

# SyncFolders Plus

From Solica Consulting and The Crossbearer Corporation

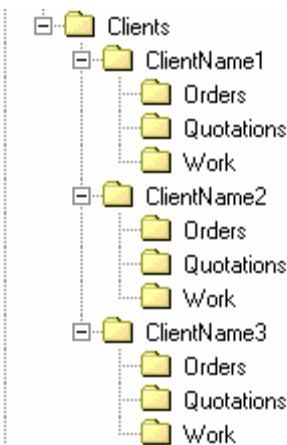
## The solution for GoldMine® linked document syncing!

- Automatically synchronizes folders between sites to ensure that linked documents sync to the correct location
- Moves documents from TmpLinks to originally intended location
- Easy to install and use
- **New:** Creates batch file to create folders on laptops/remote sites. Use prior to GoldMine installation to ensure documents go straight into correct folders!
- Runs in the background, normally on GoldSync servers and laptops
- Essential for all GoldSync users syncing linked documents!

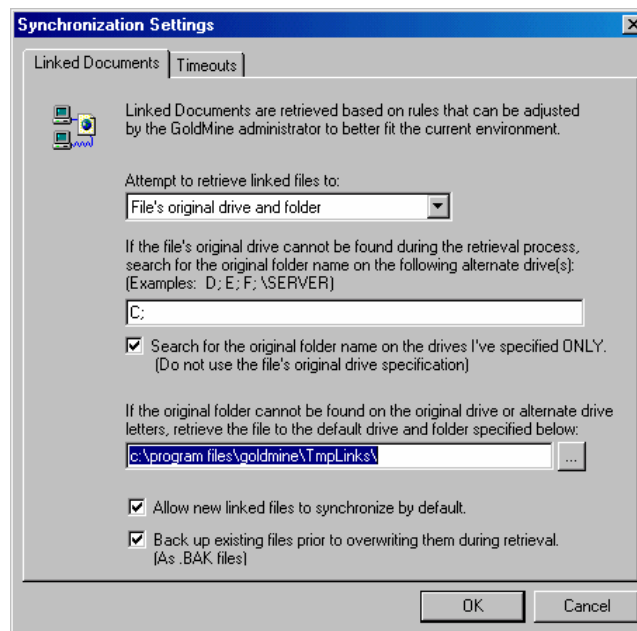
## When would I want to use SyncFolders Plus?

### Reason 1: Folder Structure Replication

Suppose you have a central networked system and hold data in a structured tree of folders. For example information on each customer might be held in a tree structure, such as shown below.



This works fine on the central system but when linked documents are synced to remote sites the documents often end up in TmpLinks – which often causes problems with duplicate names, files being overwritten and makes it more difficult to find documents. Knowledgeable GoldMine system administrators will change the sync settings using the GoldMine screen shown below.



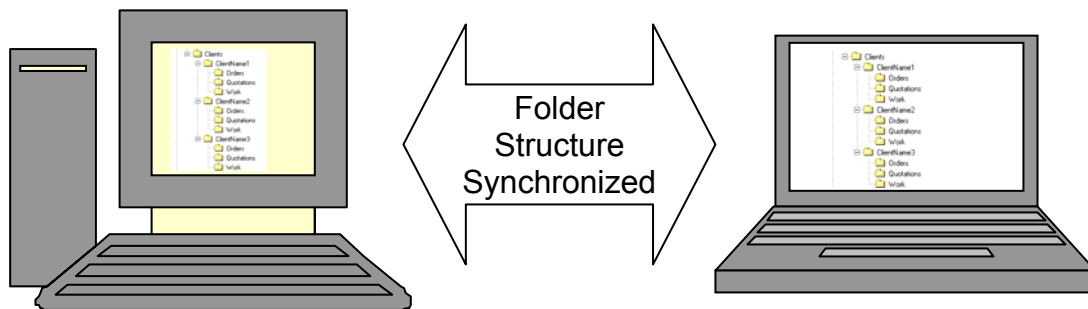
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Ticking the 'Search for the original folder name and specifying one or more drive letters above will try to place a file which is stored centrally in a location `s:\clients\abc\quotations\quoteA.doc` into the local location `c:\clients\abc\quotations\quoteA.doc`. This is what you want, but this **works only if the folder `c:\clients\abc\quotes\` already exists on the remote system**. If it does not then the document is placed into the designated temporary location, normally the `tmp\links` folder. It may overwrite existing documents there as well.

**SyncFolders Plus solves this problem!** It runs as a small background process and on a regular basis does two things:

1. It scans designated 'root folders' in the local system (such as `s:\clients` or `c:\clients`) and builds up a complete list of folders which it adds to/stores in the GoldMine InfoCenter in a reserved location. The InfoCenter is normally set to sync, so these records of folders transfer to other syncing systems
2. It reads the folder list in the InfoCenter and automatically creates any folders on the local machine which do not exist.

The net effect of this is that your designated folder structure automatically synchronizes across all syncing systems – central network(s) and remote laptops or sub-sites. This may sound small but it has **immediate benefits** for syncing systems.



Your documents if saved in a folder on one system will sync to the corresponding location on another system.

### Reason 2: Linked Document Moving

OK, folder structure replication works fine if you are syncing between folders which already exist. But what about the following.

Suppose you are a laptop user and create a new document under the Links tab called *propclient.doc* and store in a **new** folder `C:\clients\clientname`. When you next sync, whether or not SFP has done a folder scan, the document will be synced into the `TmpLinks` folder on the server because when the document is being received by the central sync server, SFP has not yet had a chance to create folder `S:\clients\clientname` (assuming S is the alternate drive on the server). The same occurs when documents are created on the server then synced to remotes.

At some stage the new folder will be created by SyncFolders Plus but it will be too late. The document will never be moved from `TmpLinks`. Document Relocation solves this problem. In summary it works as follows:

1. At some time a SFP document relocation scan occurs on the originating laptop. This adds information to the Links tab entry which holds the original path, here `C:\clients\clientname`. It also ensures that an entry for the folder exists in the InfoCenter in case a full folder scan has not been done. This gets synced at some time.



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2. On the receiving site (the central one in this example), once the information is synced a Linked Document scan is done. This first does a Create Folder scan and creates the new folder, say S:\clients\clientname. It then reviews recently synced linked document entries, sees that the original path is now present, maps drive letters and moves the document propclient.doc from the TmpLinks folder into the S:\clients\clientname, amending the Links tab entry appropriately.

The net result is that document will now end up in the correct place.

### **Reason 3: Folder creation prior to GoldMine installation**

Suppose you are installing a new laptop using the self installer and including linked documents. You run the install and the linked documents get unpacked into TmpLinks - because the folder structure does not exist.

SyncFolders Plus now helps you solve this. A new feature creates a batch file on the central server. Run it on the laptop prior to installing GoldMine and the folder structure is created. As long as your sync settings are correct, linked documents will be unpacked into the correct location.

### **SyncFolders Plus is easy to install and use.**

Future versions of SyncFolders Plus are very likely to support other challenges in linked document syncing, particularly the preparation of linked document transfer sets for new installations.

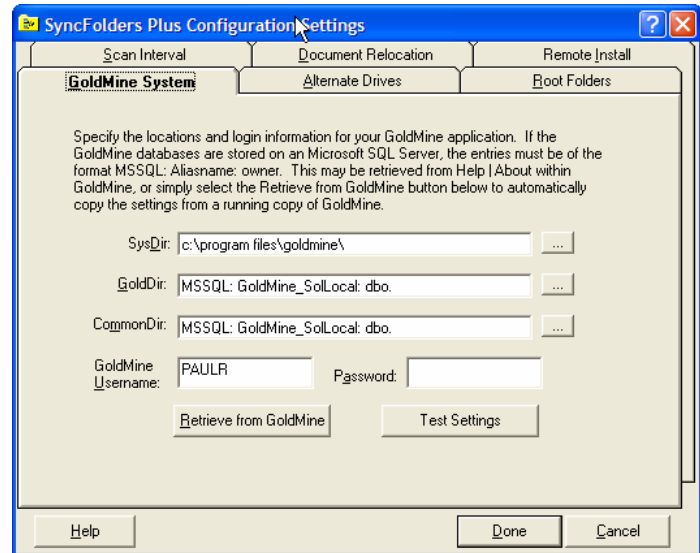
**SyncFolders Plus has been developed by Solica Consulting, developers of the award winning Details Plus add-on for GoldMine, and Frances Corazza, until recently a technical expert on GoldMine API and applications at FrontRange Inc, the developers of GoldMine.**

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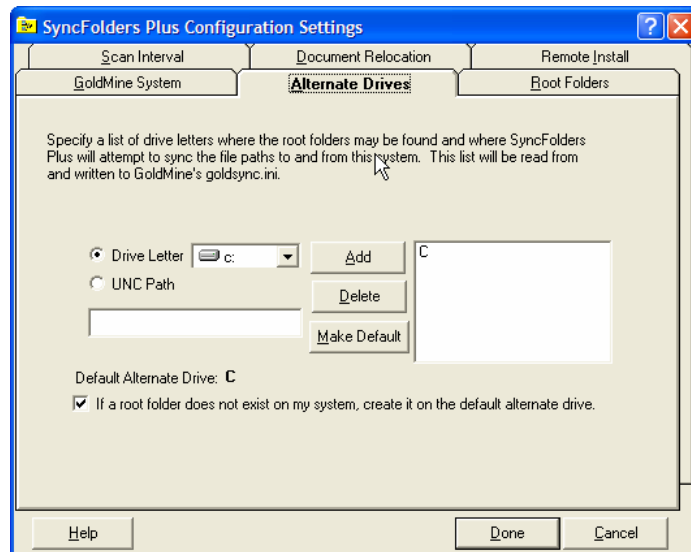
## Details

So what does it look like in practice?

When first installed a series of configuration screens are shown and this can be changed at any time. On this first screen the location of GoldMine and appropriate passwords are entered.

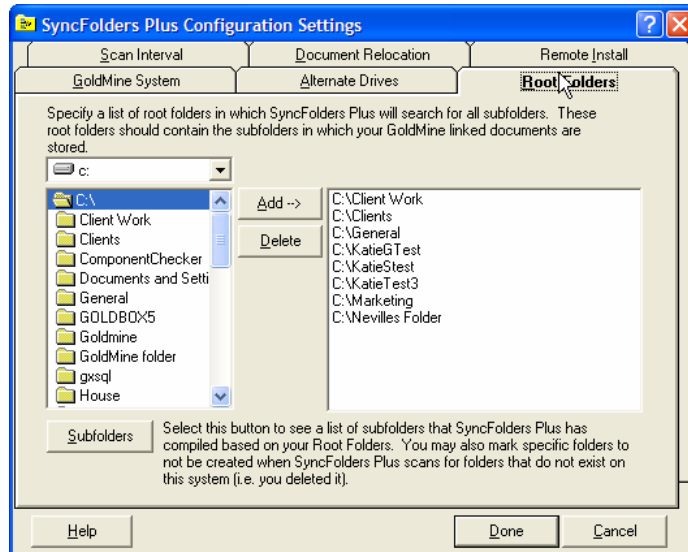


On the next screen the location of alternate drives are given. On laptops this is normally just the c: drive but there may be other drives, such as a D: drive or a remote network drive that are designated instead.



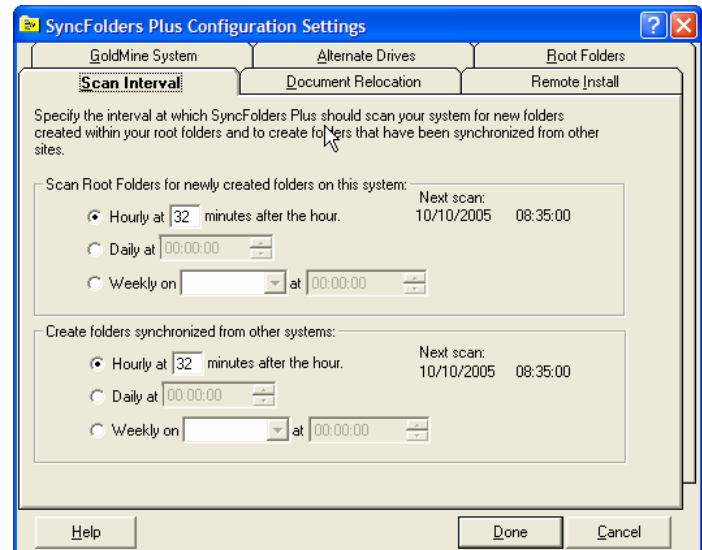
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The next configuration screen lets you designate the **root** folders, subfolders of which are to be synchronized. It also lets you designate individual subfolders which are not to be replicated, for example subfolders which have been deleted.



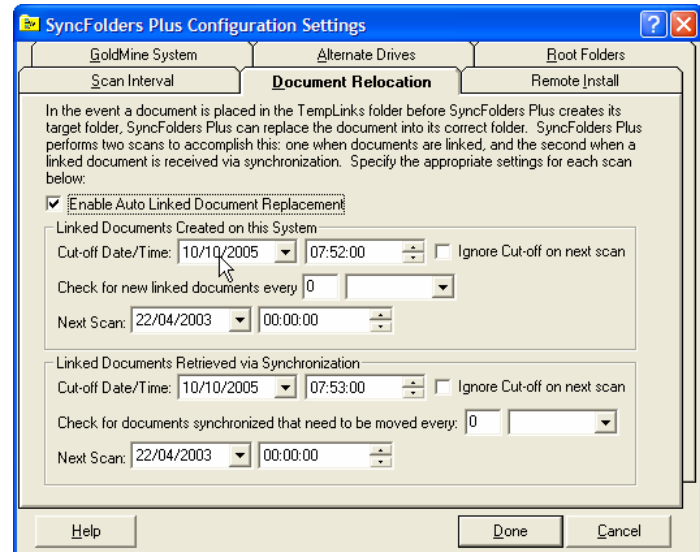
The next screen allows the intervals with which automatic scans occur. Two scans are defined here – one which scans the folder structure below the root folders, detects any new folders and creates entry for them in the database (stored in the InfoCenter).

The second scan here reads the folder structure from the database and creates folders if they do not exist.

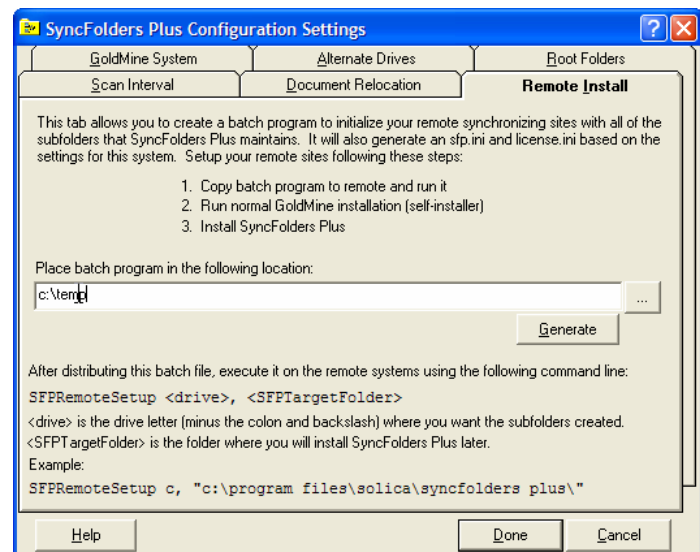


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The next screen lets you enable linked document relocation. This also has two scans: the top one scans for newly created linked documents and adds an entry to them to indicate the original path. The second scans linked documents received by sync and if appropriate moves them to new folders.



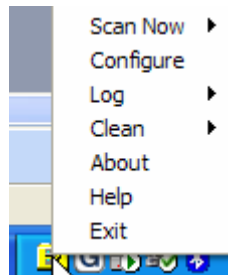
Another tab lets you create batch files which create folders on laptops or remote sites.



All the above configuration is stored in a few configuration files – one for the configuration itself and one for the linked document cutoff dates.

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SyncFolders Plus has an icon in the system tray. A pop-up menu gives access to configuration and other options. Immediate scans can also be scheduled.



## Common Questions

*Where does SyncFolders Plus hold the list of folders?* These are stored in fields in the InfoMine table (used for the InfoCenter) in folder SFP in the personal knowledgebase of user MASTER. They are thus invisible to normal users.

*Which versions of GoldMine can be used with SyncFolders Plus?* GoldMine versions 5 and 6, both dBase and SQL versions.

*I create a new folder on the central system and immediately place a document there. When this document syncs where does it go?* Initially if the exact folder does not exist it goes into the default, typically tmplinks. The folder creation process normally happens after sync, by which time the folder has been synced. However subsequent documents placed in that folder after syncing has been carried out will sync into the desired location. **In this newer version of SyncFolders Plus, document relocation if enabled will move such documents to the 'correct' location later!**

## Licensing and Pricing

SyncFolders Plus is licensed in according to the number of maximum GoldSync sites on a system or group of systems. For example for a simple sync configuration with one central site and 5 remote laptops, at least five SyncFolders Plus licenses should be purchased. SyncFolders Plus checks this when it starts.

For a more complex configuration similar issues apply. For example a system with a central site with 4 remote laptops and one remote sub-site and with the remote sub-site having 3 remote laptops syncing to it requires  $4 + 1 + 1 + 3$  licences. In summary it is just the number of sites defined in the GoldSync servers across all sites. (Note that in this example the central to sub-site link actually uses up two licences as there is a GoldSync Administration Center entry at each end).

SyncFolders Plus costs £36 per license, which at current exchange rates is about \$60 (US Dollars). Payment is required at time of order and is by credit card, so the billed amount will be converted to your local currency on your bill. VAT is payable in the UK. Payment can also be made by Paypal and is priced at \$60 per licence. See [www.solica.com](http://www.solica.com) for details.

For simplicity and given the low price, we do not discount on quantity.

Licences can be purchased via faxed, telephone or written orders to Solica in the UK, quoting a valid MasterCard, Visa or American Express number, with the order form included in the evaluation kit. Please do not e-mail credit card numbers as we cannot currently accept these for security reasons. Payment can also be made by Paypal in US dollars to ...

## Evaluation

You can download a free evaluation copy of SyncFolders Plus at [www.solica.com](http://www.solica.com). This will work on any GoldMine system but will only sync the first 3 subfolders under the first two root folders it finds and requires manual intervention to initiate and during each scan. This will allow you to evaluate it. When licenses are purchased an unlock code is provided which makes it fully functional.

## Ordering

The SyncFolders Plus evaluation contains an order form, accessible via Start |Program Files | SyncFolders Plus or in file order.txt. There is also a downloadable order form on our web site. Simply fill this out, giving details of your GoldMine licence number and a credit card, then fax to our offices. We'll e-mail you an unlock code and mail you a receipt. Order from your GoldMine reseller or from Solica directly.



## SyncFolders Plus™

### Contact Details

For further information please contact Solica by any of the means shown below:

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