<_____153.BMP|
_____154.BMP<JumpId(DS.HLPï¿½DS3_Maintaining_Your_Remote_Sites)<<1} Maintaining Your Remote Sites

Server Maintenance

{ewc rhgbtn32.dll, BlueSkyHelpButton, g<RELAUP01.BMP|RELADN01.BMP<Klink(Maintenanceï¿½ ï¿½ ï¿½)<<1}

[About Screen](#)
[Log Maintenance Report](#)
[Rebuilding the Server](#)
[Reports](#)
[Server Setup Report](#)
[Viewing the Server Log Maintenance](#)

About Screen

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The Data Synchronization Server About screen contains helpful system information concerning your central sites.

To View the About Screen:

1. On the computer containing your central or remote installation of TeleMagic, open Data Synchronization Server if it is not already open.

2. From the Data Synchronization Server **Help** menu, select **About…**.

   The About screen will open.

3. When finished viewing the About screen, click **Close**.

Continue…

{ewl rhgbtn32.dll, BlueSkyHelpButton, g<_____153.BMP| _____154.BMP<JumpId(DS.HLPï¿½DS3_Server_Maintenance)<<1} Server Maintenance

{ewl rhgbtn32.dll, BlueSkyHelpButton, g<_____153.BMP| _____154.BMP<JumpId(DS.HLPï¿½DS3_Maintaining_Your_Central_Location)<<1} Maintaining Your Central Location

{ewl rhgbtn32.dll, BlueSkyHelpButton, g<_____153.BMP| _____154.BMP<JumpId(DS.HLPï¿½DS3_Maintaining_Your_Remote_Sites)<<1} Maintaining Your Remote Sites

Rebuilding the Server

{ewc rhgbtn32.dll, BlueSkyHelpButton, g<RELAUP01.BMP|RELADN01.BMP<Klink(Maintenanceï¿½ ï¿½ ï¿½)<<1}

In order to keep your central location performing optimally, you should perform regular rebuilds. It is highly recommended that you rebuild your server on a daily basis.

In addition to rebuilding the files Data Synchronization Server uses, you have the option of archiving outdated transaction records. When you know that all sites have received transactions, and that you will not be needing them for date and time field level validation, it is safe to archive them.

To Rebuild the Server:

1. Open Data Synchronization Server if it is not already open.

2. From the Data Synchronization Server **File** menu, select **Rebuild**.

• The Rebuild Server Files dialog box will open.

3. If you would like to delete all transactions before a specific date, mark the `Delete transactions created before` check box and enter the date in the field.

• 4. If you would like to archive all transactions with a date before the oldest synchronization, mark the `Delete transactions from oldest synchronization date` check box. When marked, Data Synchronization Server will check all sites to determine which was processed the least recently and delete all transactions prior to that date and time. This will remove all transactions that have been included in an outgoing packet. (This option is not recommended if you are using the `Validate Contact Record Revisions at Field Level` option in Site Preferences for any site.)

5. If you would like to add the transactions that are being removed to the end of the file of transactions that have already been archived, select the `Append To Archive File` radio button.

• **or** If you would like to replace any existing file of archived transactions with the latest transactions, select the `Overwrite Archive File` radio button.

6. When you are ready to proceed with the rebuild, click **Rebuild**.

or If you do not want to rebuild, click **Cancel**.

When you rebuild, the specified transactions will be removed from the transaction table and placed into two files called TMTRANAR.DBF and TMTRANAR.FPT in the TeleMagic global directory (the directory containing your TeleMagic files).

Continue…

{ewl rhgbtn32.dll, BlueSkyHelpButton, g<_____153.BMP|
_____154.BMP<JumpId(DS.HLPï¿½DS3_Server_Maintenance)<<1} <u>Server Maintenance</u>

{ewl rhgbtn32.dll, BlueSkyHelpButton, g<_____153.BMP|
_____154.BMP<JumpId(DS.HLPï¿½DS3_Maintaining_Your_Central_Location)<<1} <u>Maintaining Your
Central Location</u>

{ewl rhgbtn32.dll, BlueSkyHelpButton, g<_____153.BMP|
_____154.BMP<JumpId(DS.HLPï¿½DS3_Maintaining_Your_Remote_Sites)<<1} <u>Maintaining Your
Remote Sites</u>

Viewing the Server Log Maintenance

{ewc rhgbtn32.dll, BlueSkyHelpButton, g<RELAUP01.BMP|RELADN01.BMP<Klink(Maintenanceï¿½ ï¿½ ï¿½)<<1}

Data Synchronization Server keeps a log of each synchronization process which can be useful in troubleshooting, or in simply keeping track of what has been processed.

To View the Log:

1. From the Data Synchronization Server **Maintenance** menu, select **Log Maintenance**.

   The Log Maintenance dialog box will open.

2. View the information in this log using the following guidelines:

   - The filters in use for this display are shown directly below the title bar.
   - `Date` Shows the date the synchronization was run.
   - `Time` Shows the time the synchronization was run.
   - `User` Displays the User ID of the user logged into Data Synchronization Server when it was synchronized.
   - The memo field on the right side of the screen shows details on the highlighted selection. (If the server is currently processing the highlighted entry, there may be no data available.)

3. To control what information is included in this display, click **Filter**.

   The Log Filter dialog box will open.

4. Enter the synchronization dates you would like included in the log in the `Show logs from:` and `to:` fields, or use the Date Picker icons to select the dates from a pop-up calendar.

5. If you would like the log to include synchronizations run by any users, select the `Show All Users` radio button.

   or If you would like the log to only include synchronizations run by a particular user, select the `Specific User` radio button and select the user from the drop-down list.

6. If you would like the log to include synchronizations performed for all sites, select the `Show All Sites` radio button.

or If you would only like to include synchronizations for a specific site, select the `Specific Site` radio button then select the site from the drop-down list.

7. Select `Show Detail` if you would like to see full details on the synchronization.

or Select `Show Errors Only` if you only want to view details if an error has occurred.

8. If you want to view logs relating to the synchronization of the inbox only, select the `Inbox Only` radio button.

or If you want to view logs relating to the synchronization of the outbox only, select the `Outbox Only` radio button.

or If you want to view logs relating to FTP transfer information, select the `FTP Sessions Only` radio button.

or If you want to view logs relating to the inbox, the outbox, and FTP file transfer, select the `All` radio button.

9. Click **OK** to activate the selected filter.

or Click **Cancel** to retain the original filter.

You will be returned to the Log Maintenance Dialog box. Your filter selections will be reflected below the title bar.

10. Highlight any entry in the list on the left to view details on that synchronization or FTP file transfer.

11. When finished viewing your logs, click **OK**.

To Delete Outdated Logs:

1. If you would like to delete a single log, highlight it on the list on the left.

or If you want to delete a group of logs, select a filter following steps 3 through 9 under *To View the Log*, above.

2. Click **Delete**.

The Choose Records to Delete dialog box will open.

3. If you want to delete the currently highlighted log, click **Highlighted**.

or If you want to delete all logs in the current filter, click **Filtered**.

The specified log(s) will be deleted.

Continue…

{ewl rhgbtn32.dll, BlueSkyHelpButton, g<_____153.BMP|

_____154.BMP<JumpId(DS.HLPï¿½DS3_Server_Maintenance)<<1} Server Maintenance
{ewl rhgbtn32.dll, BlueSkyHelpButton, g<_____153.BMP|
_____154.BMP<JumpId(DS.HLPï¿½DS3_Maintaining_Your_Central_Location)<<1} Maintaining Your Central Location
{ewl rhgbtn32.dll, BlueSkyHelpButton, g<_____153.BMP|
_____154.BMP<JumpId(DS.HLPï¿½DS3_Maintaining_Your_Remote_Sites)<<1} Maintaining Your Remote Sites

Reports

{ewc rhgbtn32.dll, BlueSkyHelpButton, g<RELAUP01.BMP|RELADN01.BMP<Klink(Maintenanceï¿½ ï¿½ ï¿½)<<1}

Server Setup Report
Log Maintenance Report
Remote Site Log Maintenance Report

Server Setup Report

{ewc rhgbtn32.dll, BlueSkyHelpButton, g<RELAUP01.BMP|RELADN01.BMP<Klink(Maintenanceï¿½ ï¿½ ï¿½)<<1}

It is possible to create a report that will list your settings for each site. This is useful in maintenance as it allows you to quickly view and analyze the current settings to determine if any need to be adjusted.

●

To Print a Setup Report:

1. From the Data Synchronization Server **File** menu, select **Reports**.

   The Server Setup Report dialog box will open.

2. Mark the `Global Options` check box if you would like to report on your Global Options. This includes default preferences, security, file sets, and scripts. Unmark it if you do not want global options included in the report. (If you would like more information on setting up your servers, see the [Setting Up Your Server(s)](#) topic.)

3. If you would like your report to include information on your Server Options settings, mark the `Server Options` check box. (This includes inbox and outbox options and other system-wide settings.)   Unmark this check box if you do not want data pertaining to Server Options included in the report.

4. Use the `Server Setup` list if you would like to report on the servers you have set up. This will include information on how processing occurs by the specified server(s). Select `All Servers` to include information on every server you have set up; select a specific server from the list to only include information on that server; or select `None` if you do not want to include server information . You have the option of reporting on Global Database Preferences and field rules for a specific database or all databases.

5. Use the `Global Database Preferences:` drop-down list to select the database(s) you would like included in the report. If you select `All Databases`, you will be able to report on field rules for all databases in your central installation (whether they are synchronized or not) and preferences for all databases synchronized globally. If you select an individual database, you will be able to report on field rules for that database and preferences if it is synchronized globally. (If it is not, the `Database Preferences` check box will be unavailable.)   If you select `None`, no global settings will be included. (If you would like more information on selecting databases for synchronization and creating global database preference, see the [Controlling What is](#)

[Synchronized](#) topic.)

If you selected All Databases or a specific database that is synchronized globally in the Global Database list, the `Database Preferences` check box will be available.

6. If you would like to include preferences for the selected database(s), mark the `Database Preferences` check box. Unmark it if you do not want to report on preferences.

7. If you would like to include field rules for the fields in the database(s) selected in step 5, mark the `Include All Field Rules and indicate synchronized fields` check box. This will list every field and its field rule. It will also indicate which fields are included in synchronization for any databases that use the global database preferences.

    The `Site Setup` drop-down list allows you to report on information specific to individual sites.

8. Select the site(s) on which you would like to report from the drop-down list. If you select `All Sites`, every site you have set up will be included. If you select an individual site, only information pertaining to that site will be included in the report. If you select `None`, the following site specific options will be unavailable. No site specific information will be included.

    If you have selected anything other than `None` in the `Site Setup` drop-down list, the `Site Preferences` check box will become available.

9. Mark the `Site Preferences` check box if you would like to report on the site preferences for the site(s) selected in step 8. (If you would like more information on site preferences, see the [Site Preferences](#) topic.) Unmark it if you do not want this information included.

    If you have selected anything other than `None` in the `Site Setup` drop-down list, the `Site User List` check box will become available.

10. If you would like to include the list of users established in Remote User Maintenance for this site, mark the `Site User List` check box. Unmark it if you do not want to include the list of users. (For more information on user lists, see the [Assigning Users to Your Remote Sites](#) topic.)

    If you have selected `All Sites` or a specific site that is unlinked from the Global Database settings in the `Site Setup` drop-down list, information from your site specific Database Preferences can be included in the report. You will have the option to list the Database Preferences established for each site and/or list the fields being synchronized to the site.

11. Select the database(s) on which you want to report from the

Site Database drop-down list. If you select All Databases, preference settings for all databases that are being synchronized to the site(s) selected in step 8 will be included in the report. If you select a specific database, only the preference settings for the specified database will be included in the report. If you select None, you will not receive site specific Database Preference information in the report.

12. Mark the Site Database Preferences check box to include the database preference information (except the list of fields being synchronized). Unmark it if you do not want to include preferences.

- 13. If you would like to include the list of fields selected in Database Preferences for the site, mark the List Synchronized Fields check box. Unmark it if you do not want to include the list of fields.

14. To preview the report, click **View**.

15. When you are finished viewing the report, click **OK**.

16. To print the report, click **Print**.

or Click **Close** to exit the Server Setup Report dialog box.

-

Continue…

{ewl rhgbtn32.dll, BlueSkyHelpButton, g<_____153.BMP|
_____154.BMP<JumpId(DS.HLPï¿½DS3_Reports)<<1} Reports
{ewl rhgbtn32.dll, BlueSkyHelpButton, g<_____153.BMP|
_____154.BMP<JumpId(DS.HLPï¿½DS3_Setup_Maintenance)<<1} Setup Maintenance
{ewl rhgbtn32.dll, BlueSkyHelpButton, g<_____153.BMP|
_____154.BMP<JumpId(DS.HLPï¿½DS3_Maintaining_Your_Central_Location)<<1} Maintaining Your Central Location
{ewl rhgbtn32.dll, BlueSkyHelpButton, g<_____153.BMP|
_____154.BMP<JumpId(DS.HLPï¿½DS3_Maintaining_Your_Remote_Sites)<<1} Maintaining Your Remote Sites

Log Maintenance Report

{ewc rhgbtn32.dll, BlueSkyHelpButton, g<RELAUP01.BMP|RELADN01.BMP<Klink(Maintenanceï¿½ ï¿½ ï¿½)<<1}

The Log Maintenance report allows you to create a report based on the information available at the Log Maintenance dialog box.

●

To Print a Log Maintenance Report:

1. From the Data Synchronization Server **Maintenance** menu, select **Log Maintenance**.

    The Log Maintenance dialog box will open.

2. Click the **Reports** button.

    The Log Maintenance Report dialog box will open. The settings will default to the filter currently in use in the main Log Maintenance dialog box. (Any changes you make at this dialog box will also be reflected in the filter in use in the Log Maintenance dialog box when you exit the report.)

3. Enter the synchronization and/or FTP file transfer dates you would like included in the report in the `Show logs from:` and `to:` fields, or use the Date Picker icons to select the dates from a pop-up calendar.

4. If you would like the report to include synchronizations run by any users, select the `Show All Users` radio button.

or If you would like the report to only include synchronizations run by a particular user, select the `Specific User` radio button and select the user from the drop-down list.

5. If you would like the report to include synchronizations performed for all sites, select the `Show All Sites` radio button.

or If you would like to only include synchronizations for a specific site, select the `Specific Site` radio button then select the site from the drop-down list.

6. If you want to report on the synchronization of the inbox only, select the `Inbox Only` radio button.

or If you want to report on the synchronization of the outbox only, select the `Outbox Only` radio button.

or If you want to report on FTP transfer information, select the `FTP Sessions Only` radio button.

or If you want to report on synchronization of both boxes, as well as FTP file transfer information, select the `All`

radio button.

7. Select from the following radio buttons to control how much detail is included in the report:

    ● Select `Summary Only` if you want to only include the date and time the synchronization and/or FTP file transfer was run, the user ID, the type, and the status.

    ● Select `Show All Detail` if you want to include all of the information pertaining to the synchronization and/or FTP file transfer (including the summary details).

    ● Select `Show Errors Detail Only` if you want to include the summary detail and information on any errors that occurred.

8. If you would like the report to print in order of the date the synchronization and/or FTP file transfer was performed, select `Group by Date.`

or If you would like the report to print in order of the user who performed the synchronization, select `Group by User.`

or If you would like the report to print in order by the Site ID, select `Group by Site ID.`

9. If you would like to preview your report, click **View**.

10. When you are finished viewing the report, click **OK**.

11. To print the report, click **Print**.

or Click **Close** to exit the Log Maintenance Report dialog box.

Continue…

{ewl rhgbtn32.dll, BlueSkyHelpButton, g<_____153.BMP| _____154.BMP<JumpId(DS.HLPï¿½DS3_Reports)<<1} Reports

{ewl rhgbtn32.dll, BlueSkyHelpButton, g<_____153.BMP| _____154.BMP<JumpId(DS.HLPï¿½DS3_Viewing_the_Server_Log_Maintenance)<<1} Viewing the Server Log Maintenance

{ewl rhgbtn32.dll, BlueSkyHelpButton, g<_____153.BMP| _____154.BMP<JumpId(DS.HLPï¿½DS3_Maintaining_Your_Central_Location)<<1} Maintaining Your Central Location

{ewl rhgbtn32.dll, BlueSkyHelpButton, g<_____153.BMP| _____154.BMP<JumpId(DS.HLPï¿½DS3_Maintaining_Your_Remote_Sites)<<1} Maintaining Your Remote Sites

Maintaining Your Remote Sites

{ewc rhgbtn32.dll, BlueSkyHelpButton, g<RELAUP01.BMP|RELADN01.BMP<Klink(Maintenanceï¿½ ï¿½ ï¿½)<<1}

Maintenance of the remote sites consists of any adjustments that need to be made to the remote site setup options and using the About Screen, Log Maintenance, and Rebuild features to troubleshoot and optimize the sites.

Handling maintenance at your remote sites will largely depend on the number and location of the remote sites you are using. If you have a small number of laptop users who bring their laptops back to the office each evening, you may make site maintenance a function of the user responsible for maintaining the central location. If you have a large number of remote locations, or satellite offices and laptops that are not brought back to the central installation, you may consider making the user at each site who is responsible for synchronization also responsible for maintenance. Whatever system you decide upon for maintenance, each user should be clearly informed of his or her responsibility to ensure consistent maintenance.

Continue…

{ewl rhgbtn32.dll, BlueSkyHelpButton, g<_____153.BMP| _____154.BMP<JumpId(DS.HLPï¿½DS3_About_Screen)<<1} About Screen

{ewl rhgbtn32.dll, BlueSkyHelpButton, g<_____153.BMP| _____154.BMP<JumpId(DS.HLPï¿½DS3_File_Paths_Maintenance)<<1} File Paths Maintenance

{ewl rhgbtn32.dll, BlueSkyHelpButton, g<_____153.BMP| _____154.BMP<JumpId(DS.HLPï¿½DS3_Rebuilding_Your_Sites)<<1} Rebuilding Your Sites

{ewl rhgbtn32.dll, BlueSkyHelpButton, g<_____153.BMP| _____154.BMP<JumpId(DS.HLPï¿½DS3_Remote_Site_Log_Maintenance_Report)<<1} Remote Site Log Maintenance Report

{ewl rhgbtn32.dll, BlueSkyHelpButton, g<_____153.BMP| _____154.BMP<JumpId(DS.HLPï¿½DS3_Script_Maintenance)<<1} Script Maintenance

{ewl rhgbtn32.dll, BlueSkyHelpButton, g<_____153.BMP| _____154.BMP<JumpId(DS.HLPï¿½DS3_Time_Zones_Maintenance)<<1} Time Zones Maintenance

{ewl rhgbtn32.dll, BlueSkyHelpButton, g<_____153.BMP| _____154.BMP<JumpId(DS.HLPï¿½DS3_Viewing_Site_Logs)<<1} Viewing Site Logs

{ewl rhgbtn32.dll, BlueSkyHelpButton, g<_____153.BMP| _____154.BMP<JumpId(DS.HLPï¿½DS3_Reports)<<1} Reports

{ewl rhgbtn32.dll, BlueSkyHelpButton, g<_____153.BMP| _____154.BMP<JumpId(DS.HLPï¿½DS3_Maintaining_Your_Central_Location)<<1} Maintaining Your Central Location

File Paths Maintenance

{ewc rhgbtn32.dll, BlueSkyHelpButton, g<RELAUP01.BMP|RELADN01.BMP<Klink(Maintenanceï¿½ ï¿½ ï¿½)<<1}

You can change the path to your inbox and outbox at any time. Before changing these settings, think about any other areas where you may reference the current paths. For example, if you are using a communications server that uses a script or a batch file that includes the file paths, you will probably need to change the path there as well to reflect your edits.

Continue…

{ewl rhgbtn32.dll, BlueSkyHelpButton, g<_____153.BMP| _____154.BMP<JumpId(DS.HLPï¿½DS3_Maintaining_Your_Central_Location)<<1} Maintaining Your Central Location

{ewl rhgbtn32.dll, BlueSkyHelpButton, g<_____153.BMP| _____154.BMP<JumpId(DS.HLPï¿½DS3_Maintaining_Your_Remote_Sites)<<1} Maintaining Your Remote Sites

Time Zones Maintenance

{ewc rhgbtn32.dll, BlueSkyHelpButton, g<RELAUP01.BMP|RELADN01.BMP<Klink(Maintenanceï¿½ ï¿½ ï¿½)<<1}

Time zone settings can be adjusted both at the remote site and directly from the central location. If you edit your time zone, but find the setting reverting back to the original setting (or a different time zone) an initialization has been performed from the central location that changes this time zone. If the time zone is changed in the remote location and a synchronization is performed from the remote site to the central installation, the time zone will be updated on the initialization screen at the central site. If you find that the time zone settings continue to change during initialization, someone has probably intentionally changed this setting at the initialization screen. You should coordinate with the central installation to determine what time zone settings should be used.

Continue…

{ewl rhgbtn32.dll, BlueSkyHelpButton, g<_____153.BMP|
_____154.BMP<JumpId(DS.HLPï¿½DS3_Maintaining_Your_Central_Location)<<1} Maintaining Your Central Location

{ewl rhgbtn32.dll, BlueSkyHelpButton, g<_____153.BMP|
_____154.BMP<JumpId(DS.HLPï¿½DS3_Maintaining_Your_Remote_Sites)<<1} Maintaining Your Remote Sites

Script Maintenance

{ewc rhgbtn32.dll, BlueSkyHelpButton, g<RELAUP01.BMP|RELADN01.BMP<Klink(Maintenanceï¿½ ï¿½ ï¿½)<<1}

Scripts at the remote sites will fall into two categories: those that were added directly at the remote site and those that have been created at the central location and transferred during synchronization. In the instructions on creating scripts at the central installation, it was advised to make sure that any program or batch file referenced in the script actually exists in the remote installation. If you have a problem using a script, check to make sure that any programs or batch files used with the script exist and work at the remote site.

If you have received a script from the central installation, you may have to tailor it to the needs of the site. You may also find that not all of the scripts that were sent are necessary for this site. You can edit these scripts, or those that were created at the site, at any time.

●

To Change a Script:

1. From the Data Synchronization Remote **Setup** menu, select **Script Setup**.

   A Scripting dialog box will open with your list of scripts.

2. If you want to change the details of a script, highlight it on the list and click **Change**.

●   The Remote Script Setup dialog box will open.

3. If you would like to change the order in which any step in the script is executed, click and hold the mover box next to the step description while dragging the step to the appropriate position. Repeat this until all steps are in the desired order.

4. If you would like to change the details of any step, highlight it on the list and click **Change**.

   The step details will become available and the **Save Script** button will toggle to a **Save** button.

5. Make any necessary changes to the step and click **Save**.

6. If you would like to remove any step from the script, highlight it and click **Delete**.

   A message will appear asking you to confirm your decision to delete.

7. Click **Yes** and the step will be deleted.

or Click **No** to retain the step.

8. When you are satisfied with your script, click **Save Script**.

   You will return to the Scripting dialog box.

To Delete a Script at a Remote Site:

1. From the Data Synchronization Remote **Setup** menu, select **Script Setup**.

   A Scripting dialog box will open with your list of scripts.

2. Highlight the script you want to delete from the list and click **Delete Script**.

   You will be asked to confirm your decision to delete the script.

3. Click **Yes** and the script will be deleted.

or Click **No** and the script will be retained.

Continue…

{ewl rhgbtn32.dll, BlueSkyHelpButton, g<_____153.BMP|
_____154.BMP<JumpId(DS.HLPï¿½DS3_Maintaining_Your_Central_Location)<<1} Maintaining Your Central Location

{ewl rhgbtn32.dll, BlueSkyHelpButton, g<_____153.BMP|
_____154.BMP<JumpId(DS.HLPï¿½DS3_Maintaining_Your_Remote_Sites)<<1} Maintaining Your Remote Sites

About Screen

The Data Synchronization Server About screen contains helpful system information related to your remote installation.

To View the About Screen:

1. On the computer containing the central or remote installation of TeleMagic, open Data Synchronization Server if it is not already open.

2. From the Data Synchronization Server **Help** menu, select **About…**.

   The About screen will open.

3. When finished viewing the About screen, click **Close**.

Continue…

{ewl rhgbtn32.dll, BlueSkyHelpButton, g<_____153.BMP|
_____154.BMP<JumpId(DS.HLPï¿½DS3_Maintaining_Your_Central_Location)<<1} Maintaining Your Central Location

{ewl rhgbtn32.dll, BlueSkyHelpButton, g<_____153.BMP|
_____154.BMP<JumpId(DS.HLPï¿½DS3_Maintaining_Your_Remote_Sites)<<1} Maintaining Your Remote Sites

Rebuilding Your Sites

{ewc rhgbtn32.dll, BlueSkyHelpButton, g<RELAUP01.BMP|RELADN01.BMP<Klink(Maintenanceï¿½ ï¿½ ï¿½)<<1}

In order to keep your remote locations performing optimally, you should perform regular rebuilds. It is highly recommended that you rebuild your sites on a daily basis.

In addition to rebuilding the files Data Synchronization Server uses, you have the option of deleting outdated transaction records. You should periodically delete old transactions that have been processed into packets and delivered to the central installation.

●

To Rebuild Data Synchronization Server on the Remote Sites:

1. On the computer containing the remote installation of TeleMagic, open Data Synchronization Server if it is not already open.

2. From the Data Synchronization Remote **Maintenance** menu, select **Rebuild**.

●   The Rebuild Remote dialog box will open.

●

3. If you would like to delete all transactions from before a specific date, mark the `Delete transactions created before` check box and enter the date in the field.

●

4. If you would like to delete all transactions with a date before the last synchronization, mark the `Delete transactions from oldest synchronization date` check box. This will remove all transactions that have already been included in an outgoing packet. (This option is not recommended if you are using the `Validate Contact Record Revisions at Field Level` option in Site Preferences for this site.)

5. When you are ready to proceed with the rebuild, click **Rebuild**.

    or   If you do not want to rebuild, click **Cancel**.

Continue…

{ewl rhgbtn32.dll, BlueSkyHelpButton, g<_____153.BMP| _____154.BMP<JumpId(DS.HLPï¿½DS3_Maintaining_Your_Central_Location)<<1} Maintaining Your Central Location

{ewl rhgbtn32.dll, BlueSkyHelpButton, g<_____153.BMP| _____154.BMP<JumpId(DS.HLPï¿½DS3_Maintaining_Your_Remote_Sites)<<1} Maintaining Your Remote Sites

Viewing Site Logs

{ewc rhgbtn32.dll, BlueSkyHelpButton, g<RELAUP01.BMP|RELADN01.BMP<Klink(Maintenanceï¿½ ï¿½ ï¿½)<<1}

Each site will produce a log of synchronization activities similar to the log maintained at the central location.

To View a Remote Site's Maintenance Log:

1. On the computer containing the remote installation of TeleMagic, open Data Synchronization Server if it is not already open.

2. From the Data Synchronization Remote **Maintenance** menu, select **Log Maintenance**.

   The Log Maintenance dialog box will open.

3. Follow the guidelines in step 2 under To View the Log.

Continue…

{ewl rhgbtn32.dll, BlueSkyHelpButton, g<_____153.BMP|
_____154.BMP<JumpId(DS.HLPï¿½DS3_Remote_Site_Log_Maintenance_Report)<<1} Remote Site Log Maintenance Report

{ewl rhgbtn32.dll, BlueSkyHelpButton, g<_____153.BMP|
_____154.BMP<JumpId(DS.HLPï¿½DS3_Maintaining_Your_Central_Location)<<1} Maintaining Your Central Location

{ewl rhgbtn32.dll, BlueSkyHelpButton, g<_____153.BMP|
_____154.BMP<JumpId(DS.HLPï¿½DS3_Maintaining_Your_Remote_Sites)<<1} Maintaining Your Remote Sites

Remote Site Log Maintenance Report

{ewc rhgbtn32.dll, BlueSkyHelpButton, g<RELAUP01.BMP|RELADN01.BMP<Klink(Maintenanceï¿½ï¿½ ï¿½)<<1}

It is possible to print a report based on the information available at the Log Maintenance dialog box for your remote site. This report is identical to the Log Maintenance report available for your central location. Refer to the Log Maintenance Report topic.

Continue…

{ewl rhgbtn32.dll, BlueSkyHelpButton, g<_____153.BMP|
_____154.BMP<JumpId(DS.HLPï¿½DS3_Viewing_Site_Logs)<<1} Viewing Site Logs

{ewl rhgbtn32.dll, BlueSkyHelpButton, g<_____153.BMP|
_____154.BMP<JumpId(DS.HLPï¿½DS3_Maintaining_Your_Central_Location)<<1} Maintaining Your Central Location

{ewl rhgbtn32.dll, BlueSkyHelpButton, g<_____153.BMP|
_____154.BMP<JumpId(DS.HLPï¿½DS3_Maintaining_Your_Remote_Sites)<<1} Maintaining Your Remote Sites

Date Conversion

{ewc rhgbtn32.dll, BlueSkyHelpButton, g<RELAUP01.BMP|RELADN01.BMP<Klink(Maintenanceï¿½ ï¿½ ï¿½)<<1}

If you change the date format in use at the central installation, Data Synchronization Server provides a tool for quickly updating existing dates in memo and Last Revision fields to the new date. This will prevent potential sorting errors resulting from a mixture of date formats. For example, if your central site was previously using the format MM/DD/YY, then switches to DD/MM/YY, the date December 11, 1999 previously entered as 12/11/99 will now be read as November 12, 1999 and sorted accordingly.

Example:

If your central site was previously using the format MM/DD/YY, then switches to DD/MM/YY, the date December 11, 1999 previously entered as 12/11/99 would now be read as November 12, 1999 and sorted accordingly.

To prevent this, you can automatically change the existing dates at the central site to the new format using the Date Conversion feature.

●

To Perform Date Conversion:

●

1. On the computer containing the central installation of TeleMagic, open Data Synchronization Server if it is not already open.

2. From the Data Synchronization Server **Maintenance** menu, select **Date Conversion**.

   A Date Conversion - WARNING dialog box will open confirming that you have a complete backup before continuing.

3. If you do not have a backup, click **Continue**. You will be advised to make a backup before proceeding and the Date Conversion program will exit.

   or If you have a backup, type YES in the field and click **Continue** to proceed.

   The Choose Database dialog box will open.

4. Select a database to convert and click **Select**. (Only the databases that are selected for synchronization will be available on the list. If you have no databases selected for synchronization, you will be instructed to select a database before proceeding.)

   The Date Conversion dialog box will open.

5. If you want to replace all of the dates found in the Last Revision fields in the database with a date using the new date format, select `Update Last Revision Dates`. (Replacing the Last Revision dates allows you to ensure that all of your Last Revision fields will contain the same

date format. This is the equivalent of resetting the field.)

6. Enter the date to be used in the Last Revision fields. This will default to the current date.

7. If you would like to have all dates of a specified format that exist in memo fields changed to the new date format, select `Update Notepad Stamps`.

8. Click **Select Notepad Field(s)** to open a dialog box where you can select the fields to be converted. Add all fields that need to be converted and click **OK**.

9. Select the existing date format that should be converted from the drop-down box. (This is the date format that currently appears in the memo fields.)

   The new format to which these dates will be converted will be displayed to the right of the drop-down box. This is the format that is defined in Server Options. If this needs to be changed, do so before proceeding.

10. When satisfied with the settings, select **Process**.

    You will be asked to confirm notepad changes.

11. Select **Yes** to proceed.

    You will be prompted to preview converted notepads.

12. Select **Yes** and an example of what your notepads are going to look like will appear. You may select the next or previous record.

or Select **No** to continue without previewing changes.

13. If you selected to preview the notepads, select **Close** when you are finished viewing.

    You will be asked if the notepads are formatted correctly.

14. Select **Yes** to continue.

or Select **No** to go back to the main conversion screen and adjust your settings.

    If you selected **Yes**, the conversion will proceed. A status screen will display what fields are being converted. When complete, an OK dialog will appear.

15. Select **OK**.

    You will be returned to the Select Database dialog.

16. You may now convert any other databases that have not yet been converted.

or Close this screen.

WARNING!
Do not convert your notepad fields more than once. If you run the same conversion twice in the same

database, you may end up with duplicate stamps in the notepad.

Packet Transfer

{ewc rhgbtn32.dll, BlueSkyHelpButton, g<RELAUP01.BMP|RELADN01.BMP<Klink(Packet Transferï¿½ ï¿½ ï¿½)<<1}

Data Synchronization Server provides two methods of transferring packets between sites: FTP Transfer and TeleMagic Internet Mail. You also have the option of transferring packets manually, using your existing communications server, or any other method of file transfer.

The method of packet transfer used is set at the central, satellite and remote sites. At the central and satellite sites, you can also choose a different method of packet transfer for individual remote sites. For more information, see the Setting Transport Options for Individual Remote Sites topic.

FTP transfer is automated file transfer of your Data Synchronization packets via the Internet. It allows you to automatically establish an Internet connection and send outbox packets to an FTP site. You can also retrieve packets that have been sent from other sites to the FTP site and copy them to your inbox.

●

Setup of FTP transfer entails giving Data Synchronization Server information on establishing your connection to the Internet and the location of your FTP site. You can also establish how processing should occur for your servers and remote sites and exclude any remote sites that do not have Internet access from FTP transfer. Before you begin setup within Data Synchronization Server, you should set up the workstation(s) that will be used to transfer packets via FTP.

Data Synchronization Server allows you to attach packets to e-mail messages sent via TeleMagic Internet Mail. Once received, these packets are placed in a temporary holding area until the inbox is processed.

Setup of e-mail transfer entails giving Data Synchronization Server information on your Internet e-mail service. You can also establish how processing should occur for your servers and remote sites and exclude any remote sites that do not have Internet e-mail access.

{ewc rhgbtn32.dll, BlueSkyHelpButton, g<contup01.bmp| contdn01.BMP<JumpId(DS.HLPï¿½DS3_Packet_Transfer_Setup)<<1}

Packet Transfer Setup

{ewc rhgbtn32.dll, BlueSkyHelpButton, g<RELAUP01.BMP|RELADN01.BMP<Klink(Packet Transferï¿½ ï¿½ ï¿½)<<1}

If you have not already done so, you should establish an Internet connection from the workstation that will be used to perform packet transfer. It is recommended that you establish your Internet connection and test it external to Data Synchronization Server before attempting to use packet transfer.

[Packet Transfer Requirements](#)
[Selecting the Internet Connection](#)

Continue…

{ewl rhgbtn32.dll, BlueSkyHelpButton, g<_____153.BMP| _____154.BMP<JumpId(DS.HLPï¿½DS3_FTP_Site_Setup)<<1} [FTP Transfer](#)

{ewl rhgbtn32.dll, BlueSkyHelpButton, g<_____153.BMP| _____154.BMP<JumpId(DS.HLPï¿½DS3_FTP_Site_Setup)<<1} [E-mail Transfer](#)

Packet Transfer Requirements

{ewc rhgbtn32.dll, BlueSkyHelpButton, g<RELAUP01.BMP|RELADN01.BMP<Klink(Packet Transferï¿½ ï¿½ ï¿½)<<1}

Following are the system requirements for using packet transfer:

- The workstation used to perform packet transfer must be operating under Windows 95, Windows 98, or Windows NT.
- The workstation must have a modem attached.
- The workstation must have Internet access, either through Dial-Up Networking or a proxy server.
- If Dial-Up networking is used, the workstation must have a Dial-up Adapter driver and TCP/IP must be bound to the Dial-Up Adapter. This is done automatically when an Internet browser is installed. If you do not have an Internet browser, you may have to manually perform these steps. Contact your network administrator for details.

{ewc rhgbtn32.dll, BlueSkyHelpButton, g<contup01.bmp| contdn01.BMP<JumpId(DS.HLPï¿½DS3_Selecting_the_Internet_Connection)<<1}

Selecting the Internet Connection

{ewc rhgbtn32.dll, BlueSkyHelpButton, g<RELAUP01.BMP|RELADN01.BMP<Klink(Packet Transferï¿½ ï¿½ ï¿½)<<1}

Setup for the Internet connection is workstation specific. You must be at the workstation that will be used for packet transfer when performing these steps. If you will be using multiple workstations for packet transfer, you must repeat these steps on each.

To Select the Internet Connection:

1. From the Data Synchronization Server **Setup** menu, select **Transport Options…**.

    The Transport Options dialog box will open.

2. Click the **Connection** tab.

    The Connection page will open.

3. A proxy server is a workstation dedicated to providing Internet connectivity to other workstations on a network. If you want to use a proxy server, select the `Proxy Server` radio button.

*   **or** If you want to use a Dial-Up Networking connection to the Internet, select the `Dial Up Networking` radio button.

4. Select the Dial-Up Networking connection you want to use from the `Connection Name:` drop-down list.

5. In the `User Name:` field, enter the user name used with the connection selected in step 4.

6. In the `Password:` field, enter the password used with the connection selected in step 4.

*   **or** Leave this field blank if you want to be prompted for the password when DSS accesses the Internet.

7. If you entered a password in step 6, type it again in the Verify Password: field. If the two passwords do not match, you will be notified when you click **OK** and be returned to the Password: field to correct the error.

8. In the `Number of Retries:` field, enter the number of times DSS should attempt to connect to the Internet if it cannot get through on the first try.

9. Select `Terminate Connection When Idle` if you want DSS to disconnect from the Internet when it is not processing. DSS will reconnect each time it processes.

    or Unmark this check box if you want to remain on-line after processing.

10. When you are satisfied with your settings, click **OK**.

11. Repeat steps 1 through 10 on each workstation that will be used to transfer packets via FTP or TeleMagic Internet Mail.

Continue…

{ewl rhgbtn32.dll, BlueSkyHelpButton, g<_____153.BMP|
_____154.BMP<JumpId(DS.HLPï¿½DS3_FTP_Site_Setup)<<1} FTP Transfer

{ewl rhgbtn32.dll, BlueSkyHelpButton, g<_____153.BMP|
_____154.BMP<JumpId(DS.HLPï¿½DS3_FTP_Site_Setup)<<1} E-mail Transfer

FTP Transfer

{ewc rhgbtn32.dll, BlueSkyHelpButton, g<RELAUP01.BMP|RELADN01.BMP<Klink(Packet Transferï¿½ ï¿½ ï¿½)<<1}

FTP Site Setup
Central FTP Transfer Setup
Satellite FTP Transfer Setup
Remote FTP Transfer Setup

E-mail Transfer

{ewc rhgbtn32.dll, BlueSkyHelpButton, g<RELAUP01.BMP|RELADN01.BMP<Klink(Packet Transferï¿½ ï¿½ ï¿½)<<1}

Central E-mail Transfer Setup

Satellite E-mail Transfer Setup

Remote E-mail Transfer Setup

Transferring Packets via E-mail Using the Automation Server

FTP Site Setup

{ewc rhgbtn32.dll, BlueSkyHelpButton, g<RELAUP01.BMP|RELADN01.BMP<Klink(Packet Transferï¿½ ï¿½ ï¿½)<<1}

To use FTP transfer, you must have access to an FTP site. Within Data Synchronization Server, you will specify the location at the FTP site where DSS should place outgoing packets and retrieve incoming packets. You will need to set up the directories on your FTP site for packet storage and retrieval. You will need a minimum of two directories. One directory will contain outgoing packets from the central site. The remote sites will retrieve their packets from this directory. They in turn will place outgoing packets into a second directory from which the central site will retrieve its inbox packets:
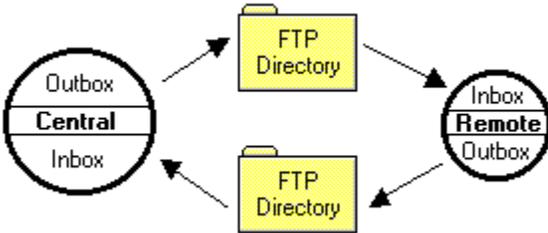
If you are using any satellite servers, you will need two additional FTP directories for each satellite's incoming and outgoing packets. The satellite server will reference the central's FTP directories when synchronizing with central, and will reference its FTP directories when synchronizing with its remotes:
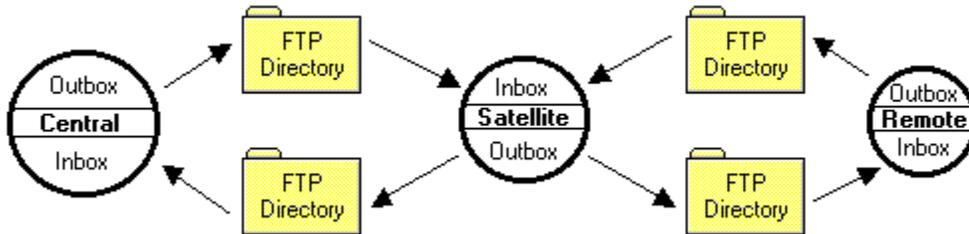
When creating your directories, give careful consideration to the naming scheme. Bear in mind that the outgoing directory for a server is the incoming directory for a remote, and vice versa. So, if you choose a name that refers to the directory as incoming or outgoing, be aware that the relationship will be reversed between the server and its remotes. Also remember that you will need a set of directories for *each* satellite office. Inside of Data Synchronization Server at each site you will point to the storage and retrieval locations for that site; make sure you have an easy way of keeping track of which directories are associated with which satellite.

●

It is highly recommended that you secure the area on the FTP server that will be used exclusively with Data Synchronization Server. Make note of your account and password as this information will need to be entered in Data Synchronization Server during FTP transfer setup.

{ewc rhgbtn32.dll, BlueSkyHelpButton, g<contup01.bmp| contdn01.BMP<JumpId(DS.HLPï¿½DS3_FTP_Transfer)<<1}

Central FTP Transfer Setup

{ewc rhgbtn32.dll, BlueSkyHelpButton, g<RELAUP01.BMP|RELADN01.BMP<Klink(Packet Transferï¿½ ï¿½ ï¿½)<<1}

To Set Up FTP Transfer at the Central Site:

●

1. From the Data Synchronization Server **Setup** menu, select **Transport Options…**.

   The Transport Options dialog box will open.

2. Select the `Transfer via FTP` radio button.

3. Click the **FTP Preferences** tab.

   The FTP Preferences page will open.

4. Enter the Internet address of your FTP site in the `FTP Host URL:` field. This is the path that DSS must use to locate the site. (For example: FTP.MYSITE.COM.)

5. Enter the User ID that you use to log onto the FTP site in the `FTP User ID:` field.

6. Enter the password that is used with the User ID entered in step 5 in the `FTP Password:` field.

7. Type the password entered in step 6 again in the `Verify FTP Password:` field. If the two entries do not match, you will be notified when you click **OK** and be returned to the `FTP Password:` field to correct the error.

●

8. In the `FTP Number of Retries:` field, enter the number of times DSS should attempt to access the FTP site if it is not successful on the first try.

9. In the `FTP Location to Store Files:` field, enter the location on the FTP site where DSS should post outgoing files that are in its outbox for its remote sites (including any satellites). This is the same location that the satellites and remote sites should use to retrieve files.

10. In the `FTP Location to Retrieve Files:` field, enter the location on the FTP site where DSS should look for files that have been posted from its satellites and remote sites. (These files will be transferred to the central's inbox.) All satellite sites and all remotes attached to the central site should be set up to store outgoing files in this location.

    Use the `After Files are Sent` radio buttons to control what happens to the original file after transfer.

11. Select `Backup Source Files` if you want to retain a

copy of the packets after they are transferred. When a file is transferred from the FTP site to the central's inbox, or from the central's outbox to the FTP site, a copy of the file will be retained in its original location. The copy will be renamed with a .BAK extension. This file will be overwritten with the new backup packet the next time a file is transferred. In this way, you will always have copies at the central of the most recent packets that were sent out, and copies on the FTP server of the most recent packets that were picked up for the central site.

or If you do not wish to retain copies of the packets that have been transferred, select `Delete Source Files.` This will move the packet to the appropriate place without retaining a copy in its original location.

12. When you are satisfied with your settings, click **OK**.

You will be returned to the Data Synchronization Server main screen.

13. Repeat steps 1 through 12 on each workstation that will be used to transfer packets via FTP.

{ewc rhgbtn32.dll, BlueSkyHelpButton, g<contup01.bmp| contdn01.BMP<JumpId(DS.HLPï¿½DS3_FTP_Transfer)<<1}

Satellite FTP Transfer Setup

{ewc rhgbtn32.dll, BlueSkyHelpButton, g<RELAUP01.BMP|RELADN01.BMP<Klink(Packet Transferï¿½ ï¿½ ï¿½)<<1}

When setting up FTP transfer, keep in mind that the satellite must synchronize with both the central site and its own remote sites. It is very important that the directories on the FTP server, which the satellite uses for packet transfer with the central, are not the same directories it uses with its remotes. If you have multiple satellites, it is also important that each has unique directories for file exchange with its remotes. Two servers should not upload or download files in the same directories.

To Set up FTP Transfer at the Satellite Site:

*

1. From the Data Synchronization Satellite **Setup** menu, select **Transport Options…**.

   The Transport Options dialog box will open.

*

2. From the `Configuration for Central` radio buttons, select `Transfer via FTP`.

3. From the `Global Configuration for Remotes` radio buttons, select `Transfer via FTP`.

4. Click the **FTP Preferences** tab.

   The FTP Preferences page will open.

5. Enter the Internet address of your FTP site in the `FTP Host URL:` field. This is the path that DSS must enter to locate the site. (For example: FTP.MYSITE.COM.)

6. Enter the User ID that you use to log onto the FTP site in the `FTP User ID:` field.

7. Enter the password that is used with the User ID entered in step 6 in the `FTP Password:` field.

8. Type the password entered in step 7 again in the `Verify FTP Password:` field. If the two entries do not match, you will be notified when you click **OK** and be returned to the `FTP Password:` field to correct the error.

*

9. In the `FTP Number of Retries:` field, enter the number of times DSS should attempt to access the FTP site before failing if it is unable to get access on the first try.

10. Click the **File Exchange with Central** button to define the directories on the FTP site where the satellite office should post and retrieve packets for synchronization with the central site.

11. In the `FTP Location to Store Files:` field, enter the location on the FTP site where DSS should post

outgoing files that are in its outbox for the central site. (Enter the location that has been established at the central site for file retrieval.)

12. In the `FTP Location to Retrieve Files:` field, enter the location on the FTP site where DSS should look for files that have been posted by the central site. Files in this directory will be transferred to the satellite's inbox. (Enter the location that has been established at the central site for posting files.)

13. Click **OK** to save these settings and return to the FTP Preferences page.

or Click **Cancel** to return to the FTP Preferences page without saving the changes.

14. Click the **File Exchange with Remotes** button to define the directories on the FTP site where the satellite office should post and retrieve packets for synchronization with its remote sites.

WARNING! Do not use the same directories that are being used by the central site or another satellite office. Each server must have its own directories that do not contain files for other servers.

15. In the `FTP Location to Store Files:` field, enter the location on the FTP site where DSS should post outgoing files that are in its outbox for its remote sites. This is the same location that the remote sites should use to retrieve files.

16. In the `FTP Location to Retrieve Files:` field, enter the location on the FTP site where DSS should look for files that have been posted by the remote sites. Files in this location will be transferred to the satellite's inbox. (All remote sites attached to this server should be set up to store outgoing files in this location.)

17. Click **OK** to save these settings and return to the FTP Preferences page.

or Click **Cancel** to return to the FTP Preferences page without saving the changes.

Use the `After files are sent` radio buttons to control what happens to the original file after transfer.

18. Select `Backup Source Files` if you want to retain a copy of the packets after they are transferred. When a file is transferred from the FTP site to the satellite's inbox, or from the satellite's outbox to the FTP site, a copy of the file will be retained in its original location. The copy will be renamed with a .BAK extension. This file will be overwritten with the new backup packet the next time a file is transferred. In this way, you will always have copies at the satellite of the most recent packets that

were sent out, and copies on the FTP server of the most recent packets that were picked up for the satellite site.

or   If you do not wish to retain copies of the packets that have been transferred, select Delete Source Files. This will move the packet to the appropriate place without retaining a copy in its original location.

19.   When you are satisfied with your settings, click **OK**.

You will be returned to the Data Synchronization Server – Satellite main screen.

20.   Repeat steps 1 through 19 on each workstation that will be used to transfer packets via FTP.

{ewc rhgbtn32.dll, BlueSkyHelpButton, g<contup01.bmp| contdn01.BMP<JumpId(DS.HLPï¿½DS3_FTP_Transfer)<<1}

Remote FTP Transfer Setup

{ewc rhgbtn32.dll, BlueSkyHelpButton, g<RELAUP01.BMP|RELADN01.BMP<Klink(Packet Transferï¿½ ï¿½ ï¿½)<<1}

It is important when setting up your remote sites for use with FTP transfer that you know to which installation of Data Synchronization Server the site is attached (the remote site's server). You must also know the locations on the FTP site that server uses for file storage and retrieval.

To Set up FTP Transfer at the Remote Site:

-

    1. From the Data Synchronization Remote **Setup** menu, select **Transport Options…**.

        The Transport Options dialog box will open.

-

    2. Select the `Transfer via FTP` radio button.

    3. Click the **FTP Preferences** tab.

        The FTP Preferences page will open.

    4. Enter the Internet address of your FTP site in the `FTP Host URL:` field. This is the path that DSS must enter to locate the FTP site. (For example: FTP.MYSITE.COM.)

    5. Enter the User ID that you use to log onto the FTP site in the `FTP User ID:` field.

    6. Enter the password that is used with the User ID entered in step 5 in the `FTP Password:` field.

    7. Type the password entered in step 6 again in the `Verify FTP Password:` field. If the two entries do not match, you will be notified when you click **OK** and be returned to the `FTP Password:` field to correct the error.

-

    8. In the `FTP Number of Retries:` field, enter the number of times DSS should attempt to access the FTP site before failing if it is unable to get access on the first try.

    9. In the `FTP Location to Store Files:` field, enter the location on the FTP site where DSS should post outgoing files that are in this site's outbox. (Enter the location that has been established at the site's server— either the central or a satellite server—for file retrieval.)

    10. In the `FTP Location to Retrieve Files:` field, enter the location on the FTP site where DSS should look for files that have been posted for this site from its server. files in this directory for this remote site will be transferred to the site's inbox. (Enter the location that has been established at the site's server for posting

files.)

Use the `After Files are Sent` radio buttons to control what happens to the original file after transfer.

11. Select `Backup Source Files` if you want to retain a copy of the packets after they are transferred. When a file is transferred from the FTP site to the remote's inbox, or from the remote's outbox to the FTP site, a copy of the file will be retained in its original location. The copy will be renamed with a .BAK extension. This file will be overwritten with the new backup packet the next time a file is transferred. In this way, you will always have copies at the remote of the most recent packets that were sent out, and copies on the FTP server of the most recent packets that were picked up for the remote site.

or If you do not wish to retain copies of the packets that have been transferred, select `Delete Source Files.` This will move the packet to the appropriate place without retaining a copy in its original location.

12. When you are satisfied with your settings, click **OK**.

You will be returned to the Data Synchronization Remote main screen.

13. Repeat steps 1 through 12 on each workstation that will be used to transfer packets via FTP.

{ewc rhgbtn32.dll, BlueSkyHelpButton, g<contup01.bmp|
contdn01.BMP<JumpId(DS.HLPï¿½DS3_FTP_Transfer)<<1}

Central E-mail Transfer Setup

{ewc rhgbtn32.dll, BlueSkyHelpButton, g<RELAUP01.BMP|RELADN01.BMP<Klink(Packet Transferï¿½ ï¿½ ï¿½)<<1}

To Set up E-mail Transfer at the Central Site:

There are several ways to connect to the Internet and exchange e-mail. Much of the information required in this procedure must be obtained from either your network administrator or from your Internet Service Provider.

●

1. From the Data Synchronization Server **Setup** menu, select **Transport Options…**.

   The Transport Options dialog box will open.

2. Select the `Transfer via E-mail` radio button.

3. Click the **E-mail Preferences** tab.

   The E-mail Preferences page will open.

4. Enter the outgoing mail server in the `SMTP Server:` field. This is the server which is used to send mail. (For example: SMTP.MYSITE.COM.) This information will be available from your network administrator or ISP.

Warning! Do not change the value in the `SMTP Port` field unless instructed to do so by the network administrator or your ISP's representative.

●

5. Enter the E-mail address to be used with this site in the `E-mail Address of This Site:` field.

6. Enter the incoming mail server in the `POP3 Server:` field. This is the server which is used to receive mail. (For example: POP.MYSITE.COM) This information will be available from your network administrator or ISP.

Warning! Do not change the value in the `POP3 Port` field unless instructed to do so by the network administrator or your ISP's representative.

7. Enter the user ID in the `User ID:` field. This is the ID used by the ISP to identify the mail customer.

8. Enter the password in the `Password:` field. This is the password used by the ISP to verify the identity of the mail customer.

9. Enter the password in the `Verify Password:` field. This password must match that entered in step 8. If the two passwords do not match, you will be notified when you click **OK** and be returned to the `Password:` field to

correct the error.

10. Mark the `Transfer E-mail using Automation Server` check box to use this option. If you are using this option, you must select the Automation Server queue from the drop-down list. For instructions on setting up the Automation Server to send and/or receive packets, see the [Transferring Packets via E-mail Using the Automation Server](#) topic.

    Use the `After Files are Sent` radio buttons to control what happens to the original file after transfer.

11. Select `Backup Source Files` if you want to retain a copy of the packets after they are transferred. When a file is transferred via e-mail, a copy of the file will be retained in the outbox directory. The copy will be renamed with a .BAK extension. This file will be overwritten with the new backup packet the next time a file is transferred. In this way, you will always have copies at the central of the most recent packets that were sent via e-mail.

or If you do not wish to retain copies of the packets that have been transferred, select `Delete Source Files`. This will send the packet without retaining a copy in the outbox.

12. When you are satisfied with your settings, click **OK**.

    You will be returned to the Data Synchronization Server main screen.

13. Repeat steps 1 through 12 on each workstation that will be used to transfer packets via TeleMagic Internet Mail.

{ewc rhgbtn32.dll, BlueSkyHelpButton, g<contup01.bmp|
contdn01.BMP<JumpId(DS.HLPï¿½DS3_E_Mail_Transfer)<<1}

Satellite E-mail Transfer Setup

{ewc rhgbtn32.dll, BlueSkyHelpButton, g<RELAUP01.BMP|RELADN01.BMP<Klink(Packet Transferï¿½ ï¿½ ï¿½)<<1}

To Set up E-mail Transfer at the Satellite Site:

There are several ways to connect to the Internet and exchange e-mail. Much of the information required in this procedure must be obtained from either your network administrator or from your Internet Service Provider.

●

1. From the Data Synchronization Server **Setup** menu, select **Transport Options…**.

   The Transport Options dialog box will open.

●

2. From the `Configuration for Central` radio buttons, select `Transfer via E-mail`.

3. From the `Global Configuration for Remotes` radio buttons, select `Transfer via E-mail`.

4. Click the **E-mail Preferences** tab.

   The E-mail Preferences page will open.

5. Enter the outgoing mail server in the `SMTP Server:` field. This is the server which is used to send mail. (For example: SMTP.MYSITE.COM.) This information will be available from your network administrator or ISP.

Warning! Do not change the value in the `SMTP Port` field unless instructed to do so by the network administrator or your ISP's representative.

●

6. Enter the E-mail address to be used with this site in the `E-mail Address of This Site:` field. This setting can be overwritten by the `E-mail Address` setting in Remote Site Maintenance at the central site.

7. Enter the incoming mail server in the `POP3 Server:` field. This is the server which is used to receive mail. (For example: POP.MYSITE.COM) This information will be available from your network administrator or ISP.

Warning! Do not change the value in the `POP3 Port` field unless instructed to do so by the network administrator or your ISP's representative.

8. Enter the user ID in the `User ID:` field. This is the ID used by the ISP to identify the mail customer.

9. Enter the password in the `Password:` field. This is the password used by the ISP to verify the identity of the mail

customer.

10. Enter the password in the `Verify Password:` field. This password must match that entered in step 8. If the two passwords do not match, you will be notified when you click **OK** and be returned to the `Password:` field to correct the error.

11. Under `E-mail Configuration for Central` mark the `Transfer E-mail using Automation Server` check box to use this option. If you are using this option, you must select the Automation Server queue from the drop-down list.

12. Under `Global E-mail Configuration for Remotes` mark the `Transfer E-mail using Automation Server` check box to use this option. If you are using this option, you must select the Automation Server queue from the drop-down list.

    Use the `After Files are Sent` radio buttons to control what happens to the original file after transfer.

13. Select `Backup Source Files` if you want to retain a copy of the packets after they are transferred. When a file is transferred via e-mail, a copy of the file will be retained in the outbox directory. The copy will be renamed with a .BAK extension. This file will be overwritten with the new backup packet the next time a file is transferred. In this way, you will always have copies at the central of the most recent packets that were sent via e-mail.

or If you do not wish to retain copies of the packets that have been transferred, select `Delete Source Files`. This will send the packet without retaining a copy in the outbox.

14. When you are satisfied with your settings, click **OK**.

    You will be returned to the Data Synchronization Server - Satellite main screen.

15. Repeat steps 1 through 14 on each workstation that will be used to transfer packets via TeleMagic Internet Mail.

{ewc rhgbtn32.dll, BlueSkyHelpButton, g<contup01.bmp|
contdn01.BMP<JumpId(DS.HLPï¿½DS3_E_Mail_Transfer)<<1}

Remote E-mail Transfer Setup

{ewc rhgbtn32.dll, BlueSkyHelpButton, g<RELAUP01.BMP|RELADN01.BMP<Klink(Packet Transferï¿½ ï¿½ ï¿½)<<1}

To Set up E-mail Transfer at the Remote Site:

There are several ways to connect to the Internet and exchange e-mail. Much of the information required in this procedure must be obtained from either your network administrator or from your Internet Service Provider.

*

1. From the Data Synchronization Server **Setup** menu, select **Transport Options…**.

   The Transport Options dialog box will open.

*

2. Select the `Transfer via E-mail` radio button.

3. Click the **E-mail Preferences** tab.

   The E-mail Preferences page will open.

4. Enter the outgoing mail server in the `SMTP Server:` field. This is the server which is used to send mail. (For example: SMTP.MYSITE.COM.) This information will be available from your network administrator or ISP.

Warning! Do not change the value in the `SMTP Port` field unless instructed to do so by the network administrator or your ISP's representative.

*

5. Enter the E-mail address to be used with this site in the `E-mail Address of This Site:` field.

6. Enter the incoming mail server in the `POP3 Server:` field. This is the server which is used to receive mail. (For example: POP.MYSITE.COM) This information will be available from your network administrator or ISP.

Warning! Do not change the value in the `POP3 Port` field unless instructed to do so by the network administrator or your ISP's representative.

7. Enter the user ID in the `User ID:` field. This is the ID used by the ISP to identify the mail customer.

8. Enter the password in the `Password:` field. This is the password used by the ISP to verify the identity of the mail customer.

9. Enter the password in the `Verify Password:` field. This password must match that entered in step 8. If the two passwords do not match, you will be notified when you click **OK** and be returned to the `Password:` field to

correct the error.

10. Mark the `Transfer E-mail using Automation Server` check box to use this option. If you are using this option, you must select the Automation Server queue from the drop-down list. For instructions on setting up the Automation Server to send and/or receive packets, see the [Transferring Packets via E-mail Using the Automation Server](#) topic.

Use the `After Files are Sent` radio buttons to control what happens to the original file after transfer.

11. Select `Backup Source Files` if you want to retain a copy of the packets after they are transferred. When a file is transferred via e-mail, a copy of the file will be retained in the outbox directory. The copy will be renamed with a .BAK extension. This file will be overwritten with the new backup packet the next time a file is transferred. In this way, you will always have copies at the central of the most recent packets that were sent via e-mail.

or If you do not wish to retain copies of the packets that have been transferred, select `Delete Source Files.` This will send the packet without retaining a copy in the outbox.

12. When you are satisfied with your settings, click **OK**.

You will be returned to the Data Synchronization Remote main screen.

13. Repeat steps 1 through 12 on each workstation that will be used to transfer packets via TeleMagic Internet Mail.

{ewc rhgbtn32.dll, BlueSkyHelpButton, g<contup01.bmp| contdn01.BMP<JumpId(DS.HLPï¿½DS3_E_Mail_Transfer)<<1}

Transferring Packets via E-mail Using the Automation Server

{ewc rhgbtn32.dll, BlueSkyHelpButton, g<RELAUP01.BMP|RELADN01.BMP<Klink(Packet Transferï¿½ ï¿½ ï¿½)<<1}

Using the Automation Server to handle the interchange of packets among your central, satellite, and remote sites can help to simplify your transportation procedure. The Automation Server can be used to send, receive, or both send and receive your packets.

Setting Up the Automation Server
Setting Up the Central Site
Setting Up a Satellite Site
Setting Up a Remote Site

{ewc rhgbtn32.dll, BlueSkyHelpButton, g<contup01.bmp| contdn01.BMP<JumpId(DS.HLPï¿½DS3_E_Mail_Transfer)<<1}

Setting Up the Automation Server

{ewc rhgbtn32.dll, BlueSkyHelpButton, g<RELAUP01.BMP|RELADN01.BMP<Klink(Packet Transferï¿½ ï¿½ ï¿½)<<1}

In order to use the Automation Server to transfer packets, the Automation Server must be set up at each site using this method. The setup procedure is the same for all sites. Perform this procedure at each site that will be using the Automation Server to transfer packets.

To Set Up the Automation Server to Transfer Packets:

1. Open the Automation Server.

2. Click **Configure**.

   The Modem Configuration dialog box will open.

3. Click the **E-mail** tab.

4. If you will be connecting through a local area network, select the `Connect through Local Area Network (LAN)` radio button and proceed to step 10.

   or Select the `Dial-up Networking` radio button.

5. Select the connection you will be using from the `Connection Name:` drop-down list.

6. Enter the User Name recognized by your ISP in the `User Name:` field.

7. Enter the Password required by your ISP in the `Password:` field.

8. Enter the password in the `Verify Password:` field. This password must match that entered in step 7. If the two passwords do not match, you will be notified when you click **OK** and be returned to the `Password:` field to correct the error.

9. The `Stay idle` field indicates the time, in minutes, that the Automation Server will remain connected to the Internet without any messages before logging off. Enter the time in the field, or use the spinner arrows to select the idle time.

10. Enter the SMTP server in the `SMTP Server` field. This is the server used for outgoing messages.

Warning! Do not change the setting in the `Port:` field unless specifically instructed to do so by your network administrator or ISP representative.

11. Click the **DSS E-mail** tab.

    The DSS E-mail page will open.

12. Enter the incoming mail server in the `POP3 Server:` field. This is the server which is used to receive mail. (For example: POP.MYSITE.COM) This information will be available from your network administrator or ISP.

Warning! Do not change the value in the `POP3 Port:` field unless instructed to do so by the network administrator or your ISP's representative.

13. Enter the user ID in the `User ID:` field. This is the ID used by the ISP to identify the mail customer.

14. Enter the password in the `Password:` field. This is the password used by the ISP to verify the identity of the mail customer.

15. Enter the password in the `Verify Password:` field. This password must match that entered in step 14. If the two passwords do not match, you will be notified when you click **OK** and be returned to the `Password:` field to correct the error.

16. Click **OK**.

    The Modem Configuration dialog box will close.

17. Click **Setup**.

    The Automation Server Setup dialog box will open.

18. Select the server that will be used to transfer your packets.

19. Click **Edit**.

    The Server Setup dialog box will open.

20. Click the **E-mail Specific Settings** tab.

    The E-mail Specific Settings page will open.

21. Choose one of the `Server Processes:` radio buttons. You can choose to `Send Only`, `Receive Only`, or `Both`. If you choose `None`, you will not transfer e-mail with this server.

22. If you chose any option in the preceding step other than `Send Only`, proceed to the next step.

or If you chose to `Send Only` with this server, proceed to step 26.

23. In the `Retrieve Mail Every:` field, enter how often the Automation Server should check for incoming mail, in minutes. Enter 0 to check continuously.

24. Select one of the `Retrieve the Following Types of E-mail:` radio buttons. You can select `DSS Only` or `Both`. If you select `User Only`, DSS e-mail will not

be retrieved.

25. Click **Save**.

The Server Setup dialog box will close.

26. Click **Close**.

The Automation Server Setup dialog box will close.

The Automation Server setup is complete. You can close the Automation Server now, but it is not required. Repeat this procedure for each site that will be using the Automation Server to transfer packets. Select from the following to set up Data Synchronization Server at each site. There is a separate setup procedure for central, satellite, and remote installations.

Continue…

{ewl rhgbtn32.dll, BlueSkyHelpButton, g<_____153.BMP|
_____154.BMP<JumpId(DS.HLPï¿½DS3_Setting_Up_the_Central_Site_to_Transfer_Packets_Using_t he_Automation_Server)<<1} <u>Setting Up the Central Site</u>

{ewl rhgbtn32.dll, BlueSkyHelpButton, g<_____153.BMP|
_____154.BMP<JumpId(DS.HLPï¿½DS3_Setting_Up_a_Satellite_Site_to_Transfer_Packets_Using_t he_Automation_Server)<<1} <u>Setting Up a Satellite Site</u>

{ewl rhgbtn32.dll, BlueSkyHelpButton, g<_____153.BMP|
_____154.BMP<JumpId(DS.HLPï¿½DS3_Setting_Up_a_Remote_Site_to_Transfer_Packets_Using_th e_Automation_Server)<<1} <u>Setting Up a Remote Site</u>

Setting Up the Central Site to Transfer Packets Using the Automation Server

{ewc rhgbtn32.dll, BlueSkyHelpButton, g<RELAUP01.BMP|RELADN01.BMP<Klink(Packet Transferï¿½ ï¿½ ï¿½)<<1}

There are several options available for setting up the Central site to use the Automation Server to transfer packets. You can use this method for all incoming and outgoing packets, only incoming, or only outgoing. You can use different methods for each site connected to the Central site.

You can select e-mail transfer via the Automation Server as your normal method of transport. As an alternative, you can choose another method and use the Automation Server for certain sites. For more information on choosing a different setting for individual sites, see the <u>Setting Transport Options for Individual Remote Sites</u> topic.

To Use Automation Server Transfer As the Global Option:

1. Open Data Synchronization Server at the central site.

2. From the **Setup** menu, select **Transport Options**.

    The Transport Options page will open.

3. On the Transport Method page, select the `Transfer via E-mail` radio button.

4. Click the **E-mail Preferences** tab.

5. Enter the incoming mail server in the `POP3 Server:` field. This is the server which is used to receive mail. (For example: POP.MYSITE.COM) This information will be available from your network administrator or ISP.

Warning! Do not change the value in the POP3 Port field unless instructed to do so by the network administrator or your ISP's representative.

6. Enter the user ID in the `User ID:` field. This is the ID used by the ISP to identify the mail customer.

7. Enter the password in the `Password:` field. This is the password used by the ISP to verify the identity of the mail customer.

8. Enter the password in the `Verify Password:` field. This password must match that entered in step 7. If the two passwords do not match, you will be notified when you click **OK** and be returned to the `Password:` field to correct the error.

9. Mark the `Transfer E-mail using Automation Server` check box.

10. From the drop-down list, select the Automation Server queue that will be used to transfer packets.

11. Choose an action to be taken after the files are sent,
    either `Backup Source Files` or `Delete Source
    Files.`

12. Click **OK**.

Continue…

{ewl rhgbtn32.dll, BlueSkyHelpButton, g<_____153.BMP|
_____154.BMP<JumpId(DS.HLPï¿½DS3_E_Mail_Transfer)<<1} E-mail Transfer

{ewl rhgbtn32.dll, BlueSkyHelpButton, g<_____153.BMP|
_____154.BMP<JumpId(DS.HLPï¿½DS3_Setting_Up_a_Satellite_Site_to_Transfer_Packets_Using_t
he_Automation_Server)<<1} Setting Up a Satellite Site

{ewl rhgbtn32.dll, BlueSkyHelpButton, g<_____153.BMP|
_____154.BMP<JumpId(DS.HLPï¿½DS3_Setting_Up_a_Remote_Site_to_Transfer_Packets_Using_th
e_Automation_Server)<<1} Setting Up a Remote Site

Setting Up a Satellite Site to Transfer Packets Using the Automation Server

{ewc rhgbtn32.dll, BlueSkyHelpButton, g<RELAUP01.BMP|RELADN01.BMP<Klink(Packet Transferï¿½ ï¿½ ï¿½)<<1}

There are several options available for setting up a satellite site to use the Automation Server to transfer packets. You can use this method for all incoming and outgoing packets, only incoming, or only outgoing. You can use different methods for each site connected to the satellite site.

You can select e-mail transfer via the Automation Server as your normal method of transport. As an alternative, you can choose another method and use the Automation Server for certain sites. For more information on choosing a different setting for individual sites, see the Setting Transport Options for Individual Remote Sites topic.

To Use Automation Server Transfer As the Global Option:

1. Open Data Synchronization Server at the satellite site.

2. From the **Setup** menu, select **Transport Options**.

    The Transport Options page will open.

3. On the Transport Method page, under `Global Configuration for Remotes,` select the `Transfer via E-mail` radio button if you will normally exchange packets with the remotes via e-mail.

or Select one of the other options for packet transfer with the remotes.

4. Under `Configuration for Satellite,` select the `Transfer via E-mail` radio button if you will normally exchange packets with the central site via e-mail.

5. Click the **E-mail Preferences** tab.

6. Enter the incoming mail server in the `POP3 Server:` field. This is the server which is used to receive mail. (For example: POP.MYSITE.COM) This information will be available from your network administrator or ISP.

Warning! Do not change the value in the POP3 Port field unless instructed to do so by the network administrator or your ISP's representative.

7. Enter the user ID in the `User ID:` field. This is the ID used by the ISP to identify the mail customer.

8. Enter the password in the `Password:` field. This is the password used by the ISP to verify the identity of the mail customer.

9. Enter the password in the `Verify Password:` field.

This password must match that entered in step 7. If the two passwords do not match, you will be notified when you click **OK** and be returned to the `Password:` field to correct the error.

10. If you will be exchanging packets with the central site via e-mail using the Automation Server, mark the first `Transfer E-mail using Automation Server` check box.

or Leave this check box unmarked and skip to step 12.

11. From the first drop-down list, select the Automation Server queue that will be used to exchange packets with the central site.

12. If you will be exchanging packets with the remotes via e-mail using the Automation Server, mark the second `Transfer E-mail using Automation Server` check box.

13. From the second drop-down list, select the Automation Server queue that will be used to exchange packets with the remotes.

14. Choose an action to be taken after the files are sent, either `Backup Source Files` or `Delete Source Files`.

15. Click **OK**.

Continue…

{ewl rhgbtn32.dll, BlueSkyHelpButton, g<_____153.BMP|
_____154.BMP<JumpId(DS.HLPï¿½DS3_E_Mail_Transfer)<<1} E-mail Transfer
{ewl rhgbtn32.dll, BlueSkyHelpButton, g<_____153.BMP|
_____154.BMP<JumpId(DS.HLPï¿½DS3_Setting_Up_the_Central_Site_to_Transfer_Packets_Using_t
he_Automation_Server)<<1} Setting Up the Central Site
{ewl rhgbtn32.dll, BlueSkyHelpButton, g<_____153.BMP|
_____154.BMP<JumpId(DS.HLPï¿½DS3_Setting_Up_a_Remote_Site_to_Transfer_Packets_Using_th
e_Automation_Server)<<1} Setting Up a Remote Site

Setting Up a Remote Site to Transfer Packets Using the Automation Server

{ewc rhgbtn32.dll, BlueSkyHelpButton, g<RELAUP01.BMP|RELADN01.BMP<Klink(Packet Transferï¿½ ï¿½ ï¿½)<<1}

To Use the Automation Server to Transfer Packets:

1. Open Data Synchronization Server at the remote site.

2. From the **Setup** menu, select **Transport Options**.

   The Transport Options page will open.

3. On the Transport Method page, select the `Transfer via E-mail` radio button.

4. Click the **E-mail Preferences** tab.

5. Enter the incoming mail server in the `POP3 Server:` field. This is the server which is used to receive mail. (For example: POP.MYSITE.COM) This information will be available from your network administrator or ISP.

Warning! Do not change the value in the POP3 Port field unless instructed to do so by the network administrator or your ISP's representative.

6. Enter the user ID in the `User ID:` field. This is the ID used by the ISP to identify the mail customer.

7. Enter the password in the `Password:` field. This is the password used by the ISP to verify the identity of the mail customer.

8. Enter the password in the `Verify Password:` field. This password must match that entered in step 7. If the two passwords do not match, you will be notified when you click **OK** and be returned to the `Password:` field to correct the error.

9. Mark the `Transfer E-mail using Automation Server` check box.

10. From the drop-down list, select the Automation Server queue that will be used to transfer packets.

11. Choose an action to be taken after the files are sent, either `Backup Source Files` or `Delete Source Files`.

12. Click **OK**.

Continue…

{ewl rhgbtn32.dll, BlueSkyHelpButton, g<_____153.BMP| _____154.BMP<JumpId(DS.HLPï¿½DS3_E_Mail_Transfer)<<1} E-mail Transfer

{ewl rhgbtn32.dll, BlueSkyHelpButton, g<_____153.BMP|_____154.BMP<JumpId(DS.HLPï¿½DS3_Setting_Up_the_Central_Site_to_Transfer_Packets_Using_the_Automation_Server)<<1} Setting Up the Central Site

{ewl rhgbtn32.dll, BlueSkyHelpButton, g<_____153.BMP|_____154.BMP<JumpId(DS.HLPï¿½DS3_Setting_Up_a_Satellite_Site_to_Transfer_Packets_Using_the_Automation_Server)<<1} Setting Up a Satellite Site

Setting Transport Options for Individual Remote Sites

{ewc rhgbtn32.dll, BlueSkyHelpButton, g<RELAUP01.BMP|RELADN01.BMP<Klink(Packet Transferï¿½ ï¿½ ï¿½)<<1}

At the central and satellite sites, you can set the method of packet transfer differently for individual remote sites. Use the following procedure when you would like to use a different method of packet transfer than that which is used globally (as configured in Transport Options).

If you will be transferring packets to and from a site using e-mail without the Automation Server, you will need to establish POP3 and SMTP settings at Data Synchronization Server. See the topic E-mail Transfer for more information. If you will be transferring a site's packets using the Automation Server, you will not need to establish SMTP settings in Data Synchronization Server. Also, if you will be transferring a site's packets using the Automation Server and both DSS and the Automation Server are on the same machine, you only need to establish POP3 settings on one or the other. If you will be using the Automation Server to transfer packets, you will need to establish SMTP settings on the Automation Server. You may need to establish POP3 settings. See the topic Setting Up the Automation Server for instructions on setting up the Automation Server.

To Use a Transport Method Other Than Global for a Site:

1. Open Data Synchronization Server at the central or satellite site associated with the remote site.

2. From the **Setup** menu, select **Site Maintenance**.

   The Site Maintenance dialog box will open.

3. Highlight the site that will be using the different method.

4. Click **Edit**.

5. Click **Site Preferences**.

   The Site Preferences dialog box will open.

6. Unmark the `Use Global Transport Configuration` check box.

7. Select the radio button corresponding to the transport method you want to use with this site:

   - `Manual`. Select this option if you are using some method of transfer other than e-mail or FTP transfer. For example, if you transfer your packets by copying them to diskette and mailing them to the site, use this option. You would also use this option if your remote sites are notebook computers which can be connected to your network when the user visits your central site.

   - `Transfer via FTP`. Select this option if you will be using your FTP site to transfer packets.

   - `Transfer via E-mail`. Select this option if you will be sending your packets via e-mail directly between sites.

   - `Transfer E-mail using the Automation`

`Server`. Select this option if you will be transferring packets via e-mail and you will be using the Automation Server to perform the actual transfer. If you select this option, you will need to select the Automation Server queue which will be used for the transfer from the drop-down list.

8. Click **OK**.

   You will be returned to the Remote Site Maintenance dialog box.

9. Click **Save**.

10. Click **Close**.

   You will be returned to the Data Synchronization Server main screen.

Continue…

{ewl rhgbtn32.dll, BlueSkyHelpButton, g<_____153.BMP|
_____154.BMP<JumpId(DS.HLPï¿½DS3_Packet_Transfer)<<1} Packet Transfer

{ewl rhgbtn32.dll, BlueSkyHelpButton, g<_____153.BMP|
_____154.BMP<JumpId(DS.HLPï¿½DS3_E_Mail_Transfer)<<1} Including Packet Transfer in Scripts

Including Packet Transfer in Scripts

{ewc rhgbtn32.dll, BlueSkyHelpButton, g<RELAUP01.BMP|RELADN01.BMP<Klink(Packet Transferï¿½ ï¿½ ï¿½)<<1}

To Include Packet Transfer Steps in a Script:

1. Open Data Synchronization Server at the remote site.

2. From the Data Synchronization Remote **Setup** menu, select **Script Setup**.

    The Scripting dialog box will open.

3. If you want to create a new script that incorporates file transfer, click **Add Script**.

or If you want to add steps for file transfer to an existing script, click **Change**.

    The Remote Script Setup dialog box will open.

4. Click **Add** to add a new step to the script.

    The right side of the dialog box will become active.

5. Enter a descriptive name for this step in the `Describe this step`: field.

6. Under `Run this step at`, choose one of the following options:

    • `Absolute Time` allows you to set a time for the step to begin in 12-hour format, followed by an "a" for a.m. or a "p" for p.m. (If you enter a time in 24-hour format, it will be translated into 12-hour format.)

    • `Relative Time` allows you to set the time in minutes for this step to begin, relative to the time established for the previous step (or to launching the script if this is the first step).

7. Under `and do the following`, choose one of the following file transfer options:

    • Select `Send Packet Via FTP` if you would like DSS to post any existing outbox packet to the FTP site. (Consider using this step after the outbox has been processed.)

    • Select `Retrieve Packet Via FTP` if you would like DSS to retrieve any incoming packet that has been posted on the FTP server for this site. (Consider using this step before processing the inbox.)

    • Select `Send/Retrieve Via FTP` if you would like DSS to retrieve any incoming packet on the FTP server for the site then post any existing outbox packet.

8. Select **Save** to save this step.

9. Repeat steps 4 through 8 if you want to include another file transfer step in the script.

   The new step(s) will appear at the bottom of the list of steps on the left side of this dialog box.

10. If necessary, use the mover boxes to the left of each step to set the order in which they should be executed when the script is launched.

11. When you are satisfied with your script, click **Save Script**.

Continue…

{ewl rhgbtn32.dll, BlueSkyHelpButton, g<_____153.BMP|
_____154.BMP<JumpId(DS.HLPï¿½DS3_Packet_Transfer)<<1} Packet Transfer
{ewl rhgbtn32.dll, BlueSkyHelpButton, g<_____153.BMP|
_____154.BMP<JumpId(DS.HLPï¿½DS3_Script_Maintenance)<<1} Script Maintenance

Troubleshooting Packet Transfer

{ewc rhgbtn32.dll, BlueSkyHelpButton, g<RELAUP01.BMP|RELADN01.BMP<Klink(Packet Transferï¿½ ï¿½ ï¿½)<<1}

FTP and E-mail in the Maintenance Log and Report
Troubleshooting Tips

FTP and E-mail in the Maintenance Log and Report

{ewc rhgbtn32.dll, BlueSkyHelpButton, g<RELAUP01.BMP|RELADN01.BMP<Klink(Packet Transferï¿½ ï¿½ ï¿½)<<1}

If you are using packet transfer, FTP and E-mail transfer information will be included in your Maintenance Log and in the Maintenance Log Report.

To View FTP and/or E-mail Logs:

1. From the Data Synchronization Server **Maintenance** menu, select **Log Maintenance**.

   The Log Maintenance screen will open.

2. Click **Filter**.

   The Log Filter dialog box will open.

   This dialog box gives you the option of viewing logs for the inbox only, the outbox only, FTP only, E-mail only, or all logs.

3. To view FTP and/or E-mail packet transfer data in your log:

   - Select `FTP Only` if you do not want to include inbox, outbox, or e-mail information in the log. The log will only include FTP transfer.
   - Select `E-mail Only` if you do not want to include inbox, outbox, or FTP information in the log. The log will only include e-mail transfer.
   - Select `All` if you would like to view FTP and e-mail data, as well as information from your inbox and outbox.

4. Make any other filter selections and click **OK**. (If you are unfamiliar with the other options on this dialog box, click **Help** for instructions.)

   The information selected will be included in the log.

To Report on FTP Data:

1. From the Data Synchronization Server **Maintenance** menu, select **Log Maintenance**.

   The Log Maintenance screen will open.

2. Click **Reports**.

   The Log Maintenance Report screen will open.

   This report gives you the option of including information from the inbox only, the outbox only, FTP only, E-mail only, or all data.

3. To report on FTP and/or E-mail packet transfer:

- Select `FTP Sessions Only` if you do not want to include inbox, outbox, or e-mail information in the report. The report will only include FTP transfer.
- Select `E-mail Only` if you do not want to include inbox, outbox, or FTP information in the report. The report will only include e-mail transfer.
- Select `All` if you would like to report on FTP and e-mail data, as well as information from your inbox and outbox.

4. Make any other necessary report selections. (If you are unfamiliar with this report, click **Help** for further instructions.)

5. When satisfied with your selections, click **Print**.

   The information selected will be included in the log.

{ewc rhgbtn32.dll, BlueSkyHelpButton, g<contup01.bmp|
contdn01.BMP<JumpId(DS.HLPï¿½DS3_Troubleshooting_Tips)<<1}

Troubleshooting Tips

{ewc rhgbtn32.dll, BlueSkyHelpButton, g<RELAUP01.BMP|RELADN01.BMP<Klink(Packet Transferï¿½ ï¿½ ï¿½)<<1}

You will not be able to transfer template packets through FTP or TeleMagic Internet Mail. If you are using template packets, you must continue to transfer them manually.

If you receive a message that DSS is unable to locate the TM.INI or DS2.INI   file, a file that is required to run TeleMagic or Data Synchronization Server is not accessible. The TM.INI file should exist in the \PROGRAMS directory, and the DS2.INI file should exist in the \TMSYNC directory (located off the main directory). Make sure those files exist and that you have network security rights to those directories, as well as network access from the current workstation.

If a packet is not generated for a site, verify that at least one database and one user has been added to the remote site at the central or satellite that serves the remote. Note that there is no error message generated if this occurs. To add users to a site, open the **Setup** menu and select **User Maintenance**. Select the site from the list and click **Add**. Enter the users ID and name. To add a database for synchronization, open the **Setup** menu and select **Databases to Synchronize**. Select the database(s) from the list of databases available.

If you have selected to perform continuous processing and it exits after one time, there is an error in the file that contains the DSS configuration settings. DSS writes your configuration settings to a file. If the information on your selection for continuous processing is not found, it will default to processing one time then exiting. Access Data Synchronization Server Transport Options from the **Setup** menu. Correct the setting and click **OK**.

If you receive an error that DSS is not able to access the local inbox or outbox, there is a problem with the path to your inbox or outbox that has been set up in Data Synchronization Server. (These are the directories on your local PC or network that Data Synchronization Server uses to process inbox and outbox packets.) Make sure that you have selected a valid path and that you have network access to that location from the current workstation. The user currently logged onto the network should also have security access to that path.

If you fail to make the Internet or FTP connection after the specified number of retries, a message will appear in the status bar. If you are processing continuously, DSS will go idle and attempt to connect again the next time it processes. If you are processing one time only, you will be informed that the connection could not be made and DSS will exit.

If you have entered an invalid password in Transport Options, a password prompt will appear. Enter the correct password to continue. Access Data Synchronization Server Transport Options from the **Setup** menu to correct the password.

If you receive a message that DSS cannot write to or transfer from the FTP site, there is a problem with the path that has been entered for the storage or retrieval directory on the FTP site. Access Data Synchronization Server Transport Options from the **Setup** menu. Correct the FTP directory path and click **OK**. It is also possible that you do not have rights to the directory on the FTP site, the directory on the FTP site does not exist, or that the connection was lost.

If you receive a message that DSS cannot get the file list, there is a problem in communicating with the FTP site. Before file transfer can occur, the DSS must retrieve a list of the files that are in the target directory on the FTP site. If it is unable to get this list, file transfer will not proceed. A message will appear in the status line informing you of this fact. If you are processing continuously, DSS will go idle and attempt it again the next time it processes. If you are processing one time, a message will appear informing you that file transfer was not successful.

If the packet already exists on the FTP site, the file will not be transferred. If you are uploading to the FTP site, any packet from this site already existing in the target FTP directory must be retrieved by the appropriate site before a new packet for that site can be uploaded.

You may receive a message that the file sizes do not match. As a safeguard to verify that the packet was not damaged during transfer, DSS verifies that the final file size matches the original file size. If there is a

discrepancy, the transferred file will be deleted. You should perform the file transfer again.

If there is no packet to transfer, you will be informed of this fact in the Maintenance Log.

If DSS is unable to gain exclusive use of a packet, you will receive a message in the status bar informing you of this fact. If you are processing continuously, DSS will go idle and attempt to access the file again the next time it processes. If you are processing one time only, a message will appear informing you that the packet could not be accessed and DSS will exit.

It is highly recommended that the following settings only be adjusted by a system administrator.

If you receive a "Connect To" dialog when initiating FTP Transfer, access Control Panel's Internet Properties. Select the **Connection** tab and unmark the `Connect to the Internet as needed` check box.

You may receive the following message:

> You are currently using NetWare servers which will be inaccessible if you establish this connection.

Novell networks use the IPX/SPX protocol to allow you to access your network over the Internet. The problem with this is that if it is used when dialing out, it leaves your network accessible to unauthorized users over the Internet. To account for this, when you dial out with the IPX/SPX protocol in place, the NetWare servers are made inaccessible to block unauthorized access.

You will most likely continue to need access to your network when dialing with DSS. If you receive this message, use the following steps to exclude the IPX/SPX protocol from your Dial-Up connection:

1. Access Dial-Up Networking (located in the My Computer and Accessories folders).

2. Find the connection selected for use with the Packet Transfer in the list of available connections.

3. Right click on the connection to open the menu and select **Properties**.

4. On the properties screen, click the **Server Type...** button.

5. At the Server Types screen, unmark the `IPX/SPX Compatible` check box and click **OK**.

6. Click **OK** again at the properties screen.

You also have the option of totally removing the IPX/SPX bind to the Dial-Up adapter from the Network screen in the Control Panel. Be aware that if IPX/SPX is removed from the bindings for the Dial-up Adapter in Network Setup, no modem connections will be able to use it.

{ewc rhgbtn32.dll, BlueSkyHelpButton, g<contup01.bmp|
contdn01.BMP<JumpId(DS.HLPï¿½DS3_FTP_in_the_Maintenance_Log_and_Report)<<1}

What are Satellite Sites?

{ewc rhgbtn32.dll, BlueSkyHelpButton, g<RELAUP01.BMP|RELADN01.BMP<Klink(Satelliteï¿½ ï¿½ ï¿½)<<1}

The satellite feature allows one installation of TeleMagic to be both a server and a remote. In a standard synchronization model, there is one central site. Additional installations of TeleMagic share information with each other through that site:
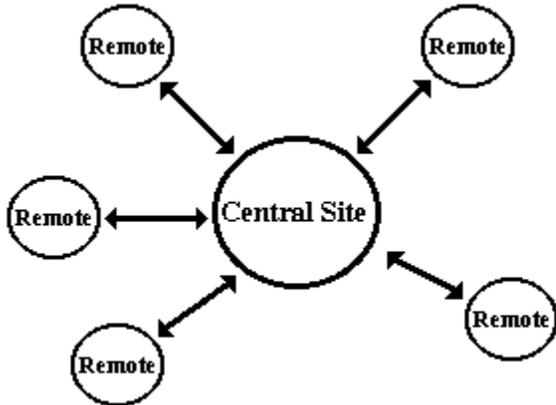
The central site maintains total control over the information that is sent to each remote, and over the information that each remote sends back to the central.

Satellite sites are similar to remote sites in the way that they communicate with the central site, its remote sites, and other satellite sites. The central site continues to maintain control over the information that it sends to the satellite site and the information that the satellite site sends back to it. The central views and treats the satellite just like any of its other remote sites. The same limits that are placed on remote sites are also placed on satellite sites when they are synchronizing with the central.

The only difference is that satellite sites have their own remote sites. These remote sites do not communicate directly with the central site. They view the satellite site as their central installation. It becomes a satellite server for its remote sites:
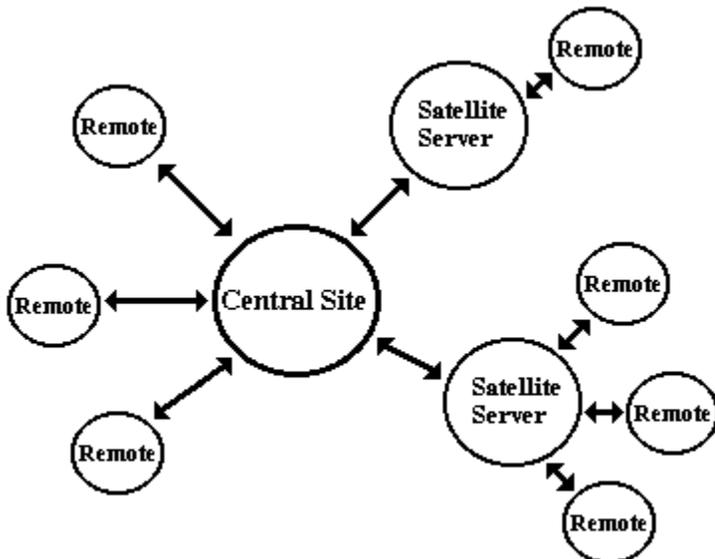
The central site has no control over the information that is synchronized between a satellite server and its remote sites. This is controlled at the satellite server. This information may or may not be included in synchronization with the central site. For example, the central site may be set up to synchronize only

the Company/Contact database with the satellite server. The satellite server may synchronize the Company/Contact database with one of its remotes, and the TeleMagic DOS Style Database with a second remote. Changes from the first remote to the Company/Contact database will be synchronized back to the satellite server and then to the central site. Changes from the second remote to the TeleMagic DOS Style Database will be synchronized back to the satellite server, but will not be synchronized to the central site.

When setting up your satellite sites, it is helpful to remember that a satellite behaves exactly like a remote in relation to the central site, and like a server in relation to its remotes. In most respects, the central site will view a satellite just like any of its other remotes. When performing general setup at the satellite site, most of the settings you make (such as selecting databases, establishing field rules, etc.) will only apply during synchronization with the satellite's remotes. Setup options that are not available at remote sites will generally not be applied when the satellite synchronizes with the central.

Continue…

{ewl rhgbtn32.dll, BlueSkyHelpButton, g<_____153.BMP|
_____154.BMP<JumpId(DS.HLPï¿½DS3_Satellite_Setup_Steps)<<1} Satellite Setup Steps

{ewl rhgbtn32.dll, BlueSkyHelpButton, g<_____153.BMP|
_____154.BMP<JumpId(DS.HLPï¿½DS3_Installation_of_the_Satellite_Server)<<1} Installation of the Satellite Server

{ewl rhgbtn32.dll, BlueSkyHelpButton, g<_____153.BMP|
_____154.BMP<JumpId(DS.HLPï¿½DS3_Marking_a_Site_as_a_Satellite)<<1} Marking a Site as a Satellite

{ewl rhgbtn32.dll, BlueSkyHelpButton, g<_____153.BMP|
_____154.BMP<JumpId(DS.HLPï¿½DS3_Converting_Remotes_to_Satellites)<<1} Converting Remotes to Satellites

{ewl rhgbtn32.dll, BlueSkyHelpButton, g<_____153.BMP|
_____154.BMP<JumpId(DS.HLPï¿½DS3_Adding_Remote_Sites_to_the_Satellite)<<1} Adding Remote Sites to the Satellite

{ewl rhgbtn32.dll, BlueSkyHelpButton, g<_____153.BMP|
_____154.BMP<JumpId(DS.HLPï¿½DS3_Attaching_and_Detaching_Remote_Sites)<<1} Attaching and Detaching Remote Sites

Satellite Setup Steps

{ewc rhgbtn32.dll, BlueSkyHelpButton, g<RELAUP01.BMP|RELADN01.BMP<Klink(Satelliteï¿½ ï¿½ ï¿½)<<1}

Setting up the satellite site is very similar to setting up the central site. Just as setup at the central site includes creating server settings and specifying what information should be synchronized with the central's remote sites, setup at the satellite includes server setup and specifying what information should be synchronized with the satellite's remote sites. There are only a few special setup requirements that are not issues at the central site.

Use the following steps when setting up your satellite site:

1) Install the satellite server on the installation of TeleMagic that will be your satellite site. If you have previously been using Data Synchronization Server, you may want to upgrade an existing remote to a satellite. You have the option of converting remotes to satellites, or creating new installations as your satellites.

2) Set up synchronization with your central site. It is very possible that the satellite office will need to synchronize with its remote sites more frequently than it synchronizes with the central site. Data Synchronization Server accommodates this by allowing you to specify when and how the central is synchronized.

3) Add your remote sites. If this is a new installation of TeleMagic, you will simply need to add remote sites at the satellite site. If this is an installation that was in use prior to the introduction of satellites, you may need to move remotes from the central to the satellite.

4) Synchronize once with the central office to verify your Site IDs. This informs the central site of the remotes you have added at the satellite and verifies that there are no conflicts with existing remotes.

Continue…

{ewl rhgbtn32.dll, BlueSkyHelpButton, g<_____153.BMP|
_____154.BMP<JumpId(DS.HLPï¿½DS3_What_are_Satellite_Offices)<<1} What are Satellite Offices?

{ewl rhgbtn32.dll, BlueSkyHelpButton, g<_____153.BMP|
_____154.BMP<JumpId(DS.HLPï¿½DS3_Installation_of_the_Satellite_Server)<<1} Installation of the Satellite Server

{ewl rhgbtn32.dll, BlueSkyHelpButton, g<_____153.BMP|
_____154.BMP<JumpId(DS.HLPï¿½DS3_Marking_a_Site_as_a_Satellite)<<1} Marking a Site as a Satellite

{ewl rhgbtn32.dll, BlueSkyHelpButton, g<_____153.BMP|
_____154.BMP<JumpId(DS.HLPï¿½DS3_Converting_Remotes_to_Satellites)<<1} Converting Remotes to Satellites

{ewl rhgbtn32.dll, BlueSkyHelpButton, g<_____153.BMP|
_____154.BMP<JumpId(DS.HLPï¿½DS3_Adding_Remote_Sites_to_the_Satellite)<<1} Adding Remote Sites to the Satellite

{ewl rhgbtn32.dll, BlueSkyHelpButton, g<_____153.BMP|
_____154.BMP<JumpId(DS.HLPï¿½DS3_Attaching_and_Detaching_Remote_Sites)<<1} Attaching and Detaching Remote Sites

Installation of the Satellite Server

{ewc rhgbtn32.dll, BlueSkyHelpButton, g<RELAUP01.BMP|RELADN01.BMP<Klink(Satelliteï¿½ ï¿½ ï¿½)<<1}

You may install the satellite server on any installation of TeleMagic V4 or later that has not already been installed as a central site. You can either perform first time installation as a satellite, or upgrade an existing remote to a satellite.

To Install the Satellite Server:

1. On the PC or network containing the installation of TeleMagic Enterprise V4 that you will be using as your satellite installation, make a note of the path to your TeleMagic installation and the Windows Program Folder containing your TeleMagic icons.

2. Insert the installation CD-ROM in your CD-ROM drive.

3. The setup program will launch.

or If the setup program does not automatically launch under your workstation configuration in Windows, select **Start**, **Run** from the Taskbar to open the Run dialog box. In the Open: field type D:\SETUP.EXE (where D: is the drive letter of your CD-ROM drive) and click **OK**.

The TeleMagic Setup screen will open.

4. Click the **Install/Upgrade TeleMagic Data Synchronization** button.

The Welcome screen will open.

5. Carefully read the Welcome screen and follow any instructions given, then click **Next>**.

The Select Data Synchronization Type screen will open.

6. Select the `TeleMagic DSS Satellite` radio button and click **Next >**.

The Choose Destination Location screen will open.

7. Enter the TeleMagic root directory (the main directory where your TeleMagic files are stored) in the field, or click **Browse...** to locate the directory from a Choose Directory dialog box. When you have selected the directory, click **Next >**.

A screen will appear showing the default TeleMagic Enterprise Program Group to hold the Data Synchronization Server icons.

8. Click **Next >** to accept this Program Folder/Group.

or If this is not the correct Program Folder/Group, select the correct Program Folder/Group containing your TeleMagic icons from the Existing Folders list. When you are

satisfied with your selection, click **Next >**.

or Enter the name of a new Program Folder/Group and it will be created. When you are satisfied with your selection, click **Next >**.

A screen will appear showing all of the current settings that you have selected for this installation.

9. Click **Next >** to accept these settings and continue with the installation.

or Click **< Back** to review and change any of the settings. If you use **< Back** to review or change any options, use **Next >** to return to this step and continue with the installation.

When you click **Next >** the installation program will start and copy the appropriate files for this installation.

After the files have been copied, a new screen will appear to inform you that the installation has been completed and that the Data Synchronization Server conversion is ready to convert your TeleMagic files for use with Data Synchronization Server.

10. Click **Finish**.

The conversion will proceed and a System ID Change dialog box will appear.

When the satellite site is added at the central site, it is assigned a Site ID. As soon as a packet is transferred to the satellite site from the central, that Site ID will be given to the satellite. This will overwrite the satellite's current System ID if it is different. If you will be adding records at the satellite before you synchronize for the first time with the central, you should make sure that the site's System ID matches the Site ID that was assigned at central.

11. Enter the Site ID that was assigned at the central in the New System ID field and click **OK**.

or If you do not know the Site ID that was assigned at central, *and you will not be adding records at the satellite before you perform synchronization with the central*, click **OK** without changing the System ID.

WARNING!

If you will be adding records, you should contact the Data Synchronization Server administrator at the central site and get the Site ID that was assigned to this satellite. If you do not, the site's System ID may be a duplicate with an existing Site ID. Adding records in this instance will result in duplicate Contact IDs. See the first bullet under <u>Obtaining Site Verification</u> for more information.

The conversion process will continue. After the conversion program has stopped you will see a message that the conversion was successful and the installation is complete.

12. Click **OK**.

The installation program will return you to the TeleMagic Setup screen.

13. Click **Exit**.

Continue…

{ewl rhgbtn32.dll, BlueSkyHelpButton, g<_____153.BMP|
_____154.BMP<JumpId(DS.HLPï¿½DS3_What_are_Satellite_Offices)<<1} What are Satellite Offices?

{ewl rhgbtn32.dll, BlueSkyHelpButton, g<_____153.BMP|
_____154.BMP<JumpId(DS.HLPï¿½DS3_Satellite_Setup_Steps)<<1} Satellite Setup Steps

{ewl rhgbtn32.dll, BlueSkyHelpButton, g<_____153.BMP|
_____154.BMP<JumpId(DS.HLPï¿½DS3_Marking_a_Site_as_a_Satellite)<<1} Marking a Site as a Satellite

{ewl rhgbtn32.dll, BlueSkyHelpButton, g<_____153.BMP|
_____154.BMP<JumpId(DS.HLPï¿½DS3_Converting_Remotes_to_Satellites)<<1} Converting Remotes to Satellites

{ewl rhgbtn32.dll, BlueSkyHelpButton, g<_____153.BMP|
_____154.BMP<JumpId(DS.HLPï¿½DS3_Adding_Remote_Sites_to_the_Satellite)<<1} Adding Remote Sites to the Satellite

{ewl rhgbtn32.dll, BlueSkyHelpButton, g<_____153.BMP|
_____154.BMP<JumpId(DS.HLPï¿½DS3_Attaching_and_Detaching_Remote_Sites)<<1} Attaching and Detaching Remote Sites

Marking a Site as a Satellite

{ewc rhgbtn32.dll, BlueSkyHelpButton, g<RELAUP01.BMP|RELADN01.BMP<Klink(Satelliteï¿½ ï¿½ ï¿½)<<1}

Although the central site does not communicate directly with a satellite's remote sites, it does need to be aware of those sites when synchronizing activities and e-mail. Users who reside at a satellite server's remote site will be included in the central user list and will be able to receive activities and e-mail from the central site, its remotes, other satellites, and their remotes. Additionally, the central site maintains a list of all sites with their Site IDs and serial numbers to avoid conflicts among the remotes. For these reasons, the central site needs to know which of its remotes are satellite sites.

Setup of a satellite server at the central site is simply a matter of marking one check box.

To Set up a Satellite at the Central Site:

1. Open Data Synchronization Server at the Central Site.

2. From the Data Synchronization Server **Setup** menu, select **Site Maintenance**.

   The Remote Site Maintenance dialog box will open.

3. Add a new remote site following the instructions in the Setting Up Your Sites topic.

- **or** Highlight an existing site and click **Edit**.

4. Click Site preferences.

   The Site Preferences dialog box will open.

- 5. Mark the `This site is a Satellite Server` check box.

6. Click **OK** to save the Site Preferences.

7. Click **OK** to save the site.

Continue…

{ewl rhgbtn32.dll, BlueSkyHelpButton, g<_____153.BMP|
_____154.BMP<JumpId(DS.HLPï¿½DS3_What_are_Satellite_Offices)<<1} What are Satellite Offices?

{ewl rhgbtn32.dll, BlueSkyHelpButton, g<_____153.BMP|
_____154.BMP<JumpId(DS.HLPï¿½DS3_Satellite_Setup_Steps)<<1} Satellite Setup Steps

{ewl rhgbtn32.dll, BlueSkyHelpButton, g<_____153.BMP|
_____154.BMP<JumpId(DS.HLPï¿½DS3_Installation_of_the_Satellite_Server)<<1} Installation of the Satellite Server

{ewl rhgbtn32.dll, BlueSkyHelpButton, g<_____153.BMP|
_____154.BMP<JumpId(DS.HLPï¿½DS3_Converting_Remotes_to_Satellites)<<1} Converting Remotes to Satellites

{ewl rhgbtn32.dll, BlueSkyHelpButton, g<_____153.BMP|
_____154.BMP<JumpId(DS.HLPï¿½DS3_Setting_up_Synchronization_with_the_Central_Site)<<1} Setting up Synchronization with the Central Site

{ewl rhgbtn32.dll, BlueSkyHelpButton, g<_____153.BMP|
_____154.BMP<JumpId(DS.HLPï¿½DS3_Adding_Remote_Sites_to_the_Satellite)<<1} Adding Remote Sites to the Satellite

{ewl rhgbtn32.dll, BlueSkyHelpButton, g<_____153.BMP|

_____154.BMP<JumpId(DS.HLPï¿½DS3_Attaching_and_Detaching_Remote_Sites)<<1} Attaching and Detaching Remote Sites

Converting Remotes to Satellites

{ewc rhgbtn32.dll, BlueSkyHelpButton, g<RELAUP01.BMP|RELADN01.BMP<Klink(Satelliteï¿½ ï¿½ ï¿½)<<1}

If you have an existing remote installation of TeleMagic that you would like to use as a satellite, you can perform a conversion to change the remote to a satellite.

To Convert a Remote Site to a Satellite Server:

WARNING!

If you convert a remote to a satellite, you will not be able to convert it back to a remote.

You may only convert remotes that are attached to the central server. If you would like to convert a remote that is currently attached to another satellite, you must first detach it from its current server and reattach it at the central. For more information on attaching and detaching sites, see the Attaching and Detaching Remote Sites topic.

1. Insert the installation CD-ROM in your CD-ROM drive.

2. The setup program will launch.

or If the setup program does not automatically launch under your workstation configuration in Windows, select **Start**, **Run** from the taskbar to open the Run dialog box. In the Open: field type D:\SETUP.EXE (where D: is the drive letter of your CD-ROM drive) and click **OK**.

 The TeleMagic Setup screen will open.

3. Click the **Install/Upgrade TeleMagic Data Synchronization** button.

 The Welcome screen will open.

4. Carefully read the Welcome screen and follow any instructions given, then click **Next>**.

 The Select Data Synchronization Type screen will open.

5. Select the Convert an Existing Remote to a Satellite radio button and click **Next>**.

 The Choose Destination Location screen will open.

6. Enter the TeleMagic global directory (the main directory where your TeleMagic files are stored) in the field, or click **Browse...** to locate the directory from a Choose Directory dialog box. When you have selected the directory, click **Next >**.

 A screen will appear showing the default TeleMagic For Windows Program Folder (Group) to hold the Data Synchronization Server icons.

7. Click **Next >** to accept this Program Folder/Group.

or If this is not the correct Program Folder/Group, select the correct Program Folder/Group containing your TeleMagic

icons from the Existing Folders list. When you are satisfied with your selection, click **Next >**.

or   Enter the name of a new Program Folder/Group and it will be created. When you are satisfied with your selection, click **Next >**.

A screen will appear showing all of the current settings that you have selected for this installation.

8.   Click **Next >** to accept these settings and continue with the installation.

or   Click **< Back** to review and change any of the settings. If you use **< Back** to review or change any options, use **Next >** to return to this step and continue with the installation.

When you click **Next >** the installation program will start and copy the appropriate files to convert this remote to a satellite.

After the files have been copied, a new screen will appear to inform you that the files have been installed and the Data Synchronization Server conversion is ready to convert your TeleMagic files for use as a satellite server.

9.   Click **Finish**.

The conversion will proceed. After it has completed, you will see a message that the conversion was successful and the installation is complete.

10.   Click **OK**.

The installation program will return you to the TeleMagic Setup screen.

11.   Click **Exit**.

12.   Open Data Synchronization Server at the central site and follow the steps in the [Marking a Site as a Satellite](#) topic for the remote site that has been converted.

13.   Process an outbox packet for that site at central and transfer it to the new satellite.

14.   At the satellite, process the packet from central.

This completes the conversion of the remote to a satellite site.

A new shortcut will be added to the folder specified in step 7 to launch DSSERVER.EXE. You should change any other shortcuts you are using for Data Synchronization to reflect the new executable. If you have been using command line parameters, they will need to be attached to the new shortcut. (Parameters for launching a script are not applicable at a satellite site.)

Continue…

{ewl rhgbtn32.dll, BlueSkyHelpButton, g<_____153.BMP|
_____154.BMP<JumpId(DS.HLPï¿½DS3_What_are_Satellite_Offices)<<1} What are Satellite Offices?

{ewl rhgbtn32.dll, BlueSkyHelpButton, g<_____153.BMP|
_____154.BMP<JumpId(DS.HLPï¿½DS3_Satellite_Setup_Steps)<<1} Satellite Setup Steps

{ewl rhgbtn32.dll, BlueSkyHelpButton, g<_____153.BMP|
_____154.BMP<JumpId(DS.HLPï¿½DS3_Installation_of_the_Satellite_Server)<<1} Installation of the Satellite Server

{ewl rhgbtn32.dll, BlueSkyHelpButton, g<_____153.BMP|
_____154.BMP<JumpId(DS.HLPï¿½DS3_Marking_a_Site_as_a_Satellite)<<1} Marking a Site as a Satellite

{ewl rhgbtn32.dll, BlueSkyHelpButton, g<_____153.BMP|
_____154.BMP<JumpId(DS.HLPï¿½DS3_Setting_up_Synchronization_with_the_Central_Site)<<1} Setting up Synchronization with the Central Site

{ewl rhgbtn32.dll, BlueSkyHelpButton, g<_____153.BMP|
_____154.BMP<JumpId(DS.HLPï¿½DS3_Adding_Remote_Sites_to_the_Satellite)<<1} Adding Remote Sites to the Satellite

{ewl rhgbtn32.dll, BlueSkyHelpButton, g<_____153.BMP|
_____154.BMP<JumpId(DS.HLPï¿½DS3_Attaching_and_Detaching_Remote_Sites)<<1} Attaching and Detaching Remote Sites

Setting up Synchronization with the Central Site

{ewc rhgbtn32.dll, BlueSkyHelpButton, g<RELAUP01.BMP|RELADN01.BMP<Klink(Satelliteï¿½ ï¿½ ï¿½)<<1}

This setup only includes server settings for synchronizing with the central. The database settings that are used when synchronizing with the central are established at the central site.

One main difference between the central site and a satellite site is that the central is only concerned with synchronization back and forth between itself and the sites that are directly attached to it. The satellite is concerned with synchronization back and forth between itself and its remotes, as well as synchronization back and forth between itself and the central. You may or may not want to process for the central site each time you process the satellite's remotes. Data Synchronization Server accommodates this by providing separate setup for synchronization with the central.

Non-supervisor users will be able to access the server at satellite offices. They will have access to the **Process** button, server selection, and maintenance logs. Non-supervisors will not be able to edit any settings or access the Setup screens.

To Set up Synchronization with the Central:

1. Open Data Synchronization Server at the satellite site.

2. From the **Setup** menu, select **Options**.

    The Options screen will open.

3. Select the **Satellite** tab.

    In the **File** menu, there is a selection for **Process** and a selection for **Process Central**. The **Process Central** option will only process inbox and/or outbox packets for your central site. By default **Process** will only process inbox and/or outbox packets for your remote sites. If you do not want to process the central and remotes separately, you can use the satellite settings to include the central site when processing the remotes. You have the further flexibility of selecting what gets processed for the central when the remotes are processed.

5. If you would like to create an outbox packet to be sent to the central site when your remote sites are processed, mark `Create Outbox Packets for Central when processing sites.`

    or If you only want an outbox packet created for central when you process using the **Process Central** option, unmark this check box.

6. If you would like to process any inbox packet received from the central when processing the remote sites, mark `Process Inbox Packets from Central when processing sites.`

    or If you only want inbox packets from central processed when you use the **Process Central** option, unmark this check box.

If you have a packet for central in the outbox, you can control how often it gets updated with changes.

- 7. Use the Update existing outbox packets for Central every spinner arrows to set how often you would like existing packets for central in the outbox updated. (This option allows you to create a packet, then update it with new data the next time the outbox is processed without overwriting it.)   Set both the hours and minutes to zero if you do not want outbox packets for central updated. The outbox will only be processed if the previous packet has been removed from the outbox.

- 8. If you would like to automatically set the satellite's remote sites for initialization whenever the satellite is initialized from central, mark the `Set all sites for one time initialization when Satellite is initialized` check box.

   or Unmark this check box if you would like to manually set the remote sites for initialization when necessary.

   If you are synchronizing based on transactions, each time the server processes a site it looks for the date and time that a packet was last created for that site. The next packet will only includes transactions entered after that date/time. If you need to include transactions prior to this, you can do so by specifying the transaction cutoff date and time. You are able to set a transaction cutoff date for any of your remote sites using Site Preferences. If you need to set a transaction cutoff date for your central site, you may do so at this dialog box.

   9. Enter the date and time of the oldest transactions you would like included in the next outbox packet for central.

   or If you would like to resend the transactions that were included the last time the outbox was processed, click **Output previous**. A message will appear informing you of the date and time of the last transactions that were processed and asking if you would like to use this as your transaction cutoff date. Select **Yes** to use those transactions. The date and time will appear in the `Include transactions created after` fields. You may edit the fields as necessary.

   10. When you are satisfied with your satellite settings, click **OK**.

Continue…

{ewl rhgbtn32.dll, BlueSkyHelpButton, g<_____153.BMP|
_____154.BMP<JumpId(DS.HLPï¿½DS3_What_are_Satellite_Offices)<<1} What are Satellite Offices?
{ewl rhgbtn32.dll, BlueSkyHelpButton, g<_____153.BMP|
_____154.BMP<JumpId(DS.HLPï¿½DS3_Satellite_Setup_Steps)<<1} Satellite Setup Steps
{ewl rhgbtn32.dll, BlueSkyHelpButton, g<_____153.BMP|
_____154.BMP<JumpId(DS.HLPï¿½DS3_Installation_of_the_Satellite_Server)<<1} Installation of the

Satellite Server

{ewl rhgbtn32.dll, BlueSkyHelpButton, g<_____153.BMP|
_____154.BMP<JumpId(DS.HLPï¿½DS3_Marking_a_Site_as_a_Satellite)<<1} Marking a Site as a Satellite

{ewl rhgbtn32.dll, BlueSkyHelpButton, g<_____153.BMP|
_____154.BMP<JumpId(DS.HLPï¿½DS3_Converting_Remotes_to_Satellites)<<1} Converting Remotes to Satellites

{ewl rhgbtn32.dll, BlueSkyHelpButton, g<_____153.BMP|
_____154.BMP<JumpId(DS.HLPï¿½DS3_Adding_Remote_Sites_to_the_Satellite)<<1} Adding Remote Sites to the Satellite

{ewl rhgbtn32.dll, BlueSkyHelpButton, g<_____153.BMP|
_____154.BMP<JumpId(DS.HLPï¿½DS3_Attaching_and_Detaching_Remote_Sites)<<1} Attaching and Detaching Remote Sites

Adding Remote Sites to the Satellite

{ewc rhgbtn32.dll, BlueSkyHelpButton, g<RELAUP01.BMP|RELADN01.BMP<Klink(Satelliteï¿½ ï¿½ ï¿½)<<1}

When adding remotes to a satellite, you have the option of adding a new remote, or attaching a remote that was previously synchronized with a different server.

Adding New Remote Sites
Obtaining Site Verification

Adding New Remote Sites

{ewc rhgbtn32.dll, BlueSkyHelpButton, g<RELAUP01.BMP|RELADN01.BMP<Klink(Satelliteï¿½ ï¿½ ï¿½)<<1}

To Add a New Remote Site:

1. Open Data Synchronization Server at the satellite site.

2. From the **Setup** menu, select **Site Maintenance**.

   The Remote Site Maintenance dialog box will open.

3. Click **Add**.

4. Enter a unique name for your remote location in the `Site Name:` field.

5. Enter a three character ID for the remote installation in the Site ID: field. If there are records already existing at the remote site, it is *strongly* recommended that you use the System ID for the installation (found in System preferences in TeleMagic) as the Site ID.

6. Click **Save** to save the remote site.

   The site will be added, but will be placed on hold until you have received verification from the central that the Site ID is not already in use. As soon as the central returns the verification, the site will be synchronized. (See *Obtaining Site Verification* for details.)

Continue…

{ewl rhgbtn32.dll, BlueSkyHelpButton, g<_____153.BMP|
_____154.BMP<JumpId(DS.HLPï¿½DS3_Obtaining_Site_Verification)<<1} Obtaining Site Verification

{ewl rhgbtn32.dll, BlueSkyHelpButton, g<_____153.BMP|
_____154.BMP<JumpId(DS.HLPï¿½DS3_Attaching_and_Detaching_Remote_Sites)<<1} Attaching and Detaching Remote Sites

Obtaining Site Verification

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After a site is added, it will be placed on hold until you receive site verification from the central. The next packet that is sent to central after adding a new remote site will contain information about the site. The central will check to make sure that the new site does not create a conflict with any existing sites. If there is no conflict, the central will send back verification to the satellite and the remote site will be taken off hold. If there is a conflict, the central will send back details on the specific information that is in question and offer suggestions on the changes that need to be made to take the site off hold. The satellite will continue to send the request for verification in every packet to the central until the conflict is resolved.

The central site will verify the following information for the new site:

- The Site ID for every remote site must be unique.

  Every record in TeleMagic has a unique Contact ID that allows TeleMagic to identify and locate the record. Contact IDs are based in part on the Site ID. If two sites have the same ID, you will have duplicate Contact IDs and TeleMagic will not be able to determine which record is which. Data Synchronization Server keeps track of all Site IDs at the central site to avoid conflict. When a new site is added at a satellite, the Site ID will be sent to the central server. If the Site ID is not in use at another installation, the central site will send back an approval. If the Site ID is a duplicate, the central site will send back a denial and you will have to change the ID for the site. If the central sends back a denial, it will determine a Site ID that is not in use and offer it as a suggestion. Be aware that this suggested ID is one that is available at that time. If you choose to use this Site ID, it will still need to be verified to make sure that it remained valid and no other server has claimed it in the interim.

Site ID verification is also required if you change the ID of an existing site. When you edit a Site ID at a satellite, the remote site will be placed on hold until the central site has sent back verification for the new ID.

WARNING!

The Site ID in synchronized sites is equivalent to the System ID in non-synchronized installations. Data Synchronization Server is able to keep track of all Site IDs for synchronized sites and make sure they remain unique. An installation that is not being synchronized, however, could have a System ID that matches a Site ID already in use. If there are records in these installations, you will have duplicate Contact IDs. If you are adding a site for an installation of TeleMagic that already contains records, it is *highly* recommended that you use the System ID as the Site ID. If you enter the System ID and the central site reports that that Site ID is already in use, this will alert you that there is a problem with the existing records. In this case, you should export all of the records out of the new site, import them into the satellite, then delete them at the remote site. This will create new Contact IDs based on the satellite's Site ID. You can then change the remote site's ID to something that has not been used.

- Your attachment selection must be consistent with the site's detachment status.

  Along with the Site ID, the satellite will provide information on whether or not the site is being reattached. Reattachment lets you claim an existing site that was previously synchronized with a different server. (See the topic Attaching and Detaching Remote Sites for more information on attaching remote sites.) If you ask to reattach a site, the central site will verify that the Site ID belongs to a detached site. If it does not, the site verification will be denied and the site will remain on hold. Alternatively, if you do not ask to reattach a site and there is a detached site with that Site ID, the site will be denied as a duplicate. Make sure you pay attention to the attachment check box when adding a site.

- The serial number must be unique for all sites.

  The first time a remote site is synchronized, it reports its serial number back to the server. (If the site is an evaluation copy, it will report the serial number as soon as it is registered.) If the server is a

satellite site, the satellite will report the serial number back to the central server the next time it is synchronized. Central will store the serial number with its record of the remote site. If the serial number is already used at another site, the central site will report that to the satellite and the site will be placed on hold. The server will not create packets for the site. It will accept packets from the site, but it will check to see if the serial number has been corrected and stop processing if it has not. If you have a duplicate serial number, contact your reseller for assistance.

Continue…

{ewl rhgbtn32.dll, BlueSkyHelpButton, g<_____153.BMP|
_____154.BMP<JumpId(DS.HLPï¿½DS3_Adding_New_Remote_Sites)<<1} Adding New Remote Sites

{ewl rhgbtn32.dll, BlueSkyHelpButton, g<_____153.BMP|
_____154.BMP<JumpId(DS.HLPï¿½DS3_Attaching_and_Detaching_Remote_Sites)<<1} Attaching and Detaching Remote Sites

Attaching and Detaching Remote Sites

{ewc rhgbtn32.dll, BlueSkyHelpButton, g<RELAUP01.BMP|RELADN01.BMP<Klink(Satelliteï¿½ ï¿½ ï¿½)<<1}

If you have been using Data Synchronization Server prior to the introduction of satellite sites, you may have remote sites currently synchronizing with the central site that need to be synchronized with a satellite site instead. A remote site can only synchronize with one server at a time. Before a remote site will accept a packet from a different server, you must tell it that it will no longer be synchronized with its current server. This is done by detaching the site from its server. If any of your existing sites need to be remotes of a satellite instead of the central, you should detach them so they can be attached to the appropriate satellite.

As time goes on, you may also need to move a remote from one satellite to another, or from a satellite to the central. For example, a user who synchronizes his laptop with a satellite site may be moved into a different region and need to synchronize with the satellite server for that region. These same steps can be followed at a satellite site to detach a remote site.

To Detach a Remote Site:

1. Open Data Synchronization Server at the central site (or the satellite site).

2. From the **Setup** menu, select **Site Maintenance**.

   The Remote Site Maintenance dialog box will open.

3. Highlight the site you would like to detach and click **Edit**.

4. Mark the `Detach site from this server` check box.

5. Click **Save**.

In addition to adding sites that have never before been synchronized, you can add remote sites that were previously synchronized with a different server. This is called attaching a detached site.

To Attach a Detached Site:

1. Open Data Synchronization Server at the satellite site.

2. From the **Setup** menu, select **Site Maintenance**.

   The Remote Site Maintenance dialog box will open.

3. Click **Add**.

   The `Detach site from this server` check box will toggle to `Site is being reattached to this server`.

4. Enter a unique name for the remote site in the Site Name field.

5. Enter the Site ID of the existing remote site in the Site ID field. (If you do not use the exact ID of the site you are reattaching, central will not recognize the site when the verification request is sent. If you ultimately need to use a

different Site ID, you may change it after you have begun synchronization with the site.)

6. Mark the Site is being reattached to this server check box. (If this check box is not marked, central will assume you are adding a new site. Since it will have the same Site ID as an existing site, the site request will be rejected by the central as a duplicate.)

7. Click **Save** to save the site.

The next time the satellite is synchronized with the central site, it will send a request to attach this site. If the site has been detached from another server, central will send back an approval to attach the site and the site will be taken off hold. An initialization packet will be created for the site the next time you process the outbox at the satellite site. When a detached site receives an initialization packet from a server, it will become attached to that server.

Setting up Newly Attached Sites

Setting up sites that have been reattached is very similar to setting up new sites. You must establish the site preferences, initialization settings, databases, and database preferences. This is performed at the satellite site using the same steps that are used at the central site.

You do not necessarily need to set up your site's user list. When the central site sends back verification for the remote site, it will also send the site's user list from its previous server. If you want to use a different group of users, it is recommended that you make the changes after the central has verified the site.

The only difference in setting up new sites and reattached sites is that reattached sites were probably already synchronizing a group of records before being detached. You may want to continue synchronizing those records from the new server, or you may want to establish a new set of records to synchronize. It is important to keep in mind that, by default, synchronization from the remote to the server is transaction based. In other words, the only data the server receives from the remote are newly added records and changes to individual fields. The server will not receive existing records unless a change has been made to the record, in which case it will add the record, but the only available data will be the changed field(s). Additionally, if a record at the remote contains different data than at the server, the server will not be updated with those differences unless there are pending transactions for them. Before beginning synchronization, it is a good idea to set up your databases so they contain the same information.
In addition to establishing your databases, you should give consideration to your first time initialization settings. When a site is selected for reattachment, it will use the default initialization settings. You should carefully consider your setup requirements and determine if you want to use those defaults or if you need to select different settings.

There are a number of possible scenarios you may encounter when setting up synchronization with a reattached site:

You may want to synchronize records that already exist at both the remote site and the central.

If the records exist at both sites, it is a simple matter to begin synchronization.

1) Select the database you would like to synchronize and establish your database preferences as usual.

(Refer to the *Data Synchronization Server User's Guide* for general setup instructions.)

2) When you first initialize the site, you should *unmark* the Transfer contact and activity records check box on the Initialization screen. This check box, selected by default, will overwrite the records that exist at the remote site with the records from the new server. With this unmarked, transactions will be respected during the initialization.

3) After the site has been initialized, create an outbox packet at the remote site. Transactions at the remote that were not processed prior to the site's being detached, and those that have been created since the site was detached, will be included in the next packet from the remote to the server. In this way, both sites will be updated with the latest transactions, while retaining record links to documents, activities, and sales forecasts at the remote site.

   One caution before proceeding is to make sure the changes that were originally being synchronized between the initial server and the remote site were also being synchronized to the new server. For example:

● If the remote site was being synchronized with the central, the central should also have been sending those records to the Satellite.

● If the site was originally synchronized with a satellite, the satellite should have been sending the records to central and, if you are reattaching to another satellite, central should have been sending the records to that satellite.

   If changes from the remote were not getting to the new server, there will be differences between the records in the two sites for which there are no transactions. Use the following steps in this case:

1) Synchronize once using transactions (as described above) to get any new changes made at the remote to the server. You may want to use a transaction cutoff date at the remote to transfer older changes.

2) Select the `Select all records, ignore transactions` radio button in Database Preferences at the satellite site to update the remote site with any differences that remain in the records at the server.

3) Once the records at the remote match those at the server, you may select the `Select records based on new transactions` radio button in Database Preferences and continue synchronizing as usual.

You may want to synchronize records that exist at the remote site, but not at the server.

If the database itself does not exist, it must be added at the new server. The best way of accomplishing this depends on whether or not the records exist at the central site.

   If the remote site was either previously attached to the central, or attached to a satellite site that was synchronizing those records with the central, you can add the database to the new server from the central.

1) At the central site, add that database to the list of databases being synchronized for the satellite site.

2) In Database Preferences for that database, select `Select all records, ignore transactions`. (If the database includes OLE data, consider also marking the `Synchronize embedded OLE fields` check box.)

3) In Database Preferences, click **Select database files to transfer** and mark all of the check boxes in the Database Files To Transfer dialog box.

4) The next time the site is synchronized, the database will be added at the satellite. Once the database is in the satellite site, you can set up the remote site for synchronization following the guidelines in the section above.

5) If you do not want to continue to regularly synchronize the database from central to the satellite site,

remove the database at the central from the list being synchronized to the satellite site. If you want to continue synchronizing the database between central and the satellite site, but do not want the database overwritten at the site each time it receives a packet from central, change the database preferences at central to respect transactions and unmark the Database Files To Transfer options.

If the database does not exist at the central, use the following steps:

1) If there are existing databases that will be synchronized with the site, *do not* set them up for the site until you have added the new database(s).

2) Manually add the database at the new server using the TeleMagic Template Maker. Do not include contact records in the template. (In TeleMagic's on-line help, search on *Adding Databases*, then select *Adding Databases from Templates* for instructions.)

3) Once the database exists at the satellite site, send the first initialization packet to the site, making sure the `Delete existing contact records from existing databases` check box on the Initialization Settings screen *is not marked*.

4) At the remote site, launch Data Synchronization Server using the /notrans parameter and process the inbox, then create an outbox packet. An outbox packet created using this parameter will ignore transactions and transfer all records from the remote to the satellite.

5) Process the packet from the remote site at the satellite.

6) Set up any additional existing databases that need to be synchronized with the site using the guidelines in the section above.

WARNING!
If you use the /notrans parameter and have selected any databases for synchronization that already contain records, be aware that those records could be overwritten with corresponding records from the remote (depending on your validations). It is strongly recommended that you wait until after you have transferred the records from the remote to the central to set up those existing databases.

You may need to synchronize an entirely new set of records to the remote site.

For example, the remote site may be a laptop for a user who was assigned to a particular region. When that user is reassigned to a different region, the laptop may need to be attached to another server and the user may need to work with an entirely new set of records for that region.

1) In this instance, you may set up synchronization with the remote site as if it were a new site. (Follow the instructions in the *Data Synchronization Server* Guide.)

2) You should select the new database or filter to be synchronized at the server, and initialize the site with that database using the default settings. It is recommended that you also mark the `Delete existing contact records from existing databases` check box in the site's Initialization Settings.

If you are synchronizing an entirely different database, as opposed to a different set of records in the same database, consider deleting the previous database at the remote site to avoid confusion.

Detachment/Reattachment Checklist

Use the following checklist to verify that you have properly completed all of the steps necessary to move a remote site from one server to another:

q At the original server, edit the site and mark the Detach site from this server check box.

q Process an outbox packet for the remote site at that server. Transfer that packet to the site's inbox and process the remote. This will instruct the site that it has been detached from its current server.

q   If the original server is a satellite, process an outbox packet for the central site. Transfer the packet to the central's inbox and process. This will inform the central that the remote site has been detached and is available for reattachment at another server. (If the original server is the central, this will be done automatically when the site is detached.)

q   Add the site at the server where you would like to attach it, making sure to enter the site's ID as it was listed at its previous server. Mark the Site is being reattached to this server check box.

q   Set up the databases, database preferences, site preferences, and initialization settings for the site. (You do not need to set up the user list. This will be added automatically based on the users previously listed at the site.)

q   If the server to which you are attaching is a satellite, process an outbox packet for the central at the satellite. Transfer the packet to the central's inbox and process. This will inform the central that you want to reattach the site to this satellite. (If you are attaching to the central, this will be handled automatically when you add the site.)

q   If you are attaching the site to a satellite, process an outbox packet at central for that satellite. Transfer the packet to the satellite's inbox and process. This will send back the verification attaching the site. (If you are attaching at central, this will be handled automatically when you add the remote site.)

q   At the new server, process an outbox initialization packet for the remote site. Transfer the packet to the site's inbox and process. This will inform the site of its new server and perform first-time initialization.

q   If the new server is not the central, process an outbox packet for the central at the satellite. Transfer it to central's inbox and process. This will inform central that the new server has received the reattachment verification and has taken the site off hold. (If you are attaching at central, this will be handled automatically when you add the remote site.)

q   If the original server was a satellite, process an outbox packet at the central for the original server. Transfer the packet to the inbox of that satellite site and process. This will inform the original server that the remote has been claimed and it may take the site off its site list. (If the original site was the central, this will occur automatically when the new server sends its acknowledgment that it received the verification and has taken the site off hold.)

       This step does not necessarily need to be performed right away. This will not affect the remote's ability to synchronize with its new server. The site's record at the original server will be deleted the next time the server processes an inbox packet from the central. Any changes made to the site record at the old server during this time will have no affect.

 Although this process may seem complicated at first glance, most of these steps are handled automatically during the normal course of synchronization. If you are processing on a regular basis, you will probably not even be aware of the verifications between the servers and remote. The only step you really need to monitor is noting when the remote site is taken off hold. Once that has occurred, you may notify the remote site that it may resume synchronization.

Common Questions and Answers

Features are only discussed in this section as they pertain to the question at hand. If you encounter any terms with which you are unfamiliar, use the **Search** button to locate the topics in which the feature is discussed in detail. (Press F1 for help on using help.)

(Click here if you would like to print out the questions and answers as one long topic.)

Select any of the following topics for a list of related questions and answers:

Complete List of Questions and Answers
Processing
Initialization
Transactions
Users and Security
Activities and Email
Structural Changes (Databases, Fields, List Boxes, etc.)
Data Changes
Using Data Synchronization with TeleMagic
Scripts
Miscellaneous Issues

Is there a quick way of getting the Everyone group to the remote sites?

Create a group named Everyone in TeleMagic at the central installation. At the central site in Data Synchronization, select the Everyone group as the default security in Security and Preferences off the Options dialog box. Be sure you select it from the `Central security group` list and not the `Remote "Everyone" group` radio button. The next time you synchronize, the Everyone group will be added at the sites. You can then select the `Remote "Everyone" group` radio button in Options and the group at the site will be used.

Why did the new fields I created get synchronized to some remote sites and not to others?

One of two things could have happened: the sites could be unlinked from the global settings, or the changes could have been made after packets for the sites were already created.

In order for any structural changes to be sent to the remote sites, you must have the options selected in the Database Files To Transfer dialog box. If you have unlinked any sites, you must edit these sites individually. (To tell if a site is unlinked, click **Site Database Preferences** at the TeleMagic Data Synchronization Server Setup screen. If a site has an asterisk in front of its name, it is unlinked. Select that site and edit the Database Files To Transfer options.)

If all sites have been set up to receive the changes, chances are the changes were made after packets had already been created for some sites. Structural changes are not stored as transactions. When a packet is first created, the first thing that Data Synchronization Server does is write any structural changes into the packet. It then incorporates the transactions. If a time has been set in the `Update existing outbox packets every` field in Server Maintenance, the packet will continue to get updated with new transactions according to that setting. The structural changes, which are not transactions, will not get written until the next new packet is created. The next time you copy the outbox packet to the site, delete it from the central installation's outbox so a new packet will be created. Your structural changes should be transferred with the new packet.

I keep deleting a database and it keeps coming back.

Your site is set up at the central installation to create the database if it does not exist. If there is a reason you do not want to keep this database at the site, contact your Data Synchronization Server system administrator. Your site will need to be unlinked from the global defaults and the database in question will need to be removed from the list of databases to be synchronized. (Alternatively, the `Create database if not found` option in the Database Files to Transfer dialog box can be unmarked for this database. If the database is deleted at any site, it will not be created again.)

Why do I keep losing changes to my database (fields, indexes, etc.)?

Your site is set up at the central installation to overwrite structural changes at the remote site. Contact your Data Synchronization Server system administrator and inform him or her that you would like to be able to make changes to the remote site. The system administrator can either make the changes in the central installation and synchronize them over, or unmark the applicable check boxes in the Database Files To Transfer dialog box for this database.

I know my script is set to process the outbox, but there is never a packet in the outbox directory.

Check your script to make sure that the `Delete Outbox Packet` option has not been selected in a step following a step using the `Process Outbox` option. If it has, the outgoing packet is being created and subsequently deleted. Adjust the script and use the /TD= parameter to resend the edits that have been lost. (Make sure the `Validate contact record revisions at field level` Site Preference is set on before sending out a packet with old transactions. If the field has recently been changed in the central installation, you do not want to overwrite it with an old edit from the remote site.)   If the packet is not being deleted, your script may be set up to run a batch file that moves the packet to the central site. Either check the script, or contact the central site and find out if the packets are being received.

I assigned activity permissions to a user at another site, but he didn't seem to receive them.

Activity permissions are stored in TeleMagic as part of the user information. Permissions will only be synchronized if users are being synchronized, which means that `Update central user list` must be marked on in Site Preferences for remote sites if you want activity permissions to be transferred. If you do not want to have the sites' central user lists updated on a regular basis, instruct users to set their permissions, perform a synchronization with this feature on, then mark it off for subsequent synchronizations.

I've edited one of my scripts, but it keeps reverting to the old settings.

If an initialization packet is being sent that was created with the `Transfer Scripts` option marked, any scripts created at the central installation will be synchronized to the site. If there is a script in the central with the same name as the script you are editing, your edits will get overwritten. Change the name of the script at the remote site. (If you have attached the script to an icon with a command line parameter, make sure you update the script name in the parameter to reflect your change.)

Is there any way to apply my Global Database Preferences to just one unlinked site?

That depends on how many databases the site is using. If it is just using one database, you can re-link the site to the global settings, then unlink it again. The Database Preferences will be updated to the global settings. However, if it is using multiple databases, all of them will revert to the global settings. In this instance it is quicker just to open the unlinked site's Database Preferences and edit the settings to match the global.

I've never used database synchronization before and I'm very nervous that important data is going to get overwritten by mistake.

Data Synchronization Server provides you with several tools to help make sure that doesn't happen. The first is field level synchronization. Important data can and does inadvertently get overwritten during record level synchronization, but using field level synchronization, changes are made on an individual field level, reducing the risk. The second tool is field level date and time validation. This ensures that old edits don't overwrite newer ones. The third tool is field rules. You can control exactly how and when a field is changed in your central databases. Finally, even if a field does get overwritten in your central site, you can store the original data in the memo field of your choice for later review. If it shouldn't have been overwritten, simply paste it back into the field. Remember additionally to always perform regular backups of your TeleMagic installations. As long as you have a backup copy of your data, nothing can be "lost".

Is there anything I can do if I've accidentally deleted a packet going to the central installation?

When you create a packet, Data Synchronization keeps a record of the date and time of the last transactions included in the packet. The next packet you create will only include transactions after that date and time. If you create a packet at a remote site that is not received by the central installation, you need to let Data Synchronization know to include the transactions from the last packet in the current one. This is done by establishing a transaction cutoff date. A transaction cutoff date tells Data Synchronization to include all transactions from a specified date forward, even if they were included in a previous packet. Setting a transaction cutoff date is done at remote sites using the /TD= parameter in the command line used to launch Data Synchronization. Once a packet has been created with this parameter, you should remove it from the command line. It is also recommended that you mark `Validate contact record revisions at field level` in Site Preferences before processing the packet into the central site. This ensures that an old transaction will not overwrite newer data if a field has been changed in the central site more recently.

What's the difference between Resend Packet and Reset?

Once an initialization packet has been sent out, Data Synchronization Server will wait for a response packet from the site acknowledging that it has received the initialization packet before allowing you to make any more changes to the site's synchronization settings. The Resend Packet and Reset options allow you to deal with situations where there is a problem with processing the initialization packet at the remote site. If your packet has accidentally been deleted, or you were for any reason not able to process it at the site, use Resend to create a copy of the original initialization packet to be synchronized into the site. If you discover that you need to adjust your initialization settings and do not want to use the original packet or a copy of it, use Reset to set the site back to the way it was before the packet was created. This will take the site off hold and reset the transaction cutoff date for the site. Reset should only be used if the site has not received the original initialization packet.

I put a time in the Start Processing At field at the remote site, but it didn't begin to process.

Simply putting a time in this field does not launch process mode. You must click the **Process** button. The `Start Processing At` field is merely a way to control when to commence processing after process mode has been launched using the **Process** button.

Database related information (such as changed fields) doesn't seem to be getting synchronized for one of my sites.

The first thing to check is your site settings. Is this site set to receive changes to the database structure?   The next thing to check is if you have your server set to update existing outbox packets. If you do, it is possible that the packets for some sites were already existing prior to when the database changes were made, and have only been updated with recent transactions. (Database structure related information gets added to a packet when the packet is first created, not on updates.)

Can users at the central location work in a database if it is being used at a remote site?

Absolutely. Data Synchronization is designed to allow you to treat users at other locations as if they were on the same network as the central location.

What initialization settings have to be used?

You don't have to use any initialization settings. The first time you synchronize to a site and any time you change the Site ID, you must perform an initialization, but you do not have to select any of the settings. If you have changed your Site ID but don't need to use any of the other initialization settings, you may want to send an initialization packet with all of the check boxes unmarked. This will change the Site ID, but will not have any other affect at the site.

What if I only want to initialize one database?

You can use Database Preferences to duplicate the results of selecting `Complete database file transfer (No contact records)` and `Transfer contact and activity records` in Initialization Settings without performing an initialization. In Database Preferences, select `Select all records, ignore transactions` and mark all of the check boxes in the Database Files To Transfer dialog box. To synchronize all activity records, select `Select all activities, ignore transactions` in the Choose Activities dialog box off Site Preferences. (Consider deselecting these options after performing the synchronization.)

Is there any way to use the default security option to transfer a security group to just one site?

You can use the hold options to temporarily take other sites out of the synchronization process. Access Site Preferences for each site that you do not want to receive the security group, and mark the `Do not create packets for this site` check box. Next, access the Default Security and Preferences dialog box off the Options screen and select your security group from the `Central security group` list box. Process the outbox at the central site. A packet will be created for the site that you did not place on hold. You can then change your default security group back to the usual settings and take the other sites off hold.

Why might I want to place a site on hold?

Aside from using the `Do not create packets for this site` and `Do not accept packets from this site` options to take a site out of one phase of the synchronization process, you can use them to temporarily take a site totally out of the synchronization process. For example, if you would like to send out a global file set to all but one site, you can place that site on hold while you process for the other sites.

How can I be sure I'm getting all of my activities and e-mail?

If you are concerned about receiving your activities and e-mail, it is recommended that you have all activity options marked on for all sites. Use the following guidelines when creating your activity and e-mail settings:

When an e-mail message is created for a user at another site, both sites have to be set up to synchronize e-mail for the message to be received.

If you are synchronizing unlinked activities, both sites have to be set up to synchronize unlinked activities. If you are synchronizing linked activities, both sites have to be set up to synchronize linked activities, and the contact to which the activity is linked must exist in both databases.

Why can't I ignore transactions from remote to central?

The central installation is set up to contain the main database(s). Data Synchronization Server is designed to make sure that you do not overwrite data contained in the central installation inadvertently. The best way to ensure this is if only data that has been changed recently is sent to the central site to be considered for synchronization.

Are there any issues I need to know about when ignoring transactions?

When you ignore transactions, Data Synchronization Server will consider any differences in the data in a field between the central and remote for synchronization, even if this same edit has already been processed previously. Unless you want your remote database to match your central database, it is a good idea to have `Validate contact record revisions at field level` in Site Preferences marked on before synchronizing. You should be aware, however, that this will dramatically increase the time it takes to process the packet at the remote site. Additionally, outgoing packets created when ignoring transactions will be considerably larger than those created with transactions only. This is especially an issue in large databases. For routine synchronization, consider using the `Select records based on new transactions` option.

I already created an initialization packet, but would like to change my settings.

If you have not yet processed the packet into the remote site, you can use the Reset feature to reset the site. When this feature is used, it will be as if the initialization packet was never created. To use the Reset feature, open the Server Options dialog box at the central location, click **Reset**, select the site from the list of sites waiting for a response to an initialization packet, and click **OK**. You may now go in and edit your initialization settings and re-process the site.

I made a change in a field, but it went back to the old data.

It was actually synchronized back to the old data. This means that the old data was included in an incoming packet. This occurs most frequently when you either ignore transactions in your outgoing packet or have set a transaction cutoff date. The best way to avoid this is to use `Validate contact record revisions at field level` to ensure that the most recent entry in the field is retained.

I've got Update central user list marked, but I'm still losing users.

Your user list is still going to be synchronized from the central installation to the site, even with `Update central user list` marked. If you also have `Delete users at this site who don't exist on Data Synchronization's user list for this site` marked, and you add a user at the site who is not on the central user list, that user list will be lost if you process an incoming packet from the central before you send a packet to the central that updates the user list. If you add a new user in TeleMagic, you have to make sure that the central user list gets updated to include that user before the next synchronization from the central to the remote site. This means that after a user is added, you have to send a packet to the central installation and that packet has to be processed into the central installation (thus updating the user list with the new user) *before* an outbox packet is created at the central installation to be processed into the site. The best way of doing this is to retrieve any packet waiting for this site at central and process it into the remote installation prior to adding or deleting users in TeleMagic. Then process the remote site immediately after editing your users and send the packet to be processed by the central installation before the central installation creates another outgoing packet for the site.

None of my users have security access to the remote site.

An initialization has probably been performed that places all users in the Everyone group at the remote site, but the site has no Everyone group. Perform an initialization that adds the SUP user to the Supervisor security group. A user at the remote site can then log into TeleMagic as SUP and create and assign security as necessary.

I keep getting a message that there is nothing to process.

There are a number of possible reasons for this.

At the central site, all of your sites may be either on hold or waiting for response packets after an initialization. The server you are trying to use may not be set to process at the current time. It may be set to process only the inbox or outbox with no packets in the inbox and/or packets already existing for all sites in the outbox that do not need to be updated. You may have no sites set up yet, or no users assigned to your sites.

At the remote site, you may have marked `Process Inbox` only and do not have a packet in the inbox. You may have attempted to process an initialization packet that will affect security with the `Do not assign security to users` option selected in the Security and Preferences screen off the Options dialog box.

Adjust your settings as necessary and re-attempt to process.

I have Remote "Everyone" Group as my default security, but it didn't get copied to the site.

When you select the `Remote "Everyone" Group` check box in Security and Preferences off the Options screen, you are instructing Data Synchronization Server to look for a security group named Everyone already existing at the remote site. The purpose of this option is to allow you to use different settings at each site as your default, without being forced to use the same security group from central at all sites. This option will not actually add a group named Everyone from the central installation. If you want to do this, create the group in central, then select the `Central security group` radio button and select the group from the drop-down list.

Why isn't the TST user added with external rebuild?

Data Synchronization Server is designed to give you total control over the security access to your remote sites. In installations of TeleMagic that are not being synchronized, the Supervisor security group and at least one Supervisor user are absolutely necessary, as some features are only accessible to Supervisor users. This is not required if an installation of TeleMagic is a remote site used in synchronization since Supervisor users can be added to the site at any time through initialization if necessary. If you do not want to allow the possibility of anyone logging into a remote installation of TeleMagic as a Supervisor, this group can totally be removed. If it is needed at a later time, it can be added through initialization. The previous feature of adding a Supervisor during external rebuild would conflict with this feature and has been removed from installations of TeleMagic used as remote sites. (This feature will still be available in your central installation.)

Do I need a Supervisor user at the remote site?

Not necessarily. You are not required to have a Supervisor user at a remote site, but bear in mind that some features of TeleMagic can only be accessed by Supervisors. (You can always use initialization to add a supervisor on an as-needed basis, then remove it when it is no longer needed.)

How can I synchronize reports and word processing documents?

Reports and documents can be synchronized to the sites using file sets. This does not, however, automatically place them in the dialog box that allows you to select them from within TeleMagic. This entails some minor setup once the file has been received by the site.

To synchronize a word processing document, once the document has been received by the site, select **Word Processor** from the **Write** menu to open the Word Processor Form Letter selection box. Click **Add**. The Add a Document dialog box will open. Enter a description for the file in the `Description` field. In the `File name` field, enter the path and file name of the existing document. Make any other necessary settings and click **OK**. (Do not select a template when adding an existing document.)   You may now edit the document as usual.

To synchronize a report, take careful note of the file name of the report in the central installation. There are two files needed for a custom report: *filename*.FRX and *filename*.FRT. When you create your file set, make sure you include both documents and that it is set to place the file in the remote database's database directory. When the file is copied to the site, select **Custom Reports** from the **Reports** menu to access the Custom Reports selection box. Click **Add**. The Custom Report dialog box will open. In the `Name:` field, type in the name of the report (without the extension) and click **OK**. You may now edit the report as usual.

The server didn't create a packet for one of my sites.

Two things could be happening, `Do not create packet for this site` could be marked in Site Preferences, or the server could be waiting for a response packet from an initialization. Access the site in the Remote Site Maintenance dialog box at central to determine which is a factor.

What happens if I select to overwrite an existing outbox packet at the remote site?

You will lose the transactions that were in the packet. This should only be done if the packet has already been received by the central installation. If you inadvertently delete a packet that was not received at the central, you can use the /TD= command line parameter to re-send those transactions.

Why aren't my activities getting synchronized?

If you are synchronizing unlinked activities, both sites have to be set up in Site Preferences to synchronize unlinked activities. If you are synchronizing linked activities, both sites have to be set up in Site Preferences to synchronize linked activities, and the contact to which the activity is linked must exist in both databases.

Additionally, you should make sure you are actually a user on the Central User List for the site. If you do not have `Delete users at this site who don't exist on Data Synchronization's user list for this site` marked in Site Preferences, it is possible that although you exist as a user at the site, you do not appear on the list of users to be synchronized. In this instance, your activities will not be synchronized.

Can I synchronize the function keys I've set up?

If the user you have set up as the default user in the Preferences section of the Security and Preferences screen in Options has function keys stored in his or her user directory, they will be synchronized as part of the preference set.

Why can't I use two sites as the central?

Data Synchronization Server is designed to keep primary control at one key location. Having multiple central locations would create severe conflicts. (For example, both central locations may initialize a site at the same time and try to place all users in different default security groups, or assign two different Site IDs.)

A second central site is not necessary to handle even a high volume of processing because you are allowed multiple servers. Even if you have an extremely large number of remote sites, you can set up as many workstations devoted to processing as you like at your one central site.

I have a security group selected in Options, but users at the site seem to still have their old security.

Selecting a default security does not move existing users from their current security group. It is merely the default for new users added through synchronization. If you want to move all users to that default group, you must use the Initialization Security Settings options off the Initialization Settings dialog box.

Why is my Process button dimmed?

If you are at the central site, you need to open Server Maintenance and select a server to use with this processing session. If you are at a remote site, you must have either `Process Inbox` or `Create Outbox Packet` selected.

Can I continue to use the central installation while Data Synchronization is processing?

Absolutely. If you have a large number of sites that need to be updated frequently, you may end up processing continuously. This would not be possible if users couldn't continue to use TeleMagic. Be aware, however, that if a record is being edited at the exact time that the server attempts to write a transaction to it, that transaction will not be processed. The Log Maintenance screen will provide information on any edits that were skipped. If an edit has been skipped you can either hand-enter it, or use the /TD= command line parameter to resend the edit.

Why can't I run a script at the central site?

Scripting is used at the remote sites to automate processing. Processing is automated at the central site through the servers.

If I have the same user at multiple sites, will he have the same preferences and security at each?

Not necessarily. If the user was added to all sites through Data Synchronization Server, chances are he or she will have the same settings because the global defaults would have been used. However, users added at the site and updated to the central user list may have different security and preferences. Additionally, changing an existing user's security or preferences at one site will not affect the settings for that user at other sites.

If the same user is at multiple sites, should he use different User IDs at each?

The same User ID can and should be used for the user at every site he or she may need to access. If different IDs are used at multiple sites, Data Synchronization Server will have no way of knowing that it is the same user when synchronizing activities and e-mail.

Can I rebuild Data Synchronization without deleting transactions?

Yes. Simply click **Rebuild** at the Rebuild dialog box without selecting either of the check boxes.

Why would I ever not want to use date/time validation?

For the most part, you will want to use the `Validate contact record revisions at field level` feature in Site Preferences to make sure that the most recent edit is always retained. However, if you want to ensure that the database at the remote site exactly matches the database at the central site, you can perform a synchronization that ignores transactions with this feature marked off. (You can always turn it back on for subsequent synchronizations.)   Additionally, if you have set up very specific field rules to precisely control how and when a field gets replaced, an incoming change could be rejected based on the date of the edit when, according to the field rule, it should have been accepted. If you do not want the chronological sequence of edits to be a factor in replacing, and only want to use the criteria established in field rules, you should unmark this option.

I keep getting messages that my remote site can't be processed because of too many packets in my inbox.

One of two things has happened: either you have inadvertently moved another site's packet into the inbox along with your own, or you have your site's inbox pointed to the central site's outbox. If you have copied too many packets, return the extra packet to the site to which it belongs. If you have your path set to the site's outbox, you must select another path. Unless you have only one remote site, you will not be able to process with this arrangement.

Why do I have duplicate records in my new database?

This could occur if you 1) take a database off the list of databases to be synchronized, 2) change the name of the original database at a site, 3) place the database with the original name back on the list to be synchronized, and 4) perform a synchronization that creates the database if not found. Once a database has been synchronized between sites, you should not attempt to synchronize it to a new database. (It is for this reason that you are not allowed to change the name of a synchronized database within TeleMagic.)

I added a new user to my site's central user list, but he wasn't synchronized to the site.

Much of the information included in a packet is placed there when the packet is first created. If a packet remains in the central installation's outbox and is updated, the updates will be based on transaction records. If you leave the same packet in the outbox and just copy it to the remote site's inbox, continuing to update the original with transactions, information that is only written into the packet when it is first created will not be synchronized. You should periodically delete packets that are sitting in the outbox (making sure all updates have been received by the site before deleting) to include new users in your packets.

If you create a new packet and the user is still not there, check your central user list to make sure the new user is still there. If you have `Update central user list` marked in Site Preferences, the list of users in TeleMagic at the remote site will be synchronized to the site's user list in central and the new user may have been overwritten. If you make changes to your user list, be sure to process an outgoing packet right away to avoid this.

If I'm concerned about the integrity of my data, is it a good idea to always ignore transactions?

Transactions are designed to protect the integrity of your data. It is for this reason that you cannot ignore transactions when synchronizing from the remote site to the central. For example, if a field is changed at the remote site, then synchronized into the central database, a field rule may keep that change from being accepted. If you are not using date/time validation, when a synchronization is then performed from the central to the remote that ignores transactions, the change to the field in remote will be lost. If you are using date/time validation, only the fields that have been changed in central recently will be synchronized — which is exactly what happens when you use transactions. In this case, you are needlessly including superfluous data in your packet, increasing the size and drastically slowing down processing at the remote site. Ignoring transactions should only be used if you have deleted transaction records during rebuild or you are intentionally trying to make sure that the remote database exactly matches the central database. (If you use ignore transactions because you have deleted transaction records, mark `Validate contact record revisions at field level` in Site Preferences. If you are trying to make your databases match, unmark it.)

How often should I delete transactions during rebuild?

You should be very careful about deleting transactions during rebuild, especially at the remote sites. Changes to your remote database can only be synchronized as transactions. You should be very sure that a packet has been received at central before deleting transactions. It is also a very good idea to pay attention to when TeleMagic is backed up at the central site. If anything happens and you have to restore a backup, you can use the /TD= parameter to send any transactions that were synchronized after the most recent backup was performed. If the transactions have been deleted, you will not be able to restore them.

Additionally, the date and time of a transaction is used to determine which is the most recent change to a field if you have `Validate contact record revisions at field level` marked in Site Preferences. If there is no transaction, Data Synchronization will assume the field has not been changed recently and overwrite it. This can become an issue when you perform a synchronization that ignores transactions, as an old edit will appear more recent. Only delete transactions when you are certain that you will not need them again.

How do I transfer my packets from one site to another?

A packet is a file and is moved just like any other file. How you transfer packets really depends on your business and how you are using Data Synchronization. If you have laptop users who bring the laptops back to the office for synchronization, you can either connect the laptops to the network or copy the packets to disk and transfer them that way. If your remote sites are in another location, you can transfer the packets over modem, either using your own communications program or the built in FTP or e-mail transfer. If you do not have access to a modem, you can transfer them to disk and mail them or overnight them.

I selected Complete database file transfer (No contact records) in Initialization, but I still got contact records.

`(No contact records)` in this option simply means that selecting this option will not automatically copy contact records. Records will be transferred according to your Database Preference settings or the `Transfer contact and activity records` option on the Initialization Settings screen if it is marked.

I added a database in TeleMagic, but it isn't being synchronized to my sites.

The first thing to look at is where you added your database. Only databases added in the central installation will be synchronized to the sites. Once a database has been created in the central installation, it must be added to the list of databases to be synchronized in Data Synchronization Server. (If you have any unlinked remote sites, be sure and add the database to the list for every site to which you want to send it.)   The next thing you have to do is instruct Data Synchronization to create the database. You can do this in one of two ways: In Database Preferences for your new database, select the `Select all records, ignore transactions` radio button and mark all of the check boxes in the Database Files To Transfer dialog box; or, in the Initialization Settings dialog box, mark `Complete database file transfer (No contact records)` and `Transfer contact and activity records`. (This method will initialize *all* databases selected for synchronization. It is recommended you use the options in Database Preferences instead.)   With either of these methods, make sure that all of the applicable sites will receive the database. If you are using the Database Preference options, mark `Apply these settings to all sites`. It will get transferred to all sites that you have set to receive this database. If you are using the initialization options, be sure to initialize all sites with these settings.

I have records I've been using at a remote site. What's the best procedure for getting them to the central site?

If you have been using a remote installation of TeleMagic prior to using Data Synchronization Server, you may need to get the data to the central installation so that it can be included in synchronization. If the database exists in both installations, the best way of doing this is to perform an export from the remote site, then import the records into TeleMagic. (This will create a new Contact ID for the records at the central installation.)   You should then perform an initialization to the site with the `Complete database file transfer (No contact records)`, `Transfer contact and activity records`, and `Delete existing contact records from existing databases` options marked.

If you need to transfer an entire database, including the contact records, use TeleMagic's Template Maker to copy the database and install it at the central installation. (See the *System Administrator & Installation Guide* for details.)   You will have the option of including contact records in the template, or not. If you want to retain activity links, consider not including contact records, and transferring them to the central installation after the database has been installed using the import and export features.

Will changes I make to a record that has been reassigned at another site be synchronized?

Yes. TeleMagic will track the record's original location and the new location, making the correct changes to the record at the new location.

Do I necessarily have to perform an initialization when I add a new database?

No; in fact you may want to consider not initializing when you add a new database. The `Complete database file transfer (No contact records)` option on the Initialization Settings dialog box will transfer all structural options for *all* databases being synchronized to the site. When this occurs, any changes users have made at the remote sites to existing databases will be lost. Unless it is your intention to overwrite structural changes at the remote site, do not use initialization to add a new database to the remote sites. Instead, select the database for synchronization by clicking **Database** on the TeleMagic Data Synchronization Server Setup screen, then open database preferences by clicking **DB Preferences**. (If you want to copy the database to an unlinked remote site, use the **Site Database** and **Site Database Preferences** buttons.)   Select the new database from the list in Database Preferences, select the `Select all records, ignore transactions` radio button, then click the **Select database files to transfer** button and mark all of the check boxes. Once the database has been added to the sites, consider accessing preferences for this database again, selecting `Select records based on new transactions,` and unmarking all check boxes in the Database Files To Transfer dialog box.

I have a 5 user network. Will having a server running continuously mean that only 4 users may be in TeleMagic at a time?

Running Data Synchronization Server does not affect the number of users who may access TeleMagic simultaneously. In fact, you can log into Data Synchronization Server using the User ID of a user currently logged into another instance of Data Synchronization Server running at another workstation, or even the ID of a user currently logged into TeleMagic.

I keep deleting a user from the central user list, and he keeps coming back.

The site is set to update the central user list and is not set to delete users at the site on synchronization. If you delete a user from a site's user list maintained in Data Synchronization at the central installation, that user will only actually be deleted from the site if you have the `Delete users at this site who don't exist on Data Synchronization's user list for this site` check box marked in Site Preferences. If you do not have this marked, the user will remain on the list of users in the installation itself. If you have `Update central user list` marked, the next time a packet is synchronized from the site the central user list will be updated to include that user. If you want to remove a particular user, mark `Delete users at this site who don't exist on Data Synchronization's user list for this site` and perform a synchronization to the site. You can unmark this option after the user has been deleted, if necessary.

I noticed a discrepancy between the printed documentation and the on-line help. Which is correct?

The on-line help file contains the most current and up-to-date documentation. Any errata that was in the printed documentation has been corrected in the on-line help. Additionally, any updates to the program that necessitated changes to the documentation have been updated in on-line help. If you encounter a difference between the printed documentation and the on-line help, use the on-line version. (This is also true for the main TeleMagic documentation, as well as most software documentation.)

Questions and Answers

If you would like to see all questions and answers in one long printout, press ALT+F, P right now. The current topic will be sent to your default printer. (To check your default printer, and change settings if necessary, press ALT+F, R.)

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Is there a quick way of getting the Everyone group to the remote sites?

Create a group named Everyone in TeleMagic at the central installation. At the central site in Data Synchronization, select the Everyone group as the default security in Security and Preferences off the Options dialog box. Be sure you select it from the `Central security group` list and not the `Remote "Everyone" group` radio button. The next time you synchronize, the Everyone group will be added at the sites. You can then select the `Remote "Everyone" group` radio button in Options and the group at the site will be used.

Why did the new fields I created get synchronized to some remote sites and not to others?

One of two things could have happened: the sites could be unlinked from the global settings, or the changes could have been made after packets for the sites were already created.

In order for any structural changes to be sent to the remote sites, you must have the options selected in the Database Files To Transfer dialog box. If you have unlinked any sites, you must edit these sites individually. (To tell if a site is unlinked, click **Site Database Preferences** at the TeleMagic Data Synchronization Server Setup screen. If a site has an asterisk in front of its name, it is unlinked. Select that site and edit the Database Files To Transfer options.)

If all sites have been set up to receive the changes, chances are the changes were made after packets had already been created for some sites. Structural changes are not stored as transactions. When a packet is first created, the first thing that Data Synchronization Server does is write any structural changes into the packet. It then incorporates the transactions. If a time has been set in the `Update existing outbox packets every` field in Server Maintenance, the packet will continue to get updated with new transactions according to that setting. The structural changes, which are not transactions, will not get written until the next new packet is created. The next time you copy the outbox packet to the site, delete it from the central installation's outbox so a new packet will be created. Your structural changes should be transferred with the new packet.

I keep deleting a database and it keeps coming back.

Your site is set up at the central installation to create the database if it does not exist. If there is a reason you do not want to keep this database at the site, contact your Data Synchronization Server system administrator. Your site will need to be unlinked from the global defaults and the database in

question will need to be removed from the list of databases to be synchronized. (Alternatively, the `Create database if not found` option in the Database Files to Transfer dialog box can be unmarked for this database. If the database is deleted at any site, it will not be created again.)

I know my script is set to process the outbox, but there is never a packet in the outbox directory.

Check your script to make sure that the `Delete Outbox Packet` option has not been selected in a step following a step using the `Process Outbox` option. If it has, the outgoing packet is being created and subsequently deleted. Adjust the script and use the /TD= parameter to resend the edits that have been lost. (Make sure the `Validate contact record revisions at field level` Site Preference is set on before sending out a packet with old transactions. If the field has recently been changed in the central installation, you do not want to overwrite it with an old edit from the remote site.)   If the packet is not being deleted, your script may be set up to run a batch file that moves the packet to the central site. Either check the script, or contact the central site and find out if the packets are being received.

I assigned activity permissions to a user at another site, but he didn't seem to receive them.

Activity permissions are stored in TeleMagic as part of the user information. Permissions will only be synchronized if users are being synchronized, which means that `Update central user list` must be marked on in Site Preferences for remote sites if you want activity permissions to be transferred. If you do not want to have the sites' central user lists updated on a regular basis, instruct users to set their permissions, perform a synchronization with this feature on, then mark it off for subsequent synchronizations.

I've edited one of my scripts, but it keeps reverting to the old settings.

If an initialization packet is being sent that was created with the `Transfer Scripts` option marked, any scripts created at the central installation will be synchronized to the site. If there is a script in the central with the same name as the script you are editing, your edits will get overwritten. Change the name of the script at the remote site. (If you have attached the script to an icon with a command line parameter, make sure you update the script name in the parameter to reflect your change.)

Is there any way to apply my Global Database Preferences to just one unlinked site?

That depends on how many databases the site is using. If it is just using one database, you can re-link the site to the global settings, then unlink it again. The Database Preferences will be updated to the global settings. However, if it is using multiple databases, all of them will revert to the global settings. In this instance it is quicker just to open the unlinked site's Database Preferences and edit the settings to match the global.

I've never used database synchronization before and I'm very nervous that important data is going to get overwritten by mistake.

Data Synchronization Server provides you with several tools to help make sure that doesn't happen. The first is field level synchronization. Important data can and does inadvertently get overwritten during record level synchronization, but using field level synchronization, changes are made on an individual

field level, reducing the risk. The second tool is field level date and time validation. This ensures that old edits don't overwrite newer ones. The third tool is field rules. You can control exactly how and when a field is changed in your central databases. Finally, even if a field does get overwritten in your central site, you can store the original data in the memo field of your choice for later review. If it shouldn't have been overwritten, simply paste it back into the field. Remember additionally to always perform regular backups of your TeleMagic installations. As long as you have a backup copy of your data, nothing can be "lost".

Is there anything I can do if I've accidentally deleted a packet going to the central installation?

When you create a packet, Data Synchronization keeps a record of the date and time of the last transactions included in the packet. The next packet you create will only include transactions after that date and time. If you create a packet at a remote site that is not received by the central installation, you need to let Data Synchronization know to include the transactions from the last packet in the current one. This is done by establishing a transaction cutoff date. A transaction cutoff date tells Data Synchronization to include all transactions from a specified date forward, even if they were included in a previous packet. Setting a transaction cutoff date is done at remote sites using the /TD= parameter in the command line used to launch Data Synchronization. Once a packet has been created with this parameter, you should remove it from the command line. It is also recommended that you mark `Validate contact record revisions at field level` in Site Preferences before processing the packet into the central site. This ensures that an old transaction will not overwrite newer data if a field has been changed in the central site more recently.

Why do I keep losing changes to my database (fields, indexes, etc.)?

Your site is set up at the central installation to overwrite structural changes at the remote site. Contact your Data Synchronization Server system administrator and inform him or her that you would like to be able to make changes to the remote site. The system administrator can either make the changes in the central installation and synchronize them over, or unmark the applicable check boxes in the Database Files To Transfer dialog box for this database.

I put a time in the Start Processing At field at the remote site, but it didn't begin to process.

Simply putting a time in this field does not launch process mode. You must click the **Process** button. The `Start Processing At` field is merely a way to control when to commence processing after process mode has been launched using the **Process** button.

What's the difference between Resend Packet and Reset?

Once an initialization packet has been sent out, Data Synchronization Server will wait for a response packet from the site acknowledging that it has received the initialization packet before allowing you to make any more changes to the site's synchronization settings. The Resend Packet and Reset options allow you to deal with situations where there is a problem with processing the initialization packet at the remote site. If your packet has accidentally been deleted, or you were for any reason not able to process it at the site, use Resend to create a copy of the original initialization packet to be synchronized into the site. If you discover that you need to adjust your initialization settings and do not want to use the original packet or a copy of it, use Reset to set the site back to the way it was before the packet was created. This will take the site off hold and reset the transaction cutoff date for the site. Reset should only be used if the site has not received the original initialization packet.

Database related information (such as changed fields) doesn't seem to be getting synchronized for one of my sites.

The first thing to check is your site settings. Is this site set to receive changes to the database structure?   The next thing to check is if you have your server set to update existing outbox packets. If you do, it is possible that the packets for some sites were already existing prior to when the database changes were made, and have only been updated with recent transactions. (Database structure related information gets added to a packet when the packet is first created, not on updates.)

Can users at the central location work in a database if it is being used at a remote site?

Absolutely. Data Synchronization is designed to allow you to treat users at other locations as if they were on the same network as the central location.

What initialization settings have to be used?

You don't have to use any initialization settings. The first time you synchronize to a site and any time you change the Site ID, you must perform an initialization, but you do not have to select any of the settings. If you have changed your Site ID but don't need to use any of the other initialization settings, you may want to send an initialization packet with all of the check boxes unmarked. This will change the Site ID, but will not have any other affect at the site.

What if I only want to initialize one database?

You can use Database Preferences to duplicate the results of selecting `Complete database file transfer (No contact records)` and `Transfer contact and activity records` in Initialization Settings without performing an initialization. In Database Preferences, select `Select all records, ignore transactions` and mark all of the check boxes in the Database Files To Transfer dialog box. To synchronize all activity records, select `Select all activities, ignore transactions` in the Choose Activities dialog box off Site Preferences. (Consider deselecting these options after performing the synchronization.)

Is there any way to use the default security option to transfer a security group to just one site?

You can use the hold options to temporarily take other sites out of the synchronization process. Access Site Preferences for each site that you do not want to receive the security group, and mark the `Do not create packets for this site` check box. Next, access the Default Security and Preferences dialog box off the Options screen and select your security group from the `Central security group` list box. Process the outbox at the central site. A packet will be created for the site that you did not place on hold. You can then change your default security group back to the usual settings and take the other sites off hold.

How can I be sure I'm getting all of my activities and e-mail?

If you are concerned about receiving your activities and e-mail, it is recommended that you have all activity options marked on for all sites. Use the following guidelines when creating your activity and e-mail settings:

When an e-mail message is created for a user at another site, both sites have to be set up to

synchronize e-mail for the message to be received.

If you are synchronizing unlinked activities, both sites have to be set up to synchronize unlinked activities. If you are synchronizing linked activities, both sites have to be set up to synchronize linked activities, and the contact to which the activity is linked must exist in both databases.

Why can't I ignore transactions from remote to central?

The central installation is set up to contain the main database(s). Data Synchronization Server is designed to make sure that you do not overwrite data contained in the central installation inadvertently. The best way to ensure this is if only data that has been changed recently is sent to the central site to be considered for synchronization.

I already created an initialization packet, but would like to change my settings.

If you have not yet processed the packet into the remote site, you can use the Reset feature to reset the site. When this feature is used, it will be as if the initialization packet was never created. To use the Reset feature, open the Server Options dialog box at the central location, click **Reset**, select the site from the list of sites waiting for a response to an initialization packet, and click **OK**. You may now go in and edit your initialization settings and re-process the site.

I made a change in a field, but it went back to the old data.

It was actually synchronized back to the old data. This means that the old data was included in an incoming packet. This occurs most frequently when you either ignore transactions in your outgoing packet or have set a transaction cutoff date. The best way to avoid this is to use `Validate contact record revisions at field level` to ensure that the most recent entry in the field is retained.

Do I need a Supervisor user at the remote site?

Not necessarily. You are not required to have a Supervisor user at a remote site, but bear in mind that some features of TeleMagic can only be accessed by Supervisors. (You can always use initialization to add a supervisor on an as-needed basis, then remove it when it is no longer needed.)

Why might I want to place a site on hold?

Aside from using the `Do not create packets for this site` and `Do not accept packets from this site` options to take a site out of one phase of the synchronization process, you can use them to temporarily take a site totally out of the synchronization process. For example, if you would like to send out a global file set to all but one site, you can place that site on hold while you process for the other sites.

I've got Update central user list marked, but I'm still losing users.

Your user list is still going to be synchronized from the central installation to the site, even with `Update central user list` marked. If you also have `Delete users at this site who don't exist on Data Synchronization's user list for this site` marked, and you add a user at the site who is not on the central user list, that user list will be lost if you process an incoming packet from the central *before* you send a packet to the central that updates the user list. If you add a new user in TeleMagic, you have to make sure that the central user list gets updated to include that user before the next synchronization from the central to the remote site. This means that

after a user is added, you have to send a packet to the central installation and that packet has to be processed into the central installation (thus updating the user list with the new user) before an outbox packet is created at the central installation to be processed into the site. The best way of doing this is to retrieve any packet waiting for this site at central and process it into the remote installation prior to adding or deleting users in TeleMagic. Then process the remote site immediately after editing your users and send the packet to be processed by the central installation before the central installation creates another outgoing packet for the site.

None of my users have security access to the remote site.

An initialization has probably been performed that places all users in the Everyone group at the remote site, but the site has no Everyone group. Perform an initialization that adds the SUP user to the Supervisor security group. A user at the remote site can then log into TeleMagic as SUP and create and assign security as necessary.

I keep getting a message that there is nothing to process.

There are a number of possible reasons for this.

At the central site, all of your sites may be either on hold or waiting for response packets after an initialization. The server you are trying to use may not be set to process at the current time. It may be set to process only the inbox or outbox with no packets in the inbox and/or packets already existing for all sites in the outbox that do not need to be updated. You may have no sites set up yet, or no users assigned to your sites.

At the remote site, you may have marked `Process Inbox` only and do not have a packet in the inbox. You may have attempted to process an initialization packet that will affect security with the `Do not assign security to users` option selected in the Security and Preferences screen off the Options dialog box.

Adjust your settings as necessary and re-attempt to process.

Are there any issues I need to know about when ignoring transactions?

When you ignore transactions, Data Synchronization Server will consider any differences in the data in a field between the central and remote for synchronization, even if this same edit has already been processed previously. Unless you want your remote database to match your central database, it is a good idea to have `Validate contact record revisions at field level` in Site Preferences marked on before synchronizing. You should be aware, however, that this will dramatically increase the time it takes to process the packet at the remote site. Additionally, outgoing packets created when ignoring transactions will be considerably larger than those created with transactions only. This is especially an issue in large databases. For routine synchronization, consider using the `Select records based on new transactions` option.

I have Remote "Everyone" Group as my default security, but it didn't get copied to the site.

When you select the `Remote "Everyone" Group` check box in Security and Preferences off the Options screen, you are instructing Data Synchronization Server to look for a security group named Everyone already existing at the remote site. The purpose of this option is to allow you to use different settings at each site as your default, without being forced to use the same security group from central at all sites. This option will not actually add a group named Everyone from the central installation. If you want to do this, create the group in central, then select the `Central security group` radio button

and select the group from the drop-down list.

Why isn't the TST user added with external rebuild?

Data Synchronization Server is designed to give you total control over the security access to your remote sites. In installations of TeleMagic that are not being synchronized, the Supervisor security group and at least one Supervisor user are absolutely necessary, as some features are only accessible to Supervisor users. This is not required if an installation of TeleMagic is a remote site used in synchronization since Supervisor users can be added to the site at any time through initialization if necessary. If you do not want to allow the possibility of anyone logging into a remote installation of TeleMagic as a Supervisor, this group can totally be removed. If it is needed at a later time, it can be added through initialization. The previous feature of adding a Supervisor during external rebuild would conflict with this feature and has been removed from installations of TeleMagic used as remote sites. (This feature will still be available in your central installation.)

How can I synchronize reports and word processing documents?

Reports and documents can be synchronized to the sites using file sets. This does not, however, automatically place them in the dialog box that allows you to select them from within TeleMagic. This entails some minor setup once the file has been received by the site.

To synchronize a word processing document, once the document has been received by the site, select **Word Processor** from the **Write** menu to open the Word Processor Form Letter selection box. Click **Add**. The Add a Document dialog box will open. Enter a description for the file in the `Description` field. In the `File name` field, enter the path and file name of the existing document. Make any other necessary settings and click **OK**. (Do not select a template when adding an existing document.)   You may now edit the document as usual.

To synchronize a report, take careful note of the file name of the report in the central installation. There are two files needed for a custom report: *filename*.FRX and *filename*.FRT. When you create your file set, make sure you include both documents and that it is set to place the file in the remote database's database directory. When the file is copied to the site, select **Custom Reports** from the **Reports** menu to access the Custom Reports selection box. Click **Add**. The Custom Report dialog box will open. In the `Name:` field, type in the name of the report (without the extension) and click **OK**. You may now edit the report as usual.

The server didn't create a packet for one of my sites.

Two things could be happening, `Do not create packet for this site` could be marked in Site Preferences, or the server could be waiting for a response packet from an initialization. Access the site in the Remote Site Maintenance dialog box at central to determine which is a factor.

What happens if I select to overwrite an existing outbox packet at the remote site?

You will lose the transactions that were in the packet. This should only be done if the packet has already been received by the central installation. If you inadvertently delete a packet that was not received at the central, you can use the /TD= command line parameter to re-send those transactions.

Why aren't my activities getting synchronized?

If you are synchronizing unlinked activities, both sites have to be set up in Site Preferences to

synchronize unlinked activities. If you are synchronizing linked activities, both sites have to be set up in Site Preferences to synchronize linked activities, and the contact to which the activity is linked must exist in both databases.

Additionally, you should make sure you are actually a user on the Central User List for the site. If you do not have `Delete users at this site who don't exist on Data Synchronization's user list for this site` marked in Site Preferences, it is possible that although you exist as a user at the site, you do not appear on the list of users to be synchronized. In this instance, your activities will not be synchronized.

Can I synchronize the function keys I've set up?

If the user you have set up as the default user in the Preferences section of the Security and Preferences screen in Options has function keys stored in his or her user directory, they will be synchronized as part of the preference set.

Why can't I use two sites as the central?

Data Synchronization Server is designed to keep primary control at one key location. Having multiple central locations would create severe conflicts. (For example, both central locations may initialize a site at the same time and try to place all users in different default security groups, or assign two different Site IDs.)   Consider using one or more [Satellite Site](#) instead.

A second central site is not necessary to handle even a high volume of processing because you are allowed multiple servers. Even if you have an extremely large number of remote sites, you can set up as many workstations devoted to processing as you like at your one central site.

I have a security group selected in Options, but users at the site seem to still have their old security.

Selecting a default security does not move existing users from their current security group. It is merely the default for new users added through synchronization. If you want to move all users to that default group, you must use the Initialization Security Settings options off the Initialization Settings dialog box.

Why is my Process button dimmed?

If you are at the central site, you need to open Server Maintenance and select a server to use with this processing session. If you are at a remote site, you must have either `Process Inbox` or `Create Outbox Packet` selected.

Can I continue to use the central installation while Data Synchronization is processing?

Absolutely. If you have a large number of sites that need to be updated frequently, you may end up processing continuously. This would not be possible if users couldn't continue to use TeleMagic. Be aware, however, that if a record is being edited at the exact time that the server attempts to write a transaction to it, that transaction will not be processed. The Log Maintenance screen will provide information on any edits that were skipped. If an edit has been skipped you can either hand-enter it, or use the /TD= command line parameter to resend the edit.

Why can't I run a script at the central site?

Scripting is used at the remote sites to automate processing. Processing is automated at the central site through the servers.

If I have the same user at multiple sites, will he have the same preferences and security at each?

Not necessarily. If the user was added to all sites through Data Synchronization Server, chances are he or she will have the same settings because the global defaults would have been used. However, users added at the site and updated to the central user list may have different security and preferences. Additionally, changing an existing user's security or preferences at one site will not affect the settings for that user at other sites.

Do I necessarily have to perform an initialization when I add a new database?

No; in fact you may want to consider not initializing when you add a new database. The `Complete database file transfer (No contact records)` option on the Initialization Settings dialog box will transfer all structural options for *all* databases being synchronized to the site. When this occurs, any changes users have made at the remote sites to existing databases will be lost. Unless it is your intention to overwrite structural changes at the remote site, do not use initialization to add a new database to the remote sites. Instead, select the database for synchronization by clicking **Database** on the TeleMagic Data Synchronization Server Setup screen, then open database preferences by clicking **DB Preferences**. (If you want to copy the database to an unlinked remote site, use the **Site Database** and **Site Database Preferences** buttons.)   Select the new database from the list in Database Preferences, select the `Select all records, ignore transactions` radio button, then click the **Select database files to transfer** button and mark all of the check boxes. Once the database has been added to the sites, consider accessing preferences for this database again, selecting `Select records based on new transactions`, and unmarking all check boxes in the Database Files To Transfer dialog box.

If the same user is at multiple sites, should he use different User IDs at each?

The same User ID can and should be used for the user at every site he or she may need to access. If different IDs are used at multiple sites, Data Synchronization Server will have no way of knowing that it is the same user when synchronizing activities and e-mail.

Can I rebuild Data Synchronization without deleting transactions?

Yes. Simply click **Rebuild** at the Rebuild dialog box without selecting either of the check boxes.

Why would I ever not want to use date/time validation?

For the most part, you will want to use the `Validate contact record revisions at field level` feature in Site Preferences to make sure that the most recent edit is always retained. However, if you want to ensure that the database at the remote site exactly matches the database at the central site, you can perform a synchronization that ignores transactions with this feature marked off. (You can always turn it back on for subsequent synchronizations.)   Additionally, if you have set up very specific field rules to precisely control how and when a field gets replaced, an incoming change could be rejected based on the date of the edit when, according to the field rule, it should have been accepted. If you do not want the chronological sequence of edits to be a factor in replacing, and only want to use

the criteria established in field rules, you should unmark this option.

I keep getting messages that my remote site can't be processed because of too many packets in my inbox.

One of two things has happened: either you have inadvertently moved another site's packet into the inbox along with your own, or you have your site's inbox pointed to the central site's outbox. If you have copied too many packets, return the extra packet to the site to which it belongs. If you have your path set to the site's outbox, you must select another path. Unless you have only one remote site, you will not be able to process with this arrangement.

Why do I have duplicate records in my new database?

This could occur if you 1) take a database off the list of databases to be synchronized, 2) change the name of the original database at a site, 3) place the database with the original name back on the list to be synchronized, and 4) perform a synchronization that creates the database if not found. Once a database has been synchronized between sites, you should not attempt to synchronize it to a new database. (It is for this reason that you are not allowed to change the name of a synchronized database within TeleMagic.)

I added a new user to my site's central user list, but he wasn't synchronized to the site.

Much of the information included in a packet is placed there when the packet is first created. If a packet remains in the central installation's outbox and is updated, the updates will be based on transaction records. If you leave the same packet in the outbox and just copy it to the remote site's inbox, continuing to update the original with transactions, information that is only written into the packet when it is first created will not be synchronized. You should periodically delete packets that are sitting in the outbox (making sure all updates have been received by the site before deleting) to include new users in your packets.

If you create a new packet and the user is still not there, check your central user list to make sure the new user is still there. If you have `Update central user list` marked in Site Preferences, the list of users in TeleMagic at the remote site will be synchronized to the site's user list in central and the new user may have been overwritten. If you make changes to your user list, be sure to process an outgoing packet right away to avoid this.

If I'm concerned about the integrity of my data, is it a good idea to always ignore transactions?

Transactions are designed to protect the integrity of your data. It is for this reason that you cannot ignore transactions when synchronizing from the remote site to the central. For example, if a field is changed at the remote site, then synchronized into the central database, a field rule may keep that change from being accepted. If you are not using date/time validation, when a synchronization is then performed from the central to the remote that ignores transactions, the change to the field in remote will be lost. If you are using date/time validation, only the fields that have been changed in central recently will be synchronized — which is exactly what happens when you use transactions. In this case, you are needlessly including superfluous data in your packet, increasing the size and drastically slowing down processing at the remote site. Ignoring transactions should only be used if you have deleted transaction records during rebuild or you are intentionally trying to make sure that the remote database exactly matches the central database. (If you use ignore transactions because you have deleted transaction records, mark `Validate contact record revisions at field level`

in Site Preferences. If you are trying to make your databases match, unmark it.)

How often should I delete transactions during rebuild?

You should be very careful about deleting transactions during rebuild, especially at the remote sites. Changes to your remote database can only be synchronized as transactions. You should be very sure that a packet has been received at central before deleting transactions. It is also a very good idea to pay attention to when TeleMagic is backed up at the central site. If anything happens and you have to restore a backup, you can use the /TD= parameter to send any transactions that were synchronized after the most recent backup was performed. If the transactions have been deleted, you will not be able to restore them.

Additionally, the date and time of a transaction is used to determine which is the most recent change to a field if you have `Validate contact record revisions at field level` marked in Site Preferences. If there is no transaction, Data Synchronization will assume the field has not been changed recently and overwrite it. This can become an issue when you perform a synchronization that ignores transactions, as an old edit will appear more recent. Only delete transactions when you are certain that you will not need them again.

How do I transfer my packets from one site to another?

A packet is a file and is moved just like any other file. How you transfer packets really depends on your business and how you are using Data Synchronization. If you have laptop users who bring the laptops back to the office for synchronization, you can either connect the laptops to the network or copy the packets to disk and transfer them that way. If your remote sites are in another location, you can transfer the packets over modem. If you do not have access to a modem, you can transfer them to disk and mail them or overnight them.

I selected Complete database file transfer (No contact records) in Initialization, but I still got contact records.

`(No contact records)` in this option simply means that selecting this option will not automatically copy contact records. Records will be transferred according to your Database Preference settings or the `Transfer contact and activity records` option on the Initialization Settings screen if it is marked.

I added a database in TeleMagic, but it isn't being synchronized to my sites.

The first thing to look at is where you added your database. Only databases added in the central installation will be synchronized to the sites. Once a database has been created in the central installation, it must be added to the list of databases to be synchronized in Data Synchronization Server. (If you have any unlinked remote sites, be sure and add the database to the list for every site to which you want to send it.)   The next thing you have to do is instruct Data Synchronization to create the database. You can do this in one of two ways: In Database Preferences for your new database, select the `Select all records, ignore transactions` radio button and mark all of the check boxes in the Database Files To Transfer dialog box; or, in the Initialization Settings dialog box, mark `Complete database file transfer (No contact records)` and `Transfer contact and activity records`. (This method will initialize *all* databases selected for synchronization. It is recommended you use the options in Database Preferences instead.)   With either of these methods, make sure that all of the applicable sites will receive the database. If you are using the Database Preference options, mark `Apply these settings to all sites`. It will get transferred to all sites that you have set to receive this database. If you are using the initialization options, be sure to

initialize all sites with these settings.

I have records I've been using at a remote site. What's the best procedure for getting them to the central site?

If you have been using a remote installation of TeleMagic prior to using Data Synchronization Server, you may need to get the data to the central installation so that it can be included in synchronization. If the database exists in both installations, the best way of doing this is to perform an export from the remote site, then import the records into TeleMagic. (This will create a new Contact ID for the records at the central installation.)   You should then perform an initialization to the site with the `Complete database file transfer (No contact records)`, `Transfer contact and activity records,` and `Delete existing contact records from existing databases` options marked.

If you need to transfer an entire database, including the contact records, use TeleMagic's Template Maker to copy the database and install it at the central installation. (See the *System Administrator & Installation Guide* for details.)   You will have the option of including contact records in the template, or not. If you want to retain activity links, consider not including contact records, and transferring them to the central installation after the database has been installed using the import and export features.

Will changes I make to a record that has been reassigned at another site be synchronized?

Yes. TeleMagic will track the record's original location and the new location, making the correct changes to the record at the new location.

I have a 5 user network. Will having a server running continuously mean that only 4 users may be in TeleMagic at a time?

Running Data Synchronization Server does not affect the number of users who may access TeleMagic simultaneously. In fact, you can log into Data Synchronization Server using the User ID of a user currently logged into another instance of Data Synchronization Server running at another workstation, or even the ID of a user currently logged into TeleMagic.

I keep deleting a user from the central user list, and he keeps coming back.

The site is set to update the central user list and is not set to delete users at the site on synchronization. If you delete a user from a site's user list maintained in Data Synchronization at the central installation, that user will only actually be deleted from the site if you have the `Delete users at this site who don't exist on Data Synchronization's user list for this site` check box marked in Site Preferences. If you do not have this marked, the user will remain on the list of users in the installation itself. If you have `Update central user list` marked, the next time a packet is synchronized from the site the central user list will be updated to include that user. If you want to remove a particular user, mark `Delete users at this site who don't exist on Data Synchronization's user list for this site` and perform a synchronization to the site. You can unmark this option after the user has been deleted, if necessary.

Transactions

If I'm concerned about the integrity of my data, is it a good idea to always ignore transactions?

Are there any issues I need to know about when ignoring transactions?

Why can't I ignore transactions from remote to central?

Can I rebuild Data Synchronization without deleting transactions?

How often should I delete transactions during rebuild?

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Troubleshooting

Processing

[Why is my Process button dimmed?](#)

[Can you continue to use the central installation while Data Synchronization is processing?](#)

[I keep getting a message that there is nothing to process.](#)

[I keep getting messages that my remote site can't be processed because of too many packets in my inbox.](#)

[The server didn't create a packet for one of my sites.](#)

[I put a time in the `Start Processing At` field at the remote site, but it didn't begin to process.](#)

[What happens if I select to overwrite an existing outbox packet at the remote site?](#)

[Is there anything I can do if I've accidentally deleted a packet going to the central installation?](#)

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Users and Security

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How can I be sure I'm getting all of my activities and e-mail?

Why aren't my activities getting synchronized?

I assigned activity permissions to a user at another site, but he didn't seem to receive them.

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Structural Changes (Databases, Fields, List Boxes, etc.)

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[Database related information (such as changed fields) doesn't seem to be getting synchronized for one of my sites.](#)

[I keep deleting a database and it keeps coming back.](#)

[Can I synchronize the function keys I've set up?](#)

[I added a database in TeleMagic, but it isn't being synchronized to my sites.](#)

[I selected Complete database file transfer (No contact records) in Initialization, but I still got contact records.](#)

[Why did the new fields I created get synchronized to some remote sites and not to others?](#)

[Why do I keep losing changes to my database (fields, indexes, etc.)?](#)

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Data Changes

[I selected Complete database file transfer (No contact records) in Initialization, but I still got contact records.](#)

[I made a change in a field, but it went back to the old data.](#)

[Why do I have duplicate records in my new database?](#)

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Using Data Synchronization with TeleMagic

[Can I continue to use the central installation while Data Synchronization is processing?](#)

[Can users at the central location work in a database if it is being used at a remote site?](#)

[I have records I've been using at a remote site. What's the best procedure for getting them to the central site?](#)

[Will changes I make to a record that has been reassigned at another site be synchronized?](#)

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Initialization

[What initialization settings have to be used?](#)

[What if I only want to initialize one database?](#)

[Do I necessarily have to perform an initialization when I add a new database?](#)

[What's the difference between Resend Packet and Reset?](#)

[I already created an initialization packet, but would like to change my settings.](#)

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Scripts

[I've edited one of my scripts, but it keeps reverting to the old settings.](#)

[Why can't I run a script at the central site?](#)

[I know my script is set to process the outbox, but there is never a packet in the outbox directory.](#)

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Miscellaneous Issues

I noticed a descrepency between the printed documentation and the on-line help. Which is correct?

How do I transfer my packets from one site to another?

How can I synchronize reports and word processing documents?

I've never used database synchronization before and I'm very nervous that important data is going to get overwritten by mistake.

Is there any way to apply my Global Database Preferences to just one unlinked site?

Is there anything I can do if I've accidentally deleted a packet going to the central installation?

Why can't I use two sites as the central?

Why might I want to place a site on hold?

Why would I ever not want to use date/time validation?

I have a 5 user network. Will having a server running continuously mean that only 4 users may be in TeleMagic at a time?

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Notes for Step 12

This option will default to 2 hours if the server is set to process continuously or 0 hours (do not update) if the server is set to process one time then exit. If you edit this setting, then change your `Process Type` option, it will revert to the default.

This option will be dimmed if you have the `Inbox` radio button selected under `This server processes`.

Note for Step 6

Time zone is only an issue if you have remote locations outside of the central location's time zone. In this instance, Data Synchronization Server will take into account the difference in times when determining which is the most recent change to a record.

Notes for Step 9

If you do not mark `Always process Inbox`, and you do not set a time in the `from` and `to` fields, you will be prompted to set a time before saving the server.

If you have selected to process outboxes only in step 6, the `Process Inbox` fields will be unavailable.

Notes for Step 10

If you do not mark `Always process Outbox`, and you do not set a time in the `from` and `to` fields, you will be prompted to set a time before saving the server.

If you have selected to process inboxes only in step 6, the `Process Outbox` fields will be unavailable.

Note for Step 10

If the server is set to `Process one time, then exit` and you try to process at a time not included in either the `Process Outbox from` and `to` or the `Process Inbox from` and `to` times, when you attempt to process you will be informed that there is nothing to process and will be returned to the main TeleMagic Data Synchronization Server dialog box.

Hint for Establishing Server Options

Knowing how packets are going to be processed and distributed will be useful when establishing your Server Options. See the topic <u>Synchronizing Your Data</u> for helpful guidelines.

Notes for Step 9

It is recommended that users get in the habit of deleting the packets themselves as soon as they retrieve them to avoid any possible confusion. If you are using FTP or E-mail transfer, this will be handled automatically when the packet is transferred.

Packet deletion will only occur when you have exited and re-opened Data Synchronization Server. If you simply stop processing to access Setup or Maintenance, your packet will not be deleted when you go into process mode again.

There is a special type of synchronization called an initialization. Packets created for this type of synchronization will only be deleted when a response packet has been received from the remote site.

Note for Step 3

This option will be applied to both the central site and your remote sites.

Note for Step 5

The **Reset** button is covered in the [Initialization Maintenance](#) topic.

Note for Setting up Your Sites

If you are a supervisor user and want to check the System ID: from the TeleMagic Main menu at each installation, select `Options, Preferences`. The Configuration Options screen will open. Select `System` from the `Choose a Topic to Edit` list. (If you have installed Data Synchronization Server, the System ID will be dimmed.)

Note for Step 3

Your central location is distinguished by being preceded by an asterisk. To avoid possible confusion, you will not be able to use an asterisk as the first character in your remote site's name. The name 'Central Location' is reserved for the central site. You will not be able to assign this name to any other site.

Notes for Step 4

Although it is recommended that you use the site's System ID for the Site ID, it is not required. If you enter a Site ID other than the installation's System ID, Data Synchronization Server will change the site's System ID at the remote installation to match the Site ID when it performs the first synchronization. If you choose to use a different Site ID, it is very important that you carefully note the old System ID and make sure never to use it as a Site ID for a different site.

You cannot use the same Site ID more than once, even if the site originally using the ID has been deleted. If you try to enter a Site ID that has already been used, a message will appear asking if you would like Data Synchronization Server to generate a unique Site ID. You should be very careful not to use a Site ID that was used as a System ID for another site prior to installing Data Synchronization.

Notes for Step 5

Options accessed from the **Site preferences** button are covered in detail in the Site Preferences topic. If you are reviewing this help file in the order in which topics appear in the **Related Topics** area (located at the bottom of each topic), Site Preferences will be covered after you have been introduced to other areas of setup that impact on your Preference settings.

The first time a site is synchronized, Data Synchronization Server will perform an initialization. An initialization is a special type of synchronization that is used to prepare the remote installation for synchronization. The default initialization settings for a first time synchronization will locate the databases that will be used in synchronization and make sure that their structures (fields, views, list boxes, indexes, filters, and database preferences) match the structures in the central location; it will also transfer contact records for those databases and activities from the central site. If you want to use different initialization settings for your new site, see the Initialization topic.

Hint for Step 6

The Auto Create feature is useful if you are setting up laptop computers with installations of TeleMagic that need to be synchronized for multiple users.

Note for Step 7

If a user's TeleMagic ID is already being used as a Site ID (or has ever been used as a Site ID), that user will not appear in the `Central Users` list. Once a Site ID has been used, it cannot be used again. If you are unable to access this dialog box, all of the central users' IDs have been (or are being) used as a Site ID.

Note for Step 8

If a user's TeleMagic ID is already being used as a Site ID (or has ever been used as a Site ID), that user will not appear in the `Central Users` list. Once a Site ID has been used, it cannot be used again. If you are unable to access this dialog box, all of the central users' IDs have been (or are being) used as a Site ID.

Notes for Assigning Users to Your Remote Sites

You must establish the user list before you can perform synchronization with a site.

Users can be on multiple user lists.

Users who do not already exist at the site will be added to the Supervisor security group with the default TeleMagic preferences. If you want to use other settings, see the topic Default Security/Prefs.

Note for Step 1

The list of users in your central location is given for the purpose of reference only. You cannot add or delete users from the central location at this dialog box. Maintaining users in the central installation must be done from within TeleMagic.

Note for Step 2

If this site was created using the Auto Create feature, the user on whom the site was based will appear in this list.

Note for Step 4

If users have previously been added to the remote site's user list, they will appear in the `Remote Users` list in the Select Central Users dialog box *only* if they also exist in the central installation. (The purpose of this dialog box is to allow you to quickly add users who exist in the central location. It is not intended to reflect the complete remote user list.)   All users will be included in the Select Central and Remote Users dialog box.

Hint for Step 8

You can also add users who do exist in other installations in this fashion, bypassing the Select Central Users or Select Central and Remote Users dialog box. This is only recommended if you do not have a large number of users to add.

Note for Step 9

The user does not necessarily have to exist at the remote site (or the central site) to be added to the remote site's user list. If this is a new user, Data Synchronization Server will add him or her to the remote site during synchronization.

Note for Step 10

If you entered a User ID in step 10 that also exists at the central location, that user's name from the central location will automatically be entered in this field and the field will dim. If this is not the user you intended to use, you must assign that user a unique User ID. No two users can have the same ID, even if they exist at different sites. If you entered a User ID that has previously been used at another remote site, but enter a different name, the user's name at the other site will be updated to reflect this change.

Note for Step 14

There is a site preference setting that allows your remote sites to update their user lists at the central site during synchronization, based on the users actually existing in the remote installation of TeleMagic. This is useful if you want to allow supervisor users the ability to add and delete users directly at the remote site without having those changes overwritten by the central user list during synchronization. Whether you use this preference or not depends on how much control you want to allow the remote site. If you would like more information on this option, see the Updating the Central User List topic.

Note for Choosing Databases to Synchronize

The databases selected here will be used as a default for all sites, unless otherwise specified. You can include or exclude any of the databases for individual sites, if necessary. If you would like more information, see the Creating Unique Settings for Sites topic.

Note for Step 1

If you want to use a database that does not currently exist in the remote installation, you can have it added automatically on synchronization (as detailed in step 16 under To Set Database Preferences). If you want to use a database that exists in the remote installation, but does not currently exist in the central site, it must be added to the central installation from within TeleMagic.

Note for Step 4

Data Synchronization Server recognizes databases by name. You will not be able to change the name of a database in TeleMagic if that database is being used in synchronization. Although it is possible to change the name of a database that was previously used in synchronization but is not currently being used, it is not recommended that you do so. If you do, and that database is later synchronized again, errors may occur.

Note for Step 2

The preferences established at this dialog box are in no way related to the Database Preferences accessed at the Configuration Options screen internal to TeleMagic. These preferences only deal with what information will be synchronized from the database.

Note for Step 3

This list will include all filters in the central installation. If you want to work only with a select group of records, make sure a filter exists to isolate that group of records before accessing the Global Preferences dialog box. If you would like help with creating filters, see the topic *Creating Filters* in TeleMagic's on-line help.

Hints for Step 3

If you are working with a very large database and are planning on synchronizing all records instead of synchronizing changed data only (see step 5, below), you can use a filtered index to dramatically speed up the process. Click here for details.

If you create a field in TeleMagic to contain a Site ID, you can create a filter to only select records with the current site's ID in that field using the m.CSITEID variable. (**Example:** Contact1.siteid=m.CSITEID)   When records are being selected for synchronization to each site, this variable will instruct Data Synchronization to check the data in the field created to contain the Site ID (Contact1.siteid in the above example) and only include records if the data in the field matches the current site's Site ID.

Note for Step 4

There is an initialization setting to transfer contact and activity records that will ignore transactions when selected. (This is the default for first time synchronization.)   If you are performing an initialization with this selected, it will override this setting.

Hint for Step 4

If this is not the first synchronization for the site, and you have not changed the site ID, this option can be used in place of an initialization if you want the data at the remote site to exactly match the central. (Make sure date and time validation is turned off.)   Due to large packet sizes, it is not recommended that you use this for routine synchronization. Additionally, unless date and time validation is being used, there is greater potential for newer edits to be overwritten by older edits with this option. If you select this option, you should edit the setting to only include records based on new transactions as soon as it is no longer needed.

Note for Step 5

If a change is made to a record that takes it out of the selected filter, that change will be synchronized. Any future changes to a record that is no longer in the filter will not be synchronized.

Hint for Step 5

An example of where this would be useful is if your filter uses a date variable to only send changes made in the last week. Although the remote site does not need to be updated with changes older than a week, you may still want the central site to have changes made to all records at the site.

Hint for Step 6

If you do not select this option, you can use the **Record Initialization** option on TeleMagic's **Contact Utilities** menu to send the record and its parent record(s). This option further allows you to select to include related child and activity records as well. Search on *Record Initialization* in TeleMagic's on-line help for more information.

Note for Step 7

If a level is inactive in this database, the button for that level will be dimmed.

Note for Step 9

If you use TeleMagic's record reassignment feature, you must have this check box marked to successfully synchronize reassigned records.

Note for Step 10

This option only includes embedded objects. Linked OLE objects will not be included. (If you would like more information on the difference between linked and embedded objects, search on *OLE* in TeleMagic's on-line help.)

Notes for Step 11

Only activities stored in the TeleMagic global directory will be included in synchronization. (Storing activities outside of the global TeleMagic directory is controlled in Activity Preferences. If you would like more information, search on *Activity Preferences* in TeleMagic's on-line help.)

There is also a site specific setting (selected by default) to include linked activities that allows you to further filter activities. (If you would like more information, see the Activities topic.)   When synchronization is performed, Data Synchronization Server will first check the site preference to determine if the site should receive any linked activities; then, if so, it will check this setting for each database.

Note for Step 12

The first time a site is synchronized, an <u>initialization</u> is performed. The default settings for this will copy all of the database structure from the central installation to the site (as well as copying contact records). This will override any individual settings you make in this dialog box. If you do not want to copy the entire structure on initialization, unmark the `Complete database file transfer (No Contact Records)` check box in the Initialization Settings screen. You can then make individual selections from this dialog box. After the first initialization, if you want to copy the entire database structure, but do not want to perform an initialization, simply mark all of the options on this dialog box.

Hint for Step 13

If you are making drastic structural changes to your remote sites from your central installation, consider also overwriting indexes at the remote location (see step 14, below). If you do not, the site may include indexes based on fields that no longer exist.

Note for Step 17

Only list boxes stored in the database directory will be synchronized. Users must have their TeleMagic Directory Preferences set to use list boxes stored in the database directory in order to access these list boxes. If they are using global or user specific list boxes, their list boxes will not be affected. (Search on *Directories Preference* in TeleMagic's on-line help for more information on setting the directory for list boxes.)

Note for Step 17

If this is marked and users intentionally delete the database at the remote site, it will be re-added. If you want to allow users to remove databases, be sure this is unmarked.

Note for Step 19

These Changes will not be included in packet updates. It   must be a new packet.

Note for Step 23

You will only be able to access the list of fields up to the database level selected in step 8, above.

Note for Step 27

If you do not select a database, the default preferences will be applied.

Note for Creating Unique Settings for Sites

Creating a unique setting for a site unlinks the site from the Global Preferences. If you later edit your Global Preferences, all sites that have not been unlinked in this manner will automatically receive those changes. If you want those changes to also be effected in sites for which you have unique settings, you must use the `Apply these settings to all sites` feature in Global Preferences. (See step 25 under <u>To Set Database Preferences.</u>)   Be aware that if you do not want *all* sights to receive these edits, you will have to enter them manually in the appropriate sites' preferences.

Note for Step 7

Even if the site will be using the same databases as the global selections, you must access the Databases To Be Synchronized dialog box for the site and click **OK** to accept the list of databases. This action unlinks the site from the global preferences in preparation for setting unique database preferences.

Note for Step 10

If you highlight a site that has not been unlinked from the global preferences as detailed in steps 2 through 7, above, you will receive a message informing you that this must be done before accessing database preferences for the site. You will be given the option of accessing the Databases To Be Synchronized dialog box at this time to unlink the site. Select **Yes** and refer to steps 5 through 7, above. (If you select **No** you will not be able to access Site Database Preferences for this site.)

Note for Step 14

Once a site is unlinked from the global preferences, all of the databases for that site will be unlinked whether or not you edit a database's preferences.

Note for Step 15

Should you ever want to re-link this site to the global database preferences, see the instructions [To Re-Link a Site to the Global Preferences.](#)

Note for Setting up the Remote Installation

You should already have installed the Data Synchronization Server remote site software on each site's installation of TeleMagic Enterprise (V2.1 or later). If you have not, see the *Installing Data Synchronization Server on Your Remote Sites* and *Opening Data Synchronization Server at the Remote Sites* headings in the *Basic Setup* chapter of the *Data Synchronization Server* guide. The help topics dealing with setting up the remote installation assume that you have accessed on-line help from within the installation of Data Synchronization you want to set up.

Note for Step 4

If you change the path to your inbox or outbox, give some consideration to where the previous paths are referenced. If you have already been synchronizing using the previous paths, make sure that the individual responsible for transferring the packets knows about the change. If you are using a script that references a batch file or program to transfer the packets, make sure you update the paths where appropriate. If you are using FTP or E-mail transfer, DSS will automatically be aware of the change in path.

Note for Default Security/Prefs

This topic deals with an option accessed off the Options dialog box. See the topic Global Options for instructions on accessing this dialog box.

Note for User Preferences

In addition to preferences, if the user has the toolbar or function keys stored in his or her User Directory in TeleMagic, they will be included in the packet.

Hint for Step 1

If such a user does not exist, you can create what is called a Master Template User. This is done by creating a User ID and name that is not actually going to be used by a TeleMagic user, but will instead be used as a template, then assigning preferences to that template. For example, you may add a user with the ID DSU and the name Data Synchronization User; then log into TeleMagic as DSU and set the desired preferences for it.

Notes for Security

Selecting a default security group does not automatically assign existing users at the remote sites to that group. The only way that the security of users already at the site will be affected by this setting is if you apply this security to existing users during initialization. Simply selecting a security group here will only affect any new users that Data Synchronization Server adds during synchronization.

Security groups must be created from within TeleMagic. You will have the option of selecting any group from the central installation for use with all sites, or using unique security for each site. If you are creating site specific security, you must create a security group at each site and name it Everyone. (If you would like instructions on creating security, see the *Security* chapter of the *System Administrator & Installation Guide*.)   If you have not already created your security groups, do so before proceeding.

Note for Step 3

You will not be able to perform an initialization that removes your security groups with this option selected. (If you did, it would remove the existing security groups and not replace them with a default, leaving remote users unable to access TeleMagic.)

Note for Edit Global File Sets

This topic deals with an option accessed off the Options dialog box. See the topic Global Options for instructions on accessing this dialog box.

Hint for Step 7

If you want to include all files in a directory, type ***.*** in place of the file name.

Note for Step 9

If the specified directory does not exist at the remote site, Data Synchronization Server will create it.

Note for Step 18

[Click here](#) for information on using file sets to transfer reports and word processing documents to your sites.

Notes for Attach Global File Sets

This topic deals with an option accessed off the Options dialog box. See the topic Global Options for instructions on accessing this dialog box.

Selecting site specific file sets is controlled in Site Preferences. If you would like more information, see the Site Preferences topic.

This set of instructions assumes that you have already created your file set. If you have not, see the instructions To Create File Sets

Note for Step 4

This file set will continue to be transferred upon synchronization until you edit this selection. If you do not want to send a file set, select the `No Files` option from this list box.

Note for Edit Global Scripts

This topic deals with an option accessed off the Options dialog box. See the topic Global Options for instructions on accessing this dialog box.

For instructions on sending these default scripts to your sites, see the Transfer Scripts topic.

Note for Step 2

A default script has been provided that will process the inbox and process the outbox. If users at remote sites want to use this script, it should be customized to your business at the central installation and distributed to the remote sites using the `Transfer Scripts` option in the Initialization Settings dialog box. (See the topic [Global Scripts Maintenance](#) for details on editing this script. See the topic [Initialization](#) for more information on `Transfer Scripts` and other initialization options.)

Note for Step 7

If you are processing the inbox, processing the outbox, or sending and/or retrieving via FTP in the previous step in the script (as defined in instruction step 9, below), the time will be relative to when processing is completed. If you are running a program (see step 9, below), it will be relative to when the program is first launched. For example, if you are running a program in the previous step and set it to begin at 9:00 and set a relative time of 45 minutes, the step will begin at 9:45.

Hint for Step 7

If you set a relative time of zero for the first step, the step will be executed immediately when the script is launched at the remote site.

Note for Step 8

Make sure the specified program exists at the remote sites when selecting this option. If it does not, you can use the file sets feature to transfer the program from the central installation to your sites. If you would like more information, see the [Edit Global File Sets](#) and [Attach Global File Set](#) topics.

Note for Step 2

If an initialization has been performed for this site and the site has not yet sent a return packet, you will receive a message informing you that you cannot edit the site at the current time. (See the Initialization topic for details.)   The **Site preferences** button will toggle to **Resend packet**. You must process the initialization packet at the remote site and send a response packet back to the server before you can alter your site settings. If, for any reason, you are unable to use the initialization packet, you can create a new one with the same settings using the **Resend packet** button. (If you do not want to use the same settings, see the Initialization Maintenance topic.)

Note for Date Format

This topic deals with an option accessed on the Site Preferences dialog box. See the topic for instructions on accessing this dialog box.

Notes for E-mail

This topic deals with an option accessed on the Site Preferences dialog box. See the topic [Site Preferences](#) for instructions on accessing this dialog box.

All users from each of your sites will appear on the `To:` list in e-mail (the list used to select to whom the e-mail message should be sent) for all sites, regardless of whether or not you have `Synchronize Email` selected for any site. It is therefore possible to create an e-mail for a user who exists at another site that is not set to receive e-mail through synchronization; in this instance that user would not receive the message. For this reason, if users will be writing e-mail to users at other sites, it is recommended that you mark this check box for all sites.

If you have neither the [Update Central User List](#) nor the [Delete users at this site who don't exist on Data Synchronization's user list for this site](#) check boxes on this dialog box marked, it is possible that users will exist at the site who are not on Data Synchronization's central user list for the site. E-mail from and to these users will not be synchronized.

Notes for Activities

This topic deals with an options that are accessed on the Site Preferences dialog box. See the topic Site Preferences for instructions on accessing this dialog box.

Only activities stored in the TeleMagic global directory will be included in synchronization. (Storing activities outside of the global TeleMagic directory is controlled in Activity Preferences. If you would like more information, search on *Location of Activity Files* in TeleMagic's on-line help.)

If you have neither the `Update Central User List` nor the `Delete users at this site who don't exist on Data Synchronization's user list for this site` check boxes on this dialog box marked, it is possible that users will exist at the site who are not on Data Synchronization's central user list for the site. In this case, these users will not receive any activities from other sites. Activities created by these users will only be included in an outgoing packet if the site has the `Include activities assigned to users at site` check box marked in the Choose Activities dialog box, and the user to whom the activity is assigned also exists at the current site and is on the central user list for the site.

Notes for Linked Activities

This topic deals with an option accessed on the Site Preferences dialog box. See the topic [Site Preferences](#) for instructions on accessing this dialog box.

If the database to which the activity is linked is synchronized to any site, the activity will be saved. If the user to whom the activity is assigned does not exist at any of the sites to which the database is synchronized, or if the particular record is not included in the filter that gets synchronized, the user will not receive the activity. When assigning activities associated with particular contacts, you should make sure that the user works with that contact.

Linked activities will only be synchronized if the contact to which they are linked exists in the target database.

There is also a Data Synchronization Server Database Preference to include linked activities. Data Synchronization Server will first check this Site Preference to determine if the site should receive linked activities. If this is not marked, no linked activities will be synchronized. If it is marked, Data Synchronization Server will then check the setting in Database Preferences for each database synchronized for this site.

Note for Unlinked Activities

This topic deals with an option accessed on the Site Preferences dialog box. See the topic [Site Preferences](#) for instructions on accessing this dialog box.

Note for Activity Filters

This topic deals with an option accessed on the Site Preferences dialog box. See the topic <u>Site Preferences</u> for instructions on accessing this dialog box.

Note for Step 6

If you have this check box marked and delete an activity, it will be deleted at all other sites with this check box marked, even if you subsequently use the **Undo** button to restore the activity.

Notes for Updating the Central User List

This topic deals with an option accessed on the Site Preferences dialog box. See the topic Site Preferences for instructions on accessing this dialog box.

This requires that the information from the remote site be synchronized to the central installation *before* the central installation next updates the remote site. If a synchronization from the central installation to the remote site is performed before the synchronization from the remote site to the central installation, changes to the users at the remote site may be lost.

The results of this setting will vary depending on whether you have also selected to delete users at the site through synchronization. See the Delete users at this site who dont exist on Data Synchronizations user list for this site topic for a breakdown of how these two check boxes work together.

Note for Delete users at this site who don't exist on Data Synchronization's user list for this site

This topic deals with an option accessed on the Site Preferences dialog box. See the topic Site Preferences for instructions on accessing this dialog box.

Notes for Validate Contact Record Revisions at Field Level

This topic deals with an option accessed on the Site Preferences dialog box. See the topic <u>Site Preferences</u> for instructions on accessing this dialog box.

Data Synchronization Server allows you to set up field rules to determine exactly when a field should and should not be replaced in the central location. (If you would like more information, see the <u>Setting Field Rules</u> topic.)   When synchronizing to the central location from the remote site, if you have `Validate contact record revisions at field level` selected as a site preference, Data Synchronization Server will first compare the transaction dates of both fields. If the incoming change is more recent, it will then apply the field rule.

Notes/Hints for Send TeleMagic Update

This topic deals with an option accessed on the Site Preferences dialog box. See the topic Site Preferences for instructions on accessing this dialog box.

Do not confuse an update with an upgrade. Use the `Send TeleMagic Update` option if the change at the server was made by simply copying files into the global directory or another TeleMagic directory.

If you are synchronizing to an evaluation copy of TeleMagic, updates will not be included. The site must be registered to perform automatic updates.

Note/Hint for Apply Settings to All Sites

This topic deals with an option accessed on the Site Preferences dialog box. See the topic <u>Site Preferences</u> for instructions on accessing this dialog box.

If you will be using the same settings for all but a few of your sites, create these settings first, apply them to all sites, then access the Site Preferences for each of the sites requiring exceptions and set them up separately.

Note/Hint for Do Not Accept/Create Packet

This topic deals with an option accessed on the Site Preferences dialog box. See the topic <u>Site Preferences</u> for instructions on accessing this dialog box.

If you do not want to place a site completely on hold, you can select only one option. For example, if you select `Do not accept packets from this site` only, the site status will indicate that the site is on hold, but you will still be able to create outgoing packets for the site at the central location and synchronize them into the remote site. This is useful if you want a site to receive changes from the central installation, but do not want to input any changes from the site into the central installation. (Conversely, if you want the central installation to receive changes from the site, but do not want the site to be updated with changes from the central installation, you can mark `Do not create packets for this site` only.)

Note for Attach File Sets

This topic deals with an option accessed on the Site Preferences dialog box. See the topic <u>Site Preferences</u> for instructions on accessing this dialog box.

Note for Step 2

This file set will continue to be transferred upon each synchronization to this site until you edit this selection. If you do not want to send a file set, select the `No Files` option from this list box.

Notes for Transaction Cutoff Date

This topic deals with an option accessed on the Site Preferences dialog box. See the topic Site Preferences for instructions on accessing this dialog box.

This will only be applied to databases that have been set to synchronize based on new transactions (as opposed to all records). See the Controlling What is Synchronized topic for more information.

If you want to set a transaction cutoff date for a remote site, you can do so using the /TD= parameter. See the Command Line Parameters topic for details.

If you have performed a rebuild that deletes transaction records, only records after the deletion date specified in the rebuild process will be available for synchronization.

Note for Step 2

Once a packet has been created, these fields will update to reflect the date and time of that packet.

Hint for Step 2

You will not need to make an entry in this field for routine synchronization. This feature would only be used in special circumstances. For example, if you are forced to restore a backup of your remote installation, enter the date the backup was made so that transactions between that date and the most recent packet will be included.

Note for Step 3

This date will reflect the transaction cutoff date that was used the last time the site was processed. If the same packet was processed more than once by leaving it in the outbox and updating it with new transactions, this date will not include the entire contents of the packet.

Note for Initialization

Initialization must be performed whenever a Site ID is created or changed. See the topic Setting Up Your Sites for details on Site IDs.

Hint for Step 5

If you choose this option and find you need to perform initialization again at a later time, you can access this screen and choose this option again. All of your other selections in this dialog box will be offered as defaults.

Hint for Step 6

You can change this setting for individual sites if necessary by accessing the sites' Initialization Settings dialog boxes.

Note for Step 10

If you click **Cancel** at this point, both Site Preferences and initialization settings will be discarded.

Notes for Rename Synchronized Databases

This topic deals with an option accessed on the Initialization Settings dialog box. See the topic [Initialization](#) for instructions on accessing this dialog box.

Selecting this option will affect *all* matched databases at this site that have been included in the synchronization. (If you would like more information on selecting databases for synchronization, see the [Choosing the Databases to Synchronize](#) topic.)   If you have databases you do not want renamed, instead of using this setting, you must go into the remote installation and manually rename the ones you would like affected. (You will only be able to rename a database within TeleMagic prior to including it in synchronization for any site. You should not rename a database within TeleMagic if it has ever been included in synchronization through Data Synchronization Server.)

Notes and Hints for Complete Database File Transfer

This topic deals with an option accessed on the Initialization Settings dialog box. See the topic Initialization for instructions on accessing this dialog box. This option is a default for first time synchronization.

Selecting this option will not automatically copy contact records, however, records will be transferred according to your Database Preference settings for contact records, or the `Transfer contact and activity records` option on this screen (if it is marked).

If you select this option during initialization, this will be performed on all databases being synchronized to this site. If you would only like this applied to a specific database, do not mark this option and instead select all of the options in the Database Files To Transfer dialog box for that database in Database Preferences. (If you would like more information, see the To Set Database Preferences topic.)

Notes and Hints for Transfer Contact and Activity Records

This topic deals with an option accessed on the Initialization Settings dialog box. See the topic Initialization for instructions on accessing this dialog box.

This option will respect any contact and activity filters you have set.

Use this option with the `Delete existing contact records` from existing databases and `Delete existing activity records` options to ensure that your contact and activity databases in the remote site exactly match those in the central installation.

Note for Delete Contact Records

This topic deals with an option accessed on the Initialization Settings dialog box. See the topic [Initialization](#) for instructions on accessing this dialog box.

Note for Delete Activity Records

This topic deals with an option accessed on the Initialization Settings dialog box. See the topic [Initialization](#) for instructions on accessing this dialog box.

Note for User Preference Option

This topic deals with an option accessed on the Initialization Settings dialog box. See the topic [Initialization](#) for instructions on accessing this dialog box.

Notes for Transfer Scripts

This topic deals with an option accessed on the Initialization Settings dialog box. See the topic Initialization for instructions on accessing this dialog box.

A default script has been included at the central site that can be transferred to your remote sites. If your sites will use the default script, mark this option. (See the topic Processing a Remote Site Using a Script for details.)

Notes for Add Supervisor

This topic deals with an option accessed on the Initialization Settings dialog box. See the topic Initialization for instructions on accessing this dialog box.

If this option is marked, the SUP user will be added to the site's user list and will therefore be added at your remote site when a packet is processed *whether or not you perform initialization*. If you do not perform initialization, the user will not necessarily be added with supervisor security; it will be assigned the default security established in the Global Options dialog box. (See the Security topic for details on setting the default security group.)

Notes and Hints for Send TeleMagic Upgrade

This topic deals with an option accessed on the Initialization Settings dialog box. See the topic [Initialization](#) for instructions on accessing this dialog box.

If the change to your central site was made by simply copying files into your global directory or another TeleMagic directory, you should use the `Send TeleMagic Update` option found on the Site Preferences screen instead of this option. The `Send TeleMagic Upgrade` option in initialization is used when the server was upgraded using the TeleMagic installation setup program. (This applies even if you used the Update option in the setup program.)

Notes for Site Time Zone

This topic deals with an option accessed on the Initialization Settings dialog box. See the topic Initialization for instructions on accessing this dialog box.

If users have previously established a time zone at the site and performed a synchronization to the central installation, the selected time zone will be displayed here. Any edits made to the time zone at the site will be synchronized back to the central installation and reflected in this field.

This does not apply to satellite offices. The time zone for a satellite office is set in the Initialization screen at the central site for that satellite, or in Server Maintenance at the satellite.

Note for Daylight Savings Time

This topic deals with an option accessed on the Initialization Settings dialog box. See the topic [Initialization](#) for instructions on accessing this dialog box.

Note for Initialization Security Settings

This topic deals with options accessed off the Initialization Settings dialog box. See the topic [Initialization](#) for instructions on accessing this dialog box.

Notes for Initialization Security Settings

If you have no default security set up in Global Options, you will not be able to access this dialog box.

If you have the `Remote "Everyone" Group` selected as your default security group, make sure that there is a group named Everyone at the remote site before selecting any of these options. If there is not, the security change will not take place. Users will retain their original security.

Notes for Remove Security Groups

This topic deals with an option on the Initialization Security Settings screen accessed off the Site Preferences dialog box. See the topic <u>Initialization</u> for instructions on accessing this dialog box.

If you have selected a security group in Global Options from the central installation that does not currently exist in the remote site, it will be created. If you have selected a security group that does exist at the remote site, or if you have selected the `Remote "Everyone" Group` option, the existing security group at the remote site will be retained and all users at the site will be assigned to it.

Notes and Hints for Apply Default Security to All Users at Site

This topic deals with an option on the Initialization Security Settings dialog box accessed off the Site Preferences dialog box. See the topic Initialization for instructions on accessing this dialog box.

You can create a SUP user through initialization who will be assigned to the Supervisor security group. This user can then transfer any users to the existing groups if necessary.

Notes and Hints for Apply these Settings to All Sites

This topic deals with an option accessed on the Initialization Settings dialog box. See the topic Initialization for instructions on accessing this dialog box.

If you will be using the same settings for all but a few of your sites, create these settings first, apply them to all sites, then the edit the initialization options for each of the sites requiring exceptions.

Note for Setting Field Rules

There is a site preference that allows you the option of <u>validating changes at the field level</u>. If this preference is selected, Data Synchronization will compare the date and time of each incoming transaction to the last date and time the field was changed in the target database and retain the most recent change. This is the only replacement criterion that is applied when synchronizing from the central installation to the remote sites. Field rules only pertain when synchronizing from the remote sites to the central. If the `Validate contact record revisions at field level` option is also selected when synchronizing to central, Data Synchronization Server will first determine if the incoming change is more recent. If it is, the applicable field rule will then be applied. If it is not, the field will not be changed, regardless of your field rules.

Note for Step 4

This memo field will be used for all fields in this database for which you choose to store replaced data.

Hint for Step 5

This setting can be further defined by creating an expression. If the specific circumstance you would like to use is not included on this list, leave the default setting `Always replace in central with data from remote` and create an expression to qualify this as necessary following the guidelines in step 8.

Notes for Step 7

This option will be unavailable for use with OLE fields.

Be aware that the memo fields can become quite large with this option selected. If you are using this feature you should regularly delete notepad entries that are obsolete.

Note for Step 7

This field rule will be applied to both the server and remotes. All other field rules will continue to be applied only at the server.

Note for Step 9

The list of variables used in Field Rules is different than those available in other areas of TeleMagic. The variables included in Data Synchronization Server include m.cADDEDBY, which allows you to create an expression based on the user who originally added the record; and m.SITEDATA,   which allows you to create an expression based on information coming in from this field in the remote site. (For example, the expression **m.SITEDATA>50,000** would cause a numeric field to be replaced only if the incoming data from the remote site exceeds 50,000.) You may only select the field on which the field rule is based with this variable.

Note for Step 1

This dialog box may already contain scripts that have been created at the central site and transferred on initialization.

Note for Step 7

If you are processing the inbox, processing the outbox, or sending and/or retrieving via FTP in the previous step in the script (as defined in instruction step 8, below), the time will be relative to when processing is completed. If you are running a program (see step 8), it will be relative to when the program is first launched. For example, if you are running a program in the previous step and set it to begin at 9:00 and set a relative time of 45 minutes, the step will begin at 9:45.

Hint for Step 7

If you set a relative time of zero for the first step, the step will be executed immediately when the script is launched at the remote site.

Hint for Setting Up the Central Site

If you will be setting up a large number of sites, it is highly recommended that you set up one site and perform a test synchronization to verify your settings before setting up all sites.

Note for Step 2

If the **Select** button is dimmed, this server is already selected at this workstation. If a server is currently in use at another workstation, you will receive a message informing you of this fact if you attempt to select it. A server can only be used at one workstation at a time. If you need to use the same server on more than one workstation, create a new server with a unique ID, but use the same settings.

Hint for Step 4

Use the [Log Maintenance](#) feature to view full details on exactly what was processed.

Note for Step 1

Be default, the central installation's outbox is located in the directory \TMSYNC\OUTBOX off the TeleMagic root directory.

> **Example:** If the central site's outbox is in the default path and the TeleMagic root directory is in the path C:\TM4, and the remote installation's ID is 500, you need to locate the file TMSRV500.TMZ or TMINI500.TMZ in the path C:\TM4\TMSYNC\OUTBOX.

Notes for Step 2

By default the remote installation's inbox is located in the directory \TMSYNC\INBOX off the TeleMagic root directory. Because it is possible to specify a different path, you may want to verify that this has not been modified before proceeding. If you need help in viewing this path, see the [Establishing the Inbox and Outbox](#) topic

Note for Step 1

Some synchronization options will not be available if you do not have exclusive use of the installation of TeleMagic. [Click here](#) for details.

Notes for Step 6

If you have selected `Start Processing At` time, the Wait To Process message will appear. This message will stay on the screen until the specified processing time. If you do not want to wait until the specified time, press x on your keyboard to begin processing immediately, or ESC to cancel processing and return to the main TeleMagic Data Synchronization - Remote dialog box.

If there is currently a packet in the outbox and you attempt to process the outbox again, you will receive a message offering you the option of appending new transactions to the current packet. Selecting **Yes** will cause transactions to be appended without affecting the data already in the packet. Selecting **No** will cause the existing file to get overwritten. Only select **No** if you are certain that the packet has been processed at the central site.

Hint for Step 6

Use the [Log Maintenance](#) feature to view full details on exactly what was processed.

Hint for Step 2

You can attach command line parameters to the default script shortcut to perform automatic login.
See the <u>Command Line Parameters</u> topic.

Note for Step 2

The FTP options will only be visible on this screen if the site's Transport Options have been configured for FTP transfer. Similarly, the E-mail options will only be visible if the site's Transport Options have been configured for E-mail transfer.

Note for Step 3

If you are using TeleMagic Internet Mail for packet transfer, the inbox will not contain a packet. Instead, the packets are stored in a temporary holding area until the inbox is processed. When processed Data Synchronization will determine which one to process, copy it to the inbox, and process.

Note for Step 4

This option will be unavailable until you have processed the inbox at least once. Once you have processed the first inbox packet, you must repeat these steps and process the outbox. You will not receive another inbox packet from the central site until it has received and processed your first response packet.

Hint for Step 3

You can attach additional command line parameters to the shortcut to perform automatic login. See the [Command Line Parameters](#) topic.

Hint for Step 6

If you later need to open Data Synchronization Server at the remote site without launching the script, remove the /Script= command line parameter or open Data Synchronization from the Run dialog box in Windows.

Note for Step 1

If you are unclear on the settings available at this dialog box, see the [Setting Up Your Server(s)](#) topic.

Note for Step 3

As a general rule, you should not have to change your Site ID. Avoid changing your Site ID unless absolutely necessary.

Note for Step 4

See <u>Site Preference Maintenance</u> and <u>Initialization Maintenance</u> for details on maintaining the power features accessible off this dialog box.

Note on Deleting Sites

If you delete a satellite office, all remote sites attached to that satellite office will be deleted from the central location's list of remote sites. You will not be able to include those installations of TeleMagic in synchronization again. This also applies to remote sites that have been detached from the satellite office that have not been reattached to another site. Make sure that any remote installations that you want to continue to synchronize have been detached from that server and claimed by another server.

Note for Step 3

You cannot delete your central location.

Note on Maintaining Users

Maintaining the users at the central installation is handled from within TeleMagic. You will not be able to edit the central site's user list in Data Synchronization Server.

Note for Step 5

If you entered a User ID in step 5 that also exists at the central location, that user's name from the central location will automatically be entered in this field and the field will dim. If this is not the user you intended to use, you must assign that user a unique User ID. No two users can have the same ID, even if they exist at different sites. If you entered a User ID that has previously been used at another remote site but enter a different name, the user's name at the other site will be updated to reflect this change.

Note for Step 8

If you change the User ID of an existing user, Data Synchronization Server will view this as a new user.

Note for Step 4

Actually deleting the users at the site is subject to the `Delete users at this site who don't exist on Data Synchronization's user list for this site` setting in Site Preferences.

Note for Step 7

Selecting **No** will cause the site to remain unlinked. However, because no databases are selected, no database related data will be synchronized. The site will only receive user related information, such as activities and e-mail, until you select a database for synchronization.

Note for Step 3

If you are unclear on the settings available at this dialog box, see the [Edit Global File Sets](#) topic.

Note for Step 3

If you are unclear on the settings available at this dialog box, see the [Edit Global Scripts](#) topic.

Note on Rebuilding

You do not necessarily have to archive transactions during rebuild. If you want to perform a rebuild that does not archive transaction records, skip to step 5.

Note for Step 4

Be aware that if you select either of these options, transactions preceding the specified time will no longer be available when you specify a Transaction Cutoff Date in Site Preferences. Additionally, if you have selected the `Validate contact record revisions at field level` option in Site Preferences, the date and time of each incoming transaction record is compared to the date and time of the last transaction for that field at the site to determine which has been edited more recently. If transactions have been archived, it will appear that the field has not been edited in the target database. Make sure that you will no longer need the transactions before archiving.

Note for Step 5

If there is no archive file, this radio button will be unavailable.

Hint on Viewing the Server Log

You can control the amount of detail included in the log. See the topic [Establishing Server Options](#) for details.

Note for Step 11

It is possible to print a report based on this data. See the topic Log Maintenance Report

Note on Printing Reports

In order to print a report from Data Synchronization Server, you must have a default printer selected in Windows.

Note for Step 7

If you unmark both `Database Preferences` and `Include All Field Rules and indicate synchronized fields`, the `Global Database` list will become disabled.

Note for Step 10

Do not confuse Site Preferences with Site Database Preferences. Site Preferences include such settings as whether or not e-mail should be synchronized to users at the site and whether the site should use date and time validation. Site Database Preferences allow you to select what database related information each site should receive. (This is the same basic information as the Global Database Preferences, but includes information for sites that do not reference the Global Database Preferences.)

Note for Step 11

If you have selected a single site in step 8 that is using the global settings, the `Site Database Preferences` option will be dimmed.

Note for Step 13

If you unmark both `Site Database Preferences` and `List Synchronized Fields`, the `Site Database Preferences` list will become disabled.

Note on Printing the Server Setup Report

Be aware that these reports can be quite long, especially if you have multiple sites and are including Database Preferences for several databases.

Hint for Scripts

A shortcut has been provided to launch a script named Default that can be provided by the central installation. Once the script has been sent from the central installation, you can edit it for each site, if desired. Alternatively, if the central installation did not provide the default script, you can create a script named Default at the remote site for use with this shortcut.

Note for Step 2

If you are unclear on the settings available at this dialog box, see the <u>Creating Scripts at the Remote Sites</u> topic.

Note on Rebuilding Sites

Deleting outdated transaction records is no longer necessary if the server has been set up to automatically delete transactions at the remote site on synchronization.

Note on Rebuilding

You do not necessarily have to delete transactions during rebuild. If you want to perform a rebuild that does not delete transaction records, skip to step 5.

Note for Step 3

The `Delete transactions…` options on the Rebuild Remote dialog box will be dimmed if the user logged into Data Synchronization Server is not a supervisor.

Notes for Step 4

Be aware that deleted transactions will not be available when a transaction cutoff date is specified using the /TD= parameter. (See the topic <u>Command Line Parameters</u> for more information.) Additionally, if you have selected the `Validate Contact Record Revisions at Field level` option in Site Preferences, the date and time of each incoming transaction record is compared to the date and time of the last transaction for that field at the site to determine which has been edited more recently. If transactions have been deleted, it will appear that the field has not been edited in the target database. Make sure that you will no longer need the transactions before deleting.

Deleting transactions at remote sites is limited to supervisor users. If a user is not a supervisor, he or she will be able to perform a rebuild, but the check boxes for deleting transactions will not be available.

Note on Date Conversion

If your notepads currently have mixed date formats, it is not recommended that you use this utility. If you do, you may end up with duplicate stamps. In that case, it is better to manually edit dates in the notes as records are edited.

Note on Date Conversion Procedure

This set of steps assumes that you have already changed the Date Format in use at the central site. This is done under System Preferences, server options, date preferences in the central installation of TeleMagic. If you have not changed the date format, open TeleMagic and adjust your date before proceeding.

Note for Step 5

If you have already converted the Last Revision fields in the selected database, you will be warned that it has already been converted. Select **Yes** to proceed regardless. If you select **No** the check box will be unmarked.

Note for Step 7

If you have already converted the memo fields in the selected database, you will be warned that they have already been converted. Select **Yes** to proceed regardless. Be aware that repeating this process could result in duplicate stamps. If you select **No** to the check box will be unmarked.

Hint for FTP Transfer

An FTP site is a special address on the Internet that is used for file transfer. To set up an FTP site, contact your Internet Service Provider. (This is required to use FTP transfer.)

Note for Step 3

If you are not sure which of these options you should choose, consult your network administrator.

Note for Step 6

Be aware that it is possible to set up the central and satellite sites to hang up after processing, sit idle until it is time to process again, then automatically dial when it is time to process. If you do not enter a password in this field, it will stop and prompt for the password every time it dials. If you will be using continuous processing and terminating the connection when DSS is idle, it is not recommended that you leave the Password: field blank.

Note on FTP Directories

Do not confuse the FTP directories with the inbox and outbox. Data Synchronization Server will continue to use the local inbox and outbox during processing. The directories created on the FTP site will only be used for packet transfer between sites. You should *not* set your Data Synchronization Server inbox and outbox to the directories on the FTP site.

Note on FTP Transfer Setup

Setup for FTP transfer is workstation specific. You must be at the workstation that will be used for packet transfer when performing these steps. If you will be using multiple workstations for packet transfer, you must repeat these steps on each.

Hint for Step 8

Do not confuse this with the number of retries used when connecting to the Internet via Dial-Up Networking. DSS will first attempt to dial out and make a general connection to the Internet. If it is unable to make that connection, it will continue to dial the number of times specified in the Dial-Up Networking section of the Connection page. Once an Internet connection is made, it will attempt to connect to the FTP site. If it is unable to connect, it will use this setting to determine how many times it should attempt to access the FTP site. As a general rule, the retries for the Dial-Up connection will be set higher than for connection to the FTP site. (If the Dial-Up connection fails, you will probably want to continue to try until the call goes through. If the connection to the FTP site fails, there is very likely a problem with the site that will need to be handled before you can continue.)

Note for Step 2

This setting must match the Transport Options setting at the central site. If it does not, the satellite will not know where to look for its packets.

Hint for Step 9

Do not confuse this with the number of retries used when connecting to the Internet via Dial-Up Networking. DSS will first attempt to dial out and make a general connection to the Internet. If it is unable to make that connection, it will continue to dial the number of times specified in the Dial-Up Networking section of the Connection page. Once an Internet connection is made, it will attempt to connect to the FTP site. If it is unable to connect, it will use this setting to determine how many times it should attempt to access the FTP site. As a general rule, the retries for the Dial-Up connection will be set higher than for connection to the FTP site. (If the Dial-Up connection fails, you will probably want to continue to try until the call goes through. If the connection to the FTP site fails, there is very likely a problem with the site that will need to be handled before you can continue.)

Note for Step 18

Make sure you allow sufficient disk space at the central's outbox for the backup files.

Note for Step 2

This setting must match the setting in Transport Options at the central or satellite installation which acts as server for this remote site. If the settings do not match, the remote will not know where to look for its packets. This setting can also be configured for each remote at the central or satellite site which acts as server for the remote. The transport option that is selected at the server will be sent in each packet, and will override the transport option selected at the remote.

Note on E-mail Transfer Setup

Setup for e-mail transfer is workstation specific. You must be at the workstation that will be used for packet transfer when performing these steps. If you will be using multiple workstations for packet transfer, you must repeat these steps on each.

Note for Step 5

We highly recommend that you contact your ISP and set up an e-mail account which is dedicated to DSS. If you use a personal e-mail account, e-mail messages which do not contain packets will not be retrieved from the e-mail server by DSS.

Note for Step 6

We highly recommend that you contact your ISP and set up an e-mail account which is dedicated to DSS. If you use a personal e-mail account, e-mail messages which do not contain packets will not be retrieved from the e-mail server by DSS.

Note for Step 5

You must have at least one Dial-Up Networking connection established in Windows for any connections to be available.

Note for Step 11

If you are running Data Synchronization Server and Automation Server on the same machine, the settings on this page need only be set up on one or the other. There is no harm in setting them in both. If different settings are used, the last one to be entered will be used. If you are running Data Synchronization Server on two different machines, these settings must be set up on both. If you only want to set these settings on Data Synchronization Server, you can skip to step 16.

Notes for Step 4

The settings in the top (SMTP Server) section of this page are only used if Data Synchronization Server is sending packets via e-mail directly, without using the Automation Server.

The settings in the second (POP3 Server) section of this page may not need to be set here. If you are running Automation Server on the same machine as Data Synchronization Server, they only need to be set on one or the other. You can set them in both places. If the settings are different, the last set to be entered will be used. If you do not want to establish these settings in Data Synchronization Server, you can skip to step 9.

Notes for Step 5

The settings in the top (SMTP Server) section of this page are only used if Data Synchronization Server is sending packets via e-mail directly, without using the Automation Server.

The settings in the second (POP3 Server) section of this page may not need to be set here. If you are running Automation Server on the same machine as Data Synchronization Server, they only need to be set on one or the other. You can set them in both places. If the settings are different, the last set to be entered will be used. If you do not want to establish these settings in Data Synchronization Server, you can skip to step 10.

Hint for Step 3

If you are adding a new script, click **Help** for general instructions.

Note for Step 3

If you are converting a remote site to a satellite site, you must also run the conversion at that installation.

Note for Step 5

The remainder of the options on this dialog box pertain to how the central site will communicate with the satellite office. They have no affect on how the satellite communicates with its remotes. For details on these settings, click **Help** or refer to *Site Preferences* in the *Power Features* chapter of the *Data Synchronization Server* guide.

Notes for Step 7

This option will be applied whenever the outbox is processed for central, whether you are processing from the **Process** button or the **Process Central** button.

This only applies to outbox packets for central. Updating outbox packets for the remote sites is controlled using the Update existing outbox packets every option on the Server Maintenance screen. The option on the Server Maintenance screen only relates to remote sites. It will not affect outbox packets for the central site.

Notes for Step 8

If you select this option, it will only set the sites for initialization. It will not change the initialization options that are currently established for the site. If an initialization option was used for the Satellite that is not currently being used for a remote site, you will have to go to the site and select that option.

If this is checked and a remote is on hold, the remote will not be initialized when the satellite is initialized.

Note for Step 3

The `Detach site from this server` check box toggles to `Site is being reattached to this server` when you are adding a site. This check box should only be used if you are attaching an existing site that has been detached from the central site or another Satellite Office. (See Attaching and Detaching Remote Sites for details.)   You should not mark this if you are adding a brand new site that has not previously been synchronized.

Note for Step 4

The name 'Central Location' is reserved for the central site. You will not be able to assign this name to any other site.

Note for Step 5

You may also set up site preferences and initialization settings if you do not want to use the defaults. Click **Site preferences** and press F1 at the Site Preferences screen for details.

Note for Step 5

If you detach a site in error, you can unmark this check box and save. The central will view this as a request to detach, then reattach the site. Be aware that if you have already sent a packet to the central with the request to detach, and another server has reattached that site, your request to reattach at this server will be rejected.

Note for Step 7

The site will not retain its site preferences or database settings from its original server. You will need to set up the site if you do not want to use the Data Synchronization Server defaults. Refer to *Setting up Newly Attached Sites*, below, for guidelines on setting up the site once it has been added.

Note for Step 7

Once a site has been marked for reattachment, you will not be able to delete it until you receive verification from the central site. Deleting the site will make it unavailable for any other servers. If the site was added at the current server in error, wait until the central verifies the site then detach it from the server. It can then be claimed by another server. If you truly want to delete the site, you may do so after verification. (Once the site has been deleted, the Site ID will not be available to any server and you will not be able to synchronize that installation of TeleMagic.)   If you have marked the Site is being reattached to this server check box for a site that is actually a new site, you may unmark the check box to change the attachment status. This change will be reflected in the next packet you send to central. If you have not yet processed a packet for central, it will treat it as if the check box was never marked. If you have already sent a packet to central, central will reject the original request to reattach the site since the site has not been detached. The next packet sent to central with this check box unmarked will request the site as an added site instead of a reattached site.

Note on Satellite Sites

When you establish database preferences at a satellite site, they only apply to synchronization with the satellite's remotes. What data gets synchronized to the central site is established in database preferences at central.

TeleMagic Data Synchronization Server - Central Maintenance Dialog Box

TeleMagic Data Synchronization Server - Satellite Maintenance Dialog Box

Date Conversion Warning Dialog Box

A Date Conversion - WARNING dialog box will open confirming that you have a complete backup before continuing.

If you do not have a backup, click Continue. You will be advised to make a backup before proceeding and the Date Conversion program will exit.

or

If you have a backup, type YES in the field and click **Continue** to proceed.

The Choose Database dialog box will open.

{ewc rhgbtn32.dll, BlueSkyHelpButton, g<PROCEDUP.BMP| PROCEDDN.BMP<JumpId(DS.HLP>thirdï¿½DS3_Date_Conversion)<<1}

Date Conversion Dialog Box

Update Last Revision Dates

If you want to replace all of the dates found in the Last Revision fields in the database with a date using the new date format, select Update Last Revision Dates. (Replacing the Last Revision dates allows you to ensure that all of your Last Revision fields will contain the same date format. This is the equivalent of resetting the field.)

Note

If you have already converted the Last Revision fields in the selected database, you will be warned that it has already been converted. Select Yes to proceed regardless. If you select No the check box will be unmarked.

Last Revision Field

Enter the date to be used in the Last Revision fields. This will default to the current date.

Update Notepad Stamps

If you would like to have all dates of a specified format that exist in memo fields changed to the new date format, select Update Notepad Stamps.

Note

If you have already converted the memo fields in the selected database, you will be warned that they have already been converted. Select Yes to proceed regardless. Be aware that repeating this process could result in duplicate stamps. If you select No to the check box will be unmarked.

Existing Date Format

Select the existing date format that should be converted from the drop-down box. (This is the date format that currently appears in the memo fields.)

The new format to which these dates will be converted will be displayed to the right of the drop-down box. This is the format that is defined in Server Options. If this needs to be changed, do so before proceeding.

Process

Click on this button when satisfied with the settings. You will be asked to confirm notepad changes.

Close

Click on this button to proceed without processing.

{ewc rhgbtn32.dll, BlueSkyHelpButton, g<PROCEDUP.BMP|
PROCEDDN.BMP<JumpId(DS.HLP>thirdï¿½DS3_Date_Conversion)<<1}

Select Notepad Fields to Convert Dialog Box

This dialog box is used to select the fields to be converted.

Add
Click this button to add a field from the `Source Fields` list to the `Selected Fields` list.

Add All
Click this button to add all fields from the `Source Field` list to the `Selected Fields` list.

Remove
Click this button to remove a field from the `Selected Fields` list.

Remove All
Click this button to remove all of the chosen fields from the `Selected Fields` list.

OK
Click this button to save your selections.

Cancel
Click this button to discard all selections and close this dialog box and return to the Date Conversion dialog box.

{ewc rhgbtn32.dll, BlueSkyHelpButton, g<PROCEDUP.BMP|
PROCEDDN.BMP<JumpId(DS.HLP>thirdï¿½DS3_Date_Conversion)<<1}

Server Maintenance Dialog Box

When setting up your server, you will need to establish certain settings pertaining to that server. This allows you to have multiple workstations processing and allows you to customize how each behaves. Data Synchronization comes with one default server already set up called DS1. (Click here for detail on the default settings.)

Server ID

Each server must have a unique three character ID to distinguish it. If you want to edit and existing server, use this drop-down list to highlight the server's three character ID.

Select Days

Click this button to open the Select Days dialog box and set the days when processing will occur.

Process Type

Select the radio button that indicates whether this server is to process packets, transfer packets, or process and transfer packets.

Frequency

Use these radio buttons to specify what you would like this server to do when it goes into Process mode:

● Select `Process one time`, if this workstation will not be used exclusively for processing packets for database synchronization. When this is selected, after processing the inbox and /or outbox, process mode will shut down and you will be returned to the main TeleMagic Data Synchronization Server dialog box where you can exit Data Synchronization if necessary.

● Select `Process Continuously` if you would like to place this server in Process mode and leave it.

● Select `Process one time, then exit`, if this workstation will not be used exclusively for processing packets for database synchronization. When this is selected, after processing the inbox and /or outbox, process mode will shut down and Data Synchronization will exit.

Processing Pause Time

Enter the time, in minutes, between processing cycles. When processing continuously, packets may be generated more frequently than desired. Use this setting to limit how often packets are generated.

Server Time Zone

Use this drop down list to specify the time zone in use by the server. Data Synchronization Server will take into account the difference in times when determining which is the most recent change to a record.

Server time zone uses daylight savings time

Mark this check box if the time zone selected for the server uses daylight savings time.

This server processes

These options allow you to select what the server processes:

- Select `Inbox` if you would like the server to process the inbox exclusively.
- Select Outbox if you would like the server to process the outbox exclusively.
- Select Both Boxes if you would like to process both the inbox and the outbox.

Process Inbox from/to
If you have set a server to process inboxes and want to limit the time that the server is available for processing the inbox, enter the time span during which it should process the inbox in these fields. Use a 12-hour format, followed by a for am and p for pm. If you select to process during a time not specified in these fields, the inbox will be skipped.

Always process Inbox
Mark this check box if you do *not* want to limit the inbox processing time.

Process Outbox from/to
If you have set a server to process outboxes and want to limit the time that the server is available for processing the outbox, enter the time span during which it should process the outbox in these fields. Use a 12-hour format, followed by a for a.m. and p for p.m. If you select to process during a time not specified in these fields, the outbox will be skipped.

Always process Outbox
Mark this check box if you do *not* want to limit the processing time.

Update existing outbox packets every
Updating the outbox packets allows you to add new transactions to existing packets without overwriting the data already there. Use these spinner arrows to set how often you would like the outbox packets updated.

Note
This option will be dimmed if you have `Inbox` selected under `This server processes`.

Packet Transfer Option
If this server will be transferring packets, you can define the time frame within which transfers can occur. Mark the **Always Transfer Packets** checkbox to transfer packets continuously.

Add
Click this button to add a new server.

Edit
Click this button to edit the settings of the highlighted server.

Delete
Highlight an existing server on the `Server ID` drop down list and click this button to delete it.

Select
Highlight a server on the `Server ID` drop down list and click this button to select it for use in this processing session. (If you would like a server automatically selected when you open Data Synchronization Server, you can use a command line parameter. [Click here](#) for details.)

Close

Click this button to save your settings and exit this dialog box.

Cancel

Click this button to close this dialog box without saving your settings. You will return to the TeleMagic Data Synchronization Server Setup screen.

{ewc rhgbtn32.dll, BlueSkyHelpButton, g<PROCEDUP.BMP|
PROCEDDN.BMP<JumpId(DS.HLP>thirdï¿½DS2_Setting_Up_Your_Server_s)<<1}

Server Options Dialog Box

The options in this dialog box allow you to configure inbox and outbox settings that will apply to all of the servers you have set up. (Click here for details on the default Server Options settings.)

Inbox Options

Enter the path to the directory you would like to use as the inbox for the server or click the **Inbox** button to select the path from a Windows Select Directory dialog box.

Outbox Options

Enter the path to the directory you would like to use as the outbox for the server or click the **Outbox** button to select the path from a Windows Select Directory dialog box.

Date Format

Open the drop-down list and select the date format. This controls the date format in use by all users at the central site.

Show Century

If you would like date fields to display all four digits of the year, select the `Show Century` check box. (This is required if you have dates that extend beyond the year 1999.)

Select User ID

Enter the three character User ID of the user who should receive notification on server activity, or select it from the drop-down list. If you would like to have more than one operator, enter each user ID separated by a comma.

Log Summary/Detail

When synchronization is performed, you can view a log detailing what was processed. Use the radio buttons to control the amount of detail included in the log.

Reset

When an initialization has been performed for a site, the site is placed on hold and you are not able to edit any settings for the site or create an outbox packet for the site until a response has been received. This button allows you to take the site off hold and instruct Data Synchronization Server that any transactions included in the initialization packet were not received. When clicked, you will be taken to a dialog box where you can select which sites you would like reset. This should only be used if the site did not successfully process the initialization packet.

Satellite Settings

Click this button to establish satellite server settings for synchronizing with the central.

OK

Click this button to save your settings and exit this dialog box.

Cancel

Click this button to exit this dialog box without saving your settings. You will return to the TeleMagic

Data Synchronization Server Setup screen.

{ewc rhgbtn32.dll, BlueSkyHelpButton, g<PROCEDUP.BMP|
PROCEDDN.BMP<JumpId(DS.HLP>thirdï¿½DS2_Establishing_Server_Options)<<1}

Server Options - Inbox Options Dialog Box

Inbox

Click on this button to browse available directories, or enter the desired path in the `Inbox` field.

Reject incoming packets older than

Use these spinner arrows to set the number of days old a packet can be before it will be rejected (not processed) by the central site.

OK

Click on this button to accept your selections and return to the `Server Options - All Servers` dialog box.

Cancel

Click on this button to return to the `Server Options - All Servers` dialog box without accepting your selections.

{ewc rhgbtn32.dll, BlueSkyHelpButton, g<PROCEDUP.BMP| PROCEDDN.BMP<JumpId(DS.HLP>thirdï¿½DS2_Establishing_Server_Options)<<1}

Server Options - Outbox Options Dialog Box

Outbox
Click on this button to browse available directories, or enter the desired path in the `Outbox` field.

Delete Packet at start of Processing session
Mark this check box if you would like any packets existing in the outbox to be deleted prior to processing. This option will only be applied the first time you select to process during any work session (the time from opening Data Synchronization Server to closing it) for servers that are set to process one time, then exit.

Warn me when less than
Use these spinner arrows to set the minimum free disk space required. You should allow approximately 50 MB of disk space, plus an additional 5 MB for each remote site for which the server will be required to create packets.

OK
Click on this button to accept your selections and return to the `Server Options - All Servers` dialog box.

Cancel
Click on this button to return to the `Server Options - All Servers` dialog box without accepting your selections.

{ewc rhgbtn32.dll, BlueSkyHelpButton, g<PROCEDUP.BMP|
PROCEDDN.BMP<JumpId(DS.HLP>thirdï¿½DS2_Establishing_Server_Options)<<1}

The TeleMagic Data Synchronization Server Setup Dialog Box

Remote Site Maintenance Dialog Box

Each remote installation of TeleMagic that will be used in synchronization needs to be set up at the central installation. Use the options in this dialog box to add, edit, and delete sites from the list of sites used with Data Synchronization Server.

Add
Click this button to add a remote site.

Edit
Highlight an existing site on the list of sites and click this button to adjust the site's details.

{ewc rhgbtn32.dll, BlueSkyHelpButton, g<PROCEDUP.BMP|
PROCEDDN.BMP<JumpId(DS.HLP>thirdï¿½DS3_Site_Maintenance)<<1}

Delete
Highlight a remote site on the list and click this button to delete it from the list. (You cannot delete your central installation.)

Auto Create
Click this button to bring up a Select Users dialog box where you can select users from your central installation and have Data Synchronization Server automatically create a remote site for each.

Site Name
Enter a name to help you identify the remote location in this field.

Site ID
Enter the system ID or another unique three character ID to identify the remote location in this field.

Note
Once you enter and save a Site ID, you cannot change it until that Site ID has been synchronized to the remote installation.

Site Preferences
Clicking this button will open the Site Preferences dialog box allowing you to attach specific settings to each site.

Resend Packet
If an initialization packet has already been sent for the selected site, `Resend Packet` will be made available instead of `Site Preferences`.

Detach site from this server
Mark this check box to detach the remote site from this server. If any of your existing sites need to be remotes of a Satellite instead of the central, you should detach them so they can be attached to the appropriate Satellite Office.

Note

The `Detach site from this server` **check box toggles** `to Site is being reattached to this server` **when you are adding a site. This check box should only be used if you are attaching an existing site that has been detached from the central site or another Satellite Office. You should not mark this if you are adding a brand new site that has not previously been synchronized.**

{ewc rhgbtn32.dll, BlueSkyHelpButton, g<PROCEDUP.BMP| PROCEDDN.BMP<JumpId(DS.HLP>thirdï¿½DS3_Attaching_and_Detaching_Remote_Sites)<<1}

Close/Save

Clicking this button will close the Remote Site Maintenance dialog box. You will return to the TeleMagic Data Synchronization Server Setup screen.

When you add or edit a site, the **Close** button will toggle to **Save**. Click **Save** to save your settings.

Cancel

Clicking this button will discard the current edits you are making to a site.

{ewc rhgbtn32.dll, BlueSkyHelpButton, g<PROCEDUP.BMP| PROCEDDN.BMP<JumpId(DS.HLP>thirdï¿½DS2_Setting_Up_Your_Sites)<<1}

Remote User Maintenance Dialog Box

Before you will be able to perform synchronization with a site, you must establish the user list. The user list should include any users who may need to access the remote installation of TeleMagic. This list will be synchronized to the site, overwriting the list of users currently at the installation.

Site

Choose each site in turn from this drop down list to establishing the user list.

Add

Click this button to add a user to the user list.

Edit

Click this button to edit the settings of a user in the user list.

Delete

Click this button to delete a user from the user list.

Auto Add

Click this button to bring up a Select Users dialog box containing users at the central installation to have Data Synchronization automatically add users from the central site to the remote site.

User ID

Enter the three-character ID of the user you want to add, edit, or delete in this field.

User Name

Enter the name of the user corresponding to the User ID of the person you are adding, editing or deleting.

OK/Save

Click **OK** to save your changes at this dialog box and exit back to the TeleMagic Data Synchronization Server Setup screen.

When you add or edit a user, the **OK** button will toggle to **Save**. Click **Save** to save the user.

Cancel

Click this button to cancel your edits at this dialog box. You will return to the TeleMagic Data Synchronization Server Setup screen.

{ewc rhgbtn32.dll, BlueSkyHelpButton, g<PROCEDUP.BMP|
PROCEDDN.BMP<JumpId(DS.HLP>thirdï¿½DS2_Assigning_Users_to_Your_Remote_Sites)<<1}

Select Central Users to Add Dialog Box

Add
Click this button to select a user to add. The selected user will move from the `Available` column to the `Selected` column.

Add All
Click this button to select all of the users in the `Available` column. They will all appear in the `Selected` column.

Remove
Click this button to remove a user from the `Selected` list and move it back to the `Available` list.

Remove All
Click this button to remove all of the users previously selected and move them back to the `Available` column.

OK
Click this button to save your selections.

Cancel
Click this button to discard your selections and return to the Remote User Maintenance dialog box.

{ewc rhgbtn32.dll, BlueSkyHelpButton, g<PROCEDUP.BMP|
PROCEDDN.BMP<JumpId(DS.HLP>thirdï¿½DS2_Assigning_Users_to_Your_Remote_Sites)<<1}

Select Central and Remote Users to Add Dialog Box

Add
Click this button to select a user to add. The selected user will move from the `Available` column to the `Selected` column.

Add All
Click this button to select all of the users in the `Available` column. They will all appear in the `Selected` column.

Remove
Click this button to remove a user from the `Selected` list and move it back to the `Available` list.

Remove All
Click this button to remove all of the users previously selected and move them back to the `Available` column.

OK
Click this button to save your selections.

Cancel
Click this button to discard your selections and return to the Remote User Maintenance dialog box.

{ewc rhgbtn32.dll, BlueSkyHelpButton, g<PROCEDUP.BMP|
PROCEDDN.BMP<JumpId(DS.HLP>thirdï¿½DS2_Assigning_Users_to_Your_Remote_Sites)<<1}

Select Sites to Reset Dialog Box

Add

Click this button to select a site to add to the list of sites being reset. The selected site will move from the `Available` column to the `Selected` column.

Add All

Click this button to select all of the sites in the `Available` column. They will all appear in the `Selected` column.

Remove

Click this button to remove a site from the `Selected` list and move it back to the `Available` list.

Remove All

Click this button to remove all of the sites previously selected and move them back to the `Available` column.

OK

Click this button to save your selections.

Cancel

Click this button to discard your selections and return to the Server Options - All Servers Dialog Box.

{ewc rhgbtn32.dll, BlueSkyHelpButton, g<PROCEDUP.BMP|
PROCEDDN.BMP<JumpId(DS.HLP>thirdï¿½DS2_Setting_Up_Your_Server_s)<<1}

Global Preferences Dialog Box

Once you have your databases selected, you can select what data is to be synchronized to those databases by establishing database preferences. The options in this screen allow you to control what information is passed, from an entire level down to individual fields. (Click here to view the default preference settings.)

Note

Depending on whether you have accessed this dialog box by clicking **DB Preferences** or **Site Database Preferences** at the TeleMagic Data Synchronization Server Setup screen, these settings may be applied to all sites that are not unlinked from the global settings, or to the site selected at the Choose Site dialog box that appeared when clicking **Site Database Preferences**.

{ewc rhgbtn32.dll, BlueSkyHelpButton, g<PROCEDUP.BMP| PROCEDDN.BMP<JumpId(DS.HLP>thirdï¿½DS2_Creating_Unique_Settings_for_Sites)<<1}

Database List

This list will include all databases that you selected at the Select Databases To Be Synchronized dialog box. Highlight a database on the list to view and/or edit the synchronization preferences for that database.

Include these records:

Choose a filter from this drop down list to further specify the group of records you want synchronized.

Select records based on new transactions

Choose this radio button if you want to include only the records that have changed since the last synchronization in your outgoing packet.

Select all records, ignore transactions

Choose this radio button if you want to include all records in a specified filter, regardless of whether or not they have changed since the last synchronization.

Only accept records from site which are in this filter

Mark this check box to apply the selected filter both to records going from the central site to the remote sites, and to records coming from the remote sites to the central.

Initialize records when filtered data changes

Mark this check box if you would like to initialize records when the information in the filter fields changes.

Level Radio Buttons

Choose the lowest level you want to have synchronized from the Level radio buttons. Data from higher levels will also be included. (For example, if you choose Level 2, Level 1 will be included, but not Level 3.)

Accept new contact records

Mark this checkbox if you would like contact records added in one installation also added to the others.

Synchronize deleted contact records

Mark this check box if you would like the contact records that have been deleted in one installation also deleted in others.

Synchronize embedded OLE fields

Mark this check box if you would like to be able to synchronize any changes made to your embedded OLE objects. (Linked OLE objects will not be included.)

Include linked activities for this database

Mark this check box to synchronize any activities linked to contacts in this database. (If selected, the activities must also meet the activity filter criteria established for each site.

{ewc rhgbtn32.dll, BlueSkyHelpButton, g<PROCEDUP.BMP|
PROCEDDN.BMP<JumpId(DS.HLP>thirdï¿½DS2_Activity_Filters)<<1}

Select database files to transfer

Click this button to bring up a Database Files to Transfer dialog box where you can select which structural changes you would like synchronized from the central to the remote sites.

Export Field Selection: Level 1, Level 2, Level 3

Click on the appropriate button to bring up a dialog box where you can select any fields you do not want to have synchronized for this database.

Apply these settings to all Sites

If you have unlinked any sites from these global defaults, mark this check box to apply the current settings to those sites. (This will not re-link the site; it is merely a quick way of transferring edits.)   This option will be dimmed (unavailable) if you have accessed this dialog box from the **Site Database Preferences** button.

Edit

Click this button to set the preferences for the highlighted database.

Save

Click this button to save your settings.

Cancel

Click this button to discard your current edits.

Close

Click this button to close the Global Preferences Dialog Box. You will return to the TeleMagic Data Synchronization Server Setup screen.

{ewc rhgbtn32.dll, BlueSkyHelpButton, g<PROCEDUP.BMP|
PROCEDDN.BMP<JumpId(DS.HLP>thirdï¿½DS2_Controlling_What_is_Synchronized)<<1}

Database Files to Transfer Dialog Box

Options are provided in this screen to allow you to select which structural changes you would like synchronized from the central installation to the remote sites.

Database Structure/ Views

Mark this check box to include any structural changes made to the database, including new and changed fields and changes made with the screen designer. Specify when to include structural changes by selecting either `Transfer When Changed` or `Always Transfer`.

Filters

Mark this check box to merge the list of filters in the remote sites with the list of filters in the central installation.

Indexes

Mark this check box to overwrite the list of indexes in the remote sites with the list of indexes in the central installation.

Listboxes

Mark this check box to overwrite the list of list boxes in the remote sites with those in the central installation. This will include list boxes stored in the database directory and those stored in the TeleMagic global directory

Create Database if not found

Mark this check box to have Data Synchronization add the database to the remote sites if it does not already exist. (If you mark this check box without marking Database Structure/Screens, a database will be created without fields or structure.)

Transfer Database Preferences

Mark this check box to have Data Synchronization overwrite internal TeleMagic Database Preferences, such as key fields and level names, with the Database Preferences from the central location.

OK

Click this button to retain your edits and return to the Global Preferences screen.

Cancel

Click here to discard your changes and return to the Global Preferences screen.

{ewc rhgbtn32.dll, BlueSkyHelpButton, g<PROCEDUP.BMP|
PROCEDDN.BMP<JumpId(DS.HLP>thirdï¿½DS2_Controlling_What_is_Synchronized)<<1}

Choose Site Dialog Box

This screen lists all of your sites and allows you to select a site when creating site specific settings. Sites on the list that are preceded by an asterisk have already been <u>unlinked</u> from the <u>global</u> defaults. Sites that do not have an asterisk are currently reading the default settings.

Select

Click this button to select the highlighted site and move on to the next dialog box where you can establish the settings for the site.

Close

Click this button to close the Choose Site Dialog box without selecting a site.

{ewc rhgbtn32.dll, BlueSkyHelpButton, g<PROCEDUP.BMP|
PROCEDDN.BMP<JumpId(DS.HLP>thirdï¿½DS2_Creating_Unique_Settings_for_Sites)<<1}

Security and Preferences Dialog Box

Default Security/Prefs allow you to select the default security and preferences that will be applied to all new users being added to a remote site of TeleMagic through Data Synchronization, as well as the default security group and preferences for use in initialization.

Assign default preferences from local user

Use the drop down list to select the name of a user existing in the central installation whose preferences will be used as a default for all new users being added to remote sites through synchronization and when selecting the `Override existing users preferences with defaults` option on the Initialization Settings screen.

Assign default security from

Use the radio buttons to select the default security:

●   Select `Remote "Everyone" group` to use a security group existing at the remote sites named Everyone. If selected, Data Synchronization will search for a security group at the remote site named Everyone and use it when assigning security. (This group must be created at each remote site.)

●   Select `Central security group` to use a security group existing in the central installation. When this radio button is selected, the list box next to it will become active. Select the appropriate group from the list.

●   Select `Do not assign security to users` if you do not want to have a default security. If selected, users will be added without security and will have to be manually assigned to a security group at the remote sites. (You will not be able to select initialization options that affect security with this selected.)

OK

Click this button to save your preference and security settings.

Cancel

Click this button to cancel any settings and exit the default Security and Preferences screen and return to the Options dialog box.

{ewc rhgbtn32.dll, BlueSkyHelpButton, g<PROCEDUP.BMP|
PROCEDDN.BMP<JumpId(DS.HLP>thirdï¿½DS2_Global_Options)<<1}

{ewc rhgbtn32.dll, BlueSkyHelpButton, g<CONTUP01.BMP|
CONTDN01.BMP<JumpId(DS.HLPï¿½DS2_Default_Security_Prefs)<<1}

File Set Setup Dialog Box

File sets allow you to define groups of files to transfer to the remote sites during synchronization. This can be used to send documents, reports, spreadsheets, and any other type of file that needs to be received by the sites. A list of any file sets previously added will appear in this dialog box.

Add Set

Click this button to bring up the Add New File Set dialog box for adding a new file set.

{ewc rhgbtn32.dll, BlueSkyHelpButton, g<PROCEDUP.BMP|PROCEDDN.BMP<<<1}

Change

Click this button to edit the highlighted file set.

Delete Set

Click this button to delete the highlighted file set.

Close

Click this button to close the File Setup dialog box and return to the Options dialog box.

Procedures:

{ewl rhgbtn32.dll, BlueSkyHelpButton, g<_____153.BMP|
_____154.BMP<JumpId(DS.HLP>thirdï¿½DS2_Edit_Global_File_Sets)<<1} <u>Edit Global File Sets</u>
{ewl rhgbtn32.dll, BlueSkyHelpButton, g<_____153.BMP|
_____154.BMP<JumpId(DS.HLP>thirdï¿½DS2_Global_Options)<<1} <u>Global Options</u>

Add/Edit New File Set Dialog Box

This screen will appear when you select to add a new file set or edit an existing one. The title bar will reflect whether you are adding or editing.

File Set Name
Enter a unique name in this field for this file set.

Add
Click this button to add a file to this set.

Change
Click this button to edit the highlighted file in the set.

Delete
Click this button to delete the highlighted file in the set.

Describe this file
Enter a descriptive name for this file in this field.

File is named
Enter the actual name under which this file is stored in this field.

File is in this directory
Enter the path to the file in this field.

Put in Remote directory
Enter the path to the file in this field if you want to have this file placed into a specific directory in the remote installation. The file will be placed in the remote's global directory if you leave this file blank. If you enter a directory that does not exist at the remote site, it will be created.

If this file already exists at the Remote side, do the following
Use the radio buttons to specify what occurs if the file already exists at the remote site.

- Selecting `Overwrite file` will cause the file to be replaced in the remote site with the file from the central installation.
- Selecting `Overwrite if Remote is older` will cause the file in the remote site to be replaced only if the file from the central installation is more recent.
- Selecting `Do not overwrite file` will cause this file to only be copied to the remote site if it does not already exist.
- Selecting `Ask Remote user` will cause a pop-up to appear during synchronization allowing the user processing at the remote site decide if the file should be overwritten or not.

Save Set/Save File
Clicking **Save Set** will save the file set and return you to the File Set Setup dialog box.

When you are adding or editing a set, the **Save Set** button will toggle to a **Save File** button. Click this button to save the settings for this file.

Cancel

Click this button to disregard the settings and close this dialog box. You will be returned to the File Set Setup dialog box.

Procedures:

{ewl rhgbtn32.dll, BlueSkyHelpButton, g<_____153.BMP|
_____154.BMP<JumpId(DS.HLP>thirdï¿½DS2_Edit_Global_File_Sets)<<1} <u>Edit Global File Sets</u>

{ewl rhgbtn32.dll, BlueSkyHelpButton, g<_____153.BMP|
_____154.BMP<JumpId(DS.HLP>thirdï¿½DS2_Attach_Global_File_Set)<<1} <u>Attach Global File Set</u>

{ewl rhgbtn32.dll, BlueSkyHelpButton, g<_____153.BMP|
_____154.BMP<JumpId(DS.HLP>thirdï¿½DS2_Attach_File_Sets)<<1} <u>Attach Site Specific File Sets</u>

{ewl rhgbtn32.dll, BlueSkyHelpButton, g<_____153.BMP|
_____154.BMP<JumpId(DS.HLP>thirdï¿½DS2_Global_Options)<<1} <u>Global Options</u>

Attach Global File Set Dialog Box

This dialog box allows you to select a file set that will be transferred to all sites during the next synchronization.

Attach Global File Set
Use this drop down list box to open a list box of file sets.

OK
Click this button to save the file set selection and return to the Options dialog box.

Cancel
Click this button to disregard the selection and exit this dialog box and return to the Options dialog box.

Procedures:
{ewl rhgbtn32.dll, BlueSkyHelpButton, g<_____153.BMP|
_____154.BMP<JumpId(DS.HLP>thirdï¿½DS2_Edit_Global_File_Sets)<<1} Edit Global File Sets
{ewl rhgbtn32.dll, BlueSkyHelpButton, g<_____153.BMP|
_____154.BMP<JumpId(DS.HLP>thirdï¿½DS2_Attach_Global_File_Set)<<1} Attach Global File Set
{ewl rhgbtn32.dll, BlueSkyHelpButton, g<_____153.BMP|
_____154.BMP<JumpId(DS.HLP>thirdï¿½DS2_Attach_File_Sets)<<1} Attach Site Specific File Sets
{ewl rhgbtn32.dll, BlueSkyHelpButton, g<_____153.BMP|
_____154.BMP<JumpId(DS.HLP>thirdï¿½DS2_Global_Options)<<1} Global Options

Scripting Dialog Box

Scripts are used at the remote sites to automate processing. To facilitate setting up your scripts, they can be created at the central site and transferred to the remote sites during initialization. (Click here for instructions on transferring the scripts on this list to your remote sites.)

Add Script
Click this button to bring up the Central Script dialog box and add a new script.

Change
Click this button to bring up the Central Script dialog box to change the details of a script.

Delete Script
Click this button to delete the highlighted script.

Close
Click this button to close the Scripting dialog box and return to the Options dialog box.

Procedures:
{ewl rhgbtn32.dll, BlueSkyHelpButton, g<_____153.BMP|
_____154.BMP<JumpId(DS.HLP>thirdï¿½DS2_Transfer_Scripts)<<1} Transfer Scripts

{ewl rhgbtn32.dll, BlueSkyHelpButton, g<_____153.BMP|
_____154.BMP<JumpId(DS.HLP>thirdï¿½DS2_Edit_Global_Scripts)<<1} Edit Global Scripts

{ewl rhgbtn32.dll, BlueSkyHelpButton, g<_____153.BMP|
_____154.BMP<JumpId(DS.HLP>thirdï¿½DS2_Global_Options)<<1} Global Options

Central Script Dialog Box

If most or all of your sites will be using the same script, you can avoid duplicate work by creating a global script at your central site and transferring it to the remote sites during initialization. Use the options in this dialog box to setup the new script.

Script name
Enter a unique name for this script in this field.

Add
Click this button to add the first step in this script.

Change
Click this button to change the details of the highlighted step in the script.

Delete
Click this button to delete the highlighted step in the script.

Describe this step
Enter a description of the step in this field.

Run this step at

● Select `Absolute Time` to set a time for the step to begin in a 12-hour format, followed by an a for a.m. or p for p.m.

● Select `Relative Time` to set the time in minutes for this step to begin, relative to the time established for the previous step or to launching the script if it is the first step.

and do the following
Use the drop down list to specify what occurs in this step:

● Select `Process Inbox` to process any packet from the central installation currently in the site's inbox.

● Select `Process Outbox` to process existing transaction records into an outgoing packet and place it in the site's outbox.

● Select `Delete Outbox Packet` to delete a packet from the outbox at the remote site. (For example, this can be used to delete an old outbox packet prior to creating a new one.)   Care should be used not to delete a packet that has not been received by the central installation.

● Select `Run a Program` to run another program to perform such functions as executing a batch file to transfer the contents of your outbox over modem to the central installation.

Program to Run
If you selected `Run a Program` for this step, enter the path and executable name for the file. (You should make sure the program exists at the remote site. If it does not, you can copy it to the remote site from the central site using the File Sets option.)   If the directory structure at the remote sites is the same or similar to the central site, you can use the `Run a Program` to open a Windows Open File dialog box to select the program. Edit the path as necessary. (Keep in mind that this script may be

transferred to multiple sites. If the directory structure is different at each site, users at the remote sites should be alerted that they need to edit the script.)

Save Script/Save

Click **Save Script** to save the script and return to the Scripting dialog box.

When you add or edit a step in the script, the **Save Script** button will toggle to a **Save** button. Click **Save** to save the current step.

Cancel

Click this button to close this dialog box without saving the script.

Procedures:

{ewl rhgbtn32.dll, BlueSkyHelpButton, g<_____153.BMP|
_____154.BMP<JumpId(DS.HLP>thirdï¿½DS2_Edit_Global_Scripts)<<1} Edit Global Scripts
{ewl rhgbtn32.dll, BlueSkyHelpButton, g<_____153.BMP|
_____154.BMP<JumpId(DS.HLP>thirdï¿½DS2_Global_Options)<<1} Global Options

Choose Activities Dialog Box

If you have selected to include unlinked or linked activities in a synchronization, you can further filter what activities should be included through the options in this dialog box.

Select activities based on new transactions

Choose this radio button to only include activities that have been changed since the last synchronization.

Select all activities, ignore transactions

Choose to include all activities in the outgoing packet.

Include activities assigned to users at site

Mark this check box to include all activities normally appearing on the calendars of the users at the remote sites.

Include activities assigned by users at site

Mark this check box to include activities created by users at the current site that have been assigned to users at other locations.

Include activities which are completed

Mark this check box to include completed activities assigned to and/or by users at this site.

Synchronize activities which have been deleted

Mark this check box to include deleted activities that were assigned to and/or by users.

OK

Click this button to save the selections and exit this dialog box. You will be returned to the Site Preferences dialog box.

Cancel

Click this button to exit this dialog box without saving the selections. You will be returned to the Site Preferences dialog box.

{ewc rhgbtn32.dll, BlueSkyHelpButton, g<PROCEDUP.BMP|
PROCEDDN.BMP<JumpId(DS.HLP>thirdï¿½DS2_Site_Preferences)<<1}

Site Preferences for (Remote Site) - FIle Set

File sets allow you to send groups of files to your remote sits. (They are created using the Edit Global File Set option off the Options dialog box. You can use this dialog box to select a file set to send to this site.

Attach File Set

Use this drop down list box to select a previously defined file set that will be sent to the remote site during synchronization.

Procedures:

{ewl rhgbtn32.dll, BlueSkyHelpButton, g<_____153.BMP|
_____154.BMP<JumpId(DS.HLP>thirdï¿½DS2_Edit_Global_File_Sets)<<1} Edit Global File Sets

{ewl rhgbtn32.dll, BlueSkyHelpButton, g<_____153.BMP|
_____154.BMP<JumpId(DS.HLP>thirdï¿½DS2_Attach_Global_File_Set)<<1} Attach Global File Set

{ewl rhgbtn32.dll, BlueSkyHelpButton, g<_____153.BMP|
_____154.BMP<JumpId(DS.HLP>thirdï¿½DS2_Site_Preferences)<<1} Site Preferences

Site Preferences for (Remote Site) - Transaction Date

Data Synchronization keeps all changes to your central installation in transaction files. Each time a server processes a site, it looks for the date and time that a packet was last created for that site. Transactions entered after that date/time in the current packet will be included in the synchronization. You can use a transaction cutoff date to specify an earlier date and time, if necessary.

Include transactions created after

Enter the earliest date and time for transactions to be included in the packet in these fields. Leave these fields blank to only include transactions following the most recent packet.

Procedures:

{ewl rhgbtn32.dll, BlueSkyHelpButton, g<_____153.BMP|
_____154.BMP<JumpId(DS.HLP>thirdï¿½DS2_Transaction_Cutoff_Date)<<1} Transaction Cutoff Date

{ewl rhgbtn32.dll, BlueSkyHelpButton, g<_____153.BMP|
_____154.BMP<JumpId(DS.HLP>thirdï¿½DS2_Site_Preferences)<<1} Site Preferences

Initialization Security Settings Dialog Box

Initialization Security Settings allow you to use the <u>default security settings</u> selected in global options to control the security available to your remote users. You have the option of removing all but the default security group, or assigning all users to that group while retaining existing security groups.

Remove existing security group

Mark this check box to delete all existing security groups from your remote site and assign all users to the group selected in Global Options.

Apply default security group to all users at site

Mark this check box to transfer all existing users to the group selected in Global Options. The existing groups will be retained for future use.

OK

Click this button to save the settings. You will be returned to the Initialization Settings screen.

Cancel

Click this button to discard the selections and exit this dialog box.

Procedures:

{ewl rhgbtn32.dll, BlueSkyHelpButton, g<_____153.BMP|
_____154.BMP<JumpId(DS.HLP>thirdï¿½DS2_Initialization_Security_Settings)<<1} <u>Initialization Security Settings</u>

{ewl rhgbtn32.dll, BlueSkyHelpButton, g<_____153.BMP|
_____154.BMP<JumpId(DS.HLP>thirdï¿½DS2_Initialization)<<1} <u>Initialization</u>

{ewl rhgbtn32.dll, BlueSkyHelpButton, g<_____153.BMP|
_____154.BMP<JumpId(DS.HLP>thirdï¿½DS2_Initialization)<<1} <u>Site Preferences</u>

Choose Database Dialog Box

This screen lists all of your databases and allows you to choose from the list when setting field rules for a specific database.

Select

Click this button to select the highlighted database.

Close

Click this button to close the Choose Database Dialog box. You will return to the TeleMagic Data Synchronization Server Setup screen.

{ewc rhgbtn32.dll, BlueSkyHelpButton, g<PROCEDUP.BMP| PROCEDDN.BMP<JumpId(DS.HLP>thirdï¿½DS2_Setting_Field_Rules)<<1}

Field Rules Dialog Box

Using Field Rules, you choose from among a selection of pre-defined rules to control how and when a field is synchronized in the central installation, and have the additional option of creating an expression to control exactly when that rule is applied. Rules can be established for every field that has been set up for synchronization.

Note

Field rules only apply when synchronizing from the remote site to the central site.

Level Radio Buttons

Choose the Level radio button containing the field in the selected database for which you want to establish field rules.

Replace [field] using this rule

Make a selection from this drop down list to specify under what circumstance the field will be updated from the remote sites.

Place original data into memo field for this level

Mark this check box to have data overwritten during synchronization for this field placed into a memo field selected using the Choose Memo Fields dialog box.

Synchronize this memo field as a character field

Mark this check box to specify that a memo field should be synchronized as a character field. For example, you may be using a memo field to contain directions to a customer's site. If a change is made to this data, you would probably not want the updated address merged as a separate entry in the field. You would most likely want it to replace the current entry. You would also probably not need to stamp the memo field with the standard notepad stamp.

When this option is selected for a memo field, that field will be treated as a character field—any changes to the field will overwrite the old data on synchronization and the notepad stamp will not be used.

Note

This field rule will be applied to both the server and remotes. All other field rules will continue to be applied only at the server.

Edit Expression

Click this button to bring up the Expression Builder dialog box allowing you to create an advanced expression to further qualify this field rule. The expression must be true before the field rule is applied. If it is not, the field will not be replaced in central.

Change

Click this button to edit the highlighted field.

Close

Click this button to close the Field Rules dialog box. You will return to the TeleMagic Data Synchronization Server Setup screen.

Memo Fields

Click this field to bring up the Choose Memo Fields dialog box allowing you to select memo fields to be used on all levels of this database to contain data that has been overwritten during synchronization. (This will only apply to fields for which you have selected the Place Original data into memo field check box.)

{ewc rhgbtn32.dll, BlueSkyHelpButton, g<PROCEDUP.BMP| PROCEDDN.BMP<JumpId(DS.HLP>thirdï¿½DS2_Setting_Field_Rules)<<1}

Choose Memo Fields Dialog Box

This dialog box allows you to establish which memo fields you would like to use for every level of a database when storing data that has been overwritten during synchronization. (This will only occur for fields that have `Place original data into memo field` selected in the Field Rules dialog box.)

Level 1

This drop down list box contains a list of all memo fields on Level 1 of the current database. Select the field you would like to use to contain data that has been overwritten on this level.

Level 2

This drop down list box contains a list of all memo fields on Level 2 of the current database. Select the field you would like to use to contain data that has been overwritten on this level.

Level 3

This drop down list box contains a list of all memo fields on Level 3 of the current database. Select the field you would like to use to contain data that has been overwritten on this level.

OK

Click this button to save the settings and return to the Field Rules dialog box.

Cancel

Click this button to disregard the selections and exit this dialog box. You will return to the Field Rules dialog box.

{ewc rhgbtn32.dll, BlueSkyHelpButton, g<PROCEDUP.BMP|
PROCEDDN.BMP<JumpId(DS.HLP>thirdï¿½DS2_Setting_Field_Rules)<<1}

Remote Script Setup Dialog Box

Scripting is used to automate processing the remote sites. Scripts consist of a set of steps that will be executed in order when the script is launched.

Script name
Enter a unique name for this script in this field.

Add
Click this button to add the first step in this script.

Change
Click this button to change the highlighted step.

Delete
Click this button to delete the highlighted step from the script.

Describe this step
Enter a description of the step in this field.

Run this step at

- Select `Absolute Time` to set a time for the step to begin in a 12-hour format, followed by an a for a.m. or p for p.m.
- Select `Relative Time` to set the time in minutes for this step to begin, relative to the time established for the previous step or to launching the script if this is the first step.

and do the following
Use the drop down list to specify what occurs in this step:

- Select `Process Inbox` to process any packet from the central installation currently in the site's inbox.
- Select `Process Outbox` to process existing transaction records into an outgoing packet and place it in the site's outbox.
- Select `Delete Outbox Packet` to delete a packet from the remote site's outbox. (For example, this can be used to delete an old outbox packet prior to creating a new one.)   Care should be used not to delete a packet that has not been received by the central installation.
- Select `Run a Program` to run another program to perform such functions as executing a batch file to transfer the contents of your outbox over modem to the central installation.

Program to Run
If you selected `Run a Program` under and do the following, click this button to open a Windows Open dialog box and locate the path and executable name for the program.

Save Script/Save
Click **Save Script** to save the script and return to the Scripting dialog box.

When you add or edit a step in the script, the **Save Script** button will toggle to a **Save** button. Click **Save** to save the current step.

Cancel

Click this button to close this dialog box without saving the script. You will return to the Scripting dialog box.

Procedures:

{ewl rhgbtn32.dll, BlueSkyHelpButton, g<_____153.BMP|
_____154.BMP<JumpId(DS.HLP>thirdï¿½DS2_Creating_Scripts_at_the_Remote_Sites)<<1} Creating Scripts at the Remote Sites

{ewl rhgbtn32.dll, BlueSkyHelpButton, g<_____153.BMP|
_____154.BMP<JumpId(DS.HLP>thirdï¿½DS3_Processing_a_Remote_Site_Using_a_Script)<<1} Processing a Remote Site Using a Script

Log Maintenance Dialog Box

Data Synchronization Server keeps a log of each synchronization process which can be useful when troubleshooting, or in simply keeping track of what has been processed.

Date

This column shows the date the synchronization was run.

Time

This column shows the time the synchronization was run.

User

This column displays the User ID of the user logged into Data Synchronization when it was synchronized.

Outbox Packet for site:

This section will show details on the selection highlighted in the `Date/Time/User` list.

OK

Click this button to close this dialog box.

Filter

Click this button to bring up the Log Filter dialog box allowing you to filter your logs.

Delete

Click this button to bring up the Choose Records to Delete Dialog Box allowing you to select the records you want deleted from the Log Maintenance Dialog Box.

Reports

Click this button to bring up the Log Maintenance Report Dialog Box allowing you to create a report based on the information available at this screen.

> **Note**
>
> In order to print a report from Data Synchronization Server, you must have a default printer selected in Windows.

Procedures:

{ewl rhgbtn32.dll, BlueSkyHelpButton, g<_____153.BMP|
_____154.BMP<JumpId(DS.HLP>thirdï¿½DS3_Viewing_the_Server_Log_Maintenance)<<1} Viewing the Log Maintenance

{ewl rhgbtn32.dll, BlueSkyHelpButton, g<_____153.BMP|
_____154.BMP<JumpId(DS.HLP>thirdï¿½DS3_Log_Maintenance_Report)<<1} Log Maintenance Report

Log Filter Dialog Box

You may want to view only certain logs at the Log Maintenance screen. This dialog box allows you to set a filter to control which logs are displayed.

Show logs from/to
In these fields enter the synchronization and/or FTP file transfer dates you would like included in the log.

Show All Users
Select this radio button to include synchronizations and/or FTP file transfers performed by any users.

Specific User
Select this radio button and choose a user from the drop down list to include only those synchronizations and/or FTP file transfers performed by a specific user.

Show All Sites
Select this radio button to include details on the synchronizations and/or performed for all sites.

Specific Site
Select this radio button and choose a site from the drop down list to only include details on synchronizations performed for that specific site.

Show Detail
Select this radio button to see full details on the synchronizations performed.

Show Errors Only
Select this radio button to only include the details pertaining to any errors that have occurred.

Inbox Only
Select this radio button to include synchronization information relating to the inbox only.

Outbox Only
Select this radio button to include synchronization information relating to the outbox only.

FTP Only
Select this radio button If you want to include information on FTP file transfers only.

All
Select this radio button to include information on synchronization relating to both boxes, as well as FTP file transfer information

OK
Click this button to activate the current filter and return to the Log Maintenance dialog box.

Cancel

Click this button to cancel your current selections and retain the original filter. You will return to the Log Maintenance dialog box.

{ewc rhgbtn32.dll, BlueSkyHelpButton, g<PROCEDUP.BMP|
PROCEDDN.BMP<JumpId(DS.HLP>thirdï¿½DS3_Viewing_the_Server_Log_Maintenance)<<1}

Server Setup Report Dialog Box

It is possible to create a report that will list the settings you created when setting up Data Synchronization Server. This is useful in maintenance, as it allows you to quickly view and analyze the current settings to determine if any need to be adjusted.

> **Note**
>
> In order to print a report from Data Synchronization Server, you must have a default printer selected in Windows.

Global Setup

Mark the `Global Setup` check box if you would like to report on your Global Setup. This includes default preferences, security, file sets, and scripts. Unmark it if you do not want global setup options included in the report.

Server Options

If you would like your report to include information on your Server Options settings, mark the `Server Options` check box. (This includes inbox and outbox options and other system-wide settings.) Unmark this check box if you do not want data pertaining to Server Options included in the report.

Server Setup

Use this drop down list if you would like to report on the servers you have set up. This will include information on how processing occurs by the specified server(s). Select All Servers to include information on every server you have set up; select a specific server from the list to only include information on that server; or select None if you do not want to include server information .

{ewc rhgbtn32.dll, BlueSkyHelpButton, g<PROCEDUP.BMP|
PROCEDDN.BMP<JumpId(DS.HLP>thirdï¿½DS2_Setting_Up_Your_Server_s)<<1}

You have the option of reporting on Global Database Preferences and field rules for a specific database or all databases.

Global Database

Use this drop down list drop-down list to select the database(s) you would like included in the report. If you select All Databases, you will be able to report on field rules for all databases in your central installation (whether they are synchronized or not) and preferences for all databases synchronized globally. If you select an individual database, you will be able to report on field rules for that database and preferences if it is synchronized globally. (If it is not, the Database Preferences check box will be unavailable.)   If you select None, no global settings will be included.

{ewc rhgbtn32.dll, BlueSkyHelpButton, g<PROCEDUP.BMP|
PROCEDDN.BMP<JumpId(DS.HLP>thirdï¿½DS2_Controlling_What_is_Synchronized)<<1}

If you selected All Databases or a specific database that is synchronized globally in the Global Database list, the `Database Preferences` check box will be available.

Database Preferences

If you would like to include preferences for the selected database(s), mark the `Database`

`Preferences` check box. Unmark it if you do not want to report on preferences.

Include Field Rules

If you would like to include field rules for the fields in the database(s) selected in step 7, mark the `Include All Field Rules and indicate synchronized fields` check box. This will list every field and its field rule. It will also indicate which fields are included in synchronization for any databases that use the global database preferences.

{ewc rhgbtn32.dll, BlueSkyHelpButton, g<PROCEDUP.BMP|
PROCEDDN.BMP<JumpId(DS.HLP>thirdï¿½DS2_Setting_Field_Rules)<<1}

> **Note**
>
> If you unmark both `Database Preferences` and `Include All Field Rules and indicate synchronized fields`, the Global Database list will become disabled.

Site Setup

Select the site(s) on which you would like to report from the drop-down list. If you select All Sites, every site you have set up will be included. If you select an individual site, only information pertaining to that site will be included in the report. If you select None, the following site specific options will be unavailable. No site specific information will be included.

If you have selected anything other than None in the Site Setup drop-down list, the `Site Preferences` check box will become available.

Site Preferences

Mark the `Site Preferences` check box if you would like to report on the site preferences for the site(s) selected in step 10.

{ewc rhgbtn32.dll, BlueSkyHelpButton, g<PROCEDUP.BMP|
PROCEDDN.BMP<JumpId(DS.HLP>thirdï¿½DS2_Site_Preferences)<<1}

If you have selected anything other than None in the Site Setup drop-down list, the `Site User List` check box will become available.

Site User List

If you would like to include the list of users established in Remote User Maintenance for this site, mark the `Site User List` check box. Unmark it if you do not want to include the list of users.

Site Database

Select the database(s) on which you want to report from the Site Database drop-down list. If you select All Databases, preference settings for all databases that are being synchronized to the site(s) selected in step 10 will be included in the report. If you select a specific database, only the preference settings for the specified database will be included in the report. If you select None, you will not receive site specific Database Preference information in the report.

{ewc rhgbtn32.dll, BlueSkyHelpButton, g<PROCEDUP.BMP|
PROCEDDN.BMP<JumpId(DS.HLP>thirdï¿½DS2_Creating_Unique_Settings_for_Sites)<<1}

> **Note**
>
> If you have selected a single site in step 10 that is using the global settings, the Site Database

Preferences option will be dimmed.

Site Database Preferences

Mark the `Site Database Preferences` check box to include the database preference information (except the list of fields being synchronized). Unmark it if you do not want to include preferences.

List Synchronized Fields

If you would like to include the list of fields selected in Database Preferences for the site, mark the `List Synchronized Fields` check box. Unmark it if you do not want to include the list of fields.

Note

If you unmark both `Site Database Preferences` and `List Synchronized Fields`, the Site Database list will become disabled.

View

Click this button to preview the report. When you are finished viewing the report, click **OK**.

Print

Click this button to print the report.

Close

Click Close to exit the Server Setup Report dialog box.

Note

Be aware that these reports can be quite long, especially if you have multiple sites and are including Database Preferences for several databases.

{ewc rhgbtn32.dll, BlueSkyHelpButton, g<PROCEDUP.BMP|
PROCEDDN.BMP<JumpId(DS.HLP>thirdï¿½DS3_Server_Setup_Report)<<1}

Log Maintenance Report Dialog Box

The Log Maintenance Report allows you to create a report based on the information available in the Log Maintenance dialog box. The settings for the Log Maintenance report will default to the current filter in use for the Log Maintenance dialog box.

Show logs from/to

In these fields enter the synchronization and/or FTP file transfer dates you would like included in the report.

Show All Users

Select this radio button to include synchronizations and/or FTP file transfers performed by any users in the report.

Specific User

Select this radio button and choose a user from the drop down list to include only those synchronizations and/or FTP file transfers performed by a specific user in the report.

Show All Sites

Select this radio button to include details on the synchronizations performed for all sites in the report.

Specific Site

Select this radio button and choose a site from the drop down list to include details on synchronizations performed for that specific site in the report.

Inbox Only

Select this radio button to include synchronization information relating to the inbox only.

Outbox Only

Select this radio button to include synchronization information relating to the outbox only.

FTP Sessions Only

Select this radio button If you want to report on FTP transfer information only.

All

Select this radio button to report on synchronization of both boxes, as well as FTP file transfer information

Summary Only

Choose this radio button to include the date and time the synchronization and/or FTP file transfer was run, the user performing the synchronization, the type, and the status.

Show All Detail

Choose this radio button to include all information pertaining to the synchronization and/or FTP file transfer (including the summary detail.)

Show Errors Detail Only

Choose this radio button the summary detail and information on any errors that occurred.

Group by Date

Select this radio button to have the report print in chronological order of the date the synchronization and/or FTP file transfer was performed.

Group by User

Select this radio button to have the report print in order by the user who performed the synchronization.

Group by Site ID

Select this radio button to have the report print in order by the Site ID.

View

Click this button to preview the report.

Print

Click this button to print the report.

Close

Click this button to exit the Log Maintenance Report Dialog Box.

{ewc rhgbtn32.dll, BlueSkyHelpButton, g<PROCEDUP.BMP|
PROCEDDN.BMP<JumpId(DS.HLP>thirdï¿½DS3_Log_Maintenance_Report)<<1}

Rebuild Remote Dialog Box

Rebuild is used to optimize Data Synchronization Server at the remote site.

Delete transactions created before
Mark this check box and enter a date in the date field to delete all transactions made before the specific date.

Delete transactions from oldest synchronization date
Mark this check box to delete all transactions with a date before the oldest synchronization.

Note
If you leave both the check boxes unmarked, a rebuild that does not delete transactions will be performed. Care should be exercised when deleting transactions as the transaction date and time is used in <u>field level</u> validation. Make sure you will not need transactions again before deleting them.

Rebuild
Click this button to proceed with the rebuild.

Cancel
Click this button to cancel the rebuild and close this dialog box. You will be returned to the main TeleMagic Data Synchronization Remote dialog box.

{ewc rhgbtn32.dll, BlueSkyHelpButton, g<PROCEDUP.BMP|
PROCEDDN.BMP<JumpId(DS.HLP>thirdï¿½DS3_Rebuilding_Your_Sites)<<1}

{ewc rhgbtn32.dll, BlueSkyHelpButton, g<CONTUP01.BMP|
CONTDN01.BMP<JumpId(DS.HLPï¿½DS3_Maintaining_Your_Remote_Sites)<<1}

TeleMagic Data Synchronization - Remote

This is the main screen for Data Synchronization Server at the remote site.

Process Inbox

Mark this check box to synchronize the packet currently in the remote installation's inbox.

Create Outbox packet

Mark this check box to create packets from your transaction records and have them placed in your outbox. (This option will be unavailable until you have processed the inbox at least once.)

Send Via FTP

Mark the `Send Via FTP` check box to have DSS access the FTP site and post outgoing packets for the server.

Retrieve Via FTP

Select `Retrieve Via FTP` if you would like DSS to retrieve any incoming packet on the FTP server for the site.

Start Processing At

Mark this check box to set the time you would like processing to begin. Enter the time in the accompanying field in 12 hour format followed by a for a.m. or p for p.m.

Process

Clicking this button will launch process mode and begin synchronization. (This button will be unavailable unless you have `Process Inbox` or `Create Outbox packet` selected.)

{ewc rhgbtn32.dll, BlueSkyHelpButton, g<PROCEDUP.BMP|
PROCEDDN.BMP<JumpId(DS.HLP>thirdï¿½DS3_Processing_the_Remote_Sites)<<1}

Maintenance

Clicking this button will open the Data Synchronization Site Maintenance Dialog box offering you the options of rebuilding your remote site, and viewing and/or printing a log of the status of all synchronizations that have been performed.

{ewc rhgbtn32.dll, BlueSkyHelpButton, g<PROCEDUP.BMP|
PROCEDDN.BMP<JumpId(DS.HLP>thirdï¿½DS3_Maintaining_Your_Remote_Sites)<<1}

Setup

Clicking this button will bring up the Data Synchronization Remote Site Setup Screen where you can set the file paths to the inbox and outbox, set the time zone in which the site is located, or create a script to automate processing.

{ewc rhgbtn32.dll, BlueSkyHelpButton, g<PROCEDUP.BMP|
PROCEDDN.BMP<JumpId(DS.HLP>thirdï¿½DS2_Basic_Setup_of_the_Remote_Installation)<<1}

Run Script

Click this button to select and run a script.

Exit

Clicking this button will close Data Synchronization Server.

Data Synchronization Remote Site Setup Dialog Box

When setting up your remote sites, you have the options of establishing time zones, setting up file paths used for the inbox and outbox, and creating scripts automate the synchronization process.

File Paths

Click this button to open the Remote Path Entry dialog box allowing you to set the paths to the inbox and outbox for use at this site.

{ewc rhgbtn32.dll, BlueSkyHelpButton, g<PROCEDUP.BMP|
PROCEDDN.BMP<JumpId(DS.HLP>thirdï¿½DS2_Establishing_the_Inbox_and_Outbox)<<1}

Scripting

Click this button to open the Scripting Dialog Box allowing you to create and/or edit your scripts.

{ewc rhgbtn32.dll, BlueSkyHelpButton, g<PROCEDUP.BMP|
PROCEDDN.BMP<JumpId(DS.HLP>thirdï¿½DS2_Creating_Scripts_at_the_Remote_Sites)<<1}

Time Zone

Click this button to bring up the Select Your Time Zone dialog box allowing you to specify the time zone in which your site is located. (Click here for details.)

{ewc rhgbtn32.dll, BlueSkyHelpButton, g<PROCEDUP.BMP|
PROCEDDN.BMP<JumpId(DS.HLP>thirdï¿½DS2_Setting_Time_Zones)<<1}

Exit Setup

Click this button to exit this dialog box and return to the main TeleMagic Data Synchronization Remote dialog box.

Remote Path Entry Dialog Box

Data Synchronization comes with default directories for use as an inbox and outbox. This dialog box makes it possible to change the path to the inbox and outbox, should you need to do so.

Path to Inbox File:

This field contains the path to the existing directory used as the site's inbox, you may edit this if necessary.

Inbox

Click this button to select the path from a Windows Select Directory dialog box.

Path to Outbox File:

This field contains the path to the existing directory used as the site's outbox, you may edit this if necessary.

Outbox

Click this button to select the path from a Windows Select Directory dialog box.

OK

Click this button to close this dialog box.

Cancel

Click this button to disregard your selections and close this dialog box.

{ewc rhgbtn32.dll, BlueSkyHelpButton, g<PROCEDUP.BMP| PROCEDDN.BMP<JumpId(DS.HLP>thirdï¿½DS2_Establishing_the_Inbox_and_Outbox)<<1}

Select Fields to Export Dialog Box

This dialog box will open for the selected level and include all available fields which can be synchronized for that level of that database.

Add

Click this button to add a field from the `Source Fields` list to the `Selected Fields` list.

Add All

Click this button to add all fields from the `Source Field` list to the `Selected Fields` list.

Remove

Click this button to remove a field from the `Selected Fields` list.

Remove All

Click this button to remove all of the chosen fields from the `Selected Fields` list.

OK

Click this button to save your selections.

Cancel

Click this button to discard all selections and close this dialog box and return to the main TeleMagic Data Synchronization Remote dialog box.

{ewc rhgbtn32.dll, BlueSkyHelpButton, g<PROCEDUP.BMP|
PROCEDDN.BMP<JumpId(DS.HLP>thirdï¿½DS2_Controlling_What_is_Synchronized)<<1}

Choose Records to Delete Dialog Box

When viewing the Log Maintenance screen, you have the option of deleting outdated logs. Use this dialog box to select which logs you want to delete.

Filtered

Click this button to delete all logs in the current filter.

Highlighted

Click this button to delete the log currently highlighted.

Cancel

Click this button to close this dialog box without deleting any logs.

{ewc rhgbtn32.dll, BlueSkyHelpButton, g<PROCEDUP.BMP|
PROCEDDN.BMP<JumpId(DS.HLP>thirdï¿½DS3_Viewing_the_Server_Log_Maintenance)<<1}

Rebuild Server Files Dialog Box

In order to keep your central location performing optimally, you should perform regular rebuilds. The options in this dialog box allow you to rebuild the files Data Synchronization Server uses and also delete outdated transaction records.

Delete transactions created before

Mark this check box and place a date in the accompanying field to delete all transactions before the specified date.

Delete transactions from oldest synchronization date

Mark this check box to delete all transactions with a date before the oldest synchronization. When selected, Data Synchronization Server will check all sites to determine which has been processed the least recently. All transactions before the cutoff date for that site will be deleted.

Note

If you leave both the check boxes unmarked, a rebuild that does not delete transactions will be performed. Care should be exercised when deleting transactions as the transaction date and time is used in field level validation. Make sure you will not need transactions again before deleting them.

Append To Archive File

Select `Append To Archive File` to add transactions to an existing archive file.

Overwrite Archive File

Select `Overwrite Archive File` to overwrite an existing archive file.

Rebuild

Click this button to proceed with the rebuild.

Cancel

Click this button to cancel the rebuild and close this dialog box. You will be returned to the main TeleMagic Data Synchronization Remote dialog box.

Procedures:

{ewl rhgbtn32.dll, BlueSkyHelpButton, g<_____153.BMP|
_____154.BMP<JumpId(DS.HLP)thirdï¿½DS3_Rebuilding_the_Server)<<1} Rebuilding the Server
{ewl rhgbtn32.dll, BlueSkyHelpButton, g<_____153.BMP|
_____154.BMP<JumpId(DS.HLP)thirdï¿½DS3_Maintaining_Your_Central_Location)<<1} Maintaining Your Central Location

Select Central Users To Auto Create Site For

It is possible to have Data Synchronization Server automatically create a remote site for each in the central installation. A list of all the users in your central site whose User ID's have not previously been used as a site ID will appear in this dialog box. The newly created site will be named after the user and the Site ID will be the user's TeleMagic User ID.

Add
Click this button to create a site for the highlighted user. That user will appear in the `Sites to Be Created` list.

Add All
Click this button to create a site for each of the users at the central site.

Remove
Click this button to remove a user from the `Sites to Be Created` list.

Remove All
Click this button to clear the `Sites to Be Created` list.

OK
Click this button to save your selections and return to the Remote Site Maintenance dialog box.

Cancel
Click this button to cancel your selections and return to the Remote Site Maintenance dialog box.

{ewc rhgbtn32.dll, BlueSkyHelpButton, g<PROCEDUP.BMP|
PROCEDDN.BMP<JumpId(DS.HLP>thirdï¿½DS2_Setting_Up_Your_Sites)<<1}

Select Databases to be Synchronized Dialog Box

Using this dialog box you can select which databases you would like synchronized to your sites.

Note

Depending on whether you have accessed this dialog box by clicking **Databases** or **Site Databases** at the TeleMagic Data Synchronization Server Setup screen, these databases may be used with all sites that are not <u>unlinked</u> from the global settings, or to the site selected at the Choose Site dialog box that appeared when clicking **Site Database**.

{ewc rhgbtn32.dll, BlueSkyHelpButton, g<PROCEDUP.BMP| PROCEDDN.BMP<JumpId(DS.HLP>thirdï¿½DS2_Creating_Unique_Settings_for_Sites)<<1}

Add

Click this button to select a database for synchronization. The selected database will move from the `Available` column to the `Selected` column.

Add All

Click this button to select all of the databases in the `Available` column to be synchronized. They will all appear in the `Selected` column.

Remove

Click this button to remove a database from the `Selected` list and move it back to the `Available` list.

Remove All

Click this button to remove all of the databases previously selected and move them back to the `Available` column.

OK

Click this button to save your selections. (If this dialog box was accessed by selecting **Site Database**, clicking **OK** will <u>unlink</u> this site from the global settings.)   You will be returned to the TeleMagic Data Synchronization Server Setup dialog box.

Cancel

Click this button to discard your selections and return to the TeleMagic Data Synchronization Server Setup dialog box.

{ewc rhgbtn32.dll, BlueSkyHelpButton, g<PROCEDUP.BMP| PROCEDDN.BMP<JumpId(DS.HLP>thirdï¿½DS2_Choosing_the_Databases_to_Synchronize)<<1}

Select Your Time Zone Dialog Box

If a particular field in a record was changed in multiple sites, Data Synchronization Server uses transaction dates and times to determine which change is the most current. If some of your sites are in different time zones, this will affect Data Synchronization Server's ability to determine when a change was made in relation to other sites. To accommodate this, you can specify the time zone in which your sites are located.

Remote Site Time Zone
Choose the applicable time zone from this drop down list box.

Use Daylight Savings Time?
Mark this check box if the time zone selected uses daylight savings time.

OK
Click this button to save your selections and exit this dialog box.

Cancel
Click this button to exit this dialog box without saving your selections.

{ewc rhgbtn32.dll, BlueSkyHelpButton, g<PROCEDUP.BMP|
PROCEDDN.BMP<JumpId(DS.HLP>thirdï¿½DS2_Setting_Time_Zones)<<1}

Options (Applies to All Sites) Dialog Box

This dialog box allows you to select defaults for options that are referenced in other areas of Data Synchronization Server.

Default Security/Prefs

Click this button to select the default security and preferences that will be applied to all new users being added to remote sites through Data Synchronization Server, as well as the default security group used for initialization.

{ewc rhgbtn32.dll, BlueSkyHelpButton, g<PROCEDUP.BMP|
PROCEDDN.BMP<JumpId(DS.HLP>thirdï¿½DS2_Default_Security_Prefs)<<1}

Attach Global File Set

Click this button to select a pre-defined group of files to transfer to the remote sites during synchronization.

{ewc rhgbtn32.dll, BlueSkyHelpButton, g<PROCEDUP.BMP|
PROCEDDN.BMP<JumpId(DS.HLP>thirdï¿½DS2_Attach_Global_File_Set)<<1}

Edit Global File Sets

Click this button to create the groups of files that can be transferred to the remote sites during synchronization.

{ewc rhgbtn32.dll, BlueSkyHelpButton, g<PROCEDUP.BMP|
PROCEDDN.BMP<JumpId(DS.HLP>thirdï¿½DS2_Edit_Global_File_Sets)<<1}

Edit Global Scripts

Click this button to create a script that can be used to automate the remote sites. Scripts created at the central installation can be transferred to the remote sites during initialization.

{ewc rhgbtn32.dll, BlueSkyHelpButton, g<PROCEDUP.BMP|
PROCEDDN.BMP<JumpId(DS.HLP>thirdï¿½DS2_Edit_Global_Scripts)<<1}

Delete Transactions Older Than

To automatically delete transactions at the remote sites, mark the `Delete Transactions Older Than` check box. Use the spinner arrows to enter the minimum age in days of transactions that should be deleted. Any transactions more recent than the specified number of days will be retained. All transactions older than that number of days will be deleted

Close

Click on this button to return to the TeleMagic Data Synchronization Server - Central Setup Dialog Box without making a selection.

{ewc rhgbtn32.dll, BlueSkyHelpButton, g<PROCEDUP.BMP|
PROCEDDN.BMP<JumpId(DS.HLP>thirdï¿½DS2_Global_Options)<<1}

Login Dialog Box

User ID

Enter your User ID as it appears in TeleMagic.

Password

Enter the password of the user whose ID you entered in the `User ID` field.

OK

Click this button to open Data Synchronization Server. (The user logged in must be a supervisor user to access Data Synchronization Server.)

Cancel

Click this button to close this dialog box. Data Synchronization Server will close.

Remote Site Scripting Dialog Box

Scripts are used to automate processing by creating a set of steps that will be executed automatically when the script is launched.

Add Script

Click this button to bring up the Remote Script Setup dialog box and add a new script.

Change

Click this button to bring up the Remote Script Setup dialog box to change the details of a script.

Delete Script

Click this button to delete the highlighted script.

Close

Click this button to close the Scripting dialog box and return to the main TeleMagic Data Synchronization Remote dialog box.

{ewc rhgbtn32.dll, BlueSkyHelpButton, g<PROCEDUP.BMP|
PROCEDDN.BMP<JumpId(DS.HLP>thirdï¿½DS2_Creating_Scripts_at_the_Remote_Sites)<<1}

Password

When selecting to view or edit the Setup report, you will be prompted for a password. Enter the password of the user currently logged into Data Synchronization Server and click **OK**.

{ewc rhgbtn32.dll, BlueSkyHelpButton, g<PROCEDUP.BMP|
PROCEDDN.BMP<JumpId(DS.HLP>thirdï¿½DS3_Server_Setup_Report)<<1}

TeleMagic Data Synchronization Remote Maintenance Dialog Box

Process Inbox Warning

If you are unable to process because there are multiple packets in your site's inbox one of two things have occurred:

●   Multiple packets have been moved or copied into the inbox. Delete any packets that do not belong to this site.

●   Your site's inbox is pointing at the central installation's outbox. The central installation's outbox will contain packets for all remote sites, preventing you from processing the inbox at the remote site if it is pointing to that directory. Unless you have only one remote site, you should select another location for your inbox and move or copy packets into it.

Central Communications Maintenance Dialog Box

Satellite Communications Maintenance Dialog Box

Remote Communications Maintenance Dialog Box

Select Days Dialog Box

Allow Processing To Be Performed On

By default, all days will be available for processing. To disable processing on any day, unmark the related check box.

Close

Click on this button to save your changes and close the Select Days dialog box.

Satellite Settings Dialog Box

On the main TeleMagic Data Synchronization Server - Satellite dialog box, there is a button for **Process** and a button for **Process Central**. The **Process Central** option will only process inbox and/or outbox packets for your central site. By default **Process** will only process inbox and/or outbox packets for your remote sites. If you do not want to process the central and remotes separately, you can use the Satellite Settings to include the central site when processing the remotes. You have the further flexibility of selecting what gets processed for the central when the remotes are processed.

Create Outbox Packets for Central when processing sites

If you would like to create an outbox packet to be sent to the central site when your remote sites are processed, mark the `Create Outbox Packets for Central when processing sites` check box. If you only want an outbox packet created for central when you process using the **Process Central** button, unmark this check box.

Process Inbox Packets from Central when processing sites

If you would like to process any inbox packet received from the central when processing the remote sites, mark the `Process Inbox Packets from Central when processing sites` check box. If you only want inbox packets from central processed when you use the **Process Central** button, unmark this check box.

Update existing outbox packets for Central every

Use the `Update existing outbox packets for Central every` spinner arrows to set how often you would like existing packets for central in the outbox updated. (This option allows you to create a packet, then update it with new data the next time the outbox is processed without overwriting it.)   Set both the hours and minutes to zero if you do not want outbox packets for central updated. The outbox will only be processed if the previous packet has been removed from the outbox.

> **Note**
>
> This option will be applied whenever the outbox is processed for central, whether you are processing from the **Process** button or the **Process Central** button.

> **Note**
>
> This only applies to outbox packets for central. Updating outbox packets for the remote sites is controlled using the Update existing outbox packets every option on the Server Maintenance screen. The option on the Server Maintenance screen only relates to remote sites. It will not affect outbox packets for the central site.

Set all sites for one time initialization when Satellite is initialized

If you would like to automatically set the satellite's remote sites for initialization whenever the satellite is initialized from central, mark the `Set all sites for one time initialization when Satellite is initialized` check box. Unmark this check box if you would like to manually set the remote sites for initialization when necessary.

> **Note**
>
> If you select this option, it will only set the sites for initialization. It will not change the initialization options that are currently established for the site. If an initialization option was used for the Satellite that is not currently being used for a remote site, you will have to go to the site and select that option.

> **Note**
>
> If this is checked and a remote is on hold, the remote will not be initialized when the satellite is initialized.

Include transactions created after

If you are synchronizing based on transactions, each time the server processes a site it looks for the date and time that a packet was last created for that site. The next packet will only include transactions entered after that date/time. If you need to include transactions prior to this, you can do so by specifying the transaction cutoff date and time. You are able to set a transaction cutoff date for any of your remote sites using Site Preferences. If you need to set a transaction cutoff date for your central site, you may do so at this dialog box.

Enter the date and time of the oldest transactions you would like included in the next outbox packet for central.

Output previous

If you would like to resend the transactions that were included the last time the outbox was processed, click **Output previous**. A message will appear informing you of the date and time of the last transactions that were processed and asking if you would like to use this as your transaction cutoff date. Select **Yes** to use those transactions. The date and time will appear in the `Include transactions created after` fields. You may edit the fields as necessary.

OK

Click this button to save your selections and close the Satellite Settings dialog box.

Cancel

Click this button to close the Satellite Settings dialog box without accepting your selections.

{ewc rhgbtn32.dll, BlueSkyHelpButton, g<PROCEDUP.BMP|
PROCEDDN.BMP<JumpId(DS.HLP>thirdï¿½DS3_Satellite_Setup_Steps)<<1}

Select Script Dialog Box

Run

Select the script you would like to run, then click this button.

Cancel

Click this button to close the Select Script dialog box without running a script.

{ewc rhgbtn32.dll, BlueSkyHelpButton, g<PROCEDUP.BMP|
PROCEDDN.BMP<JumpId(DS.HLP>thirdï¿½DS3_Script_Maintenance)<<1}

Options - Security Page

{ewc rhgbtn32.dll, BlueSkyHelpButton, g<RELAUP01.BMP|RELADN01.BMP<Klink(Preferencesï¿½ ï¿½ ï¿½)<<1}

Assign default preferences from local user

Select the local user from the drop-down list, or select No Default User.

Assign default security from:

Select the radio button to determine the default security group. If you select the remote "Everyone" group, insure that such a group exists at the remote sites. If you choose Central Security Group, select which group to use from the drop-down list.

More About…

{ewl rhgbtn32.dll, BlueSkyHelpButton, g<_____153.bmp| _____154.BMP<JumpId(TM.HLPï¿½SECURITY_User_Security)<<1} User Security

{ewl rhgbtn32.dll, BlueSkyHelpButton, g<_____153.bmp| _____154.BMP<JumpId(TM.HLPï¿½SECURITY_To_Add_a_Security_Group)<<1} To Add a Security Group

Options - Global File Sets

{ewc rhgbtn32.dll, BlueSkyHelpButton, g<RELAUP01.BMP|RELADN01.BMP<Klink(Preferencesï¿½ ï¿½ ï¿½)<<1}

List of Existing File Sets

This field contains a list of all currently defined file sets.

Add Set

Click this button to open the Add New File Set and create a new file set.

Change

Click this button to open the Edit File Set dialog box and change the highlighted file set.

Delete

Click this button to delete the selected file set. You will be prompted to confirm the decision to delete.

Attach Global File Set

Select the file set to be included with all packets. Additional file sets can be attached to packets for individual sites.

More About…

{ewl rhgbtn32.dll, BlueSkyHelpButton, g<_____153.bmp| _____154.BMP<JumpId(ds.hlpï¿½DS2_Attach_Global_File_Set)<<1} Attach Global File Set

Options - Scripting

{ewc rhgbtn32.dll, BlueSkyHelpButton, g<RELAUP01.BMP|RELADN01.BMP<Klink(Preferencesï¿½ï¿½ ï¿½)<<1}

List of Existing Scripts

All currently defined scripts are listed in this field.

Add Script

Click this button to open the Central Script Setup dialog box and add a new script.

Change

Click this button to open the Central Script Setup dialog box and change the highlighted script.

Delete

Click this button to delete the selected script. You will be prompted to confirm the decision to delete.

More About…

{ewl rhgbtn32.dll, BlueSkyHelpButton, g<_____153.bmp| _____154.BMP<JumpId(ds.hlpï¿½DS3_Script_Maintenance)<<1} Script Maintenance

Options - Misc.

{ewc rhgbtn32.dll, BlueSkyHelpButton, g<RELAUP01.BMP|RELADN01.BMP<Klink(Preferencesï¿½ ï¿½ ï¿½)<<1}

Delete Transactions Older Than

Mark this checkbox to automatically delete transaction based on their date. If this option is selected, a value should be entered in the Days field if the default is not correct. This value is the maximum age, in days, that a transaction cam be without being deleted.

More About…

{ewl rhgbtn32.dll, BlueSkyHelpButton, g<_____153.bmp| _____154.BMP<JumpId(ds.hlpï¿½DS2_Transaction_Cutoff_Date)<<1} Transaction Cutoff Date

Options - Server

{ewc rhgbtn32.dll, BlueSkyHelpButton, g<RELAUP01.BMP|RELADN01.BMP<Klink(Preferencesï¿½ ï¿½ ï¿½)<<1}

This is the date format that will be used for this Satellite Installation

Select the date format for this Satellite from the drop-down list.

Show Century

Mark this checkbox to display years in 4 digit format.

Type or select the user IDs of the users who should receive server related e-mail notifications

User IDs can be entered manually in the field on the left, or selected from the drop-down list on the right. User IDs should be separated by commas.

Select the amount of detail to be written to the maintenance logs.

Select either Log Summary, or Log Detail. The Log Summary is the more compact entry.

Reset

Click this button to reset a site that is currently awaiting a packet.

Inbox Options

Click this button to open the Server Options - Inbox Options dialog box and set the inbox options.

Outbox Options

Click this button to open the Server Options - Outbox Options dialog box and set the outbox options.

More About…

{ewl rhgbtn32.dll, BlueSkyHelpButton, g<_____153.bmp|
_____154.BMP<JumpId(ds.hlpï¿½DS2_Server_Options_Defaults)<<1} Server Options Defaults

Options - Satellite

{ewc rhgbtn32.dll, BlueSkyHelpButton, g<RELAUP01.BMP|RELADN01.BMP<Klink(Preferencesï¿½ ï¿½ ï¿½)<<1}

Create Outbox Packets for Central when processing sites

Mark this checkbox to create the outbox packet for central as the sites are processed. If this option is not selected, outbox packets for central will be created only when the Process Central menu item is selected from the **File** menu.

Process Inbox Packets from Central when processing sites

Mark this checkbox to process the inbox packets from central as the sites are being processed. If this is not marked, inbox packets from Central will only be processed when the Process Central menu item is selected from the **File** menu.

Update existing outbox packets for Central every

Enter the number of hours between updates in the Hours field, and minutes in the Minutes field. If 0 is entered in both fields, the outbox packet will only be processed if the previous packet has been removed from the outbox.

Set all sites for one time initialization when Satellite is initialized

Mark this checkbox to automatically set the remote sites for initialization when the Satellite is initialized.

Include transactions created after

To override the default, enter a date and time in the fields indicated. Normally, only transactions that occurred after the last packet would be included. This option can be used to resend transactions. All transactions after the date and time entered will be included.

Output Previous

Click this button to resend the transactions that were included the last time the outbox was processed.

More About…

{ewl rhgbtn32.dll, BlueSkyHelpButton, g<_____153.bmp| _____154.BMP<JumpId(ds.hlpï¿½DS3_Satellite_Setup_Steps)<<1} Satellite Setup Steps

Site Preferences for (Remote Site) - Site Preferences Page

{ewc rhgbtn32.dll, BlueSkyHelpButton, g<RELAUP01.BMP|RELADN01.BMP<Klink(Preferencesï¿½ ï¿½ ï¿½)<<1}

Site Preferences allow you to create site specific settings to control the synchronization of such things as activities and e-mail, as well as allowing you to further configure the site for synchronization, if desired.

This site is a Satellite Server
Mark this checkbox if the site is a Satellite.

Set this site's date format to:
Data Synchronization Server will use this format to determine which part of a date in a memo field contains the month, the date, and the year when placing notes in memo fields in chronological order. Select a date format from the drop-down list and encourage users at all sites to consistently use it when date stamping their memo fields.

Synchronize E-mail
Mark this checkbox to synchronize internal e-mail.

Synchronize linked activities
Mark this check box to synchronize activities at this site that are linked to a contact. Linked activities will only be synchronized if the contact to which they are linked exists in the target database.

Synchronize unlinked activities
Mark this checkbox to synchronize activities that are not linked (personal activities).

Edit Activity Filter Criteria
Click this button to open the Choose Activities dialog box.

Update central user list
Mark this checkbox if you want to be able to add users at the remote site and have them added to the central user list through synchronization.

Delete users at this site who do not exist on the DSS user list for this site
This option is used to maintain control at the central installation of the users who are able to access the remote installation of TeleMagic. When marked, if a user is added at the remote site who does not exist on the site's user list maintained in Data Synchronization at the central installation, that user will be deleted from the site when synchronization is performed. If this is unmarked, users deleted from the site's user list will not be removed from the installation of TeleMagic. If `Update central user list` is also marked, the user will be re-added to the site's central user list when synchronization is performed. If `Update central user list` is not marked, the user will exist at the site, but will not be included in synchronization. This will allow you to keep individual users at a site from synchronizing e-mail and activities.

Validate contact record revisions at field level
Mark this checkbox if you want to retain the most recent change to each field. This option has no effect

on memo fields.

Send TeleMagic Update

Mark this checkbox to update the remote installation through synchronization.

Hint

Do not confuse an update with an upgrade. Updates are provided by TeleMagic at no charge to enhance your installation of TeleMagic. Upgrades are purchased from TeleMagic and provide a complete version change.

Note

If you are synchronizing to an evaluation copy of TeleMagic, updates will not be included. The site must be registered to perform automatic updates.

Files From:

When an update file is synchronized, Data Synchronization Server notes the date on which it was sent. With each subsequent synchronization, it compares the date of the TeleMagic files at the central installation to that date. If any are dated later than the date recorded the last time an update was sent, those files will be included in the outbox packet. If, you have files that are dated earlier than the date the last update was sent, or if for any reason the site did not receive an update, you can specify a date in the Files From field. If there is an entry in this field, Data Synchronization Server will take all files from that date forward.

Do not transport packets to this site

Mark this checkbox if your transport option is either FTP or E-mail and this site cannot access this option. Packets for this site will be sent to the outbox if this option is marked, and can be transferred from there by whatever means are available.

Apply these settings to all sites

Mark this checkbox to make the settings for this site the default site preferences for all sites. You will be able to modify other sites on a case-by-case basis.

Do not create packets for this site

Mark this checkbox to skip this site when creating packets. This setting is normally used when a site must be removed from synchronization temporarily.

Do not accept packets from this site

Mark this checkbox to reject incoming packets from this site. Rejected packets will be placed in the \TMSYNC\BACKUP folder.

Use Global Transport Configuration

Mark this checkbox to use the transport configuration specified in Transport Options.

Transport Method

This option is only available if Use Global Transport Configuration is not marked. Select the radio button corresponding to the method to be used for this site.

Transfer E-mail using the Automation Server

This option becomes available if Use Global Transport Configuration is not marked and

`Transfer Via E-mail is selected`. Mark this checkbox to use the Automation Server to transfer the packets to this site. If you select this option, select a queue from the drop-down list.

{ewc rhgbtn32.dll, BlueSkyHelpButton, g<PROCEDUP.BMP| PROCEDDN.BMP<JumpId(DS.HLP>thirdï¿½DS2_Site_Preferences)<<1}

Site Preferences for (Remote Site) - Initialization

{ewc rhgbtn32.dll, BlueSkyHelpButton, g<RELAUP01.BMP|RELADN01.BMP<Klink(Preferencesï¿½ ï¿½ ï¿½)<<1}

Site Initialization allows you to use synchronization to initialize your remote installation by preparing the databases and certain areas of security. You can also include options in an initialization that are not included in a standard synchronization.

Initialization Settings

Choose from the following radio buttons to specify when to perform a complete initialization when synchronizing.

●   Select `Do not initialize this site` if you do not want to perform initialization.

●   Select `Initialize this site one time only` to perform the initialization the first time you synchronize, and a standard synchronization each time thereafter.

●   Select `Initialize this site continuously` to perform the initialization each time you synchronize.

Apply these settings to all sites

Mark this check box if you would like the initialization performed for all sites based on the radio button selections.

Procedures:

{ewl rhgbtn32.dll, BlueSkyHelpButton, g<_____153.BMP| _____154.BMP<JumpId(DS.HLP>thirdï¿½DS2_Initialization)<<1} Initialization

{ewl rhgbtn32.dll, BlueSkyHelpButton, g<_____153.BMP| _____154.BMP<JumpId(DS.HLP>thirdï¿½DS2_Site_Preferences)<<1} Site Preferences

Site Preferences for (Remote Site) - Initialization Opts

{ewc rhgbtn32.dll, BlueSkyHelpButton, g<RELAUP01.BMP|RELADN01.BMP<Klink(Preferencesï¿½ ï¿½ ï¿½)<<1}

Site Initialization allows you to use synchronization to initialize your remote installation by preparing the databases and certain areas of security. You can also include options in an initialization that are not included in a standard synchronization.

Rename synchronized databases which already exist

If you want to synchronize databases existing at the central installation to the remote site, but do not want to overwrite any databases already existing at the remote sites that happen to have the same name, use this check box to cause Data Synchronization Server to rename the databases at the remote sites. Data Synchronization Server will look for matching databases, but instead of synchronizing them, it will rename the database in the remote installation. If you have `Complete database file transfer (No Contact Records)` selected, a new database will be added at the remote site while retaining the original.

Complete databases file transfer (No Contact Records)

Mark this check box to have Data Synchronization Server transfer all structural information   for a database to the remote site. (Selecting this option will cause all structural data to be sent, overriding any individual settings you may have made in the Database Files To Transfer dialog box.)

Transfer contact and activity records

Mark this check box to include all contact and activity records in your selected filters in the outgoing packet, whether there are transactions for them or not.

Delete existing contact records from existing databases

Mark this check box to empty the existing database at the remote site in preparation for importing records from the central installation on synchronization.

Delete existing activity records

Mark this check box to empty the activity database (the database that stores the information that appears on the calendars in TeleMagic) in preparation for importing activities and To-Dos from the central installation on synchronization.

Override existing users preferences with defaults

Mark this check box to force all existing users to use the preference settings of the user selected in Options. (Click here for details.)

Transfer Scripts

Mark this check box to send a copy of all of the scripts created in Options to the remote site.

{ewc rhgbtn32.dll, BlueSkyHelpButton, g<PROCEDUP.BMP| PROCEDDN.BMP<JumpId(DS.HLP>thirdï¿½DS2_Edit_Global_Scripts)<<1}

Add Supervisor User (SUP)

Mark this check box to create a new supervisor user with the ID SUP at the remote site. This user will

be added to the remote site's central user list and will be added at the site with the next synchronization.

Password

If you have selected `Add Supervisor User (SUP)` the password SUPERVISOR will be assigned to this user by default. Enter a new password in this field if necessary.

Site Time Zone

Use this drop down list to select the time zone in which the site is located. Time zone is a factor when determining the most recent edit to a field.

Use Daylight Savings Time

Mark this check box if the time zone selected observes daylight savings time. Data Synchronization will automatically adjust the time when appropriate.

Remove Security Settings

Note the default security group and select the radio button that describes the action you want to take with respect to security groups.

Apply these Settings to all Sites

If all or most of your sites will use the same initialization settings, mark this check box to copy these settings to all sites. You can edit individual sites if necessary.

Procedures:

{ewl rhgbtn32.dll, BlueSkyHelpButton, g<_____153.BMP|
_____154.BMP<JumpId(DS.HLP>thirdï¿½DS2_Initialization)<<1} Initialization
{ewl rhgbtn32.dll, BlueSkyHelpButton, g<_____153.BMP|
_____154.BMP<JumpId(DS.HLP>thirdï¿½DS2_Site_Preferences)<<1} Site Preferences

Transport Options - Transport Method

{ewc rhgbtn32.dll, BlueSkyHelpButton, g<RELAUP01.BMP|RELADN01.BMP<Klink(Preferencesï¿½ ï¿½ ï¿½)<<1}

Manual/ Transfer via FTP/ Transfer via E-mail

Select the option that you will use to transfer your packets. If you choose `Manual`, the packets will be deposited in the Outbox where they will await manual distribution. If you choose `Transfer via FTP`, packets will be uploaded to the FTP site to await retrieval. If you choose `Transfer via E-mail`, packets will be sent as attachments to e-mail messages.

After Files are Sent

Select what will happen to the files after they are sent, either backup or delete. These options are not available if you transfer packets manually.

Transport Options - E-mail Preferences

{ewc rhgbtn32.dll, BlueSkyHelpButton, g<RELAUP01.BMP|RELADN01.BMP<Klink(Preferencesï¿½ ï¿½ ï¿½)<<1}

This information is required if you will be transferring packets via e-mail.

SMTP Server

Enter the SMTP (send) server in this field. This information can be obtained from your ISP or network administrator.

Port

The SMTP port is entered in this field. It is 25 by default and should not be changed unless instructed by the ISP or network administrator.

E-mail address of this site

Enter the e-mail address of this site here.

POP3 Server

Enter the POP3 (receive) server in this field. This information can be obtained from the ISP or system administrator.

Port

The POP3 port is entered in this field. This should not be changed unless specified by the ISP or system administrator.

User ID

Enter the user ID used to gain access to the mail account in this field.

Password

Enter the password used to gain access to the mail account in this field.

Verify Password

Enter the password used to gain access to the mail account in this field. This field must match Password exactly.

Transfer e-mail using Automation Server

Mark this checkbox and select the Server Queue from the drop-down list if you want to transfer e-mail via the Automation Server.

Transport Options - FTP Preferences

{ewc rhgbtn32.dll, BlueSkyHelpButton, g<RELAUP01.BMP|RELADN01.BMP<Klink(Preferencesï¿½ ï¿½ ï¿½)<<1}

This information is required if you will be transferring packets via an FTP site.

FTP Host URL
Enter the location of the FTP site.

FTP User ID
Enter the ID used to access the FTP site.

FTP Password
Enter the password used to access the FTP site.

FTP Number of Retries
Enter the number of times DSS should attempt to connect to the FTP site before the transfer is considered a failure.

FTP Verify Password
Enter the password used to access the FTP site. This entry must match FTP password exactly.

FTP Location to Store Files
Enter the directory on the FTP site where files should be stored by this site.

FTP Location to Retrieve Files
Enter the directory from which this site should download incoming files.

Transport Options - Connection

{ewc rhgbtn32.dll, BlueSkyHelpButton, g<RELAUP01.BMP|RELADN01.BMP<Klink(Preferencesï¿½ ï¿½ ï¿½)<<1}

Dial Up Networking

Select this radio button if the workstation running DSS connects to an ISP using a modem.

Connection Name

Select the connection to be used for DSS packet transfer from the drop-down list.

User Name

Enter the name used to gain access to the ISP.

Password

Enter the password used to gain access to the ISP.

Verify Password

Enter the password used to gain access to the ISP. This field must match Password exactly.

Number of Retries

Enter the number of times that DSS should attempt to connect to the ISP before the attempt is considered a failure.

Terminate Connection when Idle

Mark this checkbox to have DSS log off of the ISP when there is no traffic.

Connect through LAN

Select this radio button if the workstation running DSS connects to the Internet using the Local Area Network. If this selection is made, all other fields on this page are ignored.