

ACT! Shared Folders Synchronization using WebDrive

Introduction

Remote User Synchronization with WebDrive

Remote user synchronization of an ACT! database with WebDrive is an effective and time efficient solution to the remote ACT! user's need to share contact information with peers. The underlying FTP file communication and transfer technology is wrapped in a familiar Windows interface afforded by the WebDrive FTP client. WebDrive permits ACT! to "see" the remote FTP server housing the central contact management database as a local shared folder. When a remote user initiates a synchronization session to another user or to the synchronization administrator a synchronization packet is created in the corresponding folder on the remote FTP server. The synchronization process can remain the same whether the user is off-site or attached to the internal network. In either case, WebDrive permits ACT! to treat the central database folder as a local folder and perform Windows I/O operations on it.

Overview

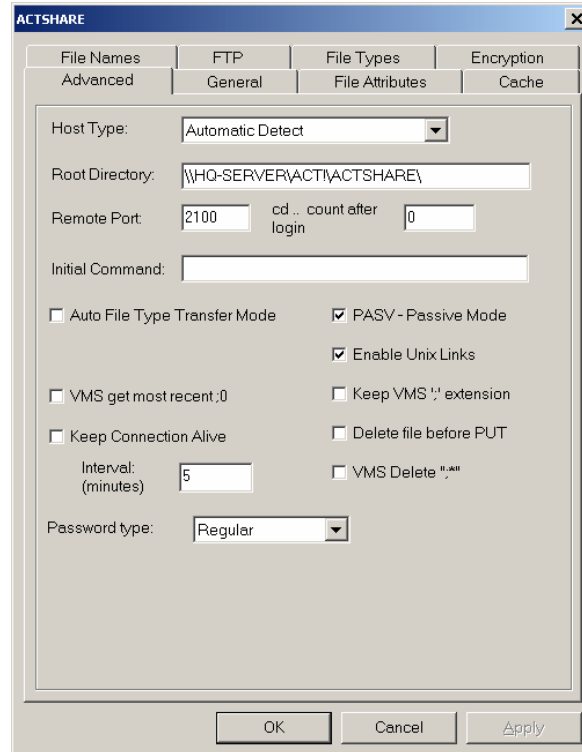
WebDrive Synchronization

The ACT! synchronization process requires that each user have a copy of the database. Complete setup instructions on how to create a new, empty copy of an ACT! database can be found in the ACT Knowledge Base (<http://itdomino.act.com/act.nsf/docid/20001129164749>). This article will provide step by step instructions for creating databases for each of the remote users.

In addition to having an empty copy of the database on each remote user's computer, the server must be properly configured. A detailed article in the ACT! Knowledge Base entitled "How To Share an ACT! Database on a Local Area Network (LAN)" (located at <http://itdomino.act.com/act.nsf/docid/200228134824>) documents the steps required to set up the server. It should be noted that the references to workstation setup in this article are for drive mapping via a local network operating connection and should not be used for remote database synchronization using WebDrive. Workstation drive mapping procedures are documented herein under the heading "WebDrive Folder Mapping".

WebDrive Folder Mapping

WebDrive is configured so that each remote user maps a drive to the location on the network server where the shared ACT! folder resides. For ease of administration it is recommended that each remote user's system be configured to map the same drive letter to the shared folder area on the FTP server. For purposes of this discussion, users will map drive T: to [\\HQ-SERVER\ACT!\ACTSHARE](#). On the WebDrive ADVANCED button (available from the "Open WebDrive" menu when right clicking the WebDrive icon in the Task bar) the root directory should be set to the fully qualified folder path: ("[\\HQ-SERVER\ACT!\ACTSHARE](#)").



Synchronization Folders

Personal synchronization folders are required for each user who will synchronize with the central ACT! database. These folders will receive sync data from the central database and serve as a repository for data sent from the remote users to the central database. These folders are created under the root of the mapped WebDrive drive. For this example there will be three remote users that need to synchronize with the central database (Remote1, Remote2, and Remote3). The personal folder setup for these three users would be as follows:

<\\HQ-SERVER\ACT!\ACTSHARE\Remote1>
<\\HQ-SERVER\ACT!\ACTSHARE\Remote2>
<\\HQ-SERVER\ACT!\ACTSHARE\Remote3>

An additional synchronization folder is needed for the ACT! database synchronization administrator. This user is referred to as the “Sync Admin” user. The folder for this user is:

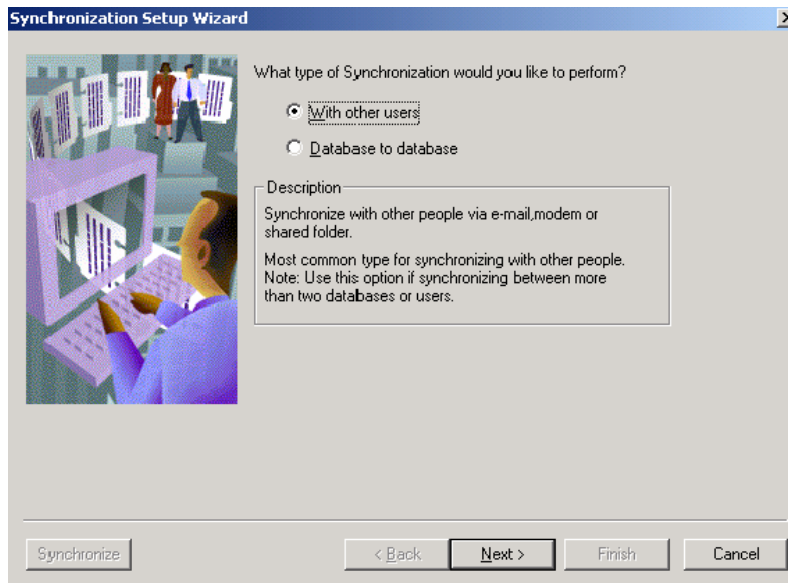
<\\HQ-SERVER\ACT!\ACTSHARE\Sync Admin>.

Remote User Synchronization Setup

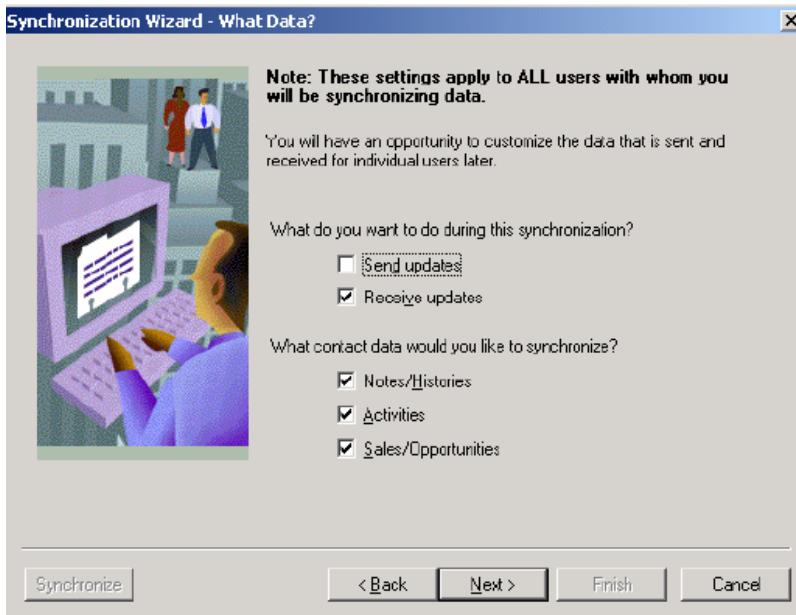
After the personal synchronization folders have been created, each remote user’s synchronization settings must be configured to communicate with the personal folders on the mapped WebDrive. The step by step process

1. Start **ACT!** on the remote user’s workstation
2. Log on as the remote user.
3. Open the database being shared.
4. Select **File > Synchronize Setup**.

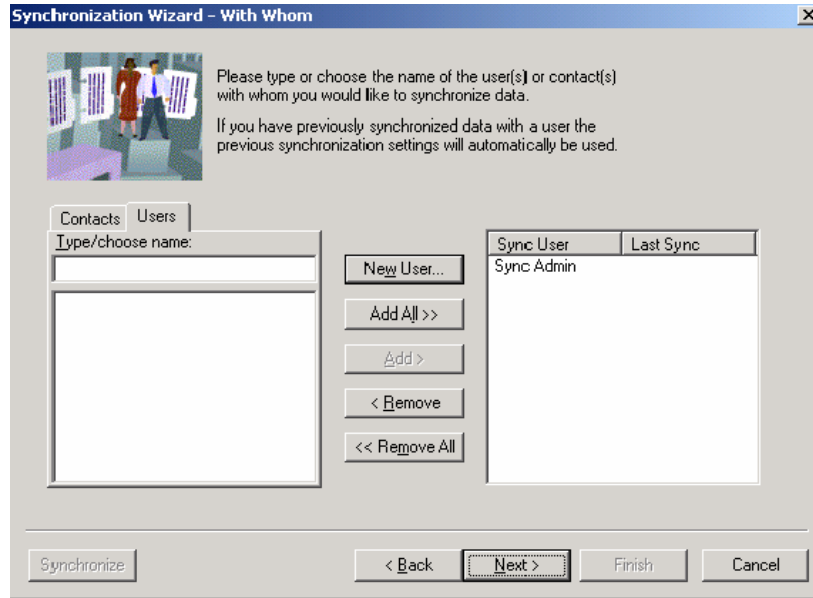
5. In the **Synchronization Setup Wizard** dialog box click the radio button to select **With other users**
6. Click the **Next** button.



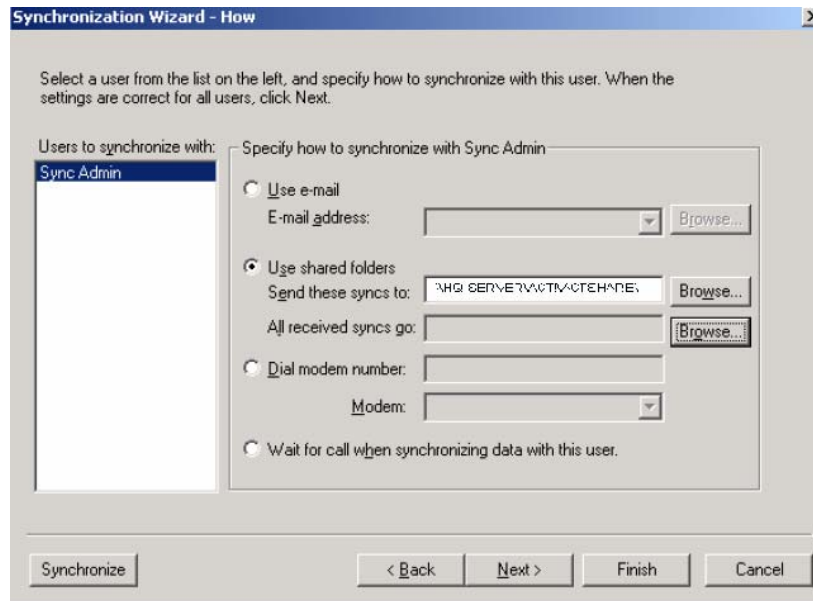
4. In the **What Data?** dialog box, clear the **Send Updates** selection at this point
5. Check **Receive Updates**
6. Select the types of contact data that you wish to synchronize
7. Click the **Next** button



8. In the **With Whom** dialog box, choose or add **Sync Admin** to the Sync User list
9. Select **Next**



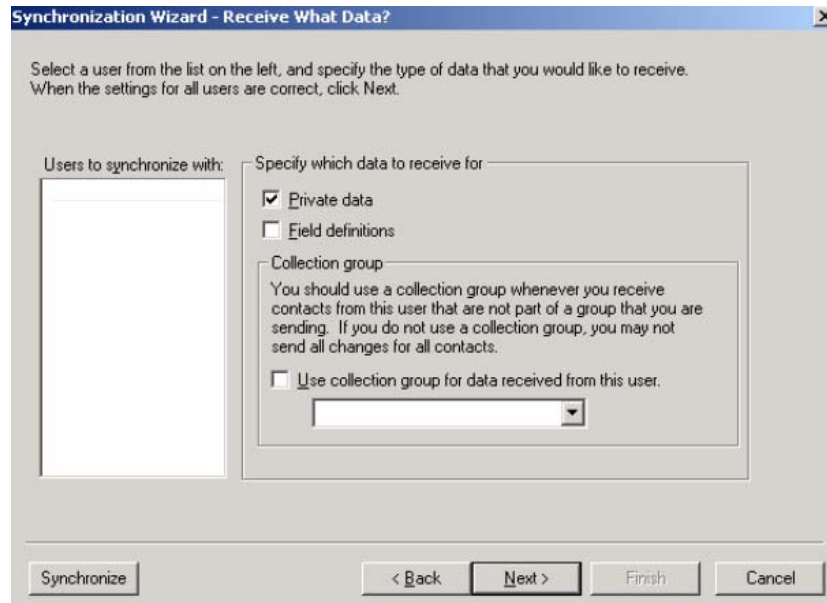
10. In the **How** dialog box, click the radio button to select **Use shared folders**.
11. Browse to the Sync Admin's synchronization folder mapped through WebDrive and double click the folder to populate the "Send these syncs to:" selection box. This folder is located at <\\HQ-SERVER\ACT\ACTSHARE\Sync Admin>.
12. Click **Next**



13. Select the **All received syncs go:** browse button and choose the synchronization folder corresponding to the user being configured. If Remote1 is being configured, the entry in this selection box would read <\\HQ-SERVER\ACT\ACTSHARE\Remote1>. This setting can be selected from the Edit > Preferences > Synchronization dialog.
14. Click **Next**

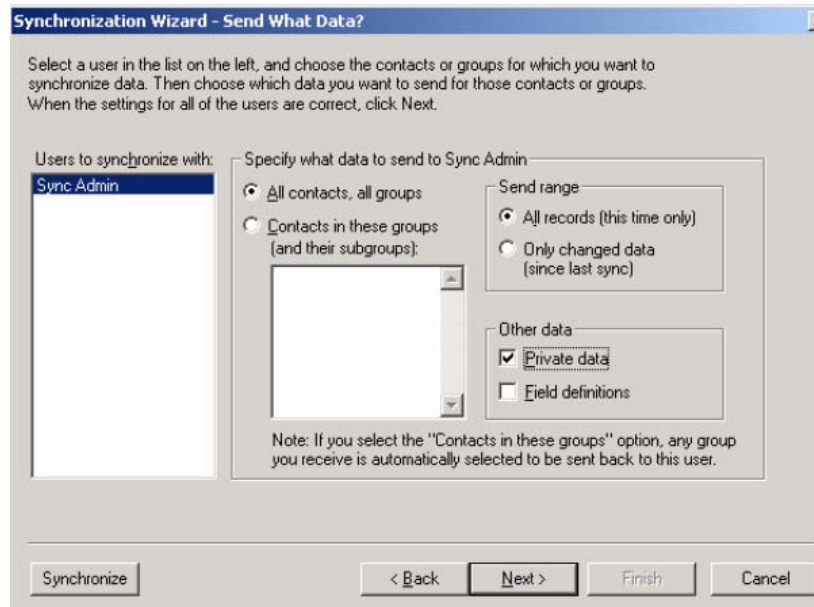
15. In the **Receive What Data** dialog box, check **Private data** and **Field definitions** to indicate the type of information to receive as required.

16. Click **Next**

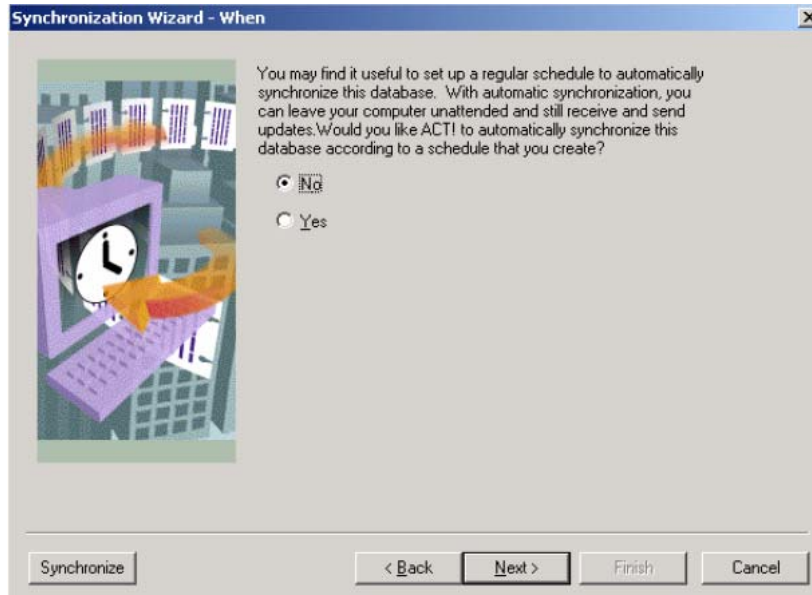


17. In the **Send What Data** dialog box, click the radio button to select **All contacts, all groups** and **Private data** to indicate what data is to be sent.

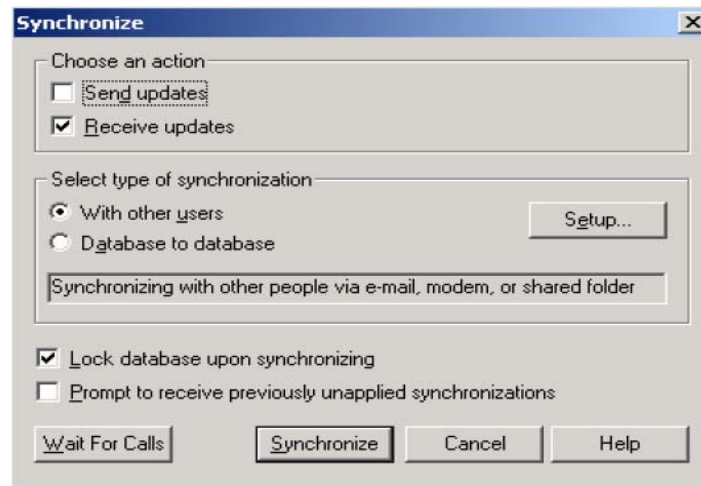
18. Click **Next**



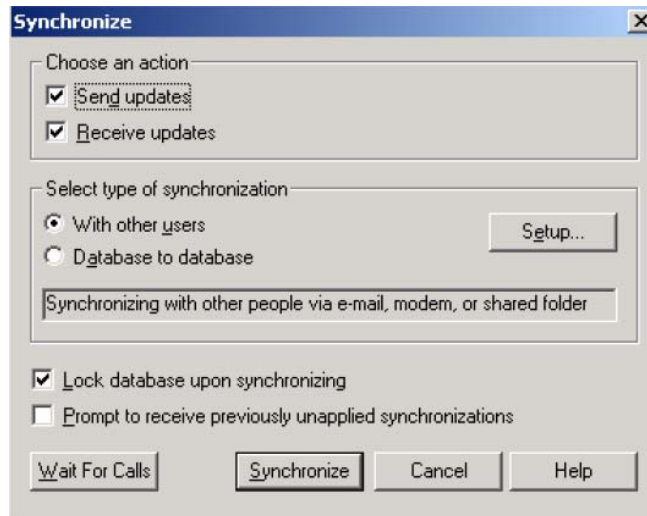
19. At this point in the setup you do not want to schedule regular synchronizations of the data. That activity will be configured after the first synchronization has been completed and verified as successful. Select **No**
20. Click **Next**



21. Clear the **Send Updates** box for the first synchronization. The first sync will only receive data.
22. Select **Synchronize** to begin the process.



23. After initial sync the user will select **File > Synchronize**
24. Check the **Send updates** box. This will permit full synchronization.



Server Synchronization Setup

In addition to configuring the individual users' workstations for synchronization, the ACT! server application must be configured to send and receive updates. The server sync is set up on the server using the Sync Admin account. The initial sync will be done manually and subsequent syncs can be done automatically through the Scheduler. For automatic synchronization to occur the central ACT! database must be opened and the Sync Admin user will need to be logged in.

Building the database

The overall process requires activities on both the server and the user's workstation. The initial database resides on the server and a full synchronization is done for each user. A blank database is created (if one is not already created) on the users PC and synced with the server. On subsequent syncs only files and records updated from the last sync are transferred.

Initial Server Synchronization Setup

The server setup centers around the selection of the correct send and receive folders for the synchronization with each user. The "Send these syncs to:" folder is set to the users sync folder previously created on the mapped WebDrive drive.

For this example, the folders are identified as follows:

[\\HQ-SERVER\ACT!\ACTSHARE\RemoteX](#)

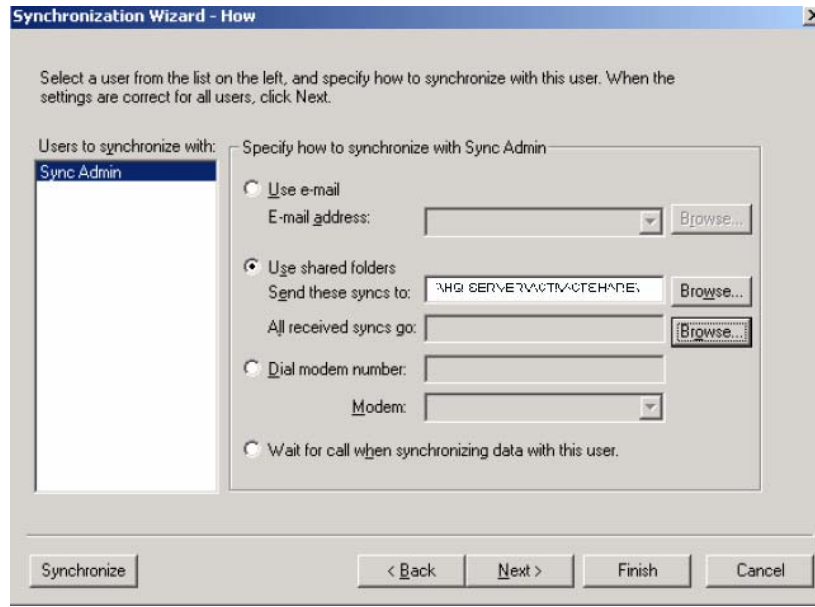
where "RemoteX" corresponds to the remote users' account.

The "All received syncs go:" folder is set to the Sync Admin user's sync folder previously created on the mapped WebDrive drive.

For this example, the Sync Admin sync folder is identified as follows:

[\\HQ-SERVER\ACT!\ACTSHARE\To_Admin](#)

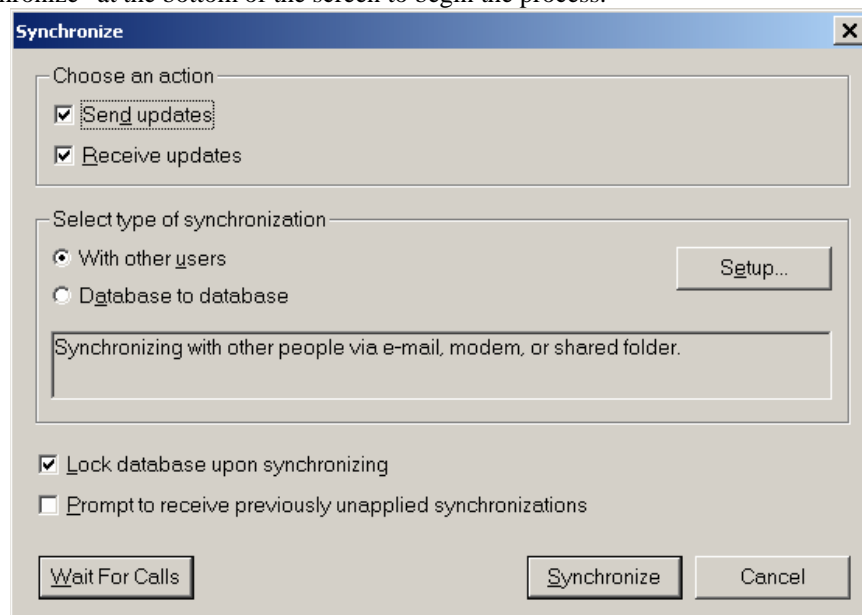
Note that this setting must be set this on the **Edit | Preferences | Synchronization** screen.



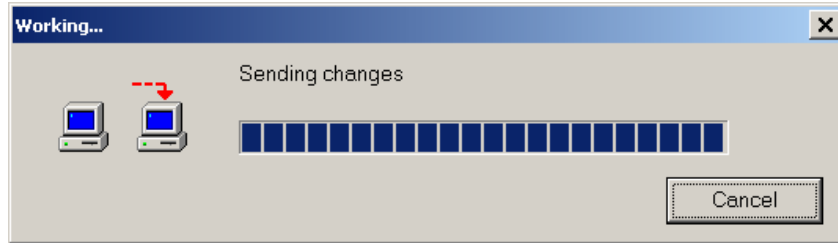
Future Server Synchronization Setup

Future synchronizations can be either initiated on demand using the Synchronize command under the File menu or scheduled from the “Synchronization” tab under the “Preferences” selection from the Edit menu.

For an on-demand synchronization you must select the Synchronize command under the File menu. That command brings up the following screen. If your WebDrive is mapped to the shared folder server you select “Synchronize” at the bottom of the screen to begin the process.



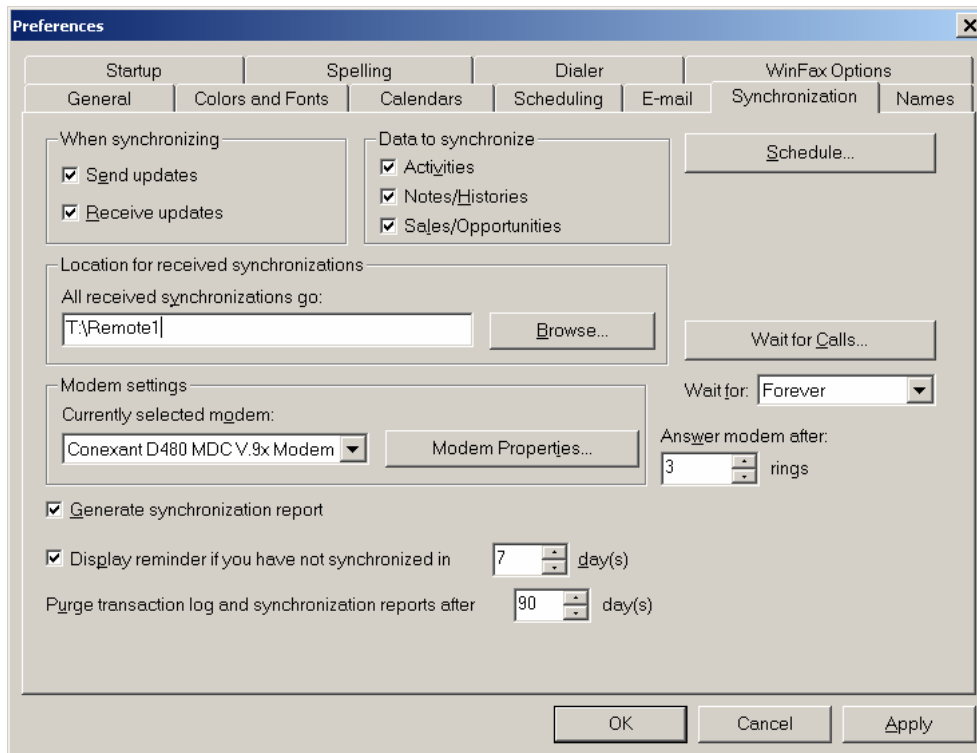
A series of “Working...” screens will display the progress of the communication.



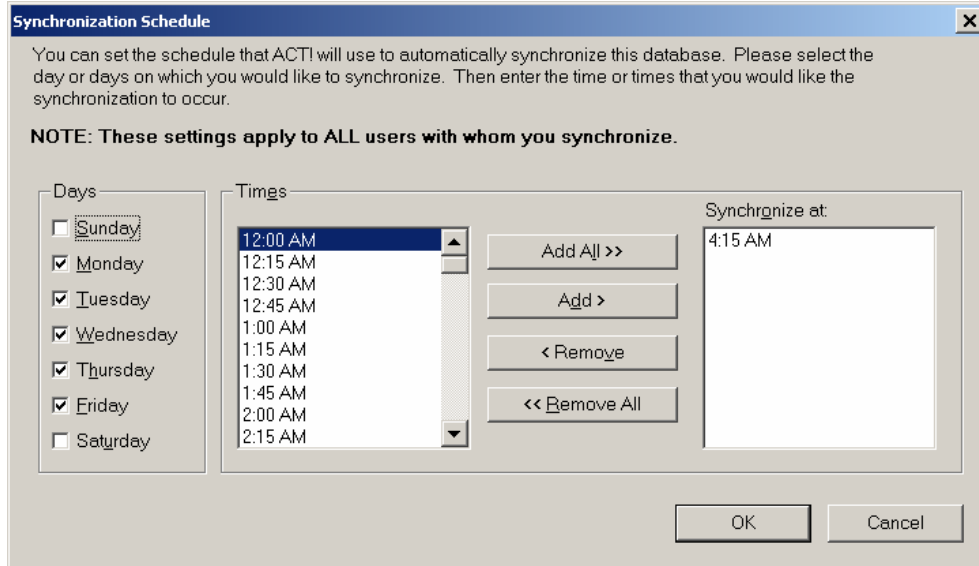
Once the communication has completed you will be returned to the main ACT! screen. The synchronization packet has been delivered to the selected user's shared folder area on the server. The next time the Remote2 or Remote3 users synchronize, the sync packets will be applied (in creation order) to their copy of the database.

The other method of synchronization involves creating a sync schedule; much like you would do when setting up a scheduled event using Microsoft Windows Scheduled Tasks. After you have verified that your sync settings have been properly configured – via the setup process previously described you can create a scheduled sync to occur on a regular basis.

To schedule database synchronization, use the “Synchronization” tab under the “Preferences” selection reachable from the main Edit menu. The tab displays the following screen.



The “All received synchronizations go:” entry box will already have been filled in during previous sync setup activity. At this point you make the desirable selections, indicating whether to send or receive or do both; selecting the type of data to be sync'ed, etc. once all the settings have been selected, click the “Schedule” button to get to the following configuration screen.



This screen enables you to select the desirable days of the week and time of day for the sync to take place. It should be noted that in order for the sync to properly execute, the WebDrive mapped to the shared folder server must be connected at the time of the synchronization. After setting the time and day, select OK to return to the main Preferences screen. Select OK again to return to the main ACT! contact window.

Once these steps have been completed, ACT! will synchronize with the selected users via the shared folder server at the preset time. It should be noted that ACT! must be running on your PC and logged in under your user name for the synchronization to take place. A log of the sync activity is maintained and entries will be made on the Notes tab of your “My Record” database entry.

Scheduled WebDrive Command Line Execution

If you are not able to keep your mapped WebDrive active all of the time, you can create a small text file that will execute a command line connection to the appropriate shared folder using WebDrive. The connection file (e.g. WebDriveConnect.BAT) would contain the following command line:

```
"c:\program files\webdrive\WebDrive.exe" /S:"ACTSHARE"
```

...where c:\program files\webdrive\WebDrive.exe is the full path to the WebDrive executable and “ACTSHARE” is the name that you assigned to the shared folder connection configured in the WebDrive configuration screen. This command causes WebDrive to execute and make a connection to the previously configured ACTSHARE site name.

This .BAT file could then be added to Windows scheduled tasks to execute just before the time that you configured the ACT! synchronization to take place. This would insure that a WebDrive would be mapped to your shared folders area of the server.

Another .BAT file with the following line could be created and scheduled to automatically disconnect the WebDrive drive mapping at the appropriate time:

```
"c:\program files\webdrive\WebDrive.exe" T:/D
```

...where c:\program files\webdrive\WebDrive.exe is the full path to the WebDrive executable and “T:” is the letter of the mapped WebDrive configured in the WebDrive configuration screen. This command causes WebDrive to disconnect from the drive mapped to T.



This combination of scheduled ACT! synchronization and scheduled WebDrive connects and disconnects fully automates your synchronization process.

Conclusion

The need to share up to the minute data between remote users and their peers continues to grow in the expanding global community. Remote user synchronization of an ACT! Database with WebDrive provides a user friendly Windows interface for the FTP file transfer technology that allows users to share time sensitive data. Synchronization of the ACT! Database with WebDrive provides remote and internal users with an efficient and secure communications tool.

About South River Technologies

South River Technologies, headquartered in Annapolis, Maryland, develops file management software that is used for file collaboration, website management and shared access. SRT's unique client technology creates an instantly familiar interface by integrating seamlessly into the Windows Operating System. Founded in 1996, South River Technologies directly sells and markets Windows based utilities, and licenses its technologies to Software Publishers and Independent Software Vendors.

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