

# SuperOffice CRM Replication with Kontineo File Sync System (FSS)



## Implementation Checklist

**\* Marked are obligatory**

### Technical Preconditions

Done	Task	Comment
	SuperOffice running on SQL Server 2000 or 2005*	
	SuperOffice Satellites running on SQL Server 2000 or 2005 (if satellites*)	
	Travel is MSDE or SuperOffice Built in (Sybase) (If Travel*)	
	Server where central so_arc is located central is Windows Server 2003 or later*	
	Server(s) where satellite so_arc(s) is/are located is/are Windows Server 2003 or later (if satellites*)	

### Server Installation and configuration

Done	Task	Comment
	File Sync System 1.803.127 or later installed*	
	Database Configuration* <ul style="list-style-type: none"> <li>- Installation type=Central*</li> <li>- Central SuperOffice SQL Connection Tested successfully*</li> <li>- So_arc points to physical harddrive (Not UNC, Not shared drive)*</li> </ul>	
	File Sync System License Activated*	
	User Licenses granted (if Travel *) (Not necessary if Auto Deployment "Grant License to Remote Travellers" is enabled")	
	Satellite Licenses Granted (If Satellites*)	
	Remote Travel Auto Deployment Enabled <ul style="list-style-type: none"> <li>- Configured for Central Database Travellers</li> <li>- Configured for Satellite Remote Travellers</li> </ul> Central Trigger configured (Requires Travel Gateway to read/write when signal file exists)	
	Application file roll out <ul style="list-style-type: none"> <li>- FSS installed under SuperOffice Centralpath (Modules\Kontineo\File Sync System)</li> <li>- Soloader_kontineo_fss.ini copied to Client folder</li> </ul> Test application file roll out: <ul style="list-style-type: none"> <li>- Close and start SuperOffice on a <b>non Remote Travel Client PC</b>. Check that Modules\Kontineo\File Sync System were created with files. Check that FSS did <b>not</b> start and run.</li> </ul>	

	<p>Travel Gateway*</p> <p>Read Updates from all users Configured* (If central Trigger – "On signal file exists")</p> <p>Write Updates (Immediately after preceding)*</p>	
	<p>File Sync System Autostart configured*</p> <ul style="list-style-type: none"> <li>- With windows login or</li> <li>- as service with Firedaemon</li> </ul>	
	<p>Firedaemon Configured for</p> <p>sotrvgate.exe</p> <p>filesystemsynchronizer.exe</p> <p>filesystemlayer.exe</p> <p>filesystemlistener.exe</p> <ul style="list-style-type: none"> <li>- Parameters OK</li> <li>- Logon Account OK</li> <li>- Schedule Restart OK</li> </ul>	
	<p>SuperOffice Application Buttons (If Travel*)</p> <ul style="list-style-type: none"> <li>- File Sync System 2007 (SOSTARTED)*</li> <li>- File Sync System 2007 (SOCLOSED)*</li> </ul>	
	<p>SuperOffice Preferences</p> <ul style="list-style-type: none"> <li>- Show Travel Menu</li> <li>- Prevent Central Update</li> </ul>	

## Satellite Installation and configuration

Done	Task	Comment
	Synchronize SuperOffice replication <ul style="list-style-type: none"> <li>- Write file from central to Satellite, and make sure it is read on the Satellite</li> </ul>	
	Satellite/Server connection* <ul style="list-style-type: none"> <li>- Is there TCPIP connection between Satellite and server (VPN tunnel)*</li> <li>- Is an ODBC DSN configured pointing to SuperOffice on the Central Database*</li> </ul>	
	File Sync System 1.803.127 or later installed*	
	Application file roll out <ul style="list-style-type: none"> <li>- FSS installed under SuperOffice Centralpath (Modules\Kontineo\File Sync System)</li> <li>- Soloader_kontineo_fss.ini copied to Client folder</li> </ul> Test application file roll out: <ul style="list-style-type: none"> <li>- Close and start SuperOffice on a <b>non Remote Travel Client PC</b>. Check that Modules\Kontineo\File Sync System were created with files. Check that FSS did <b>not</b> start and run.</li> </ul>	
	Database Configuration* <ul style="list-style-type: none"> <li>- Installation type=Satellite*</li> </ul> Central SuperOffice <ul style="list-style-type: none"> <li>- SQL Connection Tested successfully</li> <li>- Central So_arc points to UNC)</li> </ul> Satellite Database <ul style="list-style-type: none"> <li>- SQL Connection Tested successfully</li> <li>- So_arc points to physical harddrive (Not UNC, Not shared drive)</li> </ul> Satellite Area is set Satellite folder is set Autosync is Enabled Sync Interval is set	
	Synchronization Settings* <ul style="list-style-type: none"> <li>- Enable full sync and "Hour"</li> <li>- Central Travel Gateway Trigger (If signal.dat read on Central)</li> <li>- Local Travel Gateway Trigger (If Signal.dat read on Satellite)</li> <li>- Document filters</li> </ul>	

	<p>Travel Gateway*</p> <p>Read Updates from all users Configured* (If local Trigger – "On signal file exists")</p> <p>Write Updates (Immediately after preceding)*</p>	
	<p>File Sync System Autostart configured*</p> <ul style="list-style-type: none"> <li>- With windows login or</li> <li>- as service with Firedaemon</li> </ul>	
	<p>Firedaemon Configured for</p> <p>sotrvgate.exe filessystemsynchroizer.exe filessystemlayer.exe filessystemlistener.exe</p> <ul style="list-style-type: none"> <li>- Parameters OK</li> <li>- Logon Account OK</li> <li>- Schedule Restart OK</li> </ul>	
	<p>Test "Normal Quick Sync All"</p> <ul style="list-style-type: none"> <li>- Make sure Travel Gateways are active on central and Satellite and FSS is running at both sides</li> <li>- Create a "Test Document" in SuperOffice on the central database and on the Satellite</li> <li>- If Triggers are not enabled, write update manually at both sides</li> <li>- Manually run "Normal quick sync (all)" in FSS on Satellite</li> <li>- Check in FSS that the physical files were copied</li> <li>- Refresh SuperOffice on both sides, and check that documents can be opened on both sides</li> </ul> <p><i>Note: If using Firedaemon, you may need to connect to console using RDP, or you can close the services and manually start Travel Gateway and FSS in your active user session)</i></p>	
	<p>Run "Full Synchronization" – "All Files" (It will take some time)</p>	
	<p>Visibility of Kontineo Button and Kontineo Cockpit set for relevant groups in SuperOffice Admin*</p>	
	<p>SuperOffice and Kontineo restarted*</p>	

## Remote Travel Installation and configuration with Auto Deployment Configured

Done	Task	Comment
	<p><b><u>File Sync System Installation</u></b></p> <p>For Remote Travel users not on Travel</p> <ul style="list-style-type: none"> <li>- (Re)start SuperOffice using soloader to have files copied out, or install File Sync System on the Local PC</li> <li>- Go Travel</li> </ul> <p>For users currently out on Remote Travel</p> <ul style="list-style-type: none"> <li>- (Re)start SuperOffice using soloader to have files copied out, or install File Sync System on the Local PC (There is no harm done in installing File Sync System even if soloader application roll out is used)</li> <li>- Stay on Travel</li> </ul>	
	<p><b><u>Database Configuration</u></b></p> <p><u>If Auto Deployment is configured</u></p> <ul style="list-style-type: none"> <li>- Nothing – it configures itself</li> </ul> <p><u>If Auto Deployment not configured</u></p> <ul style="list-style-type: none"> <li>- Installation type=Remote Travel*</li> <li>- Auto Config</li> </ul> <p>Central SuperOffice</p> <ul style="list-style-type: none"> <li>- SQL Connection Tested successfully</li> </ul> <p>Remote Travel User</p> <ul style="list-style-type: none"> <li>- Set in Drop Down</li> </ul> <p>Autosync is Enabled Sync Interval is set SuperOffice User ID and password is set</p>	
	<p><b><u>Synchronization Settings</u></b></p> <ul style="list-style-type: none"> <li>- Enable document filters if required</li> <li>- Enable Thin Line Detection if required (Only for users connecting with Mobile or other thin line. Milliseconds should be tested and adjusted with such connection active – should be set as high as possible to avoid Thin Line mode over VPN)</li> <li>- Enable full sync and "Hour" (Not recommended)</li> <li>- Central Travel Gateway Trigger (If signal.dat read on users server)</li> <li>- Local Travel Gateway Trigger (Recommended – uses Local Travel Gateway – creates SuperOffice\LocalTRVgate folder automatically – copies sotrvgate from Centralpath on first sync (Fails if Centralpath not set))</li> <li>- Allow Background Sync (If FSS should</li> </ul>	

	<p>update SuperOffice in background when SuperOffice is closed. Does only apply, if Local Trigger is enabled)</p> <ul style="list-style-type: none"> <li>- Set Pop-up as wished for (Recommended Low alert in the beginning – after a while they may want to set it to High Alert)</li> </ul>	
	<p><b>Test "Normal Quick Sync All"</b></p> <ul style="list-style-type: none"> <li>- Make sure Travel Gateway is active on users server and FSS is running</li> <li>- Create a "Test Document" in SuperOffice on the central database and on the Remote Travel</li> <li>- If Central Trigger is not enabled, write update manually at server</li> <li>- Manually run "Normal quick sync (all)" in FSS on Remote Travel Client</li> <li>- Check in FSS that the physical files were copied</li> <li>- Refresh SuperOffice on both sides, and check that documents can be opened on both sides</li> </ul>	
	<p><b>Test "SuperOffice Current Document"</b></p> <ul style="list-style-type: none"> <li>- If possible, find a document that does not exist on the Remote Travel Client PC (otherwise one that exists)</li> <li>- Click "SuperOffice Current Document" in FSS</li> <li>- Verify that a Pop-up appears confirming copying or matching of the document.</li> <li>- Check that you can open the document on the Remote Travel Client from SuperOffice.</li> </ul>	
	<p><b>Run "Full Synchronization" – "All Files"</b> (If you want all files copied to the Client. It will take some time)</p>	

## User Instruction

Done	Task	Comment
	<p><u>Connection and background synchronization*</u></p> <ul style="list-style-type: none"> <li>- They know how to connect to central network (VPN or similar)</li> <li>- They know they should be connected as much as possible, minimum once per day</li> <li>- They know that SuperOffice synchronizes in the background</li> <li>- They know it does not synchronize when closed, unless SuperOffice has been started once.</li> <li>- They know they don't need to do anything else than be connected.</li> </ul> <p><u>Stay on Travel*</u></p> <ul style="list-style-type: none"> <li>- They know that they must say NO to make a central Update (appears if not blocked in preferences)</li> <li>- They know it is recommended to stay on travel when they are in the office.</li> </ul> <p><u>FSS Functionality*</u></p> <ul style="list-style-type: none"> <li>- They know how to make a "Normal Quick Sync (All) manually</li> <li>- They know how to Disable and Enable Autosync.</li> <li>- They know how to use the "SuperOffice Current Document" function</li> <li>- They know how to "Show" and "Hide" the FSS main Screen for trouble shooting identification</li> <li>- They know a red Cross is a warning, but not necessarily an error (It may be a time out indication occurring because no changes were made and other reasons).</li> </ul> <p><u>FSS Warnings*</u></p> <ul style="list-style-type: none"> <li>- They know the FSS Icon, and it's color codes (Green (under 6 hours), Yellow (6-24 hours) and Red (over 24 hours)</li> <li>- They know the Arrow Color Codes (Green/Red) and that red is not an error, unless the Icon is also red. Old Read/Write dates indicates errors.</li> </ul> <p><u>SuperOffice Error Correction</u></p> <ul style="list-style-type: none"> <li>- They know how to manually write an up file with next unread up file number.</li> </ul>	

## Administrator Instruction

Done	Task	Comment
	<p><u>From Users Point of View</u></p> <ul style="list-style-type: none"> <li>- They know the user side of FSS – what warning messages they get.</li> </ul>	
	<p><u>Basic Knowledge</u></p> <ul style="list-style-type: none"> <li>- They know how SuperOffice Replication works with Travel Gateway writing files that users copy and read – and users writing files back that is read by Travel Gateway.</li> <li>- They know <u>that if Travel Gateway does not run – nothing works</u></li> <li>- They know, that two running instances of Travel Gateway can cause corrupt dwn files.</li> <li>- They know FSS listens to file changes and log to SQL server table in SuperOffice – and how FSS when ran at user/satellite side make synchronization fast.</li> <li>- They know that if FSS file listener does not run on the server, Satellite and User clients will not get all documents – and that a Full Sync fixes this with a full comparison.</li> <li>- They know that a restore of a central or satellite SuperOffice database backup will crash all replication unless nothing has been read/written in between (therefore always stop gateways when doing things where you take a backup).</li> <li>- They know, that with FSS they can monitor SuperOffice Replication Status two-ways for Satellites, Remote Travel Users of the central Database – and of Remote Travel Users of Satellites all in one point at the central server.</li> <li>- They know, that the FSS Log is based on the last synchronization the client did with FSS – if Synchronized with other means, the log will not be up-to-date.</li> <li>- They know how File Sync System is deployed and configured – and that the Replication Monitor shows which FSS version Clients are running.</li> <li>- They know, that at server side FSS will always say "Auto sync disabled" because only clients synchronize – the server only logs file changes</li> </ul>	

	<p><u>Administrative Tasks (Not errors)</u></p> <ul style="list-style-type: none"> <li>- They know that file sequence cannot exceed 10.000 – and that a central /local update is required for users – and a satellite regeneration is required for satellites. (Interval depend on trigger, read/write interval and/or client synchronization frequency)</li> <li>- They know that Travel Gateway and FSS when configured with Firedaemon on the server is configured with a user logon and password – and that if password is changed it needs to be done in Firedaemon.</li> <li>- They know that if Travel Gateway and File Sync system is configured as Windows Startup it is the root of all errors – that they need to make sure that they login after server restart – that a component can hang - and that using RDP to connect can cause multiple instances with serious consequences.</li> </ul>	
	<p><u>Error monitoring</u></p> <ul style="list-style-type: none"> <li>- They know how to open the FSS SuperOffice Replication Monitor at the server or at a Remote Travel Client – and how to read it for any potential errors (File numbers, and date time stamps)</li> <li>- They are aware that a solution is available that will send error warning alerts automatically by e-mail (unless users are on vacation or similar) – and that it contains a Replication Monitoring overview available at any SuperOffice Windows Client.</li> </ul>	
	<p><u>Error correction</u></p> <ul style="list-style-type: none"> <li>- They know a dwn file can be corrupt – and how it can manually be rewritten.</li> <li>- They know an up file can be corrupt for one user, causing read of files from that user, and possibly other users to fail – and how an up file is rewritten from the client.</li> <li>- They know that if a rewrite of an up or down file with subsequent synchronization does not fix an error, a Central update will fix the problem for Remote Travel Users – and a satellite generation will fix the problem for satellites.</li> <li>- They know that a satellite regeneration is a major operation, that requires all satellite Travel users to be in – and that data will be lost if not all up-files from the satellite is read prior to the regeneration.</li> <li>- They know, that for experts it is possible to identify and eliminate an error that can not be fixed with a normal rewrite of a Travel File.</li> </ul>	