

Sharing your local data

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Each installation of the Quotation Tool has its own local database. FlexLink data is copied into the local database using the web update function from a central repository (our ERP system). But any other data (hour prices, settings, local items etc.) is only stored in the local database.

Hence only one person should administer this data to avoid having different data on different user's machines.

The administrator has access to the menu item "Basic data" and by this has the ability to create/update/delete data from the local database.

This article describes how to share your local database with your colleagues.

Note:

You can only share your database with colleagues within the same unit. If you try to share the database with someone from another unit he/she could run into problems as he/she probably does not have the same currency.

The first thing you need to do is to add some data to your local database. Click on the "Basic Data/Program Parameters/Hour cost". Enter a cost/price on each hour type and press "Done".

Congratulations! Now you've actually saved some data in your local database.

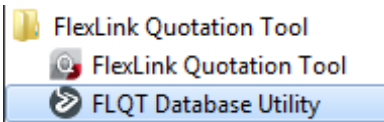
Now before you do anything else; open the web update dialog, make sure that all options are selected and press "Update".

This ensures that you have all the latest product data, customer data etc. in your local database.

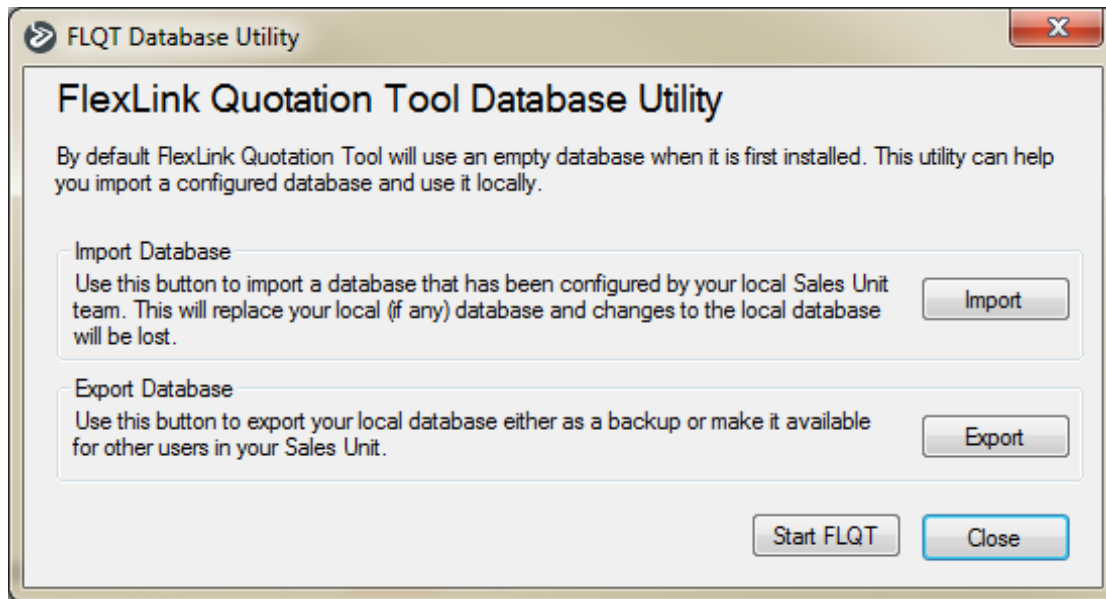
Time to share it with your colleagues

Note: Before you share your database. Make sure that you do not have Quotation Tool in "Automatic log in" mode. You most likely do not want to share your automatic login with your colleagues. You can disable auto login by setting "Automatic log in" to False in Tools -> Settings -> Global Settings

The easiest way to share database that works straight out of the box is to use the Quotation Tool Database utility found in the start menu. Before launching this application, make sure that you've closed down the Quotation Tool.



Open the application and press the "Export" button.



Save the file (.sdf) on a USB drive or a network drive.

Done!

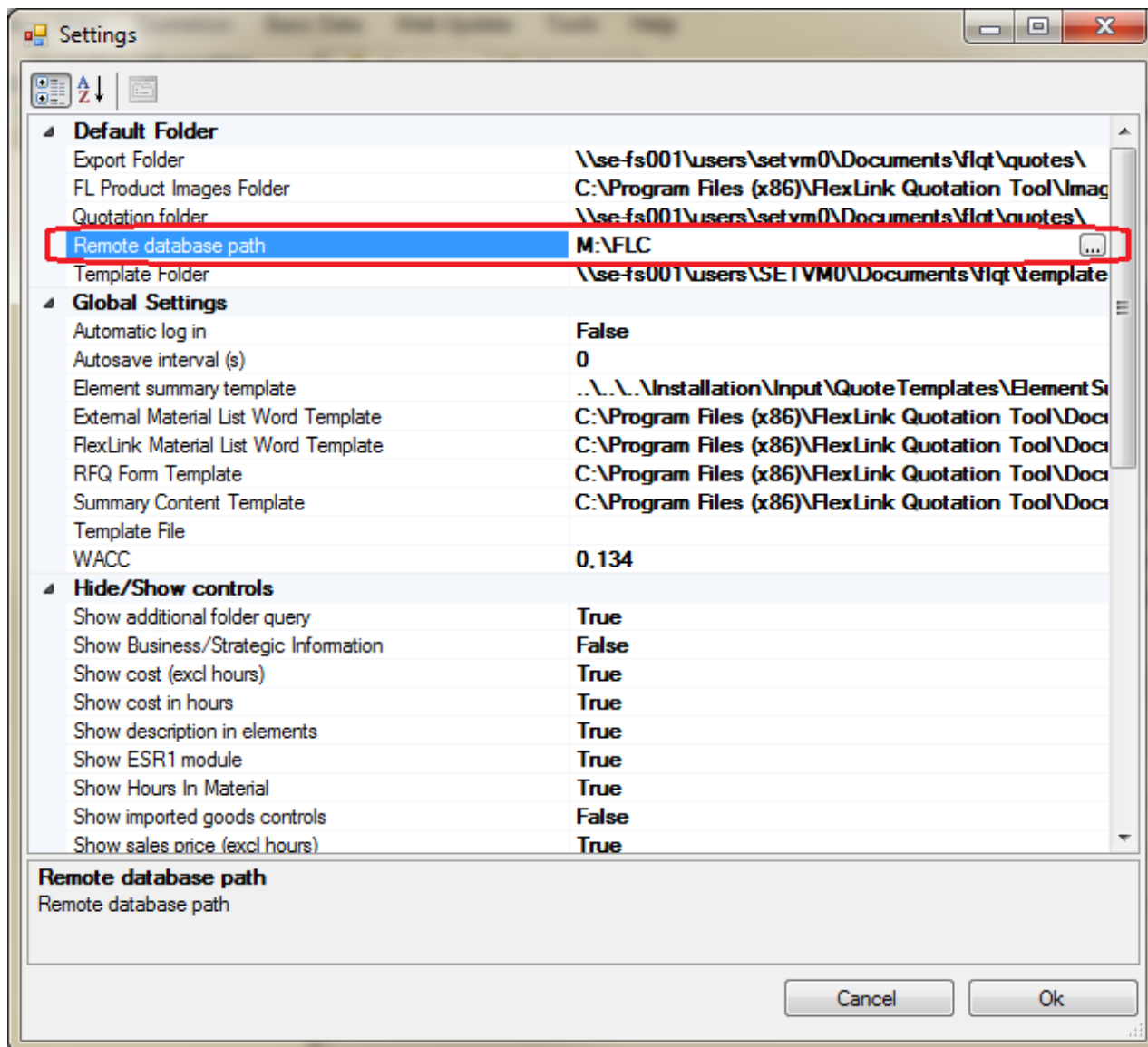
Now you can hand over the USB to your colleague so that he/she can use the Database utility application to do an import (just click on the "import" button and point out the SDF file).

Automating the process

The obvious drawback with the process described above (using a USB stick) is that it's difficult to make sure that everyone involved has the latest database version. So to make life a bit easier there's actually a way to automatically distribute the database.

The way that this is done is to have a network folder where the database is stored that the Quotation Tool will check once started to see if there's any database update available.

To do this; before exporting the database using the database utility, open the Tools/Settings dialog.



Click on the "Remote database path" button (on the right) and point out a network folder that you will use to store the database file. Please note that everyone using the Quotation Tool within your group must have access to this folder for this to work.

Click "ok" to save the changes.

Now distribute the database file using the Database utility tool (and a USB stick, network drive or your storage area of choice).

Once all your users have the new database file the Quotation Tool will look in the folder specified for any database whose name differs from the current database's name. Which mean that in the future you'll only have to export the database file to the folder you've defined before and each time someone opens up the Quotation Tool they will be asked if they want to update their database.

So the next time you want to update the database you'll have to do the following.

1. Do any changes that you want to do.
2. Do a web update of all central data (products, customers etc) to ensure that your db is up to date.
3. Delete any existing database file from your network folder (the one defined as "Remote folder" in

settings), there can only be one!

3. Use the db utility and export the file to the network folder defined in the settings dialog.

4. Naming is extremely important. The name of the new database file must be unique so that the Quotation Tool client sees that the database has been updated. We suggest you name the file date_flqt.sdf (sdf extension is a must). If you have to update the db several times in a single day, use a prefix or suffix (e.g. 20150101_2_flqt.sdf).

5. Restart the Quotation Tool on your own machine, you should be asked if you want to update the database.

Done! Now all your colleagues will be asked if they want to update their db the next time they start their application.

For more information about Basic Data and how to set up your database, please refer to the user guide found in the "Help" menu inside the Quotation Tool.