

## Remote Mappings for PF-Merge

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This document describes how to setup Remote Mapping. By default, mappings data are stored on your local PC. This is known as local mappings (**LM**). If you have many PF-Merge client machines needing to share a common mappings database, you can put your mappings data out onto a “remote” server. This is called “Remote Mapping” (**RM**).

Mappings data has two components, one is in the form of disk files (contained in a “Maps” folder) and the other is in the form of records in a database’s Table “Mappings\_PF”. Both components must exist for mapping to work. Both LM and RM use the same data storage scheme; it is the location of the data storage that differs.

- ⌘ When RM is activated, both components should reside on remote server(s); we recommend that both components be on the same remote server. You should ensure that the servers used are not subject to connectivity problems or systems failure.
- ⌘ For a general discussion of Mappings, press F1 while in PF-Merge to view its online help.

The rest of the document will start with an overview of LM data and RM data before describing in detail how to setup RM.

## Local Mapping (LM) Data Overview

Mappings default mode is LM. All mappings related files must be within the PF-Merge folder, see figure-1. You do not need to do anything for LM to work.

- ⌘ If you need to copy mappings data onto another PC, copy the folders “Maps”, “Schmaps” and “Preferences.pf”. Maps copying are not officially supported.
- ⌘ “Schmaps” pertains to Scheduler’s data. See PF-Merge’s online help for details on the Scheduler.

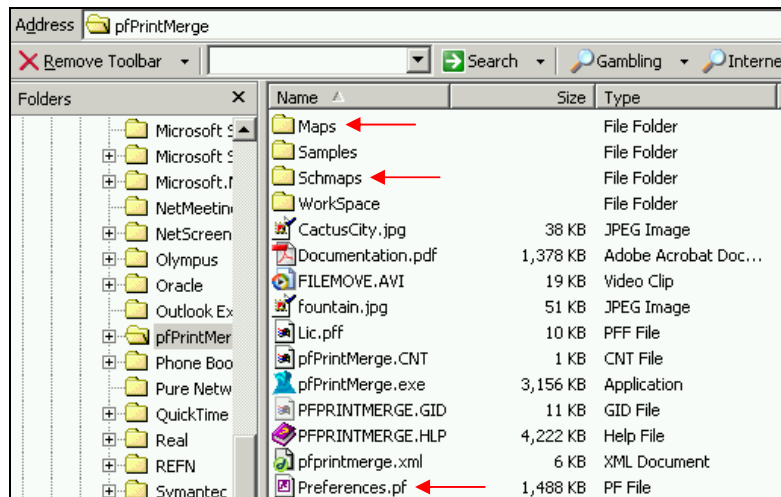


Figure 1 – LM Data Store (see arrows)

“Preferences.pf” contains “Mapping\_PF” Table. “Schmaps” contains Schedules’ data.

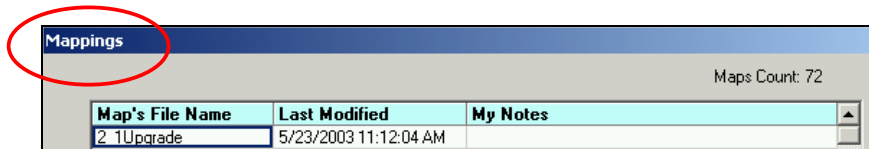


Figure 2 – Mapping Screen’s Title when LM is active

## Remote Mapping Data Overview

RM data must be stored on an enterprise-class database, e.g., MS SQL Server, DB2 and Oracle. You do not need to have a PF-Merge license for the enterprise-class database to use RM.

You can activate either Local Mapping OR Remote Mapping, not both simultaneously. LM is activated by default. You do not need to do anything manually to activate LM. See LM Data Overview above for details.

RM must be activated manually. Prior to its activation, you also need to perform a one-time setup to specify the location of the two components mentioned above.

If RM is activated successfully but it failed to find its data sources subsequently, PF-Merge temporarily fallback to LM to enable you to continue to use PF-Merge's Map feature. When the RM data is available again, your LM's data will be overridden by the remote data (when you launch the Mapping screen, figure-4).

- ⌘ Situations that caused remote data to be unavailable includes the server/database being down, network connectivity problems, "Maps Folder Location" (see figure-6) is not setup or not restarted automatically when the local machine is rebooted (see figure-A1).
- ⌘ If remote mappings data were inaccessible and you had saved new mappings locally, the latter will be overridden when the former is online again. If you want to avoid this situation for *one* particular map saved locally, you can first unplug your network cable, load the locally saved map onto PF-Merge's screen, reconnect the network cable and then resaved the map again. If you do the above, you would be resaving the map to the remote server, thus retaining the work done for the *one* map created and saved under LM mode.
- ⌘ If you are using LM only, the mappings screen's title is "Mappings" (figure-2). If you are using RM, but connectivity with the remote server was lost, the title is "Mappings (Local)", see figure-3, because you are temporarily operating under LM. When RM is activated and is working normally, the title is "Mappings (Remote)", see figure-4.



Figure 3 – Mapping Screen's Title when RM is active but connectivity was lost

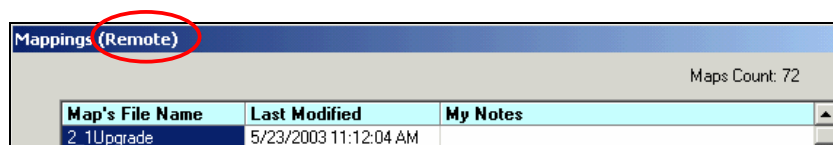


Figure 4 – Mapping Screen's Title when RM is active and connectivity is good

- ⌘ If you activated RM, we recommend that your “Maps” folder and PDF files be located on the same server, e.g., “C:/pfMerge/Forms” on the server and then use Windows Explorer to map that remote C-drive to each client’s PC as “P:/pfMerge/Forms/”. This way, the mappings saved by each client (on P-drive) will remain valid for use by another client. Figure-5 shows a typical Windows Explorer setup on a client PC, where Z-drive maps to the parent folder of “Maps” folder and P-drive maps to PDF forms.

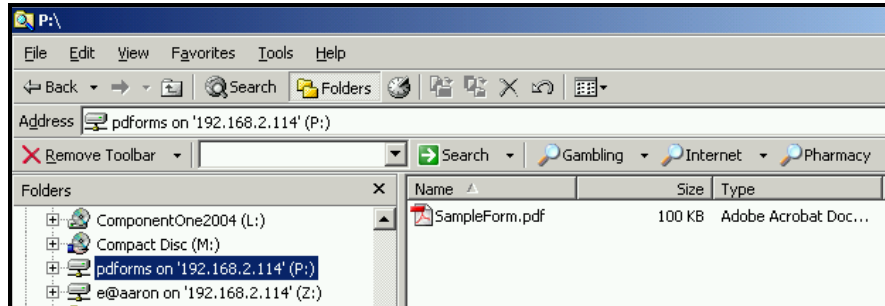


Figure 5, P-Drive contains PDF forms; Z-Drive contains mapping data

## REMOTE MAPPINGS SETUP

Remote mappings setup is accessed via PF-Merge > Ctrl+M, then click the  icon. RM Setup should be done once only.

- ⌘ RM should be setup by a systems administrator. RM setup is a password protected area on licensed PF-Merge. Systems administrator (SA) can obtain the password by emailing [support@pureforms.com](mailto:support@pureforms.com), with your serial#. Licensees are responsible for ensuring that non-SA does not contact us for the password, e.g., by providing us your SA names and email addresses in advance. SA should secure their database with a more secure scheme via database tools.
- ⌘ The Eval version has no password restriction to RM setup.

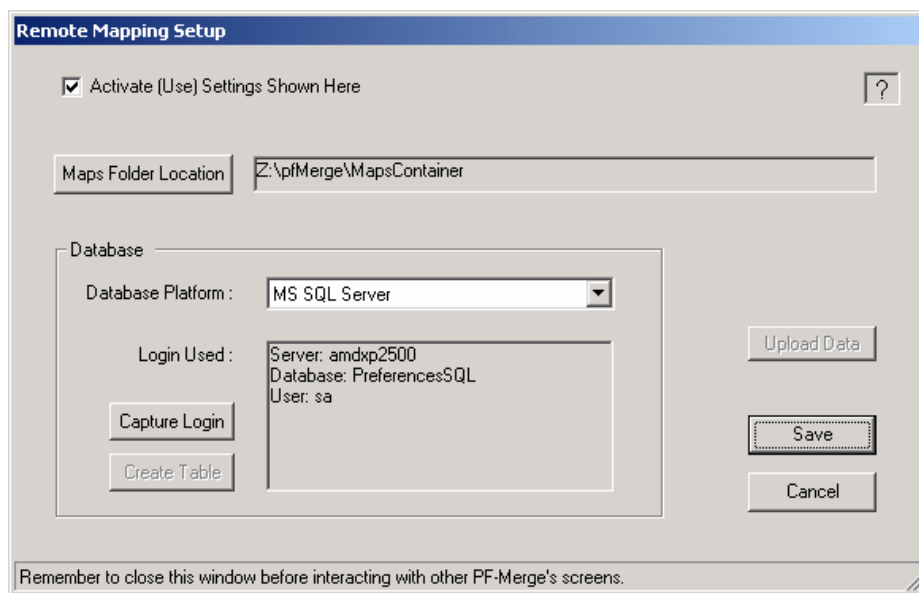


Figure 6. Remote Mappings Setup.

### **Activate (Use) Settings Shown**

Tick the checkbox to enable RM, un-tick it to disable RM.

- ⌘ When disabled, LM will be activated by default.

### **Maps Folder Location**

Specifies/browse to the *parent* folder of the “Maps” folder.

- ⌘ The parent folder is a network mapped folder. You use Windows Explorer to setup network folder/mapping. Ask your network administrator for assistance on mapping network folder/drive.
- ⌘ The folder “Maps” contains disk files pertaining to mappings, i.e., component#1 that was mentioned above.
- ⌘ “Maps” folder is found in your PF-Merge folder if you are using LM (see figure-1). For RM, the “Maps” folder will be relocated to a remote server to serve as the master version. Your local

PF-Merge folder will continue to have a “Maps” folder, which is a copy of the master version. The copy is automatically maintained by PF-Merge.

- ⌘ When using <Maps Folder Location> button to browse, you select the parent folder where the “Maps” folder will reside. Do not select the “Maps” folder itself, even if it already exists on the remote server. The “Maps” folder will be uploaded from the local machine to the remote server when you use the <Upload Data> button, below.
- ⌘ Some of the files in the “Maps” folder are hidden files.
- ⌘ You create a parent folder at the remote server and give it a mnemonic name, e.g., “MapsContainer”. PF-Merge’s “Maps” (child) folder will be contained inside “MapsContainer”. At the client PC, you first use Windows Explorer to map “MapsContainer” as a local lettered drive, e.g. “Z:/pfMerge/MapsContainer/”. Then click the button “Maps Folder Location” to browse and select “Z:/pfMerge/MapsContainer/”. Do not browse to “Z:/pfMerge/MapsContainer/Maps”, even if somehow “Maps” folder is already there.
- ⌘ You should set Windows Explorer to reconnect to “Z:/pfMerge/MapsContainer/” every time you reboot your client PC, see figure-A1.
- ⌘ You should use a letter late in the alphabet, e.g. use “Z” and not “F”. This is to ensure that all your client machines are able to use the same lettered mapped drive. If you use “F”, some machines may already be using “F” drive for purposes other than for PF-Merge.
- ⌘ We recommend that you do not store the Maps folder and your PDF forms under the same parent folder because you may accidentally delete the Maps folder when you were just intending to delete all PDF forms. Your Systems Administrator should routinely backup the remote server’s mappings data as a safety measure.

## Database Platform

Select the database platform that will contain the mappings data Table, “Mappings\_PF”.

- ⌘ You can select any supported enterprise-class database platform; it need not be the same PF-Merge platform you were licensed. As of PF-Merge v2.8, only MS SQL Server is supported.
- ⌘ E.g., you purchased multiple Excel or Access licenses. You can put your remote mappings onto MS SQL Server, Oracle or DB2 databases for Excel users to share the common mappings. Typically, only PF-Merge licensees of enterprise-class platforms would want to activate remote mappings. E.g., you purchased PF-Merge for MS SQL Server and want to store “Mappings\_PF” under MS SQL Server, an enterprise-class database.

## Login Used

The login information used to login to your mappings database. The information is acquired by clicking the <Capture Login> button, below.

- ⌘ Password is not shown. If login user or password has changed, use Capture Login again.
- ⌘ We recommend that you create a separate database dedicated for PF-Merge use. Mapping record does not take up much space, although space usage is proportional to the number of mapping records saved.
- ⌘ **During RM setup, the login user should have Create Table and Insert Record database rights.** Ask your Database Administrator for assistance on access rights. Once setup is completed, you can (optionally) use your database administrative tools to downgrade the rights to Insert/Select(read) Record only.

## Capture Login

The “Login Used” information is captured using this button. Before you click this button, you should click “Select Database” in PF-Merge’s main screen, and then login to the target mappings database. Once login successfully, click Capture Login immediately.

### **Create Table**

Click this button to create “Mappings\_PF” and “Schedules” tables at the mappings database shown in Login Used above.

### **Upload Data**

Click this button to upload local machine’s mappings data to (empty) “Mappings\_PF” and “Schedules” Tables of the remote server/database. The “Maps” and “SchMaps” folders of your local machine will also be copied over to the target “Maps Folder Location”, see above.

- ⌘ <Upload Data> should be done once only, during initial RM setup. It is not meant as a synchronizing tool between local and remote mappings data, e.g., when remote mappings data was offline and you want to upload local mappings data when remote data is back online.
  - ⌘ Click <Upload Data> only after you have created the table via Create Table above.
  - ⌘ Upload Data is optional; if it is not done, you will start with blank RM data.
  - ⌘ If you are uploading data, perform it from a PF-Merge machine that has the most valuable/complete LM data.
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- ⌘ Both Create Table and Upload Data should be done once per server only. I.e., you only do that from one client machine. Do not repeat Create Table and Upload Data from the other PF-Merge clients’ PC.

### **Save**

Click this button to save all changes made on the screen.

- ⌘ Both Create Table and Upload Data made are effective immediately; you do not need to click Save button for them to be effective.
- ⌘ You can save changes without activating RM, i.e., without checking the checkbox “Use Settings Shown Here”.

### **Cancel**

Click this button to cancel all changes made on the screen.

- ⌘ Both Create Table and Upload Data are not affected by Cancel.

You use Windows Explorer to map network folder/driver. To map network folder/driver at the client PC, you will first need to share that target folder/driver at the server. Once shared, go to the client PC and perform the steps illustrated in Figure A-1 and A-2.

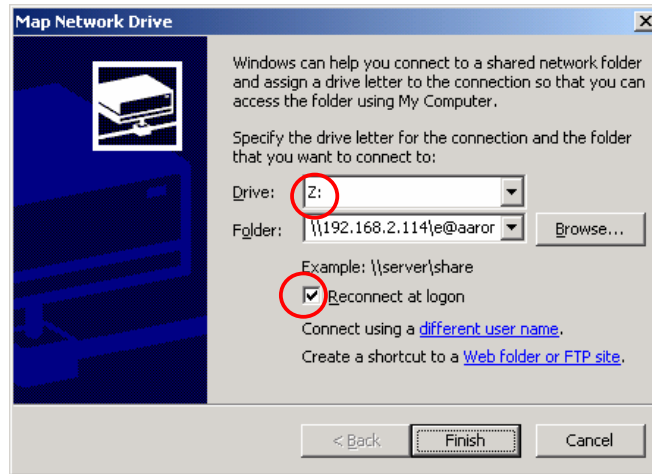


Figure A-1. Windows Explorer mapping network folder/driver at client PC

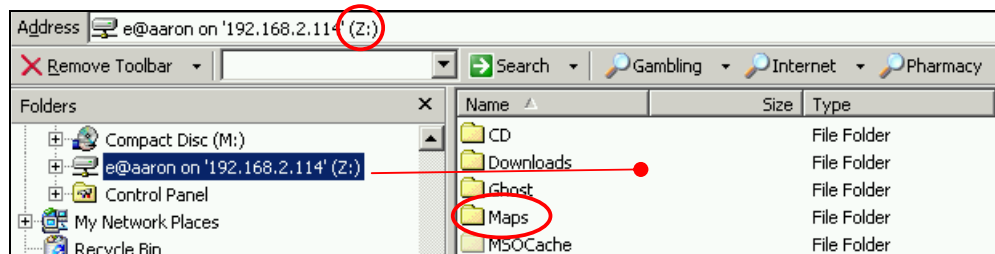


Figure A-2. Local PC's Z-drive shown mapped to remote server