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

Related Topics

Troubleshooting

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 Dial Up Server. 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.)

Can I configure Dial Up Server for one workstation from a different workstation?

No. The Dial Up Server uses the Dial Up Networking built into Windows 95. Dial Up Networking must be configured at the machine on which you intend to use it.

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.)

I noticed a discrepancy between the printed documentation and the on-line help. Which is correct?

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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 Offices 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.

Can I configure Dial Up Server for one workstation from a different workstation?

No. The Dial Up Server uses the Dial Up Networking built into Windows 95. Dial Up Networking must be configured at the machine on which you intend to use it.

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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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

I added a new user to my site's central user list, but he wasn't synchronized to the site.

I've got Update central user list marked, but I'm still losing users.

I keep deleting a user from the central user list, and he keeps coming back.

If I have the same user at multiple sites, will he have the same preferences and security at each?

If the same user is at multiple sites, should he use different User IDs at each?

I assigned activity permissions to a user at another site, but he didn't seem to receive them.

Do I need a Supervisor user at the remote site?

I have a security group selected in Options, but users at the site seem to still have their old security.

Is there any way to use the default security option to transfer a security group to just one site?

I have Remote "Everyone" Group as my default security, but it didn't get copied to the site.

Is there a quick way of getting the Everyone group to the remote sites?

None of my users have security access to the remote site.

Why isn't the TST user added with external rebuild?

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Troubleshooting

Activities and Email

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.)

[Do I necessarily have to perform an initialization when I add a new database?](#)

[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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Dial Up Server

[Can I configure Dial Up Server for one workstation from a different workstation?](#)

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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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