



Client Data System[®]

MobileMerge
User Guide



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Table of Contents

Overview	1
Using MobileMerge for the First Time	1
Getting Started with MobileMerge	1
Starting the MobileMerge Session	1
Using the Database Copy Options Dialog Box	3
Copying the Network Database Automatically	4
Copying the Network Database Manually	4
Ending MobileMerge	4
Reconciling MobileMerge Data	5
Reconciling MobileMerge Data Automatically	5
Reconciling MobileMerge Data Manually	6
Reviewing MobileMerge Transactions	6
Troubleshooting MobileMerge	6

Overview

The MobileMerge Module provides true office portability with a fast and easy method of taking your database with you when you are away from the office.

A single keystroke copies the database from the network server to your portable computer. When you return to the office, merge any changes that you made while you were away with the database on your network.

Please note that while in MobileMerge, you cannot log in to another CDS workstation. To avoid data issues when reconciling, this option has been removed from CDS v6.0.

Using MobileMerge for the First Time

Each MobileMerge user must have MobileMerge selected in their list of Module Preferences. Note that MobileMerge module availability is based on the number of licenses purchased for this module.

To add MobileMerge to the list of Module Preferences:

1. In CDS, select **Utilities** from the expanded **Database** menu.
2. Select **Module Preferences** from the expanded **Utilities** menu.
3. Select the **MobileMerge** option in the Module Preferences dialog box and then click the **OK** button.
4. Start CDS again; MobileMerge displays on the expanded **Tools** menu.

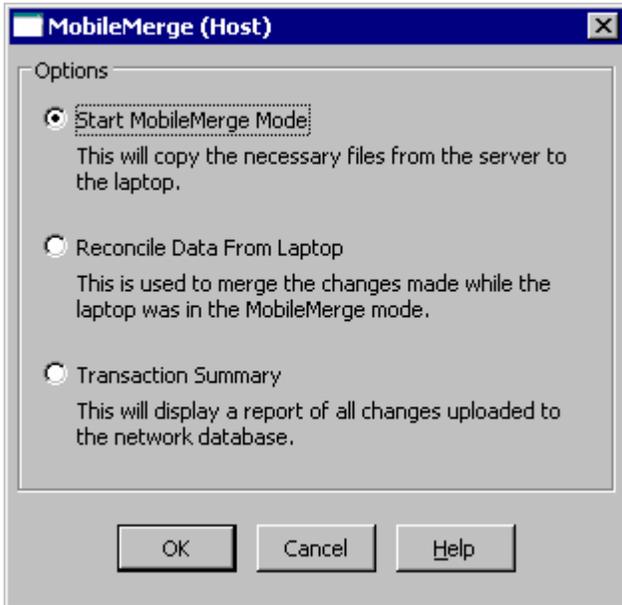
Getting Started with MobileMerge

- **Copy your database to your portable computer.**
Before traveling, copy the office database to your portable computer. With a single keystroke, MobileMerge creates a mirror image of your data.
- **Use your data while working in the field.**
Use and modify your data while you work in the field. Add new records, update client information, add notes, schedule appointments, write letters and even delete records. Back in the office, your staff can continue to work in the CDS program as usual.
- **Reconcile your data when you return to the office.**
When you select **End MobileMerge Mode**, the changes that you have made to the database on your portable computer are automatically merged with the server's database.

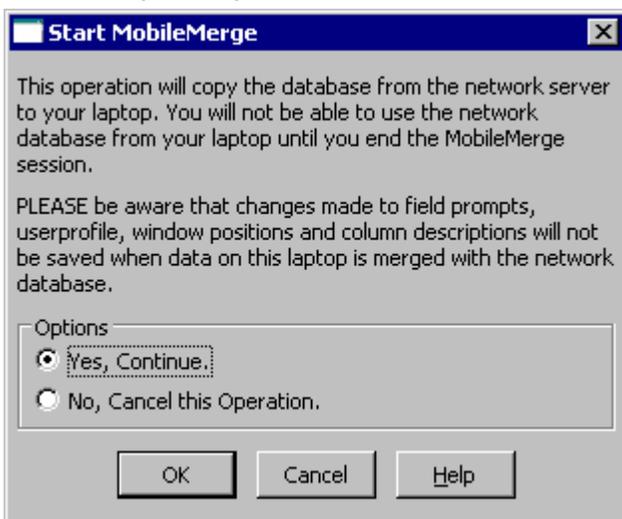
Starting the MobileMerge Session

1. Have all users log out of CDS. (This is not absolutely necessary, but recommended.)
2. Connect your portable computer, with CDS already installed, to the network.
3. Start CDS on the portable computer and log in to the database that you want to use with MobileMerge.

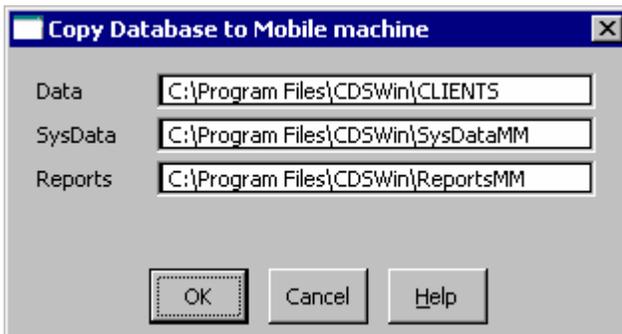
4. Select **MobileMerge** from the **Tools** menu to open the MobileMerge (Host) dialog box.



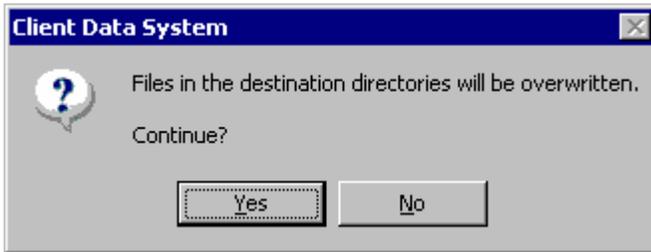
5. Select **Start MobileMerge Mode** and then click the **OK** button to display the Start MobileMerge dialog box.



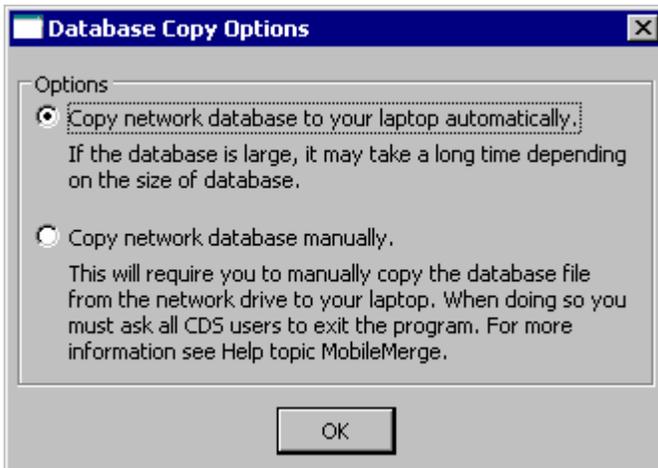
6. Read the notice in the Start MobileMerge dialog box, select the **Yes, Continue** option and then click the **OK** button to display the Copy Database to Mobile Machine dialog box.



7. This dialog box indicates the destination directories for the database and other necessary files. After reviewing the settings, click the **OK** button to display the Files in the Destination Directories will be Overwritten dialog box.



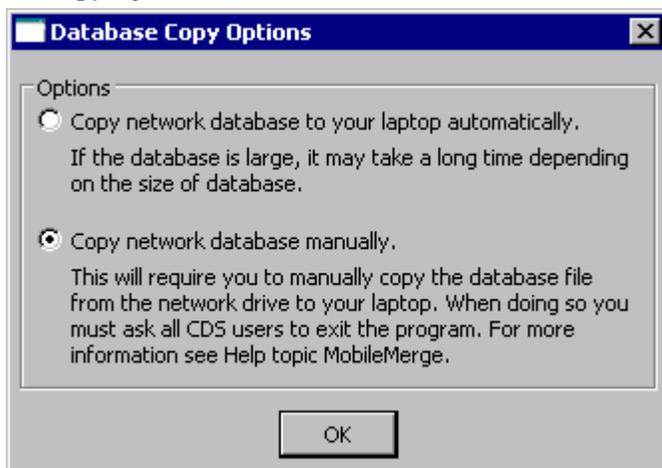
8. Click the **Yes** button to open the Database Copy Options dialog box.



9. Select the appropriate option and then click the **OK** button.
10. When you log back in to CDS after closing the program, CDS will be in Mobile Mode on the portable computer.

Using the Database Copy Options Dialog Box

Copying the network database to your portable computer automatically may take a significant amount of time, depending on how many users are already working with the database. As an alternative, have all users log out of CDS and then copy the network database manually to reduce the copying time.



Copying the Network Database Automatically

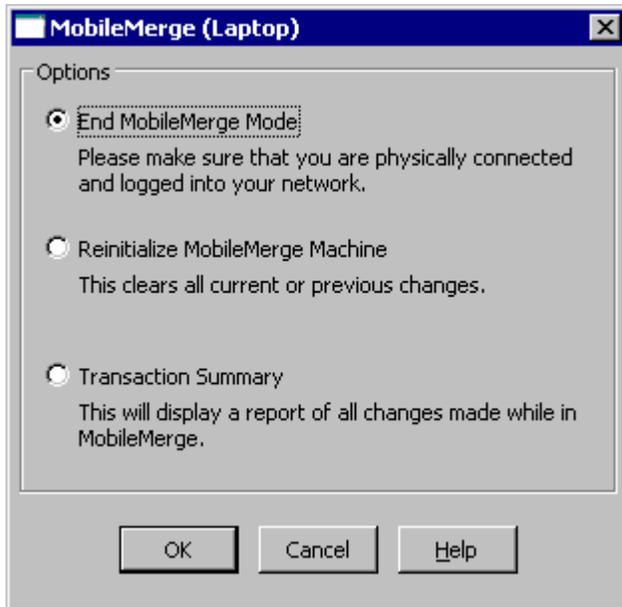
1. Select the **Copy network database to your laptop automatically** option and then click the **OK** button.
2. After the database and other files have been copied, click the **OK** button when the message displays that indicates that the CDS session will end.
3. When you log back in to CDS after the program closes, CDS will be in Mobile Mode on the portable computer.

Copying the Network Database Manually

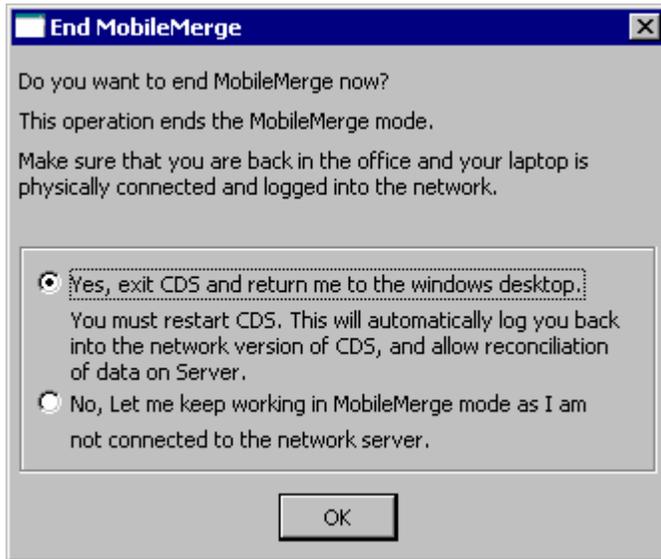
1. When you select the **Copy network database manually** option and then click the **OK** button, all necessary files, EXCEPT THE DATABASE AND LOG FILES, are copied to the portable computer. All other aspects of this option are identical to the option that copies the database automatically.
2. After the files have been copied, click **OK** when the message displays that indicates that the CDS session will end.
3. Use Windows Explorer or a DOS session to copy the network database and log files (e.g., F:\CDSWin.svr\Clients\Clients.db and F:\CDSWin.svr\Clients\Clients.log) to the appropriate directory on the portable computer (e.g., C:\Program Files\CDSWin\Clients).

Ending MobileMerge

1. When you are ready to end your MobileMerge session, you must reconnect the portable computer to the network.
2. After establishing the network connection, log in to CDS.
3. Select **MobileMerge** from the **Tools** menu to display the MobileMerge (Laptop) dialog box.



4. Select the **End MobileMerge Mode** option and then click the **OK** button to display the End MobileMerge dialog box.



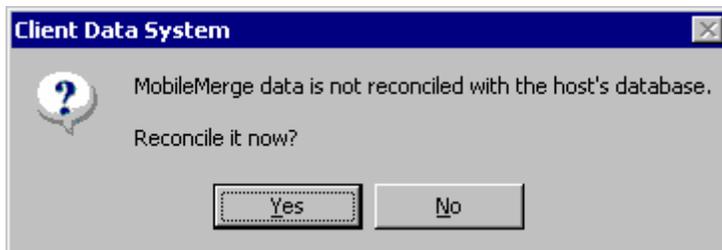
5. Select the **Yes, exit CDS and return me to the windows desktop** option and then click the **OK** button.
6. Click the **OK** button to close the program.
7. Log back in to CDS and reconcile your data.

Reconciling MobileMerge Data

After you end your MobileMerge session and log back in to CDS, you will be prompted to reconcile the database on your portable computer with the network database. Select **Yes** to update the network database with any changes that you made during the MobileMerge session. If you select **No** when prompted to reconcile, you can reconcile manually at another time. If you do not reconcile, automatically or manually, you will lose any changes that were made during the MobileMerge session.

Reconciling MobileMerge Data Automatically

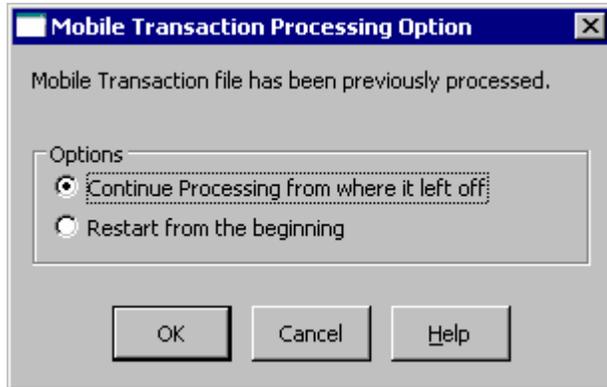
1. With the portable computer connected to the network, log in to CDS.
2. When prompted, click the **Yes** button to reconcile the MobileMerge data.



3. As the database is reconciled, dialog boxes will indicate the progress until the reconciliation is complete.
4. When the process is complete, all dialog boxes will close automatically and you may resume normal use of CDS.

Reconciling MobileMerge Data Manually

1. With the portable computer connected to the network, log in to CDS.
2. Select **MobileMerge** from the **Tools** menu.
3. Select the **Reconcile Data from Laptop** option in the MobileMerge (Host) dialog box and then click the **OK** button to display the Mobile Transaction Processing Option dialog box.



4. Select a Mobile Transaction Processing Option and then click the **OK** button.

Reviewing MobileMerge Transactions

You can review the list of MobileMerge transactions at any time. The status of each transaction indicates whether it has been reconciled (you may have to add the Status column to the spreadsheet layout). If the status is “Processed,” the transaction has been reconciled.

1. Select **MobileMerge** from the **Tools** menu.
2. Select **Transaction Summary** in the MobileMerge dialog box and then click the **OK** button.
3. When the MobileMerge Transaction log opens, a list of all transactions that occurred during the last MobileMerge session will be displayed. (The list can be printed for future reference.)

Troubleshooting MobileMerge

1. **Problem:** I cannot start MobileMerge because a file will not copy.
Solution: MobileMerge will not start if you have multiple log files in your database directory. If the error message indicates which log file is causing the error when you try to start MobileMerge, close CDS and delete that log file before attempting to start MobileMerge again.
2. **Problem:** Error: Catalog File is locked or being used.
Solution: This error indicates that the Catalog files are still loaded in memory on the portable computer. Close CDS for Windows, then log back in and start MobileMerge.
3. **Problem:** Data Source errors occur when I try to start MobileMerge.
Solution: If MobileMerge will not start because the data sources for your database cannot be created, you may need to create the data sources manually. When you install the CDS program on a client computer, a data source is created as an interface to the database on the network server. One additional data source should get created when you use MobileMerge so that the client computer can selectively operate as a client. The data source is named after the existing data source (e.g., Clients) with a two-letter suffix to identify each source as the client data source (i.e., ClientsCL). The data sources can be created using the ODBC Data Source Administrator (Select **Run** from the **Start** menu, enter **ODBCAD32** and then click **OK**). Create a “CL” data source that is used for MobileMerge mode with a path that points to the database on the server drive. The data source without the “CL” should path to the database on the local drive.

4. **Problem:** My portable computer will not go into MobileMerge mode.

Solution: A computer that is in MobileMerge mode is essentially a stand-alone installation of CDS. The database and Sysdata directories are accessed on the local drive, instead of the network server drive.

Problems that occur when you try to start MobileMerge are frequently the result of how the computer was originally configured as a CDS workstation. Minor inconsistencies with the configuration of CDS will enable your computer to function properly as a workstation on the network, but may prevent the computer from being used in MobileMerge mode. Check the following areas:

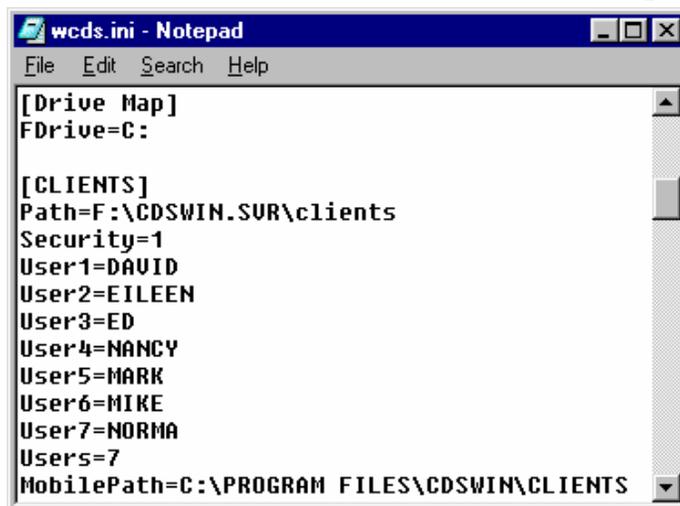
- Make certain that the shortcut on the Windows desktop is pointing to WCDS32.EXE on the local drive (e.g., c:\Program Files\CDSWin\WCDS32.EXE).
- Make certain that the CDS shortcut is a true shortcut, not a copy of the CDS program executable file (e.g., WCDS32.EXE).
- Open the ODBC Data Source Administrator and make certain that there are two DSN entries under the System DSN tab for the database that you are using with MobileMerge (e.g., Clients and ClientsCL). Each of the DSN entries should specify a different Start Command in the Startup Options dialog box (select a DSN entry, click the **Configure** button and then click the **Options** button to view the Start Command). The Start Commands for the DSN entries should be similar to the following:
CLIENTS = C:\Progra~1\Sybase\SQL Anywhere 9\win32\dbsrv9.exe
CLIENTSCL = C:\Progra~1\Sybase\SQL Anywhere 9\win32\dbeng9.exe

When you start MobileMerge, make certain that the destination for the Database, Sysdata, and Report files is the local drive.

5. **Problem:** Error: Cannot copy database to same directory.

Solution: This typically occurs when the paths in the initialization file are pointing to the same location on the local drive.

Note that the **Path** and **MobilePath** statements do not point to the same location.



```
wcds.ini - Notepad
File Edit Search Help
[Drive Map]
FDrive=C:

[CLIENTS]
Path=F:\CDSWIN.SUR\clients
Security=1
User1=DAVID
User2=EILEEN
User3=ED
User4=NANCY
User5=MARK
User6=MIKE
User7=NORMA
Users=7
MobilePath=C:\PROGRAM FILES\CDSWIN\CLIENTS
```

6. **Problem:** I ended MobileMerge, but when I try to log in to CDS a message indicates that I am in MobileMerge mode on another computer.

Solution:

- Locate the WCDS.INI file in the CDSWIN.SVR\SYSDATA directory on the server and open it with a text editor.
- Find the **IsMobile=1** line under your database and user name and change the **1** to a **0** (i.e., **IsMobile=0**).
- **Save** the changes to the WCDS.INI file.
- Locate the WCDS.INI file on the portable computer and open it with a text editor. Make certain that the following lines and values are correct:
 - IsTravel=0
 - IsServer=1

7. **Problem:** I started data reconciliation 4 hours ago, but the process is still not complete.

Solution: The time required to reconcile data is correlative; if many changes are made to the database while it is in MobileMerge mode, more time will be required for reconciliation. However, a disproportionate amount of time for reconciliation may indicate a configuration problem. Use the following steps to verify the configuration:

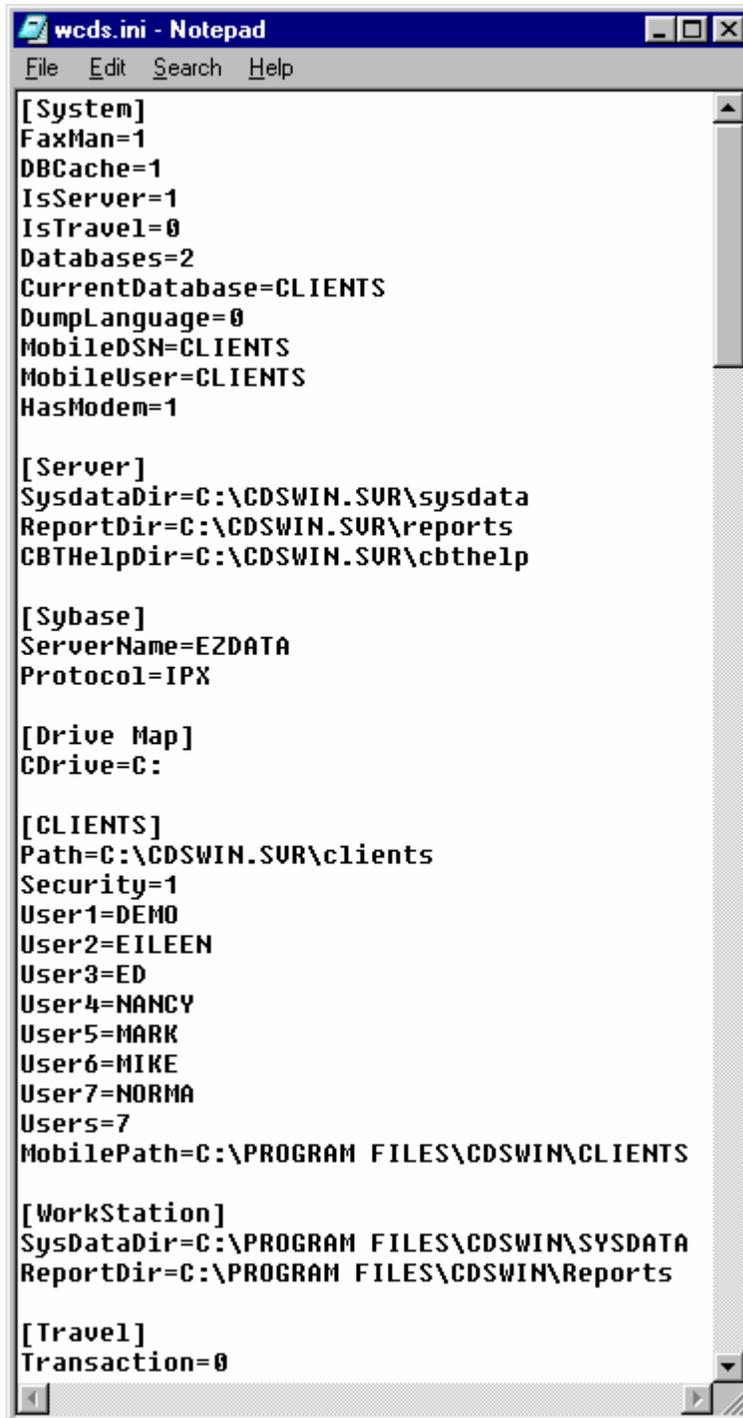
- Log in to CDS and check for the words **Mobile Mode** in the title bar.
- Open EZConfig and see if the Client box is checked, and if the Database File path is to the server or local drive.
 - If CDS is in *Mobile Mode*, the Client box should not be checked and the Database File path should point to the local drive (e.g., C:\Program Files\CDSWin\Clients\Clients.db).
 - If CDS is not in *Mobile Mode*, the Client box should be checked and the Database File path should point to a network drive (e.g., F:\CDSWin.svr\Clients\Clients.db).

8. **Problem:** Other users cannot see the changes that I made in MobileMerge mode after I reconciled the data.

Solution: You may have multiple copies of the database and Sysdata directories on your portable computer. This may be the result of an incorrect path for the MobilePath parameter in the local WCDS.INI file. The MobilePath parameter should indicate the same path that is used in the Copy Database to Mobile Machine dialog box that is displayed when you start MobileMerge. Make certain that there is only one copy of the database and Sysdata directories on your portable computer.

9. **Problem:** What information does the WCDS.INI file on the workstation contain?

Solution: The following image depicts the information and settings that are commonly found in the WCDS.INI file on a workstation. The content of each WCDS.INI file may also vary slightly between workstations on the same network.



```
[System]
FaxMan=1
DBCACHE=1
IsServer=1
IsTravel=0
Databases=2
CurrentDatabase=CLIENTS
DumpLanguage=0
MobileDSN=CLIENTS
MobileUser=CLIENTS
HasModem=1

[Server]
SysdataDir=C:\CDSWIN.SUR\sysdata
ReportDir=C:\CDSWIN.SUR\reports
CBTHelpDir=C:\CDSWIN.SUR\cbthelp

[Sybase]
ServerName=EZDATA
Protocol=IPX

[Drive Map]
CDrive=C:

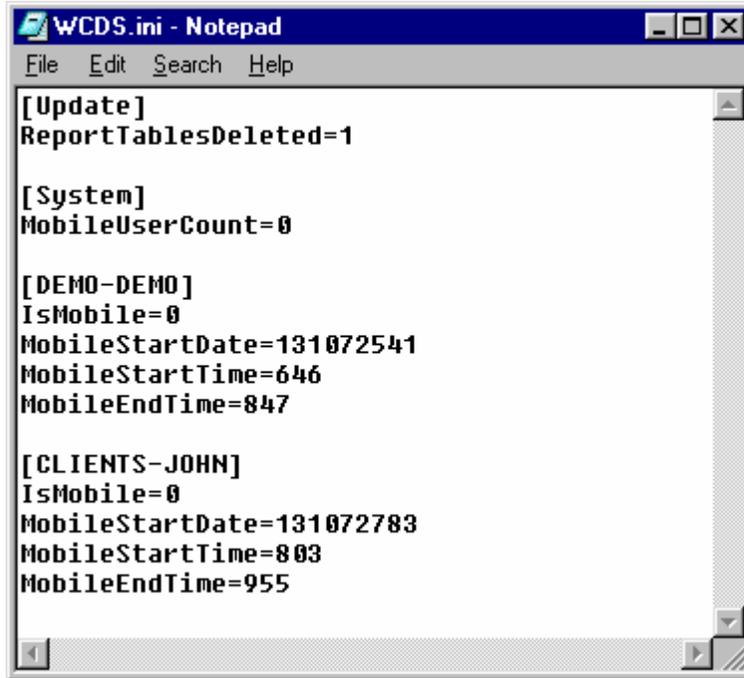
[CLIENTS]
Path=C:\CDSWIN.SUR\clients
Security=1
User1=DEMO
User2=EILEEN
User3=ED
User4=NANCY
User5=MARK
User6=MIKE
User7=NORMA
Users=7
MobilePath=C:\PROGRAM FILES\CDSWIN\CLIENTS

[WorkStation]
SysDataDir=C:\PROGRAM FILES\CDSWIN\SYSDATA
ReportDir=C:\PROGRAM FILES\CDSWIN\Reports

[Travel]
Transaction=0
```

10. **Problem:** What information does the WCDS.INI file in the Sysdata directory on the server contain?

Solution: The following image depicts the information and settings that are commonly found in the WCDS.INI file in the Sysdata directory on the server. The content of this file is relative to the number of databases and database Users.



```
[Update]
ReportTablesDeleted=1

[System]
MobileUserCount=0

[DEMO-DEMO]
IsMobile=0
MobileStartDate=131072541
MobileStartTime=646
MobileEndTime=847

[CLIENTS-JOHN]
IsMobile=0
MobileStartDate=131072783
MobileStartTime=803
MobileEndTime=955
```