

ConcourseSuite Offline v1.0

Installation & Setup



Requirements

Pick your software requirements

ConcourseSuite Offline works on a number of platforms. This means that you can choose what works best for you.

Operating System
Linux
Mac OSX
Microsoft Windows
Sun Solaris

Java Virtual Machine
Sun or IBM Java 1.5
Sun or IBM Java 1.6

Desktop Java
Java Web Start Technology

ConcourseSuite Setup (for offline use)

Download the ConcourseSuite .war and ConcourseSuite Offline .war and deploy both the applications to your web server. If you are upgrading ConcourseSuite follow the upgrade instructions described in the CRM Installation, Setup and Maintenance document.

Login into ConcourseSuite with administrator privileges and now you are ready to setup the ConcourseSuite application for offline use.

1. Navigate to Admin > Configure System and click on the 'Edit' link next to the parameter -- Concourse Suite Offline Installer URL.

	Parameter	Current Value
Edit	Company Information	Centric CRM
Edit	HTTP-XML API Client Manager	Total # of enabled clients 4
Edit	Email Server	127.0.0.1
Edit	Email Address	ananthrb@centriccrm.com
Edit	Concourse Suite URL	localhost:8080/f-20080201-branch50fixes
Edit	Concourse Suite Offline Installer URL	127.0.0.1:8080/offline -- Disabled
Edit	Fax Server	
Edit	Asterisk Server	
Edit	XMPP Server	Disabled
Edit	LDAP Server	ldap://127.0.0.1:389 Disabled
Edit	Default Time Zone for new users	GMT-5 Eastern US
Edit	Default currency for system	United States Dollar (USD)
Edit	Default language/locale for system	English - US
Edit	Default country for system	UNITED STATES

2. Click on the checkbox to enable offline use and specify the URL to point to the ConcourseSuite Offline webapp.

→ Admin > Configure System > Modify Setting

★ Enabling offline will allow users to download Concourse Offline and carry their CRM data while on-the-move. What is the URL to Concourse Suite Offline Installer download?

- The URL must be specific and must exist in your DNS
- If a domain name is not configured, you can specify the IP address, include the full path to get to the Concourse Suite web application.

Offline

Offline: Enable Offline Use

Concourse Suite Offline Installer URL: *
(ex: www.yourcompany.com/offline or crmoffline.yourcompany.com)

3. Once the offline settings form is submitted with offline enabled, you should see a new 'Offline' button on top as shown below



- Determine the users who need offline access to ConcourseSuite server. Modify each user and provide him access via XML-HTTP API (required for offline use) as shown in the figure.

Ananth Balasubramanyam → Admin > View Users > User Details > Modify User

Update Cancel Disable

Modify Primary Information

Unique Username: *

Role (User Group): *

Site:

Reports To:

Access: Allow Webdav Access
 Allow HTTP-API Access (Required for offline use)

Expire Date:

Generate new password: Note: New password will be emailed to the following address: ananthrb@concourse.com

Update Cancel Disable

Details
 Login History
 Viewpoints
 Groups

- Modify roles that need offline access and setup offline permissions for each role. The page displays a list of checkboxes for each permission that is available for offline use. Note that only a few modules are available offline, since ConcourseSuite has a restricted set of functionalities that are available while in offline mode.

Admin > View Roles > Update Role

Update Cancel

Update Role

Role Name: *

Description: *

Configure permissions for this role [Check All] [Clear All]

	[Check All]	[Clear All]	Access/View	Add	Edit	Delete	Offline Access/View	Offline Add	Offline Edit	Offline Delete
System	[Check All]	[Clear All]								
Access to Global Search	<input checked="" type="checkbox"/>		<input checked="" type="checkbox"/>	--	--	--	<input checked="" type="checkbox"/>	--	--	--
Access to My Items	<input checked="" type="checkbox"/>		<input checked="" type="checkbox"/>	--	--	--	<input checked="" type="checkbox"/>	--	--	--
Access to Recent Items	<input checked="" type="checkbox"/>		<input checked="" type="checkbox"/>	--	--	--	<input checked="" type="checkbox"/>	--	--	--
My Home Page	[Check All]	[Clear All]								
Access to My Home Page module	<input checked="" type="checkbox"/>		<input checked="" type="checkbox"/>	--	--	--	<input checked="" type="checkbox"/>	--	--	--
View Performance Dashboard	<input checked="" type="checkbox"/>		<input checked="" type="checkbox"/>	--	--	--	<input checked="" type="checkbox"/>	--	--	--
Mailbox	<input checked="" type="checkbox"/>		<input checked="" type="checkbox"/>	--	--	--	<input checked="" type="checkbox"/>	--	--	--
Tasks	<input checked="" type="checkbox"/>		<input checked="" type="checkbox"/>	--	--	--				
Re-assign Items	<input checked="" type="checkbox"/>		<input checked="" type="checkbox"/>	--	<input checked="" type="checkbox"/>	--	--	--	--	--
Profile	<input checked="" type="checkbox"/>		<input checked="" type="checkbox"/>	--	--	--	<input checked="" type="checkbox"/>	--	--	--
Personal Information	<input checked="" type="checkbox"/>		<input checked="" type="checkbox"/>	--	<input checked="" type="checkbox"/>	--	<input checked="" type="checkbox"/>	--	--	--
Password			--	--	<input checked="" type="checkbox"/>	--	--	--	--	--
Action Lists	<input checked="" type="checkbox"/>		<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	--	--	--	--
Action Plans	<input checked="" type="checkbox"/>		<input checked="" type="checkbox"/>	--						
Dashboards	<input checked="" type="checkbox"/>		<input checked="" type="checkbox"/>	--	--	--	<input checked="" type="checkbox"/>	--	--	--

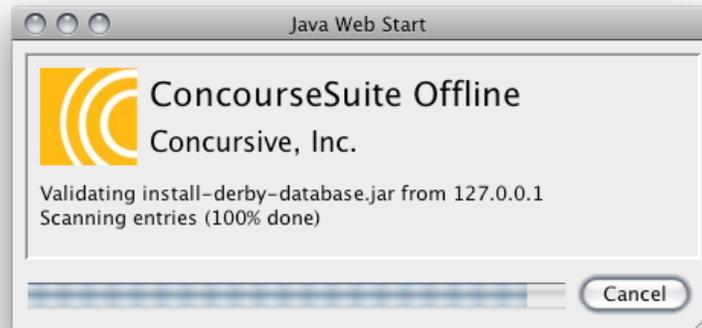
ConcourseSuite Offline Setup

Once the ConcourseSuite server is setup as explained in the previous section, you are now ready to download the ConcourseSuite Offline Installer and setup ConcourseSuite Offline.

1. Login into ConcourseSuite once it is setup for offline use. Click on the 'Offline' button displayed on the top. This will kick-start the Offline installer download via Java Web Start.



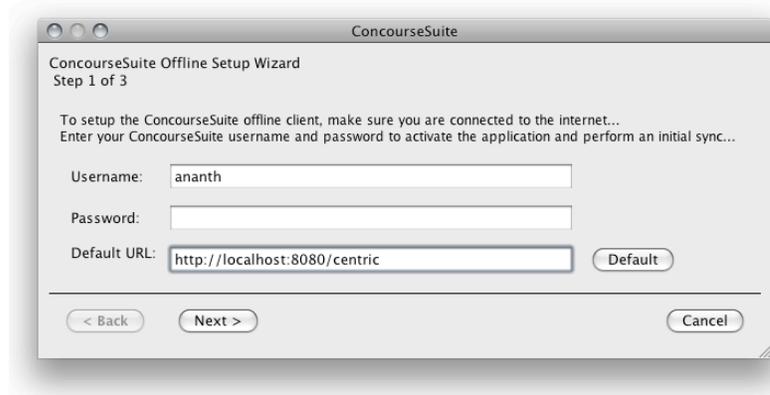
2. The ConcourseSuite Offline download should begin as shown below.



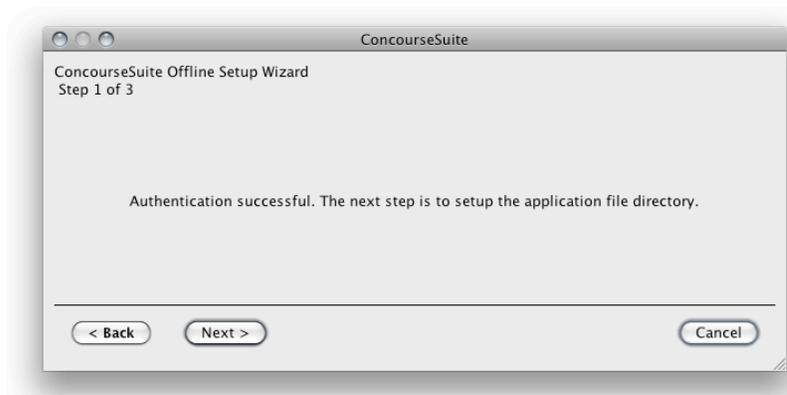
3. Once the offline application download is complete, accept the certificate by clicking on the "Trust" button.



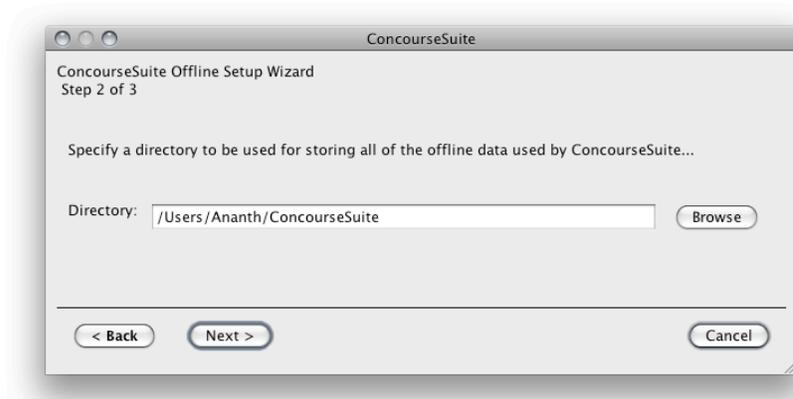
4. Provide your username, password and the URL to the ConcourseSuite Server. User should have access to the XML API as explained in the previous section.



5. The ConcourseSuite server will authenticate the user and confirm that the authentication was successful.



6. The next step is to specify the location on your system where you would like the Offline fileLibrary to be installed. It defaults to the user's home directory. On a windows machine make sure to specify a short file path due to path length restrictions. (eg: C:/Concourse/Offline)



7. The next step is to perform an initial sync with ConcourseSuite server. This will download all the server data onto your local system.



8. Wait for the Offline installer to complete the initial sync successfully.



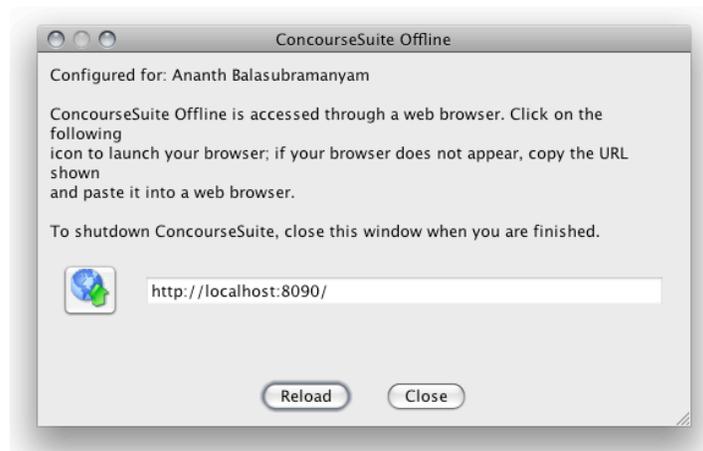
- Once the sync process has been successfully completed, you are now ready to use the ConcourseSuite Offline. Setup a desktop application to access ConcourseSuite Offline.



- A desktop icon is created that can be used to launch Centric Offline in the future.



- ConcourseSuite Offline setup is now complete and you can click on the Globe button to launch Centric Offline in a browser. If you experience any issues during setup, use the "Reload" button which will cleanup the current installation and start the setup process from start.



12. When you launch the ConcourseSuite Offline by clicking on the globe button, a new browser window is opened and you will see the following home page calendar. The “Sync” button on the home page can be used to initiate further sync requests.

The screenshot displays the ConcourseSuite Offline web interface. At the top, the logo 'concourse suite OFFLINE BETA' is visible on the left, and navigation links for Reports, Settings, Print, Help, About, and Logout are on the right. Below the logo, a navigation bar includes Home, Leads, Contacts, Pipeline, Accounts, and Company. A breadcrumb trail shows 'Dashboards > Welcome > Mailbox > Tasks > Action Plans'. The main content area is titled 'Home' and contains a message about offline mode with a 'Sync' button. Below this is a calendar for February 2008, with the 11th highlighted. To the right of the calendar is a section for 'Scheduled Actions for Balasubramanyam, Ananth' showing 'Next 7 Days View' with no pending items. A sidebar on the right contains 'Quick Actions' (Log an Activity, Schedule an Activity, Add a Contact, Add a Lead, Add an Account) and 'My Items' (No items found). A 'Subscribe to web calendar' link is at the bottom left.

concourse suite
OFFLINE BETA

Reports Settings Print Help About Logout

Home Leads Contacts Pipeline Accounts Company

Dashboards > Welcome > Mailbox > Tasks > Action Plans

Home

You are currently logged in using offline mode. Some of the features have been turned off intentionally and may not be available during offline mode. When you regain connectivity, you can perform a sync with your Centric Server to be up-to-date.

Last Synced On: 2008-02-11 15:39:17.838 [Sync](#)

Scheduled Actions for Balasubramanyam, Ananth

Pending Items

Next 7 Days View

Monday, February 11, 2008 (Today)

There are currently no items pending for you.

[Subscribe to web calendar](#)

Quick Actions

- Log an Activity
- Schedule an Activity
- Add a Contact
- Add a Lead
- Add an Account
- More

My Items

No items found

Recent items