Commence® Designer Edition RM Version 5.0

Server Guide

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Chapter 1: Introduction to Commence Workgroup

Welcome to Commence Workgroup®, from Commence Corporation. Commence Workgroup allows users to communicate and share information with other workgroup users on a network, whether they are local or remote to the server. Private information can be maintained which remains local to a client PC. While individual users benefit from the powerful capabilities of Commence to maintain calendars, address books, notes, phone and letter logs, and much more, Workgroup users can extend this power over a network and share information and work with other members of a team or work force.

Commence Workgroup's networking capabilities allow users to share and periodically synchronize database information with the server using either a Local Area Network (LAN), a compatible Windows e–mail program, or the Internet via an Internet Service Provider (ISP) or dedicated Internet connection. Users on multiple PCs can share information from the same databases, viewing and updating information simultaneously. They may also define private information that other users are unable to see or access. Different levels of authorization can be defined to control various access privileges.

Commence uses a distributed database architecture in which each client of a workgroup has its own local copy of the shared database. This arrangement has many advantages, including:

- **Users can use a local copy of the shared database off–line.** While connected to the LAN, data is automatically synchronized with all other users on the network. When disconnected, Commence remembers the changes that have been made. Later, when remote users connect to the network, the changes and updates that have been made are automatically synchronized with other users, thereby keeping all data in sync. This has the added advantage of allowing users to continue using Commence, even when the network is down. Those who synchronize via e–mail will continue to communicate their changes to the server as long as they can send and receive e–mail. Similarly, users who synchronize using an Internet connection will continue synchronizing as long as the Internet connection is intact.

- **There is no data locking, so all information is available at all times, authorizations permitting.** Some workgroup products lock records as they are being viewed making them unavailable to other users. With Commence, each user's local database is always available.

- **Users can create private information that remains in the local copy of the shared database.** Private (or local) information does not synchronize with the server nor with any other user within the workgroup, thereby protecting each user's private information.

The Components of a Workgroup

A Workgroup consists of a Server and one or more Clients. Each of these components is described in the following paragraphs.

The Commence Server

The primary component of a Workgroup is the Server. The Server software is installed by the Commence Administrator onto a PC that is designated to be the Commence Server. It is from the Server that the Commence Administrator configures and assigns permissions, configures Client and Server communications, and registers Clients.

Additionally, the Commence Server maintains the shared database. Since Commence uses a distributed database architecture, the Server acts as a hub for all database changes that are made by users. If a user adds or edits an item, this change will synchronize to the server (via the shared LAN directory, e−mail, or the Internet), at which point the server will synchronize the change(s) to other users who have appropriate access privileges.

Commence Clients

After the Server has been installed and the shared database set up, users can enroll in the Shared Database. Each user is referred to as a Client. As a Client, each user will receive a copy of the Shared Database, now called a Client Database. The Client Database is similar to the Shared Database, but, depending upon the Client's permissions, it may include all or only part of the Shared Database. Clients then access the Client Database just as they would any other Commence database. As changes are made, they will synchronize with the Server Database, and then to other Client Databases which have appropriate access privileges. Since Commence is a distributed database, a user can disconnect from the network and still use the Client Database. When they re−connect with the LAN, e−mail system, or Internet, all changes that have been made to either the Client or Server will automatically synchronize.

For a graphical representation of a simple Workgroup, see the following figure.
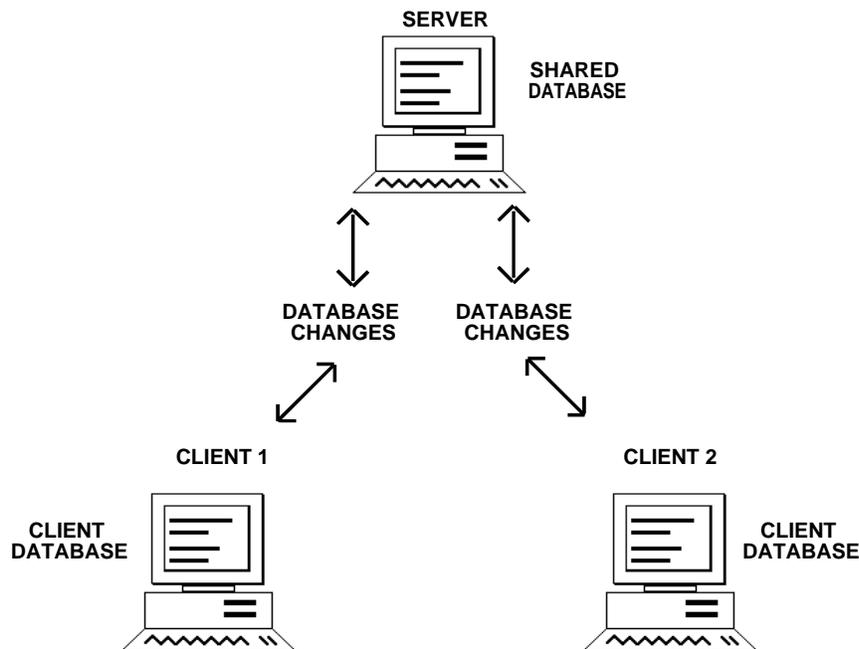
Figure 1-1: Commence workgroup

The Role of the Administrator

The Commence Administrator is responsible for the following activities:

- installing the Commence Server

- setting up the shared database

- entering and maintaining user information

- helping users set up and enroll in the shared database

- ensuring the shared database is available and actively synchronizing user data

- auditing database activity

- performing regular database backups

- troubleshooting any problems

The Administrator should have a good knowledge of how to use Commence, the network, and optionally the Internet or e–mail package installed on the system.

The Commence Administrator helps users set up Client Databases, as well as answers questions or solves problems encountered while installing, enrolling, or using the Commence Client. Additionally, the Administrator should troubleshoot any data synchronization problems or problems encountered using shared definitions or items.

About this Manual

This manual is intended to assist a Commence Administrator in the installation, configuration, and maintenance of a Commence Workgroup. The manual is organized so that a new Administrator will be able to methodically step through the process of installing and configuring a Workgroup. This is achieved by dedicating separate Chapters to each step of the process. The Appendices at the rear of the book provide information which will prove useful to both the new and experienced Administrator.

Proceed to **Chapter 2: Installing a Commence Server** to begin setting up the workgroup server.

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Chapter 2: Installing a Commence Server

What Is Needed to Run A Commence Server

To run a Commence Workgroup, there must be a copy of the Server version of Commence Workgroup installed and running on a Windows system. In addition, each user must have a licensed Client.

The hardware needed to run the Commence Server should have a 1GHz processor and must be running a supported version of Windows. See "System Requirements for Server" on page 6. System requirements vary slightly depending on which version of Windows is in use.

To use Commence Workgroup on a local area network, the LAN configuration must provide a shared file system and support Windows–compatible workstations for Commence clients and the Commence server.

If the Commence Server software is installed to a shared network directory, the Commence Server PC requires **Read–Write–Create-Delete-Modify** access to this directory and all of its subdirectories. Clients should be granted **Read–Only** access to the server program directory to prevent users from inadvertently modifying the server files.

If an e–mail package is used to synchronize the Commence workgroup, it must be a Windows–based electronic mail package that supports either a VIM, MAPI, or CMC messaging interface. E–mail packages that can be used for Commence synchronization include Lotus Notes[TM] and Microsoft Outlook[TM] as well as some versions of Outlook Express.

The Workgroup Expert is an administration tool that sends daily status reports to the Commence workgroup administrator. The Workgroup Expert works with either an SMTP e-mail server or any 32-bit MAPI e-mail package.

If the Internet is used to synchronize the Commence Workgroup, appropriate Internet software must be available and running. Additionally, an Internet FTP directory must be created to which all Clients have full access. It is in this Internet FTP directory that sync files will be maintained until no longer needed.

Basic Requirements

The minimum memory requirements listed provide a baseline for running Commence on each operating system without any additional software. However the recommended guide-lines should be followed to allow for integration with Microsoft Office, e-mail and fax software, as well as running additional applications in the background.

Table 2-1: System Requirements for Server

Operating System	Any of the following: • Windows 8, Windows 8.1 • Windows 7 • Windows Vista™ • Windows 2003® Server • Microsoft® Windows XP Professional
Hardware & Memory	Recommended: • 1GB hard drive with at least 300 MB free (your OS may require more) • 1.5 GHz or higher processor with 512 MB RAM Minimum: • 1 GHz processor with 256 MB RAM
Network	any network that provides a shared file system and supports Windows–compatible workstations for Commence clients and the Commence server
Other Hardware	• CD ROM drive • a Windows supported pointing device is highly recommended but not required

What the Installation Does

When the Commence Server is installed, several things are accomplished:

• The **Commence program** (EXE) is uncompressed and installed to the Commence program directory.

• The **License Administration program** (License) is uncompressed and installed.

• The **Commence Administration program** (ComAdmin) is uncompressed and installed in a subdirectory of the Commence program directory.

• The Commence RM **Workgroup Administration Files** (WGFILES8 directory), are installed in a subdirectory of the Application Data directory.

• The **Contact Manager**, if selected, is uncompressed and installed in a subdirectory of the Application Data directory. The Contact Manager is also added to the list of shared databases in ComAdmin.

• The **Tutorial database**, if selected, is uncompressed and installed in a subdirectory of the Application Data directory. The Tutorial database contains sample data in the Commence Contact Manager applications, including examples that take advantage of the new features in Commence RM.

• **Word processor macros**, if selected, are installed to the appropriate folder for your word processor. Note the 32-bit version of Microsoft Word must be installed in advance.

• **Commence Connect for E-Mail**, if selected, is uncompressed and installed to the Commence program directory. The document library is installed in a subdirectory of the Application Data directory. Connect simplifies E-Mail marketing campaign delivery and literature fulfillment

to your Commence contacts.

• Shortcuts to Commence **documentation** including this manual, the *Server Guide*, are placed on the Start menu.

• Other components, if not found on the PC, are installed to the Commence program directory and to the Windows system folders as needed. Such components include ActiveX Controls (OCX), Windows Telephony (TAPI) and several Dynamic Link Libraries (DLLs).

Installing a new Server

The first step when establishing a Commence Workgroup is to install the Server Software. Any PC connected to a Local Area Network (LAN) or the Internet can be used as the Commence Server.

When selecting the server system, consider that the Commence server software should be running at all times for automatic synchronization to occur. If the system is shut down or if the shared database is closed, synchronization will halt until the Commence server is brought back online. For this reason, a desktop is a better choice for a server than a portable laptop.

Since the Commence Server is the hub for all data changes within the Workgroup, frequent synchronization activity may momentarily prevent a Commence user from accessing the shared database on the server. For this reason, it is recommended that a dedicated Windows system be used to run the Commence Server.

After you have reviewed the basic server requirements, select the computer which will be designated as the Commence Server. From this machine, click on the **Commence Server** button to begin installation of the Server software.

The **Network Tools** button will also appear as one of the installation options and may only be installed on the designated Commence Server computer. By clicking on this button you will begin the installation of the Workgroup Expert software. This software is used to monitor the synchronization performance of the Commence Server and associated Clients.

Note: *The Workgroup Expert software can be installed later after you have configured the Commence server for synchronization. Use of the Workgroup Expert software requires a MAPI 32-bit or SMTP E-mail application. Please review the "Workgroup Expert Guide" for more information on installation and configuration of this software. To access this guide, click on the "View Documentation" button.*

The **Commence RM** button also appears as one of the network installation options. This is used to install the software on each client workstation.

Default Installation

Network Install
Commence Server
Network Tools
Commence RM

Perform the following procedure to install the Commence RM Server:

1 Choose one workstation with continuous network access to run the Commence Server software.

2 Insert the Commence RM compact disc into the CD-ROM drive of this PC. The compact disc will start automatically and the Commence RM installation screen will appear.

3 Click **Network Install** to select which software to install.

4 Select **Commence Server** to begin the server installation.

5 The Software License Agreement will be displayed. If you agree to abide by the terms of the licence agreement click **Yes** to continue. **Clicking No will cancel the setup operation**.

6 You will be prompted to enter your user Information. You must enter a valid Commence RM serial

number in the box labeled **Serial:**. This number can be found on the CD sleeve. After all the information is correctly entered, click **Next**, then click **Yes** to confirm your registration information.

7 Select **Next**. Follow the remaining instructions on the screen to complete the installation.

License Administration and Activation

The Commence server is initially configured for a single user. Follow the License Administration steps below to set the total number of users in the workgroup.

This must be done *before* continuing with the remaining steps of the upgrade process.

1 At the conclusion of the Server installation the program will prompt you for an Authorization Key. Enter the key printed on the Server Authorization document included with your package then click **OK**.

2 The license program will then contact the Commence Corporation servers to verify your Serial Number and Authorization Key. Click **Yes** to proceed. Note an internet connection is required.

3 When the activation is complete a confirmation message will display the number of available user licenses for this workgroup installation. Click **Yes** to confirm the user limit.

4 If the license was updated successfully, simply click **OK** to close the message window.

The first step (i.e. the server installation) is now complete. If you are configuring a new workgroup or if you have increased the number of users in your workgroup, proceed to **Chapter 3: Server Administration**. This chapter discusses how to use the ComAdmin software. This add-on utility is installed with Commence and is used to configure the usernames and passwords for the workgroup and to manage the shared database. The Contact Manager is the default shared database that was added during installation. You can use this database or add your own custom database.

Upgrading a Server from prior versions of Commence

Upon opening the Server database, Commence will determine if the database can be converted. The conversion process will first backup the database then convert it to the new format. Commence Clients may continue to use their local executable and DLL files, and will be able to open their Client Databases. However synchronization will be disabled until the Client is upgraded and the client database is converted to the same format as the Commence Server. Click any topic below for more details.

- "Run ComAdmin" on page 11
- "Launch the Commence Server" on page 11
- "Upgrade Client Workstations" on page 11

These steps assure that the existing workgroup is taken offline in an orderly manner, and that no loss of data occurs during the process. The upgrade procedure outlined in the following sections is necessary when upgrading from Commence RM 2.1 and earlier versions that require a data conversion.

Sync All Clients with the Server

Before upgrading the clients, verify that all clients within the workgroup are able to synchronize with the Server. If unsure as to the last time a sync occurred between one or more clients and the Server, a sync may be forced by using the **Home -> Workgroup Sync** command at each client workstation. It is not necessary to ensure that every client is completely up-to-date. Any updates that have not yet been sent up to the server can be synchronized later in the new version.

Caution: *If the client synchronization does not complete successfully and results in an error message, be sure to contact Technical Support to troubleshoot the errors* before *installing the upgrade. If upgrading from Commence RM 2.1 and prior versions, data loss will occur unless all synchronization errors are resolved.*

Disable Syncing at the Client Workstation(s)

After each client workstation has successfully synchronized with the Server, syncing should be disabled at the client workstations. Perform the following procedure to disable syncing at each Client Workstation:

1 Select the **Customize -> Workgroup** command from the Menu Bar of the client database.

2 Verify that the **Communicate with Server using:** radio button is set to the correct method of synchronization for the client. The choices are **E–Mail**, **Shared LAN directory**, or **Internet FTP directory**.

3 Click **OK**.

Note: *If the Client synchronizes via E–Mail, a second window will be displayed indicating current configuration for e–mail addresses.   Click **OK**.*

4 Change the **Check every:** sync interval to zero (0) seconds for Shared LAN directory synchronizations, and zero (0) minutes for e-mail or FTP synchronizations.

5 Click **OK**. A message box will be displayed indicating that the automatic sync feature for the client workstation has been disabled.

6 Click **OK**.

Clear the sync directory

After synchronization has been disabled at each Client Workstation, take a few moments to remove all pending synchronization packets from the communication directory. Search the shared LAN directory and the FTP directory for all files ending with .UP or .DWN or .TMP and delete these. These files cannot be converted to the new data format and will have to be recreated in the new version.

Backup all Shared Databases at the Commence Server

It is important to backup all server program files and data files prior to beginning any upgrade. If a problem occurs during the upgrade process, the original files may be restored from the backups. An external backup utility, such as Microsoft Backup, may be used to backup the entire Commence folder. If space permits, you may opt to make a full copy of the Commence folder saved to a different drive.

The Commence Backup command is run by clicking the **Commence Application button -> Open/Manage Database -> Backup**. This can be used to backup just the Server Database directory and the wgfiles* folder.

Shut Down the Commence Server

Select the **Commence Application button -> Exit** to close the Commence Server after all or most of the pending updates (*.UP files) have been received and accepted by the Server and the Workgroup is fully synchronized.

Run ComAdmin

Once the Commence Server is closed, this is a good time to verify the Administrator login and password. Also take a few moments to update your users list as needed.

*Note: Before starting any upgrade procedure, verify that the Password for the **Admin** login ID for ComAdmin is available. If not, **ComAdmin** will not be able to convert the admin data files, and the upgrade will not be complete.*

To run the Commence Administration software, follow the steps in the section titled "Launch ComAdmin" on page 18.

Select the **Users** button ⚏ from the *ComAdmin* menu. Verify that the number of users listed does not exceed the User Limit. This limit is displayed by selecting **Help -> About...** from the Menu Bar. The administrator (admin) user can be excluded when figuring the total number of users.

If there are more users than allowed, an error will be displayed when you attempt to launch the Commence server after the upgrade. Commence will not run until the additional users are removed. See "Deleting a User" on page 62. Once you have confirmed the Users list is correct, exit from ComAdmin.

Backup every Client Database

The Commence Backup command, select the **Commence Application button -> Open/ Manage Database -> Backup**, can be used to backup the Client Database.

Upgrade the Commence Server

Install Commence RM on the Commence server PC. This will overwrite the Commence executable and DLL files for the previous version.

1 Follow the steps in the section titled "Installing a new Server" on page 7.

2 Take special note of the Setup Type screen when it appears. The installer will detect if a prior version of Commence is installed, and set the Destination Directory to be the same as your existing Commence program directory. ***Do not change this directory***. Otherwise Commence will not be able to convert your Commence program and data files.

3 Follow the remaining on-screen instructions, clicking **Next** after each step. Press **Finish** to complete the installation.

License Administration and Activation

Immediately after installing the server, the License Administration program will ask you for an Authorization Key. The key is printed on the Server Authorization document included with your package. This step allows you to properly set the total number of users in the workgroup. This step must be done whenever you receive a new serial number for your Commence server.

The license program will then contact the Commence Corporation servers to verify your Serial Number and Authorization Key. When the activation is complete a confirmation message will display the number of available user licenses for this workgroup installation.

Note: *If the Commence server does not have a connection to the Internet, the software cannot be activated online. To activate the Commence Server via phone contact Commence Corporation to speak with a customer service representative.*

This must be done *before* continuing with the remaining steps of the upgrade process. You will not be able to run Commence RM until you have successfully completed the license administration. See "Launch the License Administration Program" on page 17.

Install Workgroup Expert

Commence RM comes with an updated version of the Workgroup Expert synchronization monitoring tool designed specifically for this version of Commence. Follow the installation steps in the *Workgroup Expert User's Guide* to setup this utility. If a previous version of the Workgroup Expert was installed on the Commence Server PC, you may upgrade the existing installation by overwriting the Workgroup Expert program directory with the new version.

Exit the CD Browser

When you are finished installing all the necessary software, click **Exit** to close the CD. You may safely remove the Commence RM CD from the CD ROM Drive at any time now.

Run ComAdmin

Immediately after upgrading to a new version of Commence Workgroup, it is crucial that you launch the Commence Administration software to complete the upgrade.

To run the Commence Administration software, follow the steps in the section titled "Launch ComAdmin" on page 18.

When ComAdmin is run for the first time after upgrading, the existing Commence admin data files are copied and converted. The converted files are placed in the **WGFILES8** directory. The Commence Server will require **Read–Write–Create-Delete-Modify** access to this new shared directory. It is not necessary for client workstations to have any access to the **WGFILES8** directory.

Launch the Commence Server

Verify you are logged in to Windows as the Administrator. Then start Commence RM and open the Commence server database. Follow the steps in the section titled "Launch the Server" on page 21. Open the shared database to convert the data to Commence RM.

Upgrade Client Workstations

Install Commence RM on the Commence client PC's. Perform the procedure outlined in the *Getting Started Guide* to install each Commence Client. When the CD browser appears, choose **Network Install** then select **Commence RM** to begin the client installation.

Check for Updates

Commence incorporates an update facility that checks for new program updates and installs them for you. Keeping up with software enhancements throughout the year can now be handled quickly and efficiently.

Whenever a new update is released it is not necessary for the Commence Administrator to visit each client workstation with a CD. Simply notify each user via e-mail that a new update is ready to download. Clients need only use the **Check for Updates** command in Commence to launch the auto update feature.

via Internet

Obtaining the latest update is easy when an Internet connection is available on all clients.

• Use the **Check For Updates** command on the Commence server to download and install the update. See "Administrator tasks" on page 12.

• Notify all Commence users that a new update is available.

• Clients can then update their workstation using the **Check For Updates** command. See "Client tasks" on page 13.

✍ Tip   Clients can check for updates at their convenience but may forget to do so. The Administrator can quickly verify all users have applied the update by reviewing the Workgroup Expert report. The report will identify which clients are not running the same version as the Server.

Commence will need to be closed and restarted when applying updates so be sure to save your work before starting the update.

Administrator tasks

Prepare the Commence server system as you normally would for a system upgrade, then apply the update at the server. The first few steps below are not required but are recommended best practices for updating your Commence server.

*Note: The update typically affects program files only and not the database. If you are not sure you have a current backup, use the **Open/Manage Database** command under the **Commence Application button** to make a new backup of the Server database.*

1 Use the **Help -> System Information** command in Commence to verify the system resources are not low. If the system has not been rebooted recently, close and restart Windows.

2 Run Commence and open the Server database.

3 Use the **View -> Close All** command in the Window group to close all views and reports in Commence.

4 Select **Help -> Check For Updates**.

5 Select the **Download and Install Update** option.

6 When the Commence Update window opens click **Next** to determine if any new files are available.

7 Follow the on-screen prompts to complete the installation.

Client tasks

To run the update at a client workstation:

1 Close Microsoft Outlook and any other Microsoft Office applications.

2 Save and close all open forms if any data modifications were in progress.

3 Use the **View -> Close All** command in the Window group to close all views and reports in Commence.

4 Select **Help -> Check For Updates**.

5 When the Commence Update window opens click **Next** to determine if any new files are available.

6 Follow the on-screen prompts to complete the installation.

Note: Users should have Windows Administrator rights to ensure the update is installed properly.

Intranet Updates

If an Internet connection is not readily available to the Commence clients, the administrator can download the updates at the Commence Server and distribute the files to all clients via an intranet location. A one-time configuration change at the server is all that's needed to redirect clients to this new location.

A summary of steps is as follows:

• Use the **Check For Updates** command on the Commence server to download the update. The downloaded file can be copied to your intranet location. See "Download update for intranet distribution" on page 13.

• Modify the configuration file, CmcUpdt.INI, for intranet distribution. Allow enough time for this file to synchronize to all users. Those who have not received the localized configuration file will require an Internet connection to install the update. See "Configuration file for intranet distribution" on page 14.

• Modify the xml file, Commence_update.xml, for intranet distribution. See "Configuring XML file for intranet distribution" on page 16.

• Use the **Check For Updates** command on the Commence server to download and install the update. See "Administrator tasks" on page 12.

• Notify all Commence users that a new update is available.

• Clients can then update their workstation using the **Check For Updates** command. See "Client tasks" on page 13.

Download update for intranet distribution

Each time a new update becomes available, the Commence administrator must download this file and post it to the local intranet before clients can apply the update.

Note: An Internet connection is still required at the Commence Server to download the update file. The clients will just need access to the local intranet.

To obtain the latest update file:

1 Select **Help -> Check For Updates** at the Commence Server.

2 Choose to **Download Update** then click **OK** to continue.
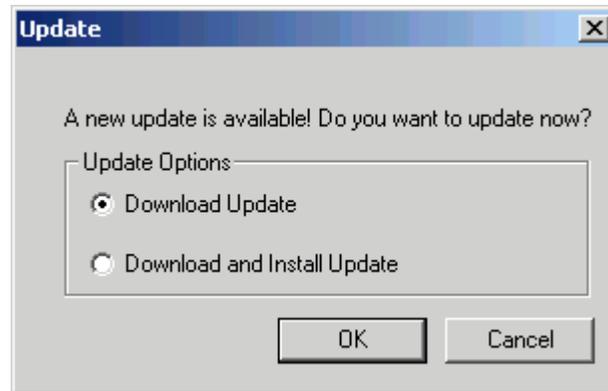
Figure 2-2: Update options

3   The next screen gives you an opportunity to choose where the file will be stored. The Commence update file is normally saved to the Application Data Directory. Use the **Select Directory** button to choose a different location or to create a new folder. Click **OK** to continue.
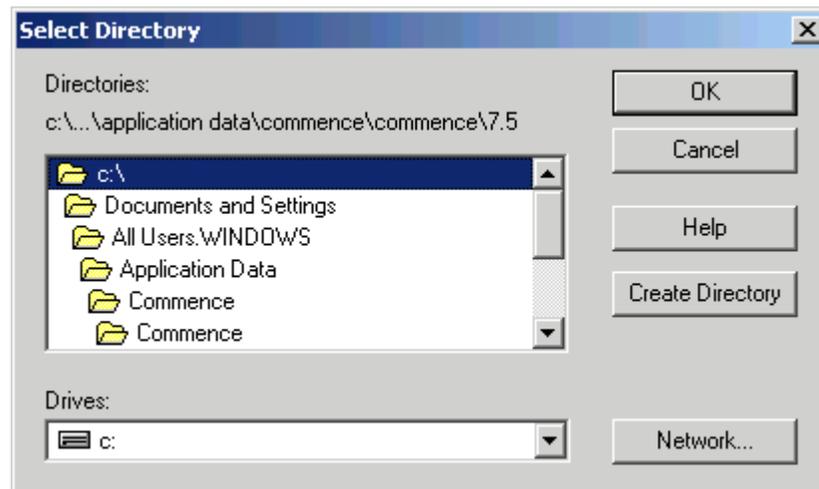
Figure 2-3: Save update file to local directory for intranet distribution

4   Click **Next** to determine if any new files are available for download.

5   Follow the on-screen prompts to complete the download.

6   Copy the downloaded file(s) to the designated intranet location. Overwrite any existing update files.

Configuration file for intranet distribution

The steps below will reconfigure the Check For Updates feature for intranet distri- bution. These steps only need to be performed once. This assumes the same intranet folder will be used every time an update is released.

The Commence administrator will need to determine the following paths at the Commence server:

• The *Application Data directory* can be found by selecting **Help -> System Information**, then display **Directory Information**.

• The *Admin Path* can be determined by selecting **Help -> System Information**, then display **Workgroup Information**.

• Use the **Save to File** button to create a report of all system paths. Then open the commence.txt

file in the program directory to view the system report.

Once you have gathered all the information above you may proceed with the steps below.

1 Close the Commence Server database.

2 Locate the configuration file named "CMCUPDT.INI" in the *Application Data directory*.

3 Copy the configuration file to the *Admin Path* (WGFILES8 folder) on the Commence server machine. This folder will also be located in the *Application Data directory*.

4 Edit the copy of the CMCUPDT.INI file in the WGFILES8 folder using any text editor. A sample is shown below.
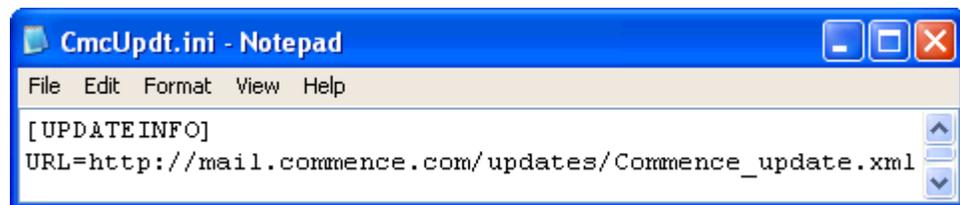
Figure 2-4: Configuration file used by the Commence Server to get Internet updates

5 Note the URL setting that directs the Update feature to the commence.com site (e.g. http://mail.commence.com/updates/Commence_update.xml). This setting directs the Commence instal-lation to the Internet for it's updates.

6 Using Internet Explorer, browse to the the Internet URL address you noted in the CMCUPDT.INI file. Download a copy of the Commence_update.XML file from the Internet site and save it to the intranet location of your choice.

Note: *Confirm the Commence_update.XML file is present in your intranet folder before proceeding to the next section. See "Configuring XML file for intranet distribution" on page 16.*

7 Continue editing the CMCUPDT.INI file. Change the URL setting to use the same intranet location. This is the intranet directory from which clients will download all updates. In the example shown below, replace <MY DOMAIN> with the IP Address or domain name of your intranet (e.g., http://myintranet/Commence/). This is the designated intranet location where all update files will be stored.

Figure 2-5: Sample changes to configuration file

8 Save the modified CMCUPDT.INI file.

9 Open the Commence Server database. Select **Customize -> Workgroup**, click **Next** then click **Finish**.

10 The URL setting from the modified configuration file will be copied to each client the next time they synchronize with the server.

Configuring XML file for intranet distribution

The steps below will reconfigure the Commence_update.xml file for intranet distribution. These steps only need to be performed once. This assumes the same intranet folder will be used every time an update is released.

1 Locate the Commence_update.xml file in your intranet location.

2 Edit the Commence_update.xml file using a text or xml editor.

3 Change the CONSTANT value to use the intranet location where all update files are stored. Be sure to change only the "value=" statement that indicates the update file location (e.g., http://mail.commence.com/updates/new). A sample is shown below.

Figure 2-6: CONSTANT value to change in Commence_update.xml

4 Save the modified Commence_update.xml file.

Update the server

The update can now be installed on the Commence Server. See "Administrator tasks" on page 12. Note the server will still be downloading the update from the Internet location, not the local intranet.

Client tasks for intranet update

Once the Commence Administrator has reconfigured the Update feature to use the local intranet, clients must synchronize with the server to receive the modified configuration file. This file will automatically be sent to all clients during their regular data exchange with the Commence workgroup server. Aside from this normal sync requirement no special instructions are needed.

The procedure for applying the update at the Commence client workstations is the same regardless of the method of distribution. See "Client tasks" on page 13.

Chapter 3: Server Administration

The first step in setting up a Commence Workgroup is administering the shared database. This process is managed through two specialized programs included with Commence called **License** and **ComAdmin** (short for Commence Administration.)

Launch the License Administration Program

The first step that must be completed after installing Commence RM Workgroup is to set the total number of users that will be accessing the shared database. The License Administration program is launched automatically after installing the Commence Server. If additional client licenses are purchased, the License Administration program must be run manually to set the new user limit.

1 From the Windows desktop, select **Start** -> **All Programs** -> **Commence RM 5.0 Workgroup**

2 Right click on **License** then choose **Run As Administrator**.

3 The *License* Dialog Box will be displayed. Your Name, Company Name, and Server serial # should already be filled in. This information is gathered from the values you entered during the Commence RM Workgroup installation. You may correct these values as needed.
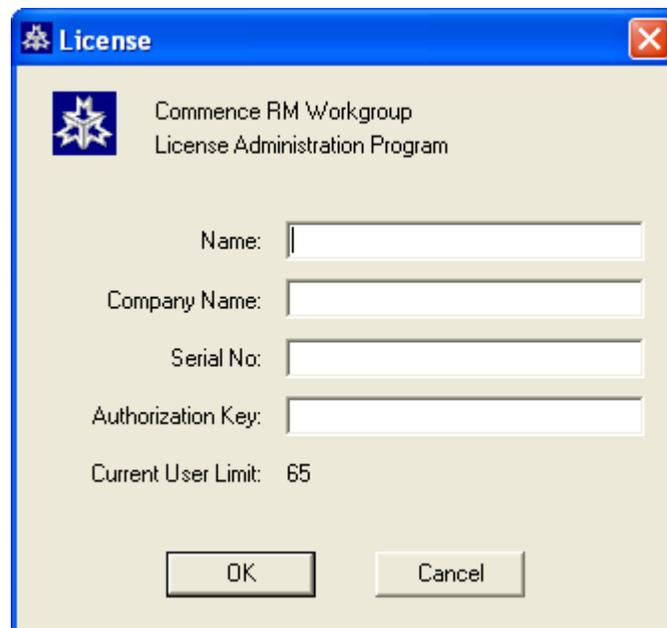
Figure 3-1: License dialog box

4 In the box labeled **Authorization Key:** enter the key printed on the Server Authorization document.

Note: *The Authorization Key is based on the serial number. Be sure to enter the same serial number that you received with the product.*

---

5 Click **OK**.

6 You will be prompted to activate the product over the Internet. Click **Yes** to continue.

The current user limit will be increased to match the total number of user licenses you purchased.

Launch ComAdmin

Once the total number of licenses has been set, perform the following procedure to launch **ComAdmin**:

1 From the Windows desktop, select **Start** -> **All Programs** -> **Commence RM 5.0 Workgroup**-> **ComAdmin**. The *Login* Dialog Box will be displayed.

2 Login as follows:

- **Login ID** - enter **admin**.

- **Password** - leave blank; do not type anything into this space.

Caution: *The **admin** Login ID is typically reserved for use by the Administrator of the Workgroup. By design, this login ID initially does not have a password assigned. For Workgroup Security purposes, it is strongly recommended that a password immediately be assigned. Refer to the next section, **Assign an Administrator Password**, for complete instructions.*

---

3 Click **OK**. The *ComAdmin* Main Menu screen will be displayed.

Figure 3-2: ComAdmin main menu

It is from this Main Menu that many of the parameters are accessed and configured.

Assign an Administrator Password

Before proceeding with configuring the Commence Server, it is critical to maintain the security of the Workgroup. By assigning a password to the **admin** Login ID, it assures that only authorized persons will have access to vital configuration parameters. Once a Workgroup has been established, having an unauthorized person access these parameters could result in a failure of the Workgroup and/or loss of critical data.

Perform the following procedure to assign a password to **admin**:

1 Press the **Users** [icon] button from the ComAdmin main menu or select **File** -> **Users** from the ComAdmin Menu Bar. The *Users* Dialog Box will be displayed.

2 From the *Users* Dialog Box, highlight *Administrator (admin)*. Click **Edit**.

3 Enter the desired password in the **Password** field.

*Note: To help maintain security, when typing in the desired password, each character will be displayed as an asterisk (*) in the **Password** field as well as the **Verify Password** field. For example, if the string **ABC123DEF** were typed into each field, ********* would actually be displayed.*

4 Enter the desired password again in the **Verify Password** field.

5 Click **OK**.

It will now be required to enter the password whenever the Administrator uses the **admin** Login ID. It is strongly suggested that the password be stored in a secure location in the event it is forgotten or is needed by another person authorized to login with the **admin** Login ID.

Proceed with the next section, Add Users, to continue configuring the Commence Workgroup Server.

Add Users

Each user of Commence Workgroup must be added before they can access the Shared Database.

*Note: Each Commence Server limits the number of Clients it can service. This limit can be found in the About Dialog Box for ComAdmin. Select **Help** -> **About** from the Menu Bar. Although the number of Client Licenses and Users that can be added is limited to that shown, the Commence Server Edition may be easily upgraded to accommodate more clients as required. Contact your vendor for information about increasing the number of clients permitted by the Commence Server.*

Perform the following procedure to add users to a Commence Workgroup:

1 Select the **Users** button, [icon] from the *ComAdmin* main menu. The *Users* Dialog Box will be displayed.

2 Select **Add**. The *Add User* Dialog Box will be displayed.

3 Enter the information for the first user as follows:

• **Enter the new user's full name** - Type in the first name and last name of the user that is being added.

• **Enter the new user's login ID** - Type in the Login ID that is to be used when logging into the Commence Workgroup. This is typically the user's initials, their first name, last name, or any combination of this information. It is recommended that each user's Login ID be set to the same ID they use for logging into the network in order to make it easier to remember.

Note: *A User Password is not required. If a password is not to be assigned for a user, leave the corresponding two fields in the Add User Dialog Box blank and proceed with step 4 below.*

• **Enter the new user's Password** - [OPTIONAL] If used, this is the password that must be entered whenever the user opens the database. Requiring the user to logon with a password provides an added level of security to the shared database.

• **Verify Password** - [OPTIONAL] If a Password is assigned, this is used to verify that the correct password has been entered by the user.

4   When all user information is entered correctly, click on **Save**. After the information for each User is saved, an empty *Add User* Dialog Box continues to be displayed, and the **Save** and **Cancel** buttons revert to a single **OK** button. Refer to step 2 above.

5   Repeat steps 3 and 4 for each additional User that is to be added.

6   When all Users have been added, click on **OK**.

7   The *Users* Dialog Box is again displayed, showing all users that have just been added.

8   Click **OK**.

Proceed with the following section, Set Up a Shared Database, to continue configuring the Commence Workgroup Server.

Set Up a Shared Database

The basis for any Commence Workgroup is a Shared Database, which is defined using **ComAdmin**. Whether creating a new database from scratch, or converting an existing stand–alone database to a Shared Database, the database will need to be added via **ComAdmin**.

Perform the following procedure to add a Shared Database:

1   Select the **Databases** button, ▣ from the *ComAdmin* main menu. The *Database* Dialog Box will be displayed.

2   Select the **Add** button. The *Add Shared Database* Dialog Box will be displayed.

3   Complete the information for the new database as follows:

• **Name** - the name of the new Shared Database

• **Description** - [OPTIONAL] description of the information to be maintained within the new Shared Database.

• **Database Location** - the path to the database that will become the Server Database. Enter the path to an existing database that is to become shared. The path can point to a location on a local

drive of the Server PC. If uncertain of the exact path, click **Select**, and navigate to the desired location.

4 When all information is complete, select **OK**.

5 Commence will display the following messages:

• If promoting an existing standalone database to a server database, Commence will ask if it should be made Shared. Select **Yes**.

• Commence will ask if an entry for the new database is to be added to the Commence Database List. Select **No** if the database is already available in the **Open/Manage Database** menu command in Commence. If you select **Yes**, the database name and location will be added to Commence.

Note: *If the database is already available in Commence, say **No** to this prompt. This will prevent a duplicate entry from being added.*

---

6 The new database will be shown in the *Database* Dialog Box.

7 To add additional shared databases to the Server, repeat steps 2 through 4.

8 When all databases have been added, click **OK**.

9 Click **Exit Program** to exit ComAdmin.

Once the database has been promoted to a Server, the following steps must be taken in order to provide a user with access to the information:

• Configure client permissions

• Configure communications parameters

• Register clients

Launch the Server

Before any configuring of the shared database can begin, the Commence Server must be running and the Shared Database must be open.

Note: *The following procedures assume that the Server was installed using the default path values. If the Server was installed in a location other than the default location, some the menu selections indicated will need to be modified.*

Perform the following procedure to start the Server:

1 From the **Start** Menu, select **All Programs** -> **Commence RM 5.0 Workgroup** -> **Commence Workgroup**.

2 If Commence does not open in the shared database, select the **Commence Application button** -> **Open/Manage Database** and open the desired database.

If more than one shared database is available, each database must be opened using a separate copy of Commence. See "Running Multiple Commence Instances" on page 65.

Note: *The server MUST be running the shared database in order for any client to enroll or to have any synchronization occur.*

After the Server has been successfully started and the Shared Database opened, the next step is to establish what the permissions are to be for a newly added User. Proceed to the next chapter, "Configure the Client Permissions" on page 23, to continue setting up the Commence Workgroup.

Chapter 4: Configure the Client Permissions

The Commence Server can control what information each user is able to view and modify within a Shared Database. There are two levels of permissions that can be configured.

- **User Level** - defines whether users can access the shared database.

- **Permissions** - define how users can access data in each shared category or desktop. Permissions can be assigned for all items in the category or Selective Permissions can be used to define access on a per–item basis within the category.

All users are assigned the default category permissions for any new shared categories added to the database. The permissions for any new category may then be modified as necessary to allow the information to be accessed as required.

The following sections describe each permission level as well as how to implement Selective Permissions.

User Levels

User Levels control which users can enroll to a Shared Database, as well as which users are able to change the Shared objects in that database. An object is any one of the following:

Category, Connection, Agent, Detail Form, Color Code, Letter Template, Import/Export Template, View, or Desktop.

One of three (3) User Levels may be defined as the default for the Shared Database. These User Levels are:

- **Author** - can access the Shared Database, and add, edit, and delete shared definitions.

- **User** - can access the Shared Database, but cannot add, edit, and delete shared definitions. Most users will have this user level.

- **None** - cannot access the Shared Database. This will prevent any new users from being registered and enrolled to the shared database. Access must then be granted on a per–user basis via the *Permissions* dialog box.

Each of these User Levels may be assigned on a per–user basis.

Permissions

Category Permissions

Category Permissions determine whether shared items in each category can be viewed, modified, or deleted for each shared category within a Shared Database.

- **Read Permission** - determines whether shared items can be viewed for the selected categories.

- **Write Permission** - determines whether shared items can be added or modified in the selected categories.

- **Delete Permission** - determines whether shared items can be deleted from the selected categories.

For each permission, the following choices determine how items in the selected categories are handled:

- **All** - All items in the category are synchronized to the user.

- **Selective** - A subset of items in the category is synchronized to the user.

- **None** - No items in the category are synchronized to the user. The user receives an empty category.

These permissions can be assigned as a default for all users or on a per–user basis.

Note: *Category Permissions do not affect access to local data. So granting a user None or Selective category permissions does not prevent a user from adding and modifying local data in that category. Any changes made by a user to non-shared items would not synchronize and would only affect their local Client Database.*

Desktop Permissions

Desktop Permissions allow you to control which shared desktops will synchronize to each user. When setting desktop permissions, only the Read Permissions can be controlled; write and delete permissions do not apply to desktops. Shared desktops can be modified and deleted by users who have been granted Author level access.

For each shared desktop within a Shared Database, the following read permissions may be assigned.

- **All** - This translates to full read (R) permission to the desktop. The desktop in its entirety will synchronize to the selected user(s).

- **None** - The desktop will *not* synchronize to the selected user(s).

These permissions can be assigned as a default for all users or on a per–user basis.

Set Default Permissions

Initially, the Default Permissions for a shared database are set to *User* for the User Level and *All* for category and desktop Permissions. However, these Default Permissions may be modified to satisfy specific needs. If the Default Permissions are to remain unchanged, proceed directly to the next chapter "Configure Communication Settings" on page 31 to continue configuring the Commence Server.

Perform the following procedure to set the Default Permissions assigned to new clients:

1 Verify that the Commence Server is running, and the desired Shared Database is active.

2 Select **Customize** -> **Workgroup** from the Menu Bar. The *Customize Workgroup - Server Administration* Dialog Box will be displayed.

3 Click **Next >**. The *Customize Workgroup - Database Options* Dialog Box is displayed.

4 Click **Default Permissions**. The *Authorization Defaults* Dialog Box will be displayed.

Figure 4-1: Setting the User Level

5 Three **User Level** permissions (User, Author, and None) are available from which to select. Select the desired **Default User Level** from the pull–down menu. The Level indicated will automatically be assigned to each user as they are added to the database. Individual access privileges may then be modified on a per–user basis as needed.

6 Default permissions can be set for each Category and Desktop in the Shared Database. Categories are listed as Type C. Highlight each one individually and assign the desired Read, Write, and Delete permissions. Desktops are listed as Type D. Highlight each desktop and assign the desired Read permission.

The *Authorization Defaults* dialog uses a *list view control* to list the shared objects for which permissions can be modified. Similar to Windows Explorer, a click on the column header will sort that column and clicking again will reverse the sort order from ascending to descending.

⌨ Shortcut   The keyboard equivalent for sorting each column is ALT+1 for column 1 (view name), ALT+2 for column2 (view type), and ALT+3 for column 3 (category).

Multiple categories or multiple desktops may be highlighted and their permissions modified at the same time. Sort the list by type, then hold down the SHIFT key on your keyboard to select a range of objects. Or hold down the CTRL key and then click each object you want.
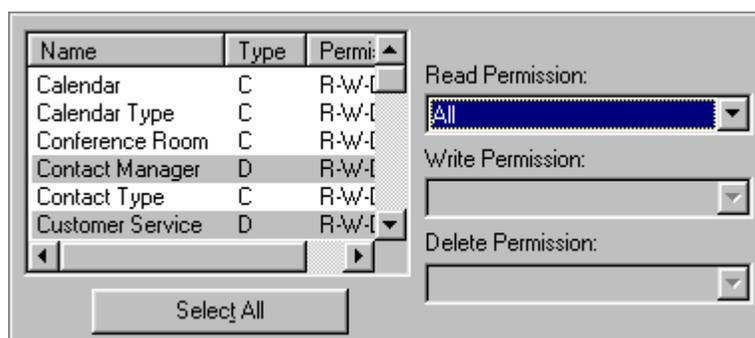
Figure 4-2: Selecting multiple desktops

Note: *Write and Delete permissions for desktops are granted to users with author level access. The only relevant permission that needs to be set for desktops is the Read permission. When setting permissions, if the selection includes one or more desktops, only the Read permission may be set. For full control over all applicable permissions, it may be helpful to sort by the **Type** column to group similar objects together.*

7 Repeat the above steps to set permissions for the next group of objects. Be sure to click **Deselect All** to select a new group of objects before re-setting the permissions.

8 When the default permissions are as desired, click on **Save**. The *Database Options* dialog is again displayed.

9 If the default permissions need to be overridden for specific individuals in the workgroup, click **Next >** to change the permissions for those users. Otherwise press **Finish** to close the dialog.

Any users who enroll from this point on will be given the indicated **Default User Level** with the corresponding permissions immediately upon being enrolled. Existing users who are already enrolled to the database are not affected by this change.

If you have finished configuring permissions proceed to the next chapter, "Configure Communication Settings" on page 31, to continue setting up the Commence Workgroup. If stricter permission control is required for the database, see the section titled "Selective Permissions".

Assigning Permissions

If some users should be assigned permissions other than the default settings, the permissions can be configured on a per–user basis.

Perform the following procedure to change a user's permission level as well as the permissions for a shared category:

1   Select **Customize -> Workgroup**.

2   Click **Next>** two (2) times to display the *Customize Workgroup - Permissions* Dialog Box. The "Set Permissions for:" section will show a list of all users that were entered into ComAdmin.

3   Select the user(s) for whom permissions are to be modified. Selecting groups of users (such as users in the same department) is permitted on this screen. Simply click once on each username to select the additional users. If more than one user will be assigned identical permissions, multiple users may be selected at the same time so that their permissions may be modified at the same time.

4   Click **Edit Permissions...**. The *Edit Authorizations* Dialog Box will be displayed.

5   From the **User Level** pull–down menu, select the permission level that is to be assigned to the user(s).

6   Category and Desktop Permissions can be modified for the selected user(s). Categories are listed as Type C, and Desktops are listed as Type D. Highlight each one individually and assign the desired Read, Write, and Delete permissions. For details on how to work with the *Edit Authorizations* Dialog Box, see "Set Default Permissions" on page 24.

7   When all permissions for the selected user(s) are as desired, select **Save**.

8   Repeat all steps for the next group of users. Be sure to deselect the previous user(s) before re-setting the permissions.

9   Click **Next >** to continue configuring the workgroup. Otherwise press **Finish** to close the dialog.

Once you have finished configuring permissions proceed to the next chapter, "Configure Communication Settings" on page 31, to continue setting up the Commence Workgroup. If stricter permission control is required for the database, see the section titled "Selective Permissions".

Selective Permissions

Defining *Selective Permissions* for a shared category allows the fine–tuning of exactly what items a user can view and change. For example, if a user does not need to view all items in a shared category, the Commence Administrator may set the Read permission to Selective for the specific category. The user will then receive only those shared items to which they are connected. This allows confidential data to be shared only with those

users who need to view it. It also improves the synchronization performance, since there is less data that needs to be synchronized with all Client Databases. The Server Database contains all shared data, even though Clients may receive only a subset of the shared data.

Note: While Selective Permissions may give the administrator the greatest level of control over items in a category, it is not necessary to use this option to setup a typical workgroup.

Using selective permissions is a straightforward way of giving users access to items in a shared category on a per–item basis. Simply put, If a shared item is connected to a user, that user can view, modify, or delete the item. If the user is not connected to the item, then no access is granted. This permission requires that a connection exist from the shared item to an item in the category that contains items for all users in the Commence Workgroup (i.e., the (-Me-) item).

Assign Users

In order to use Selective Permissions for shared categories, the Selective Permissions parameters must first be configured. One setting defines the category and Commence items which represent the users in the Commence Workgroup. It is also necessary to select which connections are used with each shared category that uses Selective Permissions.

Perform the following procedure to define the category and items that represent users:

1   Launch Commence.

2   If the desired Shared Database is not the database that is open, open it by selecting the **Commence Application button** -> **Open/Manage Database**. Highlight the desired database, and click **Open**.

3   Select **Customize** -> **Workgroup** from the Menu Bar.

4   Click **Next>**. The *Customize Workgroup - Database Options* Dialog Box will be displayed.
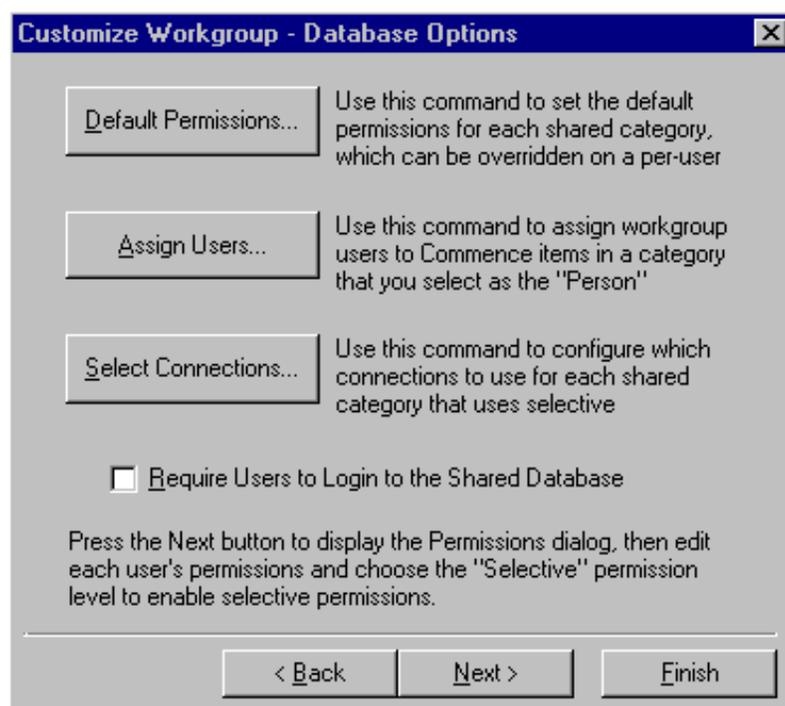
Figure 4-3: Database Options dialog box

5   Select **Assign Users**. The *Assign Users to Commence Items* Dialog Box will be displayed.

Note: *Items that are used to represent users in the Workgroup must be shared items, and will need to be added to the selected Person category before using this dialog. If an item does not exist for each of the users in the Commence workgroup, press the **OK** button to close this dialog. Add the appropriate shared items to the selected Person category, and return to this Dialog Box.*

6 Select a **Person Category** from the pull–down list. The category should be one that contains an entry for each Commence User that has access to the shared database. This is the category where internal Employee names would be entered. In the Customer Relationship Management applications, this information is stored in the *Contact* category. Previous versions of the database used the *Person/Company* category to store information about the individual and their company.

7 The **Users** listed on the left side of the screen are the user names and login ID's that were entered into ComAdmin. The **Person Items** listed on the right side of the screen are the names you entered into Commence. You will need to match up the Users from ComAdmin with the corresponding Person Items in Commence. Select the username on the left, then select the same person's name on the right. Click **Assign Person**.

8 When all users have been assigned to a corresponding Commence item, select **OK**.

Select Connections

Perform the following procedure to select the connections to be used with Selective Permissions:

1 From the *Customize Workgroup - Database Options* Dialog Box, press the **Select Connections** button. The *Select Connections for Selective Permissions* Dialog Box will be displayed.
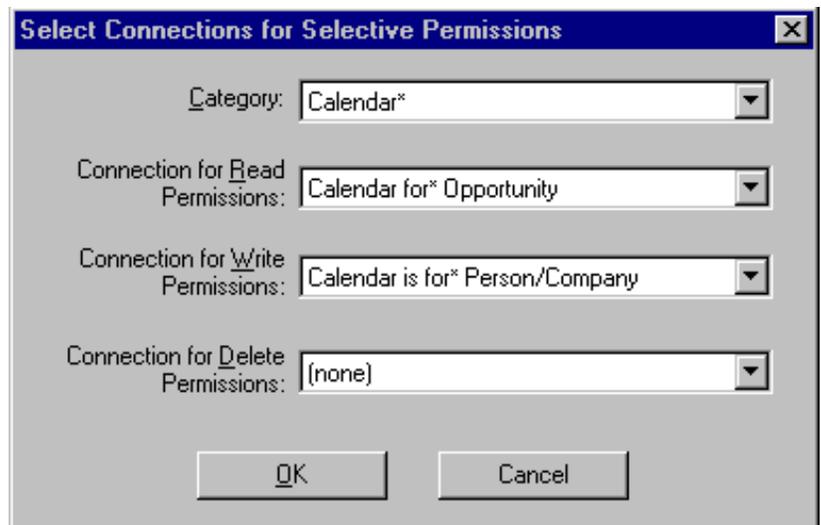
Figure 4-4: Select connections dialog box

2 Select the category to configure, and then select the appropriate connections for the read, write, and delete permissions. For example, the Calendar category can be set so that the Calendar is for Person/Company connection controls the user's read permission. Similarly, the write and delete permissions can be controlled by a different connection, such as the Calendar Coordinated by Person/Company connection.

3 Click **OK**.

Selective Permissions can now be used for this shared category.

For example, if a sales database includes a contacts category, a manager would have the category permission of **All** for read, write, and delete. A salesperson might have read, write, and delete permissions for the category set to **Selective**. This would allow each salesperson to view, edit, and/or delete their own contacts, but have no access to those contacts for other salespersons.

Proceed to the next chapter, "Configure Communication Settings" on page 31, to continue setting up the Commence Workgroup.

Chapter 5: Configure Communication Settings

Each Commence user has the ability to synchronize information with the Commence Server by sending files using either a shared LAN directory, e–mail, or the Internet. In order to synchronize, the Server must be configured with each user's communication information.

For more information about the three methods of communications refer to "Running Commence Workgroup" on page 45.

Before configuring the communications information, make a list of all anticipated users and how they intend to communicate with the Commence Server. If all users will be using the shared LAN directory then there is no need to set e–mail or Internet parameters. If e–mail is to be used, verify that all users have been added to the e–mail program and their user IDs are known. If the Internet is to be used, verify that the specified Internet FTP directory has been created, and that all affected clients have full access to this directory.

Note: *The Commence Server can synchronize using a shared LAN directory, e–mail, and the Internet, but a single Client can use only one of the three methods.*

Define Server Settings

Three sets of Server Communications Settings are provided (e.g. one for each of the available synchronizing methods.) Depending upon the method(s) used for synchronizing updates, one or more of these sets of parameters must be configured. The methods available for synchronizing data are:

• **Shared LAN Directory** - used when a Local Area Network (LAN) is used by the Workgroup; a directory which is accessible by both the Server and Clients is used to distribute updated information

• **E–Mail** - uses electronic mail to send and receive updated information for the Shared Database

• **Internet FTP Directory** - uses File Transfer Protocol (FTP) commands to send and receive updated information for the Shared Database over the Internet.

Perform the following procedure to define Server Communications Setting:

1 Select the **Customize -> Workgroup** command. Click on **Next >** two times. The *Customize Workgroup - Communications* Dialog Box will be displayed.

2 In the **Server Communications** section, click **Configure**. The *Workgroup Communications* Dialog Box will be displayed.
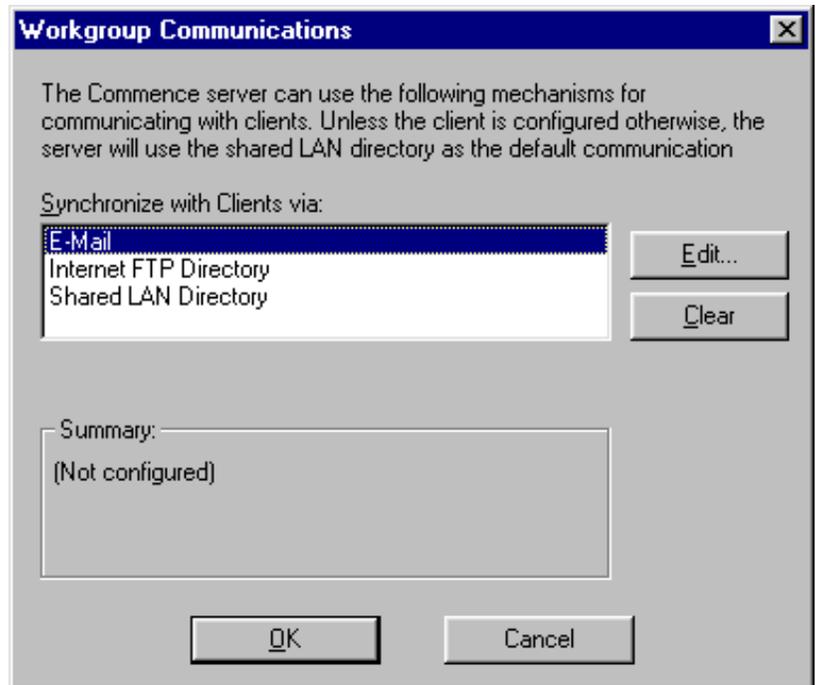
Figure 5-1: Server communication parameters

3 At this point, each of the sets of Communications Parameters may be defined. For completeness, instructions are provided in the following sections for each set of Server Communications Parameters. One or more of these sections may be skipped if the information is not pertinent to a particular installation.

Configuring Shared LAN Directory Parameters

Perform the following procedure to configure the Server to use a Shared LAN Directory for exchanging synchronizing information:

Caution: The Shared LAN Directory is NOT the same as the Server data directory. Do not point to a directory that is already in use by other Commence files, such as the Server database, the Workgroup Administration Files, or the Program Directory.

---

1 Select the **Customize -> Workgroup** command. Click on **Next >** two times. The *Customize Workgroup - Communications* Dialog Box will be displayed.

2 In the **Server Communications** section, click **Configure**. The *Workgroup Communications* Dialog Box will be displayed.

3 From the *Workgroup Communications* Dialog Box, highlight **Shared LAN Directory** and select the **Edit** button.

4 Set the path for the **Shared LAN Directory**.   Enter this path as it would be seen by the Commence Server. It is through this directory that the Server will communicate with the Clients by sending and receiving data files. The directory selected should be accessible to all users, and should be a new directory that is not used by any other program or Commence. All users require full access (read/write/create/delete/etc.) to this directory.

5 Indicate how frequently (in seconds) the Server should check the shared LAN directory for data updates sent by Clients. A very small number will guarantee that updates are processed in a timely manner, although the Server may be busy for extended periods of time. This limits the Server's ability to run other tasks. The default value for this is every 15 seconds. This value should be adjusted to meet the specific needs for the Workgroup being established, as well as the hardware specifications.

6 When the Shared LAN Directory parameters have been configured as desired, select **OK**. The *Workgroup Communications* Dialog Box will be displayed.

Configuring E– Mail Parameters

Perform the following procedure to configure the Server to use E–Mail to exchange synchronization information with the clients:

1 Select the **Customize -> Workgroup** command. Click on **Next >** two times. The *Customize Workgroup - Communications* Dialog Box will be displayed.

2 In the **Server Communications** section, click **Configure**. The *Workgroup Communications* Dialog Box will be displayed.

3 From the *Workgroup Communications* Dialog Box, highlight **E-Mail** and select the **Edit** button.

4 Configure the **E-Mail** parameters as follows:

• **Mail Program** - select the appropriate mail program/protocol from the pull–down menu.

• **Post Office Path** - [only necessary if using a VIM–based mail system, such as Lotus Notes.]

• **Exchange Profile Name** [only applies to MS–Mail or MAPI compatible programs] - the name used to log into MS–Mail or other MAPI compatible program.

• **Login Name** [only applies to CMC–compatible programs] - the name used by the Server to log into the E-mail account. This is the account that the Server will be using to send/receive updates to and from clients.

• **Password/Verify Password** - the password associated with the **Exchange Profile Name/Login Name** defined above.

5 When the Server's e–mail login information is correct, select **OK**.

6 Next, the e–mail address for the Server must be specified. This is the address to which Clients mail their update information during a synchronization.

7 Indicate how often (in minutes) the Server will check the mail server for Client synchronization requests. This number should not be very large in order to assure the timely receipt of updated information by the Server. A recommended value is ten (10) minutes.

8 Select **OK** when done. The *Workgroup Communications* Dialog Box will be displayed.

Configuring Internet FTP Directory Parameters

Synchronizing via the Internet is much the same process as synchronizing via a shared LAN directory, only instead of the directory's being located on a LAN, it is now located remotely and is accessed via dial–up service (e.g. Internet Service Provider) or a dedicated Internet connection. The transferring of synchronization files between Client(s) and Server is then done using File Transfer Protocol (FTP) procedures.

Perform the following procedure to configure the server with the Internet FTP Directory information:

1   Select the **Customize -> Workgroup** command. Click on **Next >** two times. The *Customize Workgroup - Communications* Dialog Box will be displayed.

2   In the **Server Communications** section, click **Configure**. The *Workgroup Communications* Dialog Box will be displayed.

3   From the *Workgroup Communications* Dialog Box, highlight **Internet FTP Directory** and select the **Edit** button. The *Server Communications* dialog will appear.

Figure 5-2: Setting the Server Communications for FTP synchronization

4   Enter the **Internet FTP Directory** information. The format of this address is typically an IP Address, or sometimes ftp://DIRECTORY_NAME. If the Internet FTP Directory is unknown, it should be available from the Network Administrator responsible for the FTP site.

5   Enter the **User Name** under which the Server will log into the Internet FTP Directory. It is recommended that the **Admin** login be used.

6   Enter the **Password** for the Server's Login ID.

7   Enter the Password again to **Verify Password**.

8   Indicate how often (in minutes) the Server will check the Internet FTP Directory for Client synchronization requests. A recommended value is ten (10) minutes at the server (or three times as fast as the client interval).

9   After the Internet FTP Directory parameters have been configured as desired, select **OK**. The *Workgroup Communications* Dialog Box will be displayed.

After all desired Server Communications Parameters have been successfully configured, select **OK** from the *Workgroup Communications* Dialog Box. The *Customize Workgroup - Communications* Dialog Box will again be displayed.

Define Client Settings

Once the Commence Server has been configured properly for each of the methods to be used for synchronizing, each Client must in turn be configured as well. Unlike the Commence Server, which is capable of being configured for all three means of synchronizing (i.e. Shared LAN directory, e–mail, and/or an Internet FTP directory), a Commence Client is capable of using only one method of synchronizing at any given time. The method of synchronization you choose may be changed at any point by resetting the Client Communications Parameters at the Server and at the Client. However, a Client cannot be configured for multiple methods of synchronizing simultaneously.

E–Mail Parameters

Perform the following procedure to configure a Commence Client to use e–mail for synchronization:

1. From the *Customize Workgroup - Communications* Dialog Box, highlight a user name in the **Client Communications** section.

2. Click the **Configure** button at the bottom of the Dialog Box.

3. Select the **Communicate with Server using: E–Mail** radio button.

4. Click **OK**. The *Client Communications* Dialog Box will be displayed.

5. Complete the **User Address** for the Client. This is the address to which the Server will send synchronization information that is intended for this Client.

6. Click **OK** to return to the *Customize Workgroup - Communications* Dialog Box.

Shared LAN Directory Parameters

Perform the following procedure at the Commence Server to configure a Commence Client to use a Shared LAN Directory for synchronization:

1. From the *Customize Workgroup - Communications* Dialog Box, highlight a user name in the **Client Communications** box.

2. Click the **Configure** button at the bottom of the Dialog Box.

3. You can specify that this client will **Communicate with Server using:** the Shared LAN directory. Note that the default method for synchronizing data within a Commence Workgroup is using a Shared LAN Directory. This step is only necessary if you are switching from a different method of synchronization back to using shared LAN directory.

4. Click **OK**. A message indicating that no further configuring is necessary is displayed. See the following figure.
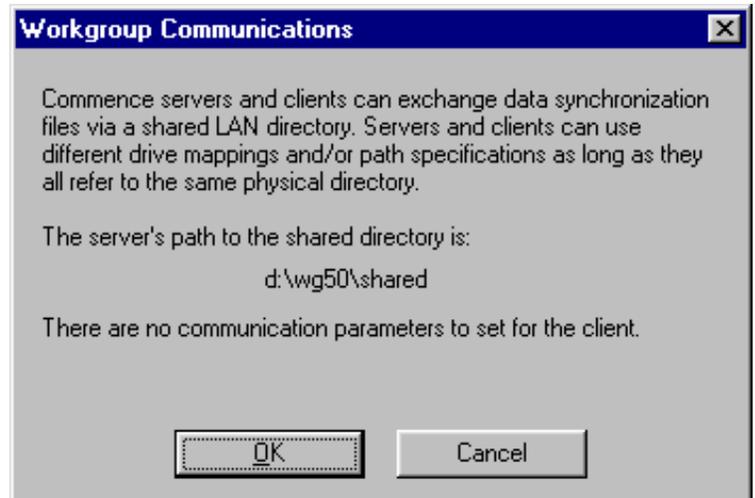
Figure 5-3: Choosing shared LAN directory

5 Click **OK** to return to the *Customize Workgroup - Communications* Dialog Box.

Internet FTP Directory Parameters

Perform the following procedure at the Commence Server to configure a Commence Client to use an Internet FTP Directory for synchronization:

1 From the *Customize Workgroup - Communications* Dialog Box, highlight a user name in the **Client Communications** box.

2 Click the **Configure** button at the bottom of the Dialog Box.

3 Select the **Communicate with Server using: Internet FTP directory** radio button.

4 Click **OK**. A message indicating that no further configuring of parameters is necessary is displayed.

5 Click **OK** to return to the *Customize Workgroup - Communications* Dialog Box.

Repeat the above procedure for each remaining Client that is to have its Communications Parameters configured.

Users' communications parameters may need to be updated if the methods available for syncing change. For example, if a user usually works in the office, they would typically be connected via a shared LAN directory. If they begin using Commence on a laptop from outside of the office, e–mail communication would allow the Client Database to communicate with the Server even when away from the office. The server will then need to be reconfigured so that it sends (and receives) synchronization data from the Client via e–mail. Additionally, the user will need to configure the Client Database to communicate via e–mail.

After all Client Communications Parameters have been properly configured, proceed to the next chapter "Register Clients" on page 37 to continue configuring the Shared Database.

Chapter 6: Register Clients

Each client must be registered with the Shared Database. Registering will create a link between the Clients and the Server. Registering from the Server will generate an Instruction Sheet, which is to be given to the appropriate user. This sheet includes information necessary in order to enroll as a user from the Client Database. Also, initialization information will be sent to each client using the communication settings as configured above.

Personalizing the Instruction Sheet

When you register a client, Commence will ask if an Instruction Sheet should be generated for this user. The instruction sheet provides step–by–step instructions for enrolling a client to the shared database. Since the instruction sheet is a text file generated by Commence, it can be printed out, e–mailed, or faxed to the user.

The instruction sheet is generated from a template file that should be customized to include information specific to your installation. At a minimum, it should include the Commence Administrator's name and telephone number so that users can contact the Administrator if they experience any difficulties during the enrollment. The template file is a text file that can be edited using any text editor (such as Notepad or WordPad).

There are three template files included with Commence. They are stored in the \wgfiles6 folder beneath the commence program directory.

- **steps1.txt** - is the e–mail template file

- **steps2.txt** - is the shared LAN template file

- **steps8.txt** - is the Internet FTP template file

Each template file has special markers that Commence replaces with the appropriate data to create the instruction sheet. Some examples of the special markers include **(-Directory-)** and **(-Serial Number-)**. Do not remove these markers or the instruction sheets will be missing vital information!

Synchronizing Personal Information to each Client

Normally the personal information is set at the client workstation by the end user after the enroll has taken place. However in some cases, especially if selective permissions are enforced in the shared database, it is crucial that the personal information be set as soon as possible. Rather than leave this important task up to the end user, the Commence Administrator can opt to automatically synchronize these settings to a newly enrolled client during the initial synchronization.

To use this feature:

1   Verify that the Commence Server is running, and the desired Shared Database is active.

2   Select **Edit -> Preferences -> Personal Info**. Choose the **Category:** where the Commence client names have been entered. This is typically the Person/Company category. Set **Your Name:** to the item that will represent the Commence Server. This user will be mapped to the admin login ID. If an item does not exist for the Commence server, use the **Add New Item** button to add one.

3   Select **Done** to close the Personal Info dialog.

4   For the Category selected above, add an item for each client that will be enrolled.

Note: *Items that are used to represent users in the Workgroup must be shared items, and will need to be added to the selected category before continuing.*

---

5   Select **Customize -> Workgroup** from the Menu Bar. The *Customize Workgroup - Server Administration* Dialog Box will be displayed.

6   Click **Next >**. The *Customize Workgroup - Database Options* Dialog Box is displayed.

7   Click **Assign Users**. The *Assign Users to Commence Items* Dialog Box will be displayed.

8   Select a **Person Category** from the pull–down list. Choose the same category as in step 2 above.

9   The **Users** listed on the left side of the screen are the user names and login ID's that were entered into ComAdmin. The **Person Items** listed on the right side of the screen are the names you entered into Commence. You will need to match up the Users from ComAdmin with the corresponding Person Items in Commence. Select the username on the left, then select the same person's name on the right. Click **Assign Person**.

10 When all users have been assigned to a corresponding Commence item, select **OK**.

Proceed with the next section titled "Register Clients With the Shared Database". After the clients have enrolled and received their copy of the shared database, the (-Me-) item will be pre-set in each client database to the appropriate user item mapped at the server.

Note: *The (-Me-) item setting only synchronizes with the client when the client database is first created. If changes are made to this setting at the server after the clients have been registered, those changes will not synchronize to the clients. The client settings may be updated from each individual client workstation by selecting the **Edit -> Preferences -> Personal Info** command.*

Register Clients With the Shared Database

Perform the following procedure at the Commence Server to register a client with the shared database:

1   Select the **Customize -> Workgroup** command. Click **Next >** four times. The *Customize Workgroup - Register* Dialog Box will be displayed.

2   From the list of *All Users* highlight a user that is to be registered with the Shared Database.

3   Click **Register**.   The *Register User* Dialog Box will be displayed.

4   Click **OK**. An informational Dialog Box will be displayed, providing the authorization key for the user just registered. You may write this information down to take with you to the client PC if you plan to enroll the client yourself or you may create an instruction sheet to give to the user by proceeding with the remaining steps.

5   Commence will ask if an Instruction Sheet should be generated for this user. If you have already

taken note of the pertinent information in the previous step, you may click **No**. Otherwise, click **Yes** to save the Client Enrollment instructions to a file. Select a directory in which the instruction sheet will be stored, and what the name of the user–specific sheet will be.

6 Click **Save**. An informational dialog box will be displayed indicating that the instruction sheet has been successfully saved.

7 Click **OK**.

8 Repeat the steps above for each user to be Registered with the Shared Database.

View Registration Details

Registration Details for each registered user may be viewed. This shows the Authorization Key if needed and allows the instruction sheet to be recreated. Additionally, each registered user may be re–registered or may be re–synchronized with the Server. Note: Only re-register or re-sync a user if a problem has occurred.

Perform the following procedure to view the registration details:

1 From the *Customize Workgroup - Register* Dialog Box, highlight a registered user from the list of *Registered Users*.

2 Click **Details**. The *Registered Users* Dialog Box will be displayed.

The **Full Name**, **Login ID**, and **Authorization Key** for the selected registered user will be listed.

From here, one or all of the following may be done:

• **Create Instructions** - Creates an instruction sheet for the registered user. This is useful if you lost the original instruction sheet, or have changed the method of synchronization for this user.

• **Re–Register** - Sends the initial synchronization packet to the registered user, enabling the user to re-attempt the enrollment. Use this command ONLY if the user is having difficulty enrolling to the shared database or if the original synchronization packet has been lost or mis-directed.

• **Re–Sync** - Sends the complete database to the registered user. All shared information contained in the shared database will be sent. Use this command only if the client database has fallen out of sync with the server database. USE WITH EXTREME CAUTION.

After all users have been registered with the Shared Database, proceed to the next chapter titled "Enroll in the Shared Database" to continue the Workgroup Installation.

Chapter 7: Enroll in the Shared Database

Install Commence RM on Clients

After the Server has been configured, Commence RM must be installed for each user. Clients can install the software themselves. However, the Commence Administrator may be called upon for assistance.

Refer to Chapter 2 of the *Getting Started Guide* for detailed steps on how to setup Commence RM on a client PC.

Caution: *If running a Client on the same PC as the Server, DO NOT install Client Software. Instead, refer to "Running a Server and Client on the same machine" on page 66 for further instructions.*

Enroll Clients

After installing Commence RM, each user must enroll in the shared database. The enrollment process provides each client with a copy of the shared database directly from the Commence Server.

It is not required that the Commence Administrator enroll each user personally. A user can enroll with the Shared Database on their own by following the steps in the instruction sheet. However, the Commence Administrator may be called upon for assistance.

Perform the following procedure to enroll a client to the shared database:

1 Verify that the Commence Administrator has registered the user to be enrolled with the server.

2 Launch Commence at the Client PC.

3 Open a standalone database. This is a database that is neither a Client Database nor a Server Database. If necessary, create a new database by selecting the **Commence Application button** -> **Open/Manage Database** command.

4 Select **Customize** -> **Workgroup**. The *Customize Workgroup – Enroll Client* Dialog Box will be displayed.

5 Select the **Next >** button.

6 Enter the **authorization key** in the space provided. This number is found on the Instruction Sheet generated when the Client was registered with the Server. This is a unique number for each user and is available from the Commence Administrator.

7 Select the **Next >** button. When each user was registered with the **Commence Server**, it was established how the Client Database would synchronize with the server (i.e. via a shared LAN directory, by e–mail, or the Internet.) The specific communications parameters must now be defined in order to enable the synchronizing of data between the Server and Client Databases.

8 Select **Configure**. The *Workgroup Communications* Dialog Box will be displayed.

9 Indicate by which method data synchronization will take place for the Client that is being enrolled.

10 Click **OK** and proceed as indicated below. Any specific information required may be found by referring to the information sheet provided by the Commence Administrator.

Table 7-1: Configuration options

Method of synchronization	What to enter...
Shared LAN Directory	Indicate the path to the **Shared LAN Directory**, as well as the frequency with which Commence is to check this shared LAN directory for synchronization requests. When the information is complete, select **OK**. Proceed to step 11.
E-mail	• Select the **Mail Program** that will be used, as well as all related information that is indicated based on the mail program selected. • When all information is complete, select **OK**. Indicate the **Server E–Mail Address**, as well as the frequency with which Commence is to check the e–mail program for synchronization requests. • When the information is complete, select **OK**. Proceed to step 11.
Internet FTP Directory	Enter the FTP login information. When the information is complete, select **OK**. Proceed to step 11.

11 When all *Workgroup Communications* parameters have been configured, the *Customize Workgroup – Enroll Client* Dialog Box is again displayed. Select the **Next >** button.

12 Next, information about the Local Database needs to be completed. See the following figure.
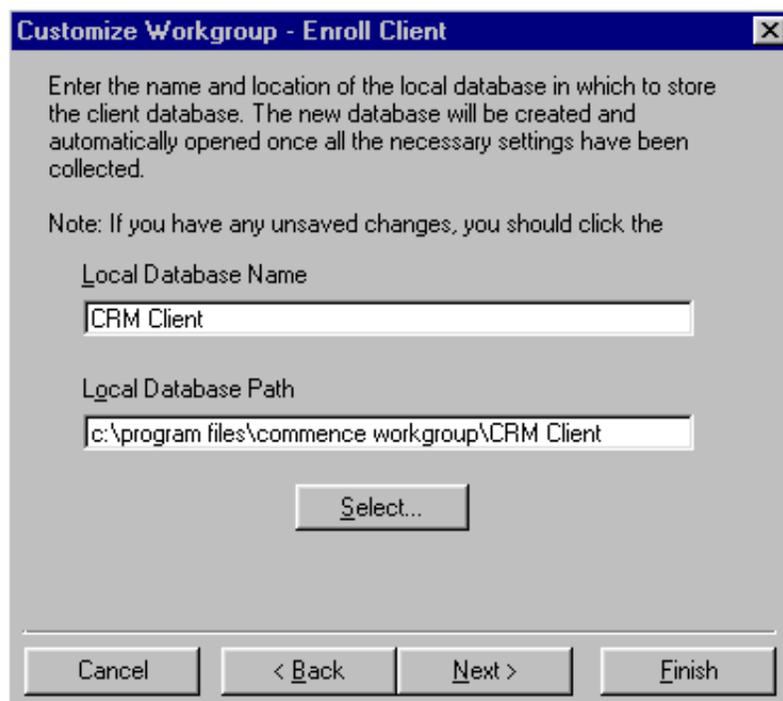
Figure 7-2: Specify client database name and path

• **Local Database Name** - The Local Database Name is a descriptive name that will appear in the Title Bar across the top of the Commence window. This name does not have to match the server database name.

• **Local Database Path** - This is the directory in which the client copy of the shared database is stored. For example, *c:\ProgramData\Commence\Commence\8.0\mydata*. Choose a new directory on the client's local hard drive. Do *not* choose the path to an existing database, or a directory that contains any files used by Commence or any other program. If the directory you specified does not exist, Commence will automatically create it.

13 Select the **Next >** button. When all information has been correctly entered, a message indicating this is displayed.

14 Select **Finish**. Commence will open the new client database and proceed to process the initial sync from the Commence Server. This will download all information from the Commence Server to the Client Database. This may take several minutes. While Commence is busy, the *Sync in Progress* Message Box will be displayed.

When all of the data has synchronized from the Commence Server to the Client Database, the Message Box will be dismissed.

Caution: *The procedure just described must be completed by each client in order to enroll and obtain a personal copy of the shared database. It is not possible to simply copy the shared database for use by a Client.*

This completes the Installation and Configuration of a Commence Workgroup.

For more detailed information about Administering a Commence Workgroup, refer to "Maintaining a Commence Workgroup" on page 53.

Chapter 8: Running Commence Workgroup

Using a Commence Client is almost identical to using Commence. The ability to add, edit, delete items, categories, etc., is still there. The only difference is that the data and definitions are specified as local or shared. Therefore, Commence Workgroup extends the features and functions of Commence over a network of local and remote users for a shared workgroup environment.

There are two classifications of data that are maintained within a Client Database:

• **Local**, or private, information is data that is maintained and available only from within the Client database. It does not synchronize to the Server Database or to any other Client databases. The only way to read, modify, add, or delete private data is from the PC on which the Client Database resides.

• **Shared** data is synchronized to the Server Database and all other Client Databases in the Workgroup. Consequently, all users can read, write, and delete it, depending on their permissions.

Most data and definitions used by Commence are able to be shared. However, there are a few exceptions as listed below.

The following objects are able to be shared between users:

Agents, Categories, Color Templates, Connections, Desktops,

Detail Forms, Import/Export Templates, Items, Letter Templates

• Views

The following items are not able to be shared between users:

• Preferences

Shared objects are indicated by one of three methods:

• An asterisk (*) appears next to the name.

• A **Shared** checkbox is checked.

• Within a detail form, the **Shared** toggle button is depressed.

Displaying Shared or Local Items

A View may be created that is filtered to display only shared or only local items.

Perform the following procedure to create a View that will display only Shared or only Local items:

1 Open a view of the desired Category.

2 Select **Customize** -> **Filter View** from the Menu Bar.

3 Click an unused filter tab.

4 Highlight **Filter for all items: (Shared vs. Local)**.

5 Select the **Shared** or **Local** radio button, depending upon which items are to be viewed. If **Shared** is selected, only those items identified as *Shared* will be displayed. If **Local** is selected, only those items identified as *Local* will be displayed.

6 Select **Save**.

Modifying Data Definitions

Although the Commence Server can be used to modify data definitions (views, categories, connections, etc.) it is not recommended to use the Server to modify large amounts of data on a regular basis. Rather, perform all data modifications from a Client Database that has been assigned the appropriate permissions. If necessary, run a Commence Server and Client on the same machine. Refer to "Running a Server and Client on the same machine" on page 66 for further information.

Maintaining Private Information For Shared Items

If a category is shared, then all of its fields are also shared. A shared category cannot include local fields. If local information is to be maintained about a shared item, this may be accomplished by using a Connection. For example, if the Person category is designated as shared, notes pertaining to each Person can be maintained by creating a local *Personal Notes* category and adding a connection between the two categories.

Synchronizing via LAN, E–Mail, and the Internet

The Commence Server and Clients communicate by sending data files to each other. This communication can be accomplished by using a shared LAN directory, an external e–mail program, or the Internet. Although each client can use only one of these mechanisms for communicating, the server is able to use all three since it must communicate with all clients.

Using a Shared LAN Directory requires that the Server and each Client have access to a common LAN directory. Each client can use a different drive mapping or directory path, but each must point to the same physical directory.

Note: *Even when not connected to the network, the Client Database may still be accessed and updated. Any changes made will synchronize when the Client reconnects to the network.*

For users without a LAN connection, Commence is able to exchange files by using an external e–mail program. Commence works with any 32-bit e-mail program (such as Lotus Notes or Microsoft Outlook) that supports either VIM or MAPI protocols.

If the Internet is to be used to exchange files, an Internet FTP directory must be created to which all affected users have full access.

Special Considerations

Although using Commence Workgroup is very similar to using Commence, there are several considerations which must be remembered. The following sections discuss these Special Considerations.

Agents

Agents are very powerful tools. They have the ability to change all data within a database with a simple click of a button. When creating agents in a Commence Workgroup, there are some important things that must be considered, such as:

• Should the Agent be designated **Local** (i.e. available only for use by the Client database), or should it be designated **Shared**?

• When using a **Save Item** Agent, should the Agent be triggered when the item is saved at the local database or when it synchronizes into the database?

There are some instances when an Agent should be shared and located on each Client copy of the Shared Database. For example, an Agent used to process appointment alarms would be Shared because all users would want to be notified when it is time for an appointment.

Any Agent that is unique to a single user should be local so it runs on only one PC.

Save Item triggers in workgroup databases have several additional options that enable expanded control over their operation.

The **Trigger If... an item is added/edited** now includes options for **as local** or **as shared**. This instructs Commence that the agent should run whenever an item is saved as a either a shared or a local (private item) at the Client Database.

Selecting the **Options** button provides a means of fine–tuning exactly under what conditions the *Save Item* trigger fires.

An item can be added or modified in a number of ways, such as manually entering the information into a Detail Form, automatically adding it via an Agent, Importing the information from a different database application, DDE from another application, or Sync Linking with a remote or base database. By default, the **Save Item** trigger fires when an item has been manually added/edited via a Detail Form. However, the option of triggering when data has been entered/modified by a specific method is selectable. Select the desired method(s) of adding and/or editing items for which the agent is to fire. Each of the methods listed can be independently selected or deselected.

The **Workgroup** option will cause the agent to run when the specified item is saved at another Client Database and is added as a result of a synchronization request. An example of this situation are:

• A new appointment is synchronized to a Client Database. The user/owner of the Client Database is included as one of the participants. An agent can display a message box informing the user of this new appointment that has been scheduled for them.

Data File Fields

A Data File Field is a Commence field that references an external file on a local or network drive. A common example of data files fields are the logged letter items in the database that reference word processor documents. When a Shared item containing a Data File Field is synchronized with a Client Database, a series of events takes place:

• The referenced data file is copied from the source directory to each into each Client's **External Data Files** directory. This directory is defined via the **Edit** -> **Preferences** -> **Other** selection from the Client Database Menu Bar, and is not necessarily the same for each Client.

• The Commence Data File Field is updated to reflect the path to the file's location on the Client Workstation. That is, the path is corrected to use the path specified by the Client for the **External Data File** directory.

Note: *The data file is only synchronized when the item is first added and when the filename is edited. It does not synchronize when the contents of the referenced file are changed.*

Instead of copying these files to all Clients, it is possible to provide all users with access to data files without synchronizing them. The **Synchronize Data Files** option must first be disabled in order for Commence to preserve the original Data File Path.

Perform the following procedure to disable automatic synchronization of data files and begin using a central data file directory:

1 Selecting **Edit** -> **Preferences** ->**Database** from the Menu Bar

2 Turn off the **Synchronize Data Files** option on the Server and all Clients.

3 Use Network Neighborhood to map the same drive letter to a Shared Directory on the network to which all users have access.

4 Copy any existing data files to this Shared Directory.

Commence will preserve the original path to the file found in the Data File Field, thus pointing to the correct file.

Peer–to–Peer Networks

Peer–to–Peer networks require additional support when sharing files in a common shared directory. This is because the file may have the path of **C:\DOCS\ABC.TXT** at the Commence Server PC, but the Client PC references the file using the path **D:\ABC.TXT**. The Commence Server can modify or translate the path so the client will be able to reference the file using the proper path.

Perform the following procedure to configure the Commence Server to translate Data File Field paths in Peer–to–Peer networks:

Caution: *Perform the following only if using a Peer–to–Peer network.*

---

1 Select the **Commence Application button** -> **Open/Manage Database**.

2 Highlight the Server Database, and select **Edit**. Determine the path of the Commence Server database.

3 Close the Commence Server.

4 Navigate to the directory in which the Commence Server is stored.

5 Locate the **DATA.INI** file in this directory.

6 Using any text editor (e.g. Notepad) edit the **DATA.INI** file by adding to the **[Workgroup]** section the following command:

XLAT={server path},{client path}

where:

server path = the Server Path that is to be translated for use by the client (i.e. **c:\docs**)

client path = the Client Path with which the "Server Path" will be replaced (i.e. **d:**).

The brackets, {}, around the each path and trailing backslashes must be included. Using the sample paths listed, the command would then be:

XLAT={c:\docs\},{d:\}

For example documents are stored in **C:\PUB\DOC1** on the Server. The **C:\PUB** directory is the Shared Directory. Clients access the **C:\PUB** directory using **D:**. The translation would then have the Server Path equal **C:\PUB** and the Client Path equal **D:**. The result would be that files found in **C:\PUB\DOC1** on the Commence Server to appear in **D:\DOC1** at the Commence Clients.

Note: *The Client Path must be identical for all Clients. In the above example, all Clients must access the **C:\PUB\DOC1** directory using the **D:** drive.*

Image Fields

Image Fields are Commence fields that store and display bitmap and other types of images (pictures). The information stored in an Image Field is automatically synchronized with each Client Database. Depending on the number of images, as well as the size of each, including Image Fields in a Shared Database may cause each Client Database to consume a large amount of disk space.

Letter Templates

Letter Templates can be shared between Client Databases, and changes made to the Letter Templates will be automatically synchronized by Commence. Note that the Letter Template must be opened or modified using Commence's Letter Template dialog boxes, not simply by opening the file directly from a word processor. If changes to the Letter Template are made directly from a word processor, Commence will not be aware of the changes, and therefore will not be able to synchronize these changes to other client databases.

Maintaining a Commence Server Database

The Commence Server tracks synchronization information for all Client Databases using a special file, **SYNCLOG.PIM**, located in the Server's Database. This file will grow in size in order to track all changes that need to be synchronized with Client Databases. The Commence Server will automatically discard data that has been synchronized with all Client Databases and will shrink the size of this file.

Commence will only discard data that has already been synchronized with all Clients of a Workgroup. If a Client is inactive for a long period of time, or if the Client Database has been deleted but not removed from the Workgroup, the Commence Server will continue to track information for this Client. This will prevent the automatic maintenance of the **SYNCLOG.PIM** file from working properly, and result in an excessively large file.

All Client Databases must be opened regularly to allow Commence to synchronize with them. This allows Commence to reduce the amount of synchronization information that must be tracked within **SYNCLOG.PIM**.

Additionally, whenever a Client Database is to be removed, it must be done using the **Customize** -> **Workgroup** command. Going to the **Register** dialog, and using the **Remove** command will remove the Client from the Server's synchronization information so that the Server will no longer track information for this Client.

If the Commence database is using a large amount of disk space, check the size of the **SYNCLOG.PIM** file. If this file represents most of the disk space used by the database, verify that all Clients are actively syncing and that any deleted Clients have been removed from the Workgroup.

For further information about maintaining a Workgroup, refer to "Maintaining a Shared Database" on page 55.

Workgroup Options

There are some options that are applicable specifically to Commence Workgroup. The following sections discuss these options.

File -> Workgroup Sync Menu Command

This menu command instructs the Client Database to immediately synchronize any changes with the Server Database, and updates the Client Database with any changes from the Server Database. This command overrides the automatic synchronization that occurs periodically in situations where changes to the Shared Database must be retrieved quickly.

This command is useful when a database contains changes that are to be shared immediately with another user, or if the Server contains changes that are needed quickly. For example, a Client Database resides on a notebook computer. Just before leaving the office, the **Home** -> **Workgroup Sync** command is used to retrieve the latest changes to the Shared Database before disconnecting from the network.

Home -> **Workgroup Sync** is also useful when a Client Database is connected to the network via modem using remote access software. This command allows updates to be retrieved on demand, rather than having to wait for a scheduled synchronization. This reduces the amount of time that the remote connection must be kept active.

Workgroup Preferences

There are two Preferences that are Workgroup specific. The following sections describe each preference.

Set Shared Checkbox by Default

This option is used to define whether data added to a Shared Database is automatically identified as shared. If shared data is typically added, then this checkbox should be selected. If private (local) data is typically added, then clear the checkbox. Since this option automatically sets the **Shared** button, data will automatically be shared or kept private unless the **Shared** button's status is manually changed on detail forms or definition screens.

This option also applies to the **Shared** toolbar button on detail forms, as well as to the **Shared** checkbox in the *Add* and *Edit* dialog boxes for those definitions that are able to be shared in a database. This option is used to set the initial state of the **Shared** button, and can be overridden by setting (or clearing) the **Shared** button, and then saving the data.

Synchronize Data Files

This option defines whether data files that are referenced by shared items are automatically copied along with the shared items. If this option is cleared, data files will not be copied from the Client Database to the Server Database. If this option is selected, which is the default, all data files will be copied from the Client Database to the Server Database, and will be received by other Client Databases.

This option should be cleared if the data files that are referenced by shared items are already located in a shared directory on the network. The file name and path referenced by the shared item are modified to reflect the path selected for the **External Data Files** directory. This directory will need to be changed to reflect the path of the shared directory by selecting **Edit** -> **Preferences** -> **Other**.

This option should be selected if data files are not stored on a shared network directory. Selecting this option will cause Commence to copy the data files associated with shared items so that they are available on every Client Database. Commence will also automatically update the data file path to reflect the file's location on the Client Workstation (the **External Data File** directory), and will attempt to preserve the filename if possible.

Note: *This option must be selected at the Server Database to enable Clients to synchronize data files. Disabling this option at the Server will disable it for the Shared Database, even if the option is selected at the Client Databases.*

Using Sync Link in a Workgroup

Sync Link is used to keep databases on multiple PCs up–to–date with the same infor-mation, similar to synchronization within a Commence Workgroup. Sync Link can keep a Commence Client Database on an office PC "in sync" with the Commence Client Database on a laptop or home PC. This way, a user only has to be registered once with the Server.

When Sync Link is used in a Commence Workgroup, the remote database will contain the same data as the base or Client Database on the network. If shared information is added or changed, when these changes are Sync Linked back to the Client, they will synchronize with the rest of the Workgroup. The user will also have to login to the remote database if that is required at the Client Database.

For further information on configuring and using a Sync Link Group, refer to the *Commence User's Guide*.

Caution: *Sync Link should not be used with the Server Database. The Server Database should be used only for synchronizing Client updates received either by shared LAN directory, e–mail, or the Internet.*

Appendix A: Maintaining a Commence Workgroup

A Commence Workgroup requires periodic maintenance to detect and prevent problems with the Shared Database(s). It is strongly recommended that backup copies be made weekly (or daily if feasible) of the Server Database. If a database becomes too large, archiving older data that is no longer needed will improve performance and reduce the size of the server backup files.

Backups of the admistrative files in the **wgfiles8** directory can be made monthly or as needed. The administrative files are updated whenever changes are made via the Customize -> Workgroup menu on the Commence Server. For example, changes to users' permissions may be required if they need access to different information in a shared database, or if new shared categories are added to a shared database. The wgfiles are also updated when users are added and updated in ComAdmin.

The Commence Administrator will require access to the Commence Administration program (**ComAdmin**), the Commence Server Database, as well as Network, FTP, and/or e–mail software in order to perform maintenance on the Workgroup and Shared Databases.

• **ComAdmin** is used to maintain users and shared databases.

• The Commence Server is used primarily to register new users with the shared database (including appropriate permissions), to remove users who no longer require access to the shared database, and to modify permissions for existing users.

• A dedicated folder on the shared drive is used to exchange updates between the server and the clients. The shared drive can be either a shared LAN directory and/or an Internet FTP folder. If no other method of communication is available, users can exchange data with the server via e-mail, however your email server may impose file size limits.

The following sections provide an overview of the tasks required of a Commence Administrator while maintaining a Workgroup.

Administering Users

The Commence Server is used to maintain users' access to the shared database, such as when registering new clients or modifying users' permissions. In order to maintain users, the Commence Server must be running, and the Shared Database must be open.

As users are added to the Workgroup, they will need to be registered with the Shared Database. A data sheet containing information needed to enroll a new Client Database with the Server will be generated for each new user. If the user will be enrolling themselves, be sure to provide them with this data sheet.

Depending upon the specific access requirements for each user, it may be necessary to update the access privileges for one or more users.

When maintaining a group of Users, there are several situations which may present themselves on a regular basis. Recommended actions are described in the following paragraphs.

An Existing Client Needs to Re-enroll

Re-enrolling a client is typically only necessary if the client database has become damaged due to hard disk problems, and if no recent backup of the client database exists. Re-enrolling creates a new copy of the client database. To re-enroll a client:

1 Open the shared database at the Commence Server. Select **Customize -> Workgroup**. Click **Next>** until you reach the Register screen.

2 Select the User from the list of registered users (at the bottom half of the screen). Click **Remove**. This disconnects the previous copy of the database from the server so that no further updates will be accepted by the server.

Caution: Once a client has been removed from the workgroup, be sure to delete the existing client database at the client PC to prevent any further updates from being sent to the server. Synchronization attempts from a client that has been removed will be rejected by the Server.

3 **Register** the user to obtain a new Authorization Key. Create an instruction sheet as needed.

4 At the client PC, select the **Commence Application button -> Open/Manage Database** to open a standalone database (one which does not say Server or Client on the Title Bar.) Proceed with the steps to enroll a new client as per the instruction sheet.

A New User Takes Over an Existing Client Database

If a new user will be assuming ownership of an existing Client Database, do not remove the previous user from the list of Registered Users or from **ComAdmin**. Rather, change the previous user's name to the new user's name (using **Users** -> **Edit** from **ComAdmin**).

Preventing a Particular User from Accessing Data in a Shared Category

It may become necessary to prevent a particular user from gaining access to data in a shared category. Using the Commence Server, go to the Permissions screen (via **Customize -> Workgroup**) to change the Category permissions for the given user to *None* (as opposed to *All* or *Selective*). This will prevent the user from receiving any new data in that shared category. It will not, however, remove the shared data that has already synchronized to this client. If it is necessary to completely remove all shared data from the category at this client, then re-enroll the client to the Shared Database.

A User with Selective Permission now needs Full Access to a Shared Category

1 Open the shared database at the Commence Server. Select **Customize -> Workgroup**. Click **Next>** until you reach the Permissions screen. Change the Category permissions for the given user to *All* (as opposed to *None* or *Selective*).

2 Click **Next>** until you reach the Register screen.

3 Select the User from the list of registered users (at the bottom half of the screen). Click **Details**.

4 Click **Resync**.

The next synchronization request received by the server from this client will return a complete copy of the database to the client. The complete sync will update the user's database to include any missing items based on the new permissions.

A User No Longer Requires Access to a Shared Database

Perform the following procedure if a user no longer requires access to a shared database:

1 Determine the user's Workgroup ID Number. This is done from the Client Database using the **Help** -> **System Information** -> **Workgroup Information** command from the Menu Bar. A number such as **0x00006501** will be displayed. The Workgroup ID Number is determined by taking the non–zero portion of this number (e.g. **6501**), and dropping the **01** from the end. In this case, the Workgroup ID Number would be **65**.

2 Search both the Shared LAN Directory as well as the **\workgrp** directory (under the Server's **data** directory) for any sync files from the specific database. These files will be named, for example, ***65.up** or ***65.dwn** and should be deleted.

3 Open the shared database at the Commence Server. Select **Customize -> Workgroup**.

4 Click **Next>** until you reach the Register screen.

5 Select the User from the list of registered users (at the bottom half of the screen). Click **Remove**.

Caution: It is important that a Client Database be removed as described above **BEFORE** deleting the associated user from ComAdmin.

6 Permanently delete the user from the Workgroup using **ComAdmin**.

Maintaining a Shared Database

The Commence Server tracks synchronization information for all Client Databases in a special file, **SYNCLOG.PIM**, located in the directory that contains the Server Database. This file will grow and shrink in size as it tracks all changes to be synchronized with the Client Databases. The Commence Server automatically discards all data that has already been synchronized with the Client Databases and will reduce the size of this file.

Commence will only discard data that has already synchronized with all Clients in a Workgroup. If a Client is inactive for a long period of time, or if the Client Database has been deleted from ComAdmin but not removed from the Workgroup, the Commence Server will continue to track information for this Client. This will prevent the automatic maintenance of the **SYNCLOG.PIM** file from working properly, and result in an excessively large file.

All Client Databases must be opened regularly to allow Commence to synchronize with them. This allows Commence to reduce the amount of synchronization information that must be tracked within **SYNCLOG.PIM**.

Additionally, whenever a Client Database is to be removed, it must be done via the **Customize** -> **Workgroup** command. Navigating to the **Register** dialog, and using the **Remove** command will remove the Client from the Server's synchronization information so that the Server will no longer track information for this Client.

Caution: It is important that a Client Database be removed as described above **BEFORE** deleting the associated user from ComAdmin.

If the Commence database is using a large amount of disk space, check the size of the **SYNCLOG.PIM** file. If this file is larger than 4 MB, verify that all Clients are actively syncing and that any deleted Clients have been removed from the Workgroup.

The Server copy of the Shared Database is the master copy of the database, and it is strongly recommended that it be backed up daily. Local agents can be added to the Server Database that will automatically backup the Commence Server every day. Such an agent

would have a Timer trigger and a Backup action, and should be designated as local so it only operates on the Server. Refer to the chapter on **Customizing Databases** in the *Commence User's Guide* for additional information on creating and using Agents.

Archiving

If the shared database is getting too large, you should plan to archive outdated information from the shared database. Archiving (exporting and then deleting) this data removes it from the Server, as well as from all Client Databases. This should improve performance. Typically, old appointment items, old phone log or letter log items, or any date or time sensitive information that is no longer required can (should) be archived. The information to be archived can be copied out of the Commence database by using the **Transfer Out** command, or by using the **Export** command. If access to the information is again required in the future, use the **Transfer In** or **Import** commands to restore the data into the shared database.

Maintaining Client Databases

By following the basic routines in this section, end-users can feel comfortable that their database and the information they have entered is properly shared with the other users in their workgroup.

Synchronizing Regularly

All Client Databases must be opened regularly and synchronized to exchange information with the Server Database. This allows the Commence Server to reduce the amount of synchronization information that must be tracked.

Manual synchronization is done by clicking the **Workgroup Sync** command found on the **Home** menu. If a reliable full-time network or internet connection is available the Commence Client can be setup to automatically synchronize at regular intervals. This is done via the **Customize** -> **Workgroup** command. Click OK and set the auto-sync interval to some number other than zero (0).

Backups

Additionally, Client Databases should be backed up periodically in order to secure any local data that a user creates. Local (or private) data is stored only in the client database, and cannot be backed up with the server database.

Disk Space

Verify that the Client Workstations all have sufficient disk space. Commence requires sufficient disk space in the **TEMP** directory. This directory is used when synchronizing information between the Server and Client, and the amount of space needed depends on the amount of changed information that the Server needs to send to each Client. If a Client has not connected to the Server in a long time, or if a significant number of changes have been made to the Shared Database, there may not be enough disk space to store Commence's temporary files. Disk space will need to be freed up, or change the **TEMP** directory to a drive that has more disk space available.

Obtaining Additional Information

In order to obtain additional information about Commence Workgroup, check the Commence Web site, located at **http://www.commence.com** on the World Wide Web. The Web site provides current information about maintaining and using the Commence software, including information on how to resolve problems.

Appendix B: Using ComAdmin

Commence Workgroup includes a specialized program that is used for the administration of Users, and Shared Databases. This program, **ComAdmin**, is a stand–alone program which may be run independently of the Server Software.

Launch ComAdmin

Perform the following procedure to launch **ComAdmin**:

Note: *The following procedure assumes that default settings were used during the installation of Commence. If not, slight modifications will need to be made to accommodate specific path names, menu structures, etc.*

1 Exit from the Commence Server database.

2 From the Windows desktop, select **Start** -> **All Programs** -> **Commence RM 5.0 Workgroup** -> **ComAdmin**. The *Login* Dialog Box will be displayed.

3 Login as follows:

• **Login ID** - enter **admin**.

• **Password** - leave blank; do not type anything into this space. The **admin** Login ID is typically reserved for use by the Administrator of the Workgroup. By design, this ID does not initially have a password associated with it. For Workgroup Security purposes, it is strongly recommended that a password immediately be assigned. Refer to **Assigning an Administrator Password**, found in the **Users** section later in this Appendix, for complete instructions.

4 Click **OK**. The *ComAdmin* Main Menu screen will be displayed. See the following figure.

Figure 8-1: ComAdmin Main Menu

It is from this Main Menu that all **ComAdmin** activities are initiated. To access the Dialog Boxes that are used for administration of the Server, click on the corresponding button shown on the *ComAdmin* Main Menu.

The following sections describe each of the administration activities that is performed from **ComAdmin**.

Users

Commence Users are those clients who are provided access to a Commence Workgroup. Each user is assigned a unique login ID and password.

One special user, the Administrator, uses the login ID **admin**. This user has the ability to add, edit, and delete users and shared databases. By default, the password is blank. However, for protection, a password should be assigned to this login ID.

Caution: *Keep the password for the **admin** login in a safe place. If this password is forgotten, there is no way to recover it.*

Perform the following procedure to access the Users area of **ComAdmin**:

1 Select the **Users** button from the *ComAdmin* menu. The *Users* Dialog Box is displayed.

This dialog box will initially display the Administrator (admin) as the only user. The Administrator is automatically added by *ComAdmin* when it detects a new installation.

From this screen, an Administrator can assign a Password to the **admin** login ID, as well as add, edit, and delete users. The following sections describe each of these activities.

Assigning an Administrator Password

As the Commence Administrator, it is critical to maintain the security of the Workgroup. By assigning a password to the **admin** Login ID, it assures that only authorized persons will have access to vital configuration parameters. Once a Workgroup has been established, having an unauthorized person access these parameters could result in a catastrophic failure of the Workgroup and/or loss of critical data.

Perform the following procedure to assign a password to **admin**:

1 Highlight *Administrator (admin)*. Click **Edit**. The *Edit User* Dialog Box will be displayed.

2 If desired, replace *Administrator* with the **Full Name** of the actual administrator. However, it is strongly recommended that the **Login ID** remain *admin*.

3 Enter the desired password in the **Password** field.

Note: *To help maintain security, when typing in the desired password, each character will be displayed as an asterisk (*) in the **Password** field as well as the **Verify Password** field. For example, if the string **ABC123DEF** were typed into the field, ********* would actually be displayed.*

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4 Enter the desired password again in the **Verify Password** field.

5 Click **OK**.

It will now be required to enter the password whenever the Administrator (or any person authorized to perform Administrator duties) uses the **admin** Login ID. It is strongly suggested that the password be stored in a secure location in the event it is forgotten or is needed by another person authorized to login with the **admin** Login ID.

Adding a User

Each Commence Server limits the number of Users that it can handle. This number is displayed by selecting **Help** -> **About...** from the Menu Bar on the *ComAdmin* Dialog Box.

Figure 8-2: License information under Help - About

The maximum number of licenses available for use with this particular Server is 10, as indicated by the **User Limit: 10** text, not including the Administrator. The administrator will only be able to add as many Users as this limit allows, in this case 10. The Commence Server is able to be upgraded to handle more Clients as necessary. Contact Commence Corporation for information about this upgrade procedure.

Once the number of users you have added reaches the user limit, then another copy of the Client Software must be purchased before any additional users may be added to the Workgroup.

Perform the following procedure to add a user:

1 From the *Users* Dialog Box, select the **Add** button. The *Add User* Dialog Box will be displayed.

2 Enter the following information for the user that is being added:

- **Enter the new user's full name** - This is the full name of the user.

- **Enter the new user's login ID** - This is the name that will be used to login to the shared database. It is recommended that each user's login ID be set to the same ID they use for logging into the network in order to make it easier to remember.

- **Enter the new user's Password** - [OPTIONAL] This is the password used to verify the user's identity during login to the shared database. In order to maintain security, when entering the password, an asterisk (*) will be displayed for each character typed.

- **Verify Password** - [OPTIONAL] Re–enter the password information to verify that it has been entered correctly. In order to maintain security, when entering the password, an asterisk (*) will be displayed for each character typed.

Note: *It is not necessary to assign a password in order to add a user. It is, however, recommended that passwords be used in order to maintain database security.*

3   When complete, select **Save**. The user will be added, and the *Add User* Dialog Box will be displayed with the single button labeled **OK**.

4   Repeat steps 2 and 3 for each user that is to be added to the Workgroup.

5   When all users have been added, select **OK**. The *Users* Dialog Box will be displayed showing all users that have been added.

Editing a User (Login ID or Password)

From time to time, it may be necessary to change information about a user, such as their login ID or password.

Caution: *Verify that Commence is running on the affected user's workstation, and that the Client copy of the Shared Database is open. Any changes made to a User's Login ID and/or Password **MUST** sync to the User before they can take effect at the User's workstation.*

Perform the following procedure to edit the information for a user:

1   From the *Users* Dialog Box, highlight the user whose information is to be edited.

2   Select the **Edit** button. The *Edit User* Dialog Box will be displayed.

3   Modify the fields that have changed. As soon as any character is typed into any of these fields, the button labeled **OK** will be automatically replaced by two buttons with the labels **Save** and **Cancel**.

4   Click **Save** when all fields have been updated.

Deleting a User

If a user is no longer a member of the Commence Workgroup, delete the User Entry using **ComAdmin**.

Caution: *This is the last step in the procedure for deleting a user from a Commence Workgroup. There are additional steps which must be completed prior to this in order to successfully and completely remove a user without disrupting Workgroup Operation. Refer to "A User No Longer Requires Access to a Shared Database" on page 55, for complete information.*

Perform the following procedure to delete a user:

1 From the *Users* Dialog Box, highlight the user that is to be deleted.

2 Click **Delete**. A message box requesting confirmation before deleting the user will be displayed.

3 Click **Yes**. The *Users* Dialog Box will be displayed, and the entry for the user that was just deleted will not be shown.

When a user is deleted from the Commence Workgroup, their Client Database is disconnected from the Server Database and will no longer receive any updates from the Server. The Client Database must then be deleted using the **File** -> **Open/Manage Database** command from within Commence.

Databases

The Shared Database is the master copy of Workgroup data, and is maintained by the Commence Server software. When a Workgroup is setup, it is done so initially with this database. All Clients then enroll to the Shared Database, which then copies the Shared Database to each Client Workstation.

A Shared Database can be added in one of two ways:

- Start with an existing database that is already defined as desired

- Add an empty database and then define objects such as categories, agents, etc.

If an empty database is used, each object that is added will need to be made shared manually. It is much easier and more efficient to use an existing database and make it shared since the existing data and objects will automatically be made shared.

Perform the following procedure to access the Databases area of **ComAdmin**.

1 Select the **Databases** button from the *ComAdmin* menu. The *Database* Dialog Box is displayed.

This dialog box will initially display no shared databases. After adding one or more shared databases to the Workgroup, they will be listed under **Shared Databases**.

From this screen, an Administrator can add, edit, and delete Shared Databases. The following sections describe each of these activities.

Adding a Shared Database

Perform the following procedure to add a shared database:

1 From the *Database* Dialog box, select **Add**. The *Add Database* Dialog Box will be displayed.

2 Complete the following information for the new database:

- **Name** - The name of the database. This will appear across the top of the Commence Desktop when the database is active. The name can be up to thirty (30) characters in length, including spaces.

- **Description** - A brief description of the data that is to be maintained within this database.

- **Database Location** - The path of the directory in which the Shared Database and its components will be resident. This is the database that will become the **Server Database**. This can either be the path of an existing database that is to become shared (recommended), or an empty, new database. ***DO NOT*** use a directory that is already used for other Commence files, such as the Shared LAN Directory, Workgroup File Directory, or Program Directory.

3 When all information for the new database is complete, click **OK**. This will create the Shared

Database.

All data and definitions in the Shared Database will be marked as shared.

If there is more than one Shared Database, more than one copy of the Server must be running (e.g. one Server per Shared Database.) For information on running more than one copy of the Server, refer to "Running Multiple Commence Instances" on page 65.

Editing a Shared Database

At some point, it may become necessary to relocate a shared database. To do this, the path to the shared database must be edited from **ComAdmin**.

Perform the following procedure to edit a shared database:

1 From the *Database* Dialog Box, highlight the database to be edited. Click **Edit**. The *Edit Database* Dialog Box will be displayed.

2 Make the necessary changes.

3 Click **OK**.

Deleting a Shared Database

Deleting a Shared Database removes all links between the Server Database and Client Databases, thus preventing them from synchronizing changes. This command does not delete either the Server Database or any of the Client Databases used by Commence, which means that each can still be opened and used as a standalone database. If any of these databases are to be deleted, do so by selecting the **Commence Application button** -> **Open/Manage Database** command at each respective copy of the database.

Perform the following procedure to delete a shared database:

1 From the *Database* Dialog Box, highlight the database that is to be deleted.

2 Click **Delete**.   A message box requesting confirmation before deleting the database will be displayed.

3 Click **Yes**. The *Database* Dialog Box will be displayed, and the entry for the database that was just deleted will no longer be shown.

Appendix C: Running Multiple Commence Instances

The Commence server software is capable of managing more than one server database on the same server hardware. To do this simply run Commence again from the shortcut then choose a different shared database to open. When you do this you may receive a warning message that Commence is already running. You can confirm this is intentional by responding Yes to the prompt.

To run multiple copies of Commence more seamlessly, additional Windows shortcuts can be created on your desktop. The following command line options are recommended to control how Commence is launched.

• **/Database** - The **/Database** option defines which database Commence opens immediately upon its launch. For example, one shortcut can be used to open Server Database1 and a second shortcut can be used to open Server Database2. In the properties for each shortcut, change the Target to point directly to the database path.

For example, to create a shortcut that opens the first server database when Commence launches, set the Target to *"c:\Program Files (x86)\Commence\Commence RM Workgroup\commence.exe" /Database=c:\ProgramData\Commence\Commence\8.0\ServerData1*

Similarly, set the second shortcut to *"c:\Program Files (x86)\Commence\Commence RM Workgroup\commence.exe" /Database=c:\ProgramData\Commence\Commence\8.0\ServerData2*

• **/Prompt** - The **/Prompt** option instructs Commence to display a list of available databases when it launches. The database to be opened may then be selected from this list. For example, *"c:\Program Files (x86)\Commence\Commence RM Workgroup\commence.exe" /Prompt*

• **/Quiet** - When one copy of Commence is running, launching an additional copy will normally display a warning message. Use the **/Quiet** option to suppress this warning message. For example, *"c:\Program Files (x86)\Commence\Commence RM Workgroup\commence.exe" /Quiet*

Adding Command Line Options

Perform the following procedure to add a command line option:

1 From the Windows **Start** Menu, select **Settings** -> **Taskbar**.

2 Select **Start Menu Programs**.

3 Click on the **Advanced** button.

4 Double click on the **Programs** icon.

5 Double click on the **Commence** folder.

6 Highlight the **Commence** icon.

7 Right click on the **Commence** icon. Select **Properties**.

8 Click on the **Shortcut** tab.

9 Locate the **Target** information. Press the End key on the keyboard to place the cursor at the end of the command line. Type the desired Command Line Option at the end of this line of text.

10 Click **OK**. The desired option(s) will take effect the next time Commence is launched.

Note: *The* */Quiet* *option can be used in conjunction with other options. However,* */Database* *and* */Prompt* *cannot be used simultaneously.*

Running a Server and Client on the same machine

In general it is not recommended that data be modified on a regular basis from the Commence Server. There are a variety of reasons for this, including:

- the Server experiences frequent interruptions due to the constant syncing

- the Server is logged in as **admin** which typically has full permissions

Any adding and/or modifying of data should be done from a client.

For large workgroups it is recommended that a dedicated machine run the Commence Server. This will guarantee that data updates are handled in a timely manner.

For smaller workgroups, it is possible to run a Commence Client on the same machine as the Server. In this configuration, use the Client to modify data, and allow the Commence Server to run in the background to perform data synchronization.

Caution: *Do not reinstall the Client software from the same machine that is running the Commence Server. Only the procedure outlined below should be performed.*

Perform the following procedure to run a Client and a Server on the same machine:

1 Install and configure the Server software.

2 Register the Client as described in "Register Clients With the Shared Database" on page 38.

3 Launch Commence, and open the shared database.

4 From the Commence Server, create a new empty database by selecting the **Commence Application button** -> **Open/Manage Database** from the Menu Bar.

5 Add a command line option of **/Prompt** to the Commence shortcut.

6 Launch a second copy of Commence. Open the database created in step 4 above. This is a temporary database used during the enrollment process.

7 From the temporary database, enroll to the shared database as described in the instruction sheet. See "View Registration Details" on page 39.

8 Use the **/Database** or **/Prompt** command line option to launch the appropriate database.