

Preparing and sharing a Master database

Introduction

This applications note is to assist preparation of the Master database onto a server in a shared folder for access by other Legrand CRM users. Once installed, the shared folder will make available the Legrand CRM datafile to other Legrand CRM clients who log onto on the same LAN.

Also, this same environment is accessible to mobile Legrand CRM users who are set up to synchronise data.

Logging onto the LAN may consist of any of the following methods:

- connecting to the LAN using a network interface card (most PCs and laptops have a NIC built into them for connection into a LAN using a CAT5 cable)
- connecting to the LAN via a VPN (virtual private network)
- RAS (remote access server, generally a modem)

NOTE: The Legrand CRM datafile that resides on the server (the "Master" datafile) does not require a Legrand CRM licence.

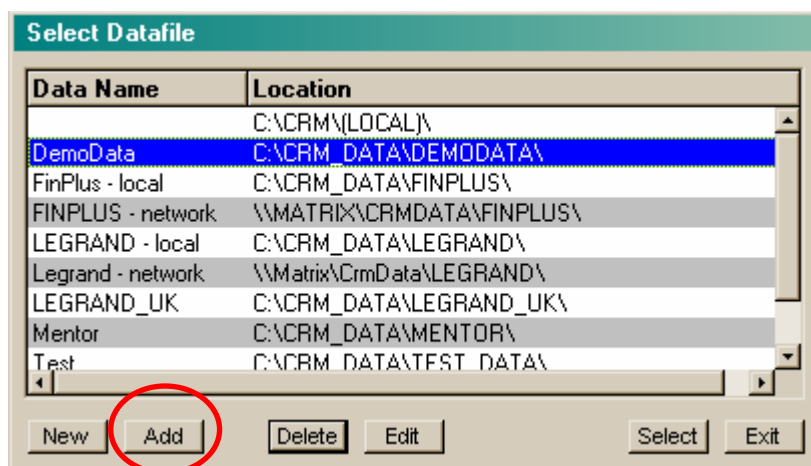
Procedure

Let's assume that you wish to move the DEMODATA folder from your local machine to the network:

- (1) The first step is to decide in which directory on your filerserver you will keep the Legrand databases. Let's assume that you have created a directory called CRMdata on your filerserver; i.e. the full path is \\fileservname\CRMdata. Note that all users who will use Legrand CRM on this data need to have full Read/Write access to this file server directory
- (2) Simply copy the DEMODATA folder from your local PC into the CRMdata folder at your filerserver.
- (3) Next, start Legrand CRM and at the Login screen click on "Select"

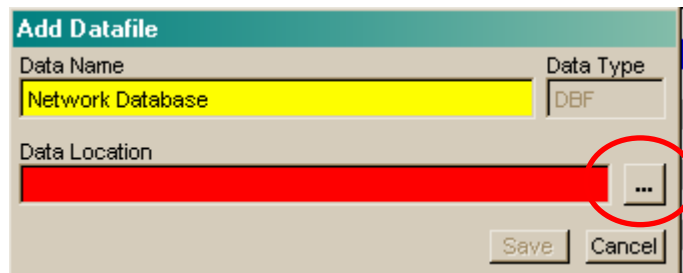


- (4) this brings up a screen that enables you to Select, Add & Remove CRM databases to the list of databases that you often use.



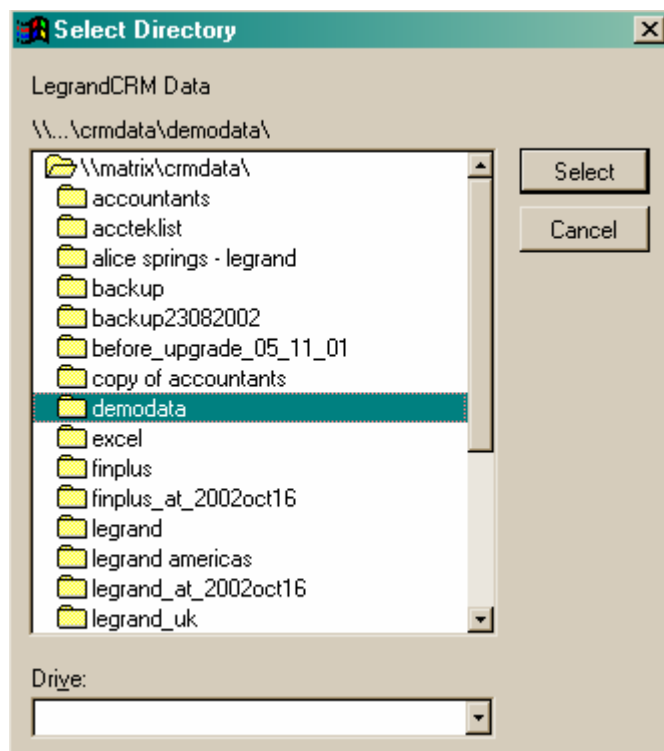
- (5) Click on the “Add” button.

- (6) Type in the name by wish you wish to remember this CRM database; for instance “Network Database

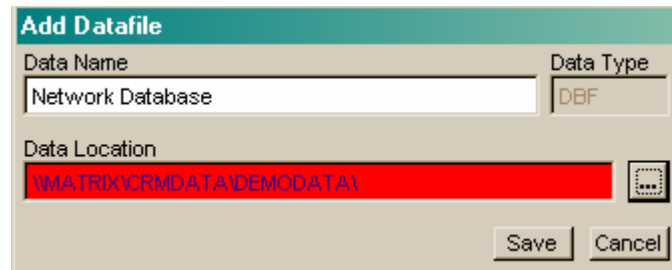


- (7) Then click on the navigate button (...) and use the standard Windows Explorer style navigator to go to the fileserver and select the Demodata folder under the [\\fileservname\CRMdata](#) location. Click 'Select'.

Note: for quicker navigation it may be advisable to first set up a 'mapped drive' to that network location



- (8) The 'Add Datafile' screen should now display the full path to the CRM database on the fileserver and the name by which you want this database to be known to you.

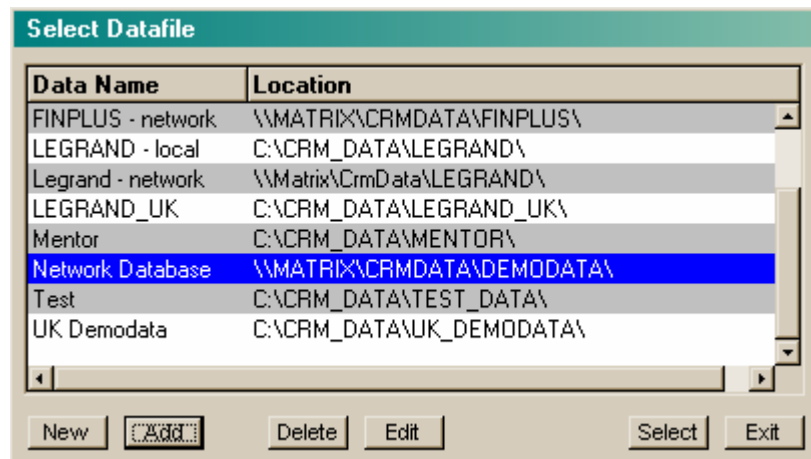


Add Datafile

Data Name	Data Type
Network Database	DBF
Data Location	
\\MATRIX\CRMDATA\DEMODATA\	

Save Cancel

- (9) After you click 'Save' you'll find yourself back at the 'Select Datafile' screen, with the database that you have just added to your list being clearly highlighted.



Select Datafile

Data Name	Location
FINPLUS - network	\\MATRIX\CRMDATA\FINPLUS\
LEGRAND - local	C:\CRM_DATA\LEGRAND\
Legrand - network	\\Matrix\CrmData\LEGRAND\
LEGRAND_UK	C:\CRM_DATA\LEGRAND_UK\
Mentor	C:\CRM_DATA\MENTOR\
Network Database	\\MATRIX\CRMDATA\DEMODATA\
Test	C:\CRM_DATA\TEST_DATA\
UK Demodata	C:\CRM_DATA\UK_DEMODATA\

New Add Delete Edit Select Exit

- (10) Click on 'Select' and you will find yourself back at the Login screen with the full path to the datafile clearly showing; in our example it is shown as [\\Matrix\CRMdata\demodata](#), Matrix being the name of the fileserver in this example.



Preparing other Legrand CRM users

Other Legrand CRM users who require access to the shared datafile, which now resides on the server, simply repeat steps 3 to 10.

(Steps 1 and 2 are not needed since the database already exists at the fileserver).

NOTE: Each Legrand CRM client machine requires a separate licence. The Master server does not require a licence.

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