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 Concourse-Suite Offline webapp.

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

4. 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.

5. 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.

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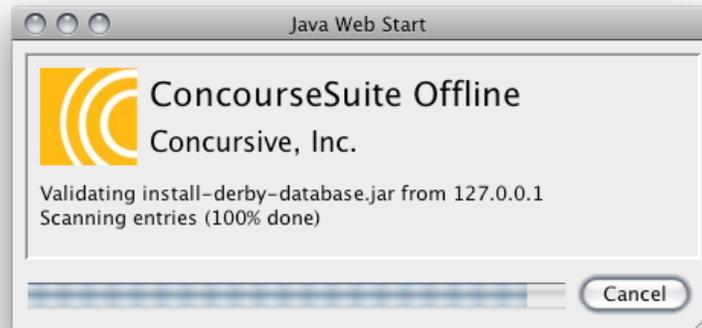
3. Once the offline application download is complete, accept the certificate by clicking on the "Trust" button.

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.
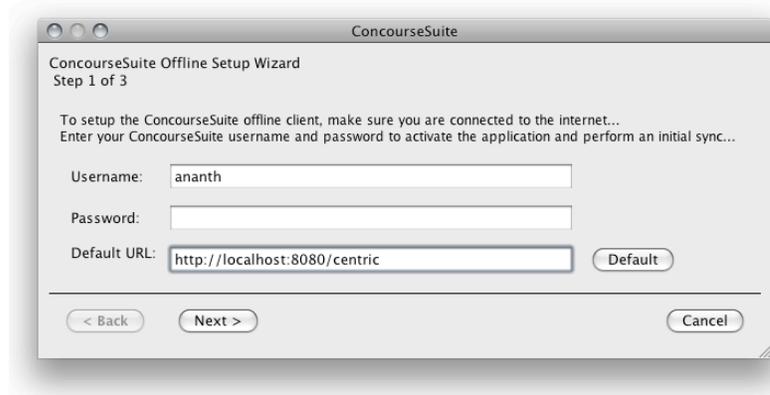
5. The ConcourseSuite server will authenticate the user and confirm that the authentication was successful.
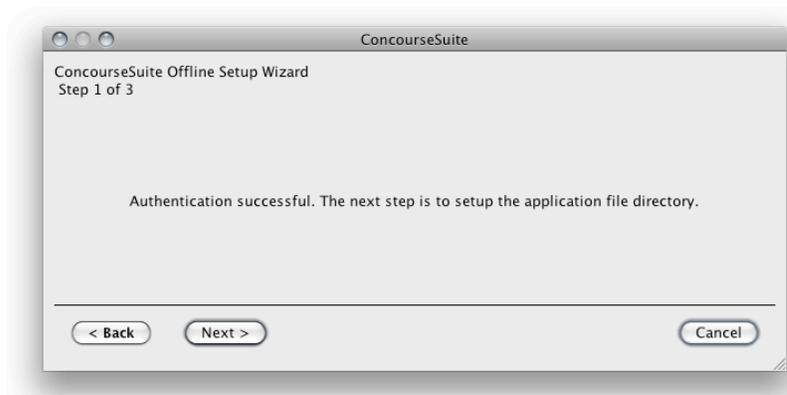
6. The next step is to specify the location on your system where you would like the Offline fileLibrary to be installed. It defaults to the user's home directory. On a windows machine make sure to specify a short file path due to path length restrictions.
    (eg: C:/Concourse/Offline)
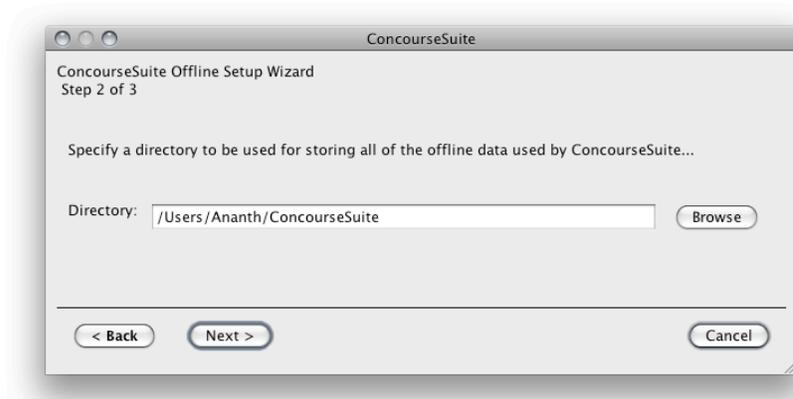
7. The next step is to perform an initial sync with ConcourseSuite server. This will download all the server data onto your local system.

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

9. 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.

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

11. 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 "Re-load" button which will cleanup the current installation and start the setup process from start.
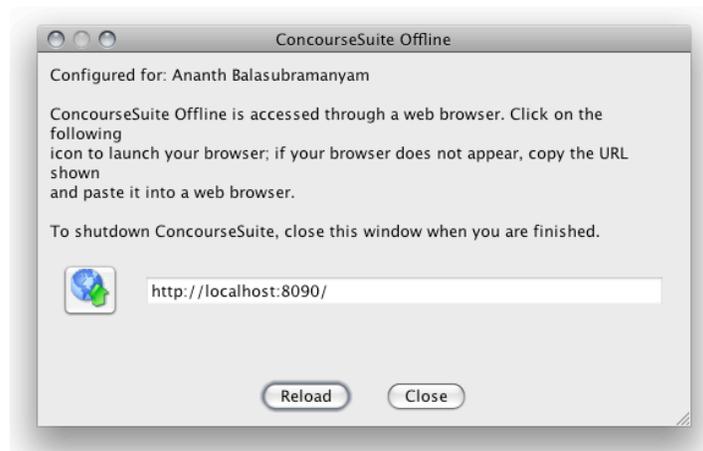
12. When you launch the ConcourseSuite Offline by clicking on the globe button, a new browser window is opened and you will see the following home page calendar. The "Sync" button on the home page can be used to initiate further sync requests.