

Sharing a BEAT 2004 Database on a Local Area Network (LAN)

Introduction and Important Notes

- Before sharing an ACT! database over a network see the following document to resolve any issues that may cause database corruption when an ACT! database is accessed over a network.

Title: Important Issues Concerning Sharing an ACT! Database Over a Network
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- By *server* we are referring to the computer that will be hosting the ACT! database and other files such as layouts, documents, templates, etc. By *workstation* we are referring to any of the computers that are accessing the ACT! data that resides on the server.
- You must purchase a licensed copy of ACT! for each workstation.
- You must perform a full install of ACT! on each workstation. The server only needs ACT! installed if you want to run ACT! on the server.
- The computer being used as the server should be running one of the following operation systems: Novell NetWare 3.12 or later, Microsoft Windows NT, 2000, or XP Professional.

Note: We do not recommend running Microsoft Windows ME or 98 on the server; these operating systems do not have the stability or memory management required to be used reliably as a server. Windows XP Home can be used. However, because of the inability to disable *simple file sharing* on Windows XP Home, you will not be able to share a folder within a user's profile. By default, ACT! places the database folder within the **My Documents** folder (which is part of a user's profile). For more details on simple file sharing, including how to disable it on Windows XP Professional, refer to the following document:

Title: Issues Caused by Windows XP Simple File Sharing
Document ID: 2002112116812
Web URL: <http://itdomino.act.com/act.nsf/docid/2002112116812>

- We neither support nor recommend accessing ACT! databases over dial-up connections, virtual private networks (VPNs), or wide area networks (WANs).
- To set up a shared database correctly, all workstations should have a drive letter mapped to the shared folder (where the data is held) on the server. **All workstations should use the same drive letter for the mapped drive.** Before choosing a drive letter to map to, be sure that the drive letter is available on all workstations.

Setting Up the Server

1. Create a folder on the server named ACTSHARE. This folder can be anywhere on the server's hard drives, but we suggest creating in on the root folder of the hard drive (for example, C:\ACTSHARE).

Note: If the server is running Windows XP Home, *do not place the ACTSHARE folder within any user's profile folders.* Simple file sharing will prevent the folder from being shared properly.

2. Set the ACTSHARE folder to be shared over the network. Each ACT! user must have full access rights to this folder. If you need assistance sharing a folder, please contact a local computer technician or Microsoft or Novell Support.
3. Create a folder called DATABASE within the ACTSHARE folder (for example, C:\ACTSHARE\DATABASE).
4. Save a copy of the ACT! database to be shared into the DATABASE folder that you created in step 3.

Note: For information about sharing more than the database, please see the section titled, "Sharing more than just the database."

Setting Up the Workstations

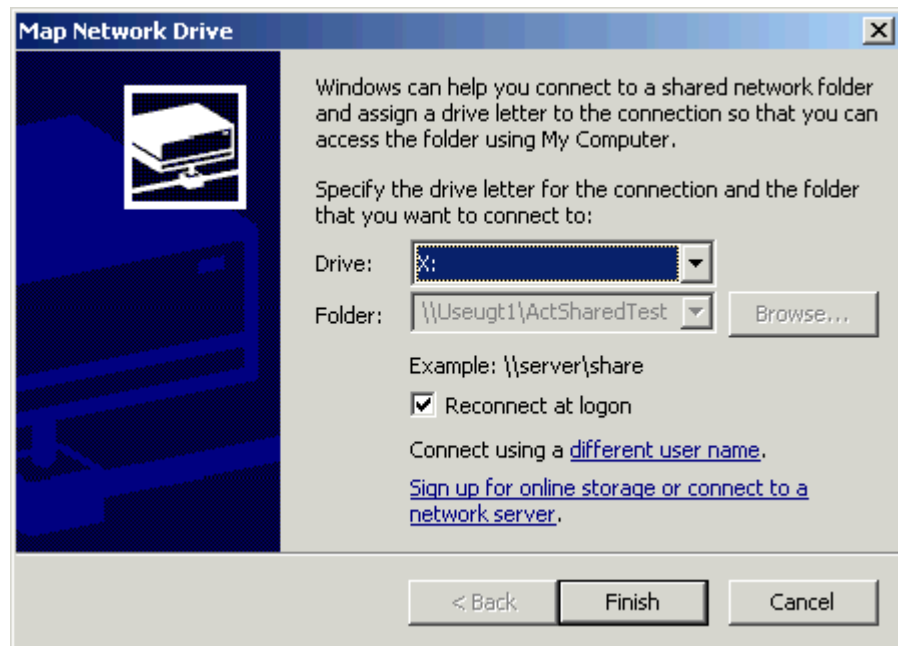
1. On each workstation, map a drive letter to the ACTSHARE folder on the server.

Note: This information is provided as a courtesy. ACT! does not provide technical support for server configuration or mapping of network drives.

To map a drive letter, follow the steps for the workstation's version of Windows:

- **Windows 2000 and XP:**
 - a. Right-click on the Windows **Start** button, then click **Explore** on the shortcut menu. **Windows Explorer** launches.
 - b. Click the **Tools** menu, then click **Map Network Drive**. The **Map Network Drive** dialog box appears.
 - c. In the **Drive** drop-down list, click the planned drive letter.
 - d. To the right of the **Folder** box, click **Browse**. The **Browse** dialog box appears.
 - e. Navigate to and click the **ACTSHARE** folder on the server. Click **OK** to close the dialog box and save the path.
 - f. Select the **Reconnect at logon** check box.
 - g. Click **Finish** to assign the mapped drive letter.
- **Windows NT 4.0:**

- a. Right-click on the Windows **Start** button, then click **Explore** on the shortcut menu. **Windows Explorer** launches.
 - b. On the **Tools** menu, click **Map Network Drive**. The **Map Network Drive** dialog box appears.
 - c. In the **Drive** drop-down list, click the planned drive letter.
 - d. In the folder hierarchy display in the lower portion of the **Map Network Drive** dialog box, navigate to and click the **ACTSHARE** folder on the server. The path to it will appear in the **Path** box when clicked in the folder hierarchy display.
 - e. In the **Connect As** box, enter the user name of the user who will be logging on to the network to access the ACT! database.
 - f. Select the **Reconnect at logon** check box.
 - g. Click **OK** to assign the drive letter.
- **Windows 95, 98, and ME:**
 - a. Right-click on the Windows **Start** button, then click **Explore** on the shortcut menu. **Windows Explorer** launches.
 - b. In the right pane, open either **My Network Places** or **Network Neighborhood** (varies with different versions of Windows).
 - c. Navigate to and click the **ACTSHARE** folder on the server. The files in that folder will appear in the right pane.
 - d. Right-click on the **ACTSHARE** folder, then click **Map Network Drive** on the shortcut menu. The **Map Network Drive** dialog box appears.
 - e. In the **Drive** drop-down list, click the planned drive letter. The **Folder** box will already contain the path to the **ACTSHARE** folder.
 - f. Select the **Reconnect at logon** check box.
 - g. Click **Finish** to assign the drive letter.



Note: The drive letter must be the same on all workstations to ensure that shared attachments can be accessed from all workstations, and to simplify database administration. *Plan the drive letter assignment before setting up workstations.*

2. Set the default database folder to the database folder on the server:
 - . Launch ACT!.
 - a. On the **Edit** menu, click **Preferences**. The **Preferences** dialog box appears.
 - b. Click the **General** tab.
 - c. Under **Default locations**, click **Database** in the **File type** drop-down list.
 - d. Click **Browse** to the right of the **Location** box below the **File type** drop-down.
 - e. Locate the drive letter that was just mapped in the previous step. Locate the **DATABASE** folder on the network drive, click it, and then click **OK**.
 - f. Click **Apply** and then **OK** to close the dialog box and save the setting.
3. Open the network database by clicking **Open** on the **File** menu. The **Open** dialog box appears, showing the contents of the **DATABASE** folder on the network drive. Click the database, and then click **Open**.

Running ACT! on the Server

If the server is also going to be used as an ACT! workstation, follow the same steps as **Setting up the Workstations**. This is done so that every machine's setup is the same for purposes of files being attached to contacts, as well as other functions that rely upon the file path being the same. When finished, the server will have a network drive letter mapped to the database that is actually stored locally.

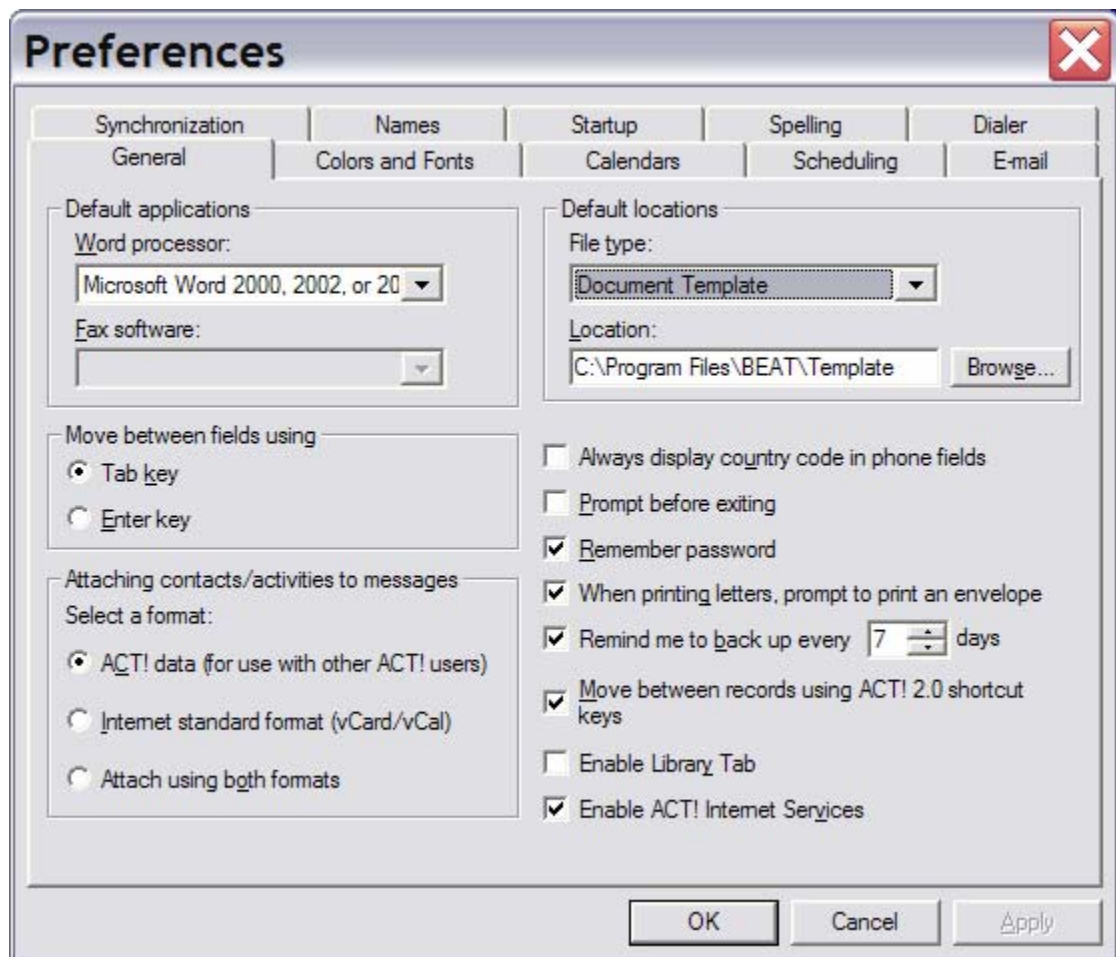
Sharing the supplemental BEAT files

Please move a copy of all of the folders contained within "C:\Program Files\BEAT"

In addition to the BEAT database the following folders contain items customized for BEAT:

- **Document** - Letters written using Microsoft Word)
- **Templates** - Templates used for writing letters and performing mail merges
- **Layout** - The database layouts
- **Macro** - Macros
- **Query** - Custom Queries
- **Report** - Report, label, and envelope templates

1. On the **Edit** menu, click **Preferences**. The **Preferences** dialog box appears.



2. Under the General tab, in the **Default locations** section, click the file type you want to share on the server in the **File type** drop-down list.
3. Click **Browse** to the right of the **Location** box below the **File type** drop-down.
4. Locate the drive letter that was previously mapped. Locate the folder copied to the **network** drive in Step 1, click it, and then click **OK**.
5. Click **Apply**, and then **OK** to close the dialog box and save the setting.
6. Repeat Steps 1 through 7 each file type to be shared on the server.
7. Repeat Steps 2 through 8 for each workstation accessing the shared folders.

Note: All workstations, including the server if it is being used as a workstation, must access the shared folders through the same mapped drive letter.