Roaming Users (Legacy)

SYSPRO Technical Article

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SYSPRO™

SYSPRO Help and Reference

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Introduction

Roaming User support in SYSPRO is introduced as a concept and the most recent technologies to support this are described in a separate technical guide: **SYSPRO 8 – Roaming Users**, available from the **Resources** - **Technical Guides** section of the SYSPRO 8 Help website.

This document describes how to setup **Windows** for 'Roaming Profiles' so that the user's application data folder is persisted and restored between Windows sessions. This is an older technology than 'user profile disks' described in the technical guide mentioned above – however can still be used if required.

Prior to **SYSPRO 8 2019 R1**, the only method of setting up SYSPRO to store it's '`Settings`' folder in the user's application data folder was to edit a registry entry on each client.

This technology is still supported for backward compatibility and is described more fully in this document.

SYSPRO Roaming Users

ROAMING USER OPTION WITHIN ACTIVE DIRECTORY

A user has to sign into a domain environment in order to make use of the roaming user option. Users also have to be configured with the roaming user option from within **Active Directory**.

In order to implement SYSPRO roaming profiles each roaming user needs to be associated with a profile from within Active Directory. This will be elaborated on shortly.

USER PROFILES

A user profile contains global settings and configuration options that are linked to a particular user account.

User profile settings are stored in various sub-folders under the folder:

`C:\Users\{User}`

Where '`{User}`' is the username used to login to Windows.

The `AppData` folder contains application settings, files, and data specific to the applications on your PC – including SYSPRO settings.

The folder is hidden by default in **File Explorer**, and has three hidden sub-folders:

- **Local**
  This folder contains data that can't move with your user profile. This data is typically specific to a PC or too large to sync with a server.
  For example: Web browsers usually store their temporary files here.

- **LocalLow**
  This folder contains data that can't move, but also has a lower level of access.
  For example: If you're running a web browser in protected or safe mode, the app will only be able to access data from the **LocalLow** folder.

- **Roaming**
  This folder contains data that can move with your user profile from PC to PC.
  For example: If you sign in to a different PC on a domain, your web browser favorites or bookmarks will be available. In addition, when configured appropriately, SYSPRO 'Settings' are stored in this folder.

CONSIDERATIONS

- Profiles can either be local or roaming.
- Local profiles are specific to stand alone computers that do not sign into a domain.
- Computers that connect to a **domain** can make use of roaming profiles.
- With a roaming profile, a user's profile is stored on the computer's local hard disk as well as on a central server within a domain environment.
- A roaming user profile is simply a user profile that has been copied to a network share so that a user can access the same profile from more than one computer on the network.
- Roaming user profiles are stored on a central server location within a domain environment.

When a user signs onto the domain, Windows copies the user profile from the central location to the local computer. When the user logs off, Windows copies the profile changes from the client computer to the central storage location. This ensures that the client data follows users as they roam the environment.

Before you can create roaming user profiles, you need to create a shared folder on the server that can store the profiles. You can name the shared folder anything you like.

CONFLICT RESOLUTION

Roaming profile usage is not intended for simultaneous use on more than one device at a time. If a conflict arises during synchronization because a particular data unit was changed on two devices, the system will always favor the value that was written last. This ensures that the app utilizes the most up-to-date information.

If you are logged on to more than one machine at a time, both machines will update your Roaming Profile when you log off. This means that the last machine you log off from will write its changes last and that will be the profile you see on your next logon.

POTENTIAL PROFILE ISSUES

Windows 7 and **Windows 8** use similar user profile formats. However, they are not compatible. When a user with a Windows 7 profile signs on to a Windows 8-based computer for the first time, the user profile on the server will be updated to the new Windows 8 format. The user profile will now no longer be compatible with Windows 7-based computers.

A similar problem existed between **Windows XP** and **Windows Vista/7**. This was mitigated by creating separate profile folders for Windows Vista/7 and XP. The Vista/7 folders used a different naming convention that involved appending a .v2 extension to the folder name. With Windows 7 and Windows 8 both operating systems use roaming profiles with a .v2 extension.

It makes the whole setup procedure easier if the various roaming computers are installed with the same operating system.

IMPLEMENTING THE SYSPRO ROAMING USER OPTION

Third party developers like SYSPRO can make use of the `\AppData\Roaming` folder on the client computer in order to store configuration settings that are specific to their product.

For instance, SYSPRO creates a SYSPRO folder under `\AppData\Roaming` as illustrated in the screen shot below:
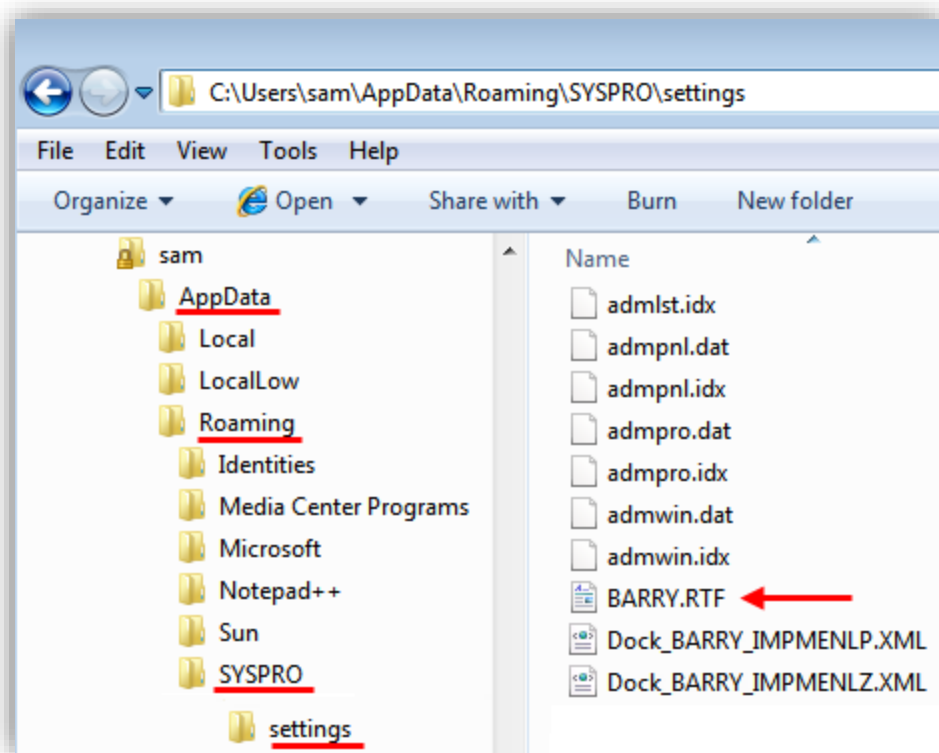
The SYSPRO settings that reside under the `\AppData\Roaming\SYSPRO` folder will be copied across to the corresponding profile on the server. Furthermore, changes made to the SYSPRO settings on the client will be uploaded to the server side profile whenever the user signs off.

The process of how to implement the SYSPRO roaming user platform will be elaborated on shortly.

The following steps need to be implemented to make use of the SYSPRO Roaming User option:

1. A Windows Roaming Profile needs to be configured on the server for each roaming user on the Domain Server.

2. A SYSPRO Roaming User registry entry has to be configured on each roaming SYSPRO client computer.

SERVER SIDE

Before you can create roaming user profiles, you need to create a shared folder on the server to hold the user profiles.

The following has to be configured on the server:

- A shared folder has to be created on a Domain Server in order to accommodate each user's Roaming Profile.

- A Roaming Profile needs to be created in Active Directory for each roaming user.

Each user in Active Directory has a Profile property that can be configured in order to implement the Roaming Profile option for the user. This will be elaborated on shortly.
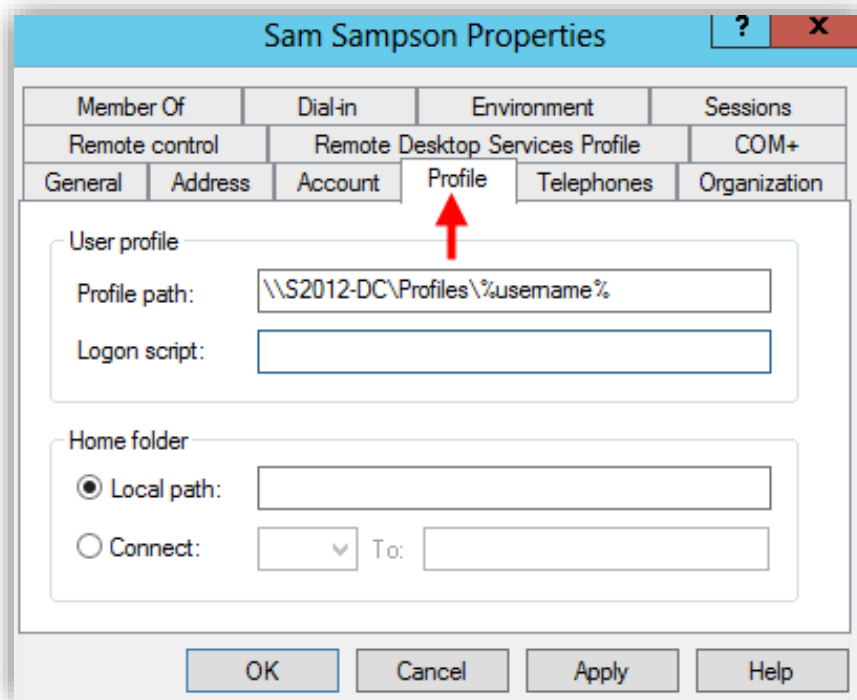
CLIENT SIDE

In order to activate the Roaming User option on a SYSPRO client you need to include a registry string value called `RoamingUser` (illustrated below). This will be elaborated on shortly.
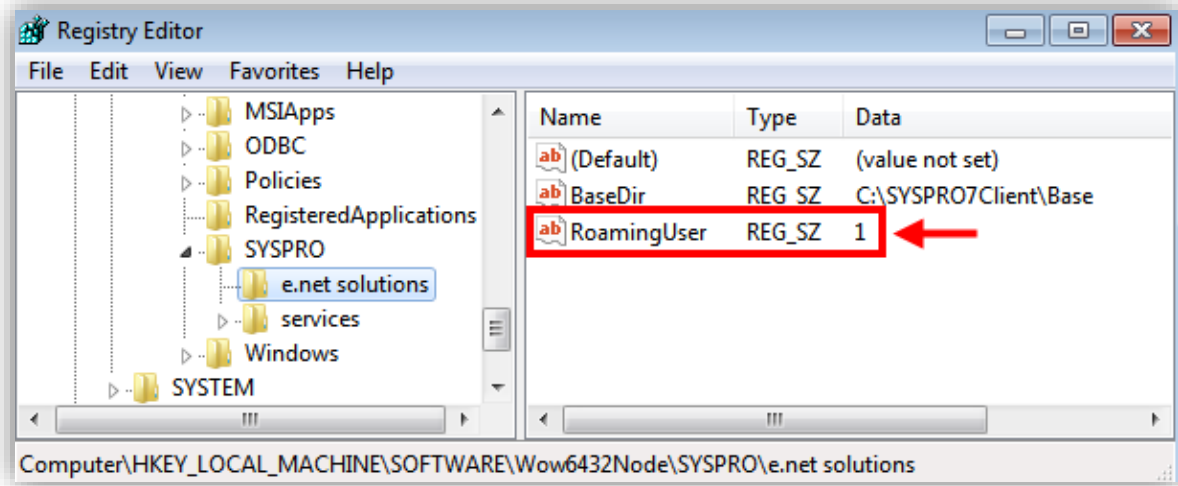
Roaming Profiles (Active Directory)

The following task will demonstrate how to configure Roaming Profiles on a domain controller from within Active Directory.

In order to implement Roaming Profiles you need to create a shared folder on a server that is part of the domain. The shared folder is required to store user profiles.

In this instance we will create the shared folder directly on the domain controller that will contain the user profiles. For the purpose of the exercise we will create a folder called `Profiles` and share it (you can use your own naming convention).

Note: You can hide the folder by adding a Dollar symbol ($) to the end of the folder name e.g. `Profiles$`.

PROCESS TO CREATE SHARED FOLDER TO STORE USER PROFILES

1. Create a folder called `Profiles` on the domain controller (or on another server that is part of the domain).

2. Share the folder with everyone.
   Even though you are giving access permissions to everyone, each user will only have access to their own profile folder. However, administrators will most likely want to implement more stringent access rules.

3. Once the Profiles folder is in place you need to configure a profile for each roaming user.
   On the Domain controller open **Active Directory Users** and **Computers**.

4. Locate an appropriate user.
   In this instance we selected a user called Sam Sampson.

5. Right click on the user and select **Properties**.
   You are presented with the Properties utility screen:
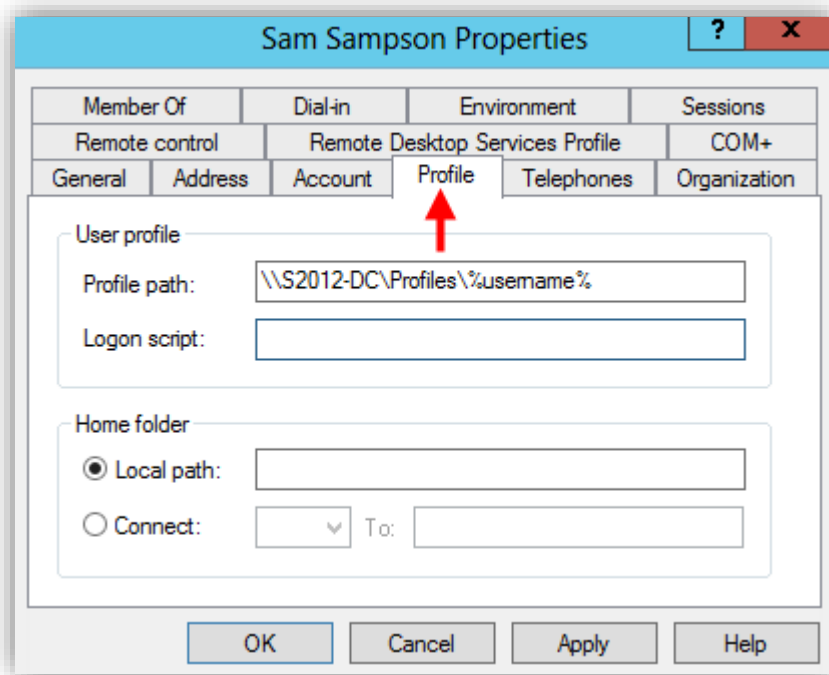
6. Select the **Profile** tab.

7. Enter the Profile path: `\\Server Name\Profiles\%username%.`
   The profile path must be a UNC path.
   Enter a UNC path that relates to your environment.

8. Select **Apply** to save the settings.
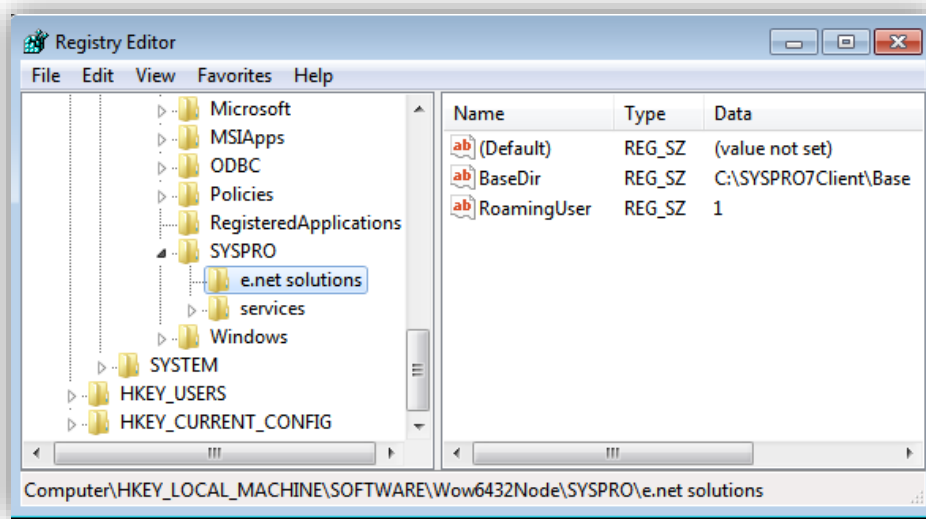
Roaming User Profile (Client Configuration)

This task takes place on the SYSPRO client (workstation).

To activate roaming users on the SYSPRO client you need to define the following registry key:
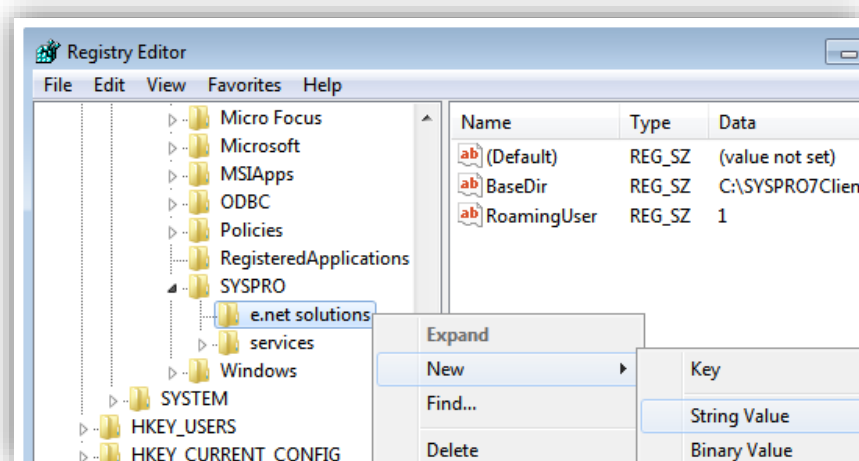
- `RoamingUser`

The `RoamingUser` key needs to reside in:
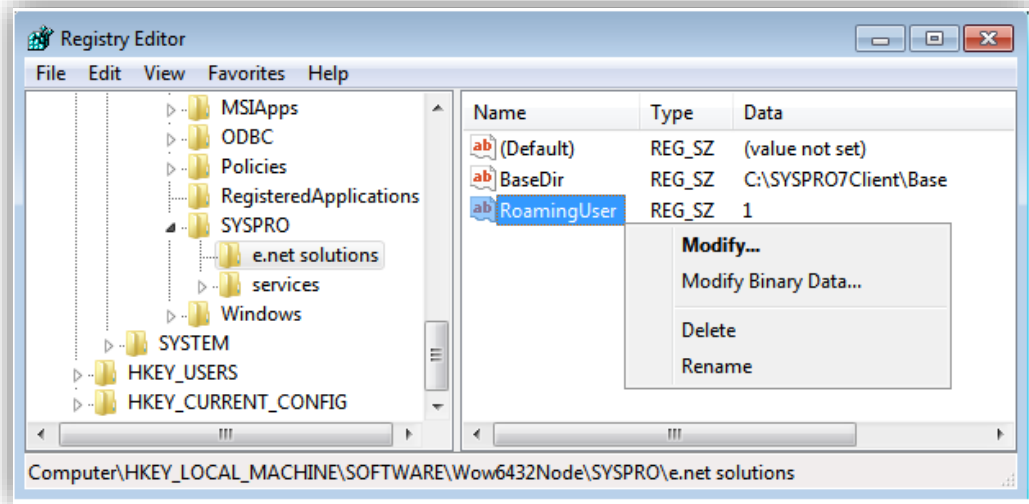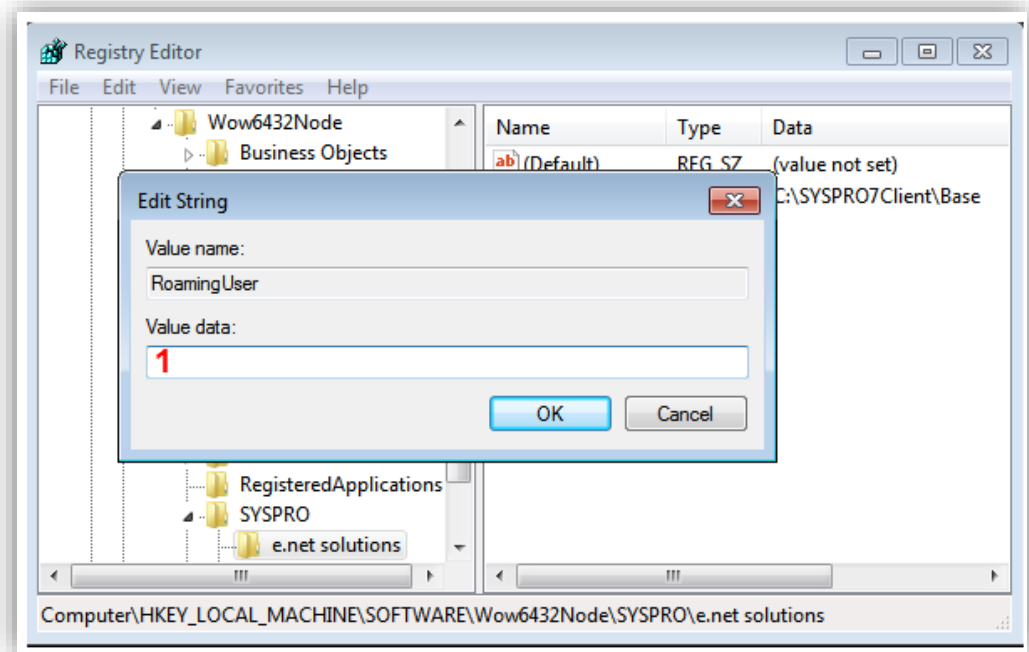`HKEY_LOCAL_MACHINE\SOFTWARE\Wow6432Node\SYSPRO\e.net solutions`

PROCESS

1. Open the registry editor.

2. Navigate to `HKEY_LOCAL_MACHINE\SOFTWARE\Wow6432Node\SYSPRO\e.net solutions`.

3. Right click on e.net solutions:

4. Select **New** -> **String Value** from the drop-down menu.

5. Enter `RoamingUser` as the string value.

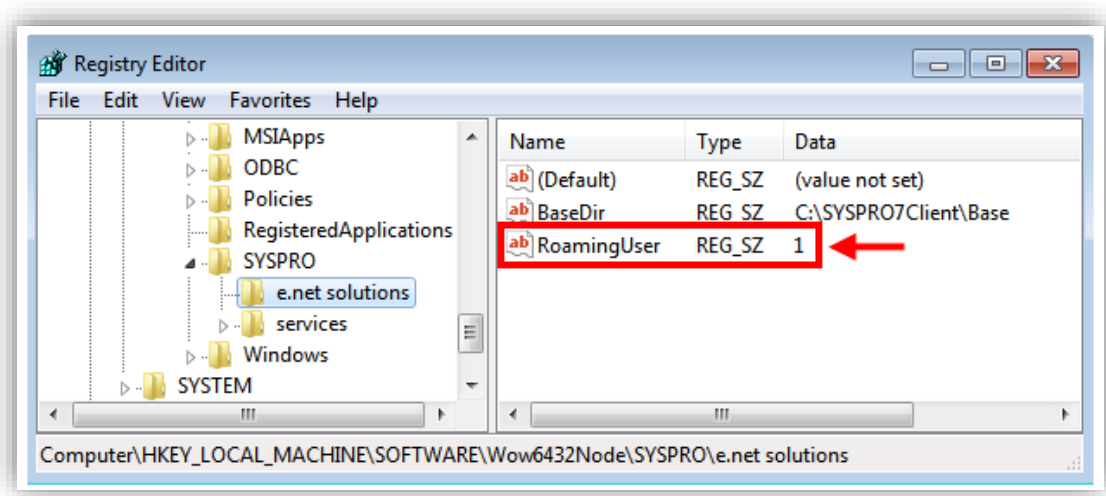6. Right Click on `RoamingUser` and select **Modify**:

7. Enter **1** in the **Value** data field.

8. Click on OK.

   The `RoamingUser` entry will now have a value of **1** as depicted below:

9. Exit the registry.

Note: You need to repeat this exercise on every computer that will be used on the domain by the roaming user.

Roaming User Client/Server Connection

Once the `RoamingUser` option on the client has been configured, the next step that is required is for the user to launch SYSPRO on the client.

When the user connects to SYSPRO the following dialog will be displayed:
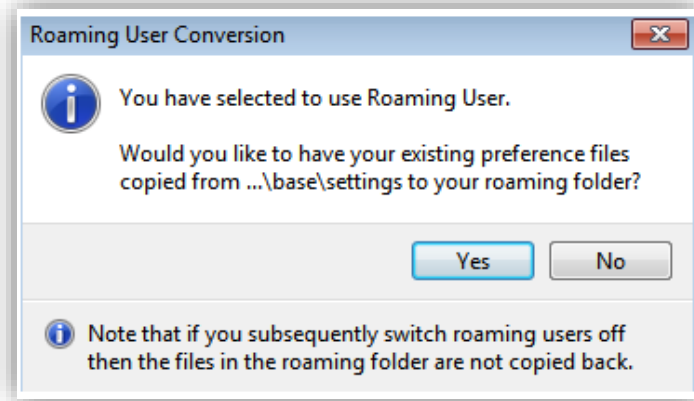

When the user selects **Yes** the `SYSPRO\Settings` folder will be created in the `AppData\Roaming` folder on the client machine.

This is illustrated in the illustration below:
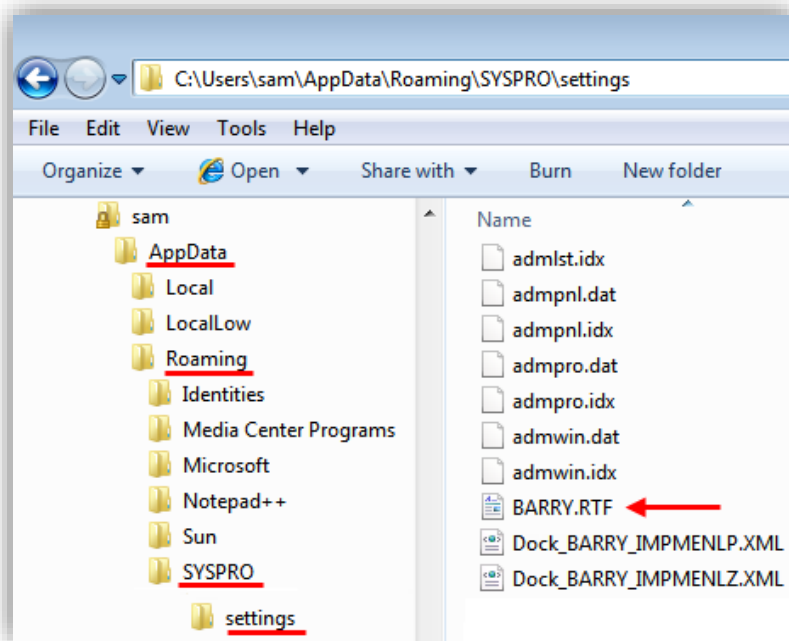
Under the hood, files will be copied from the `SYSPRO7\Base\settings` folder to the `AppData\Roaming\SYSPRO\settings` folder on the client.

Once the files have been copied from the server to the client, the user will be presented with the following dialog screen:
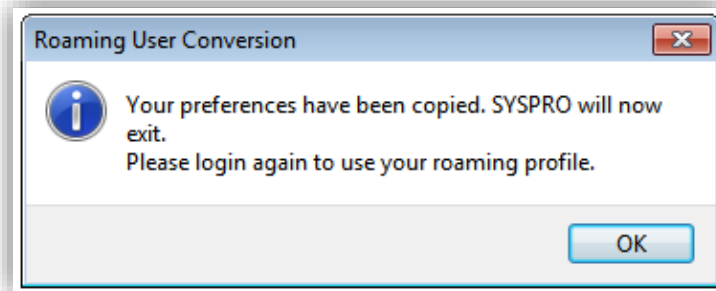

After selecting **OK**, the Roaming User option will have been successfully configured.

The contents of the `AppData\Roaming\SYSPRO\Settings` folder on the client will be updated to the user's profile on the server as soon as the user signs out of the domain.

When the user signs off from the domain, the user's profile will be updated on the server.

The update process will copy the SYSPRO folder from the client to the user's `AppData\Roaming\SYSPRO\Settings` folder on the server. As per the illustration below, it can be seen that under the `Profiles` folder on the server there is a profile folder for user `Sam`. Under the user `Sam.V2` folder it can be seen that the `AppData\Roaming` folder has been updated with the SYSPRO folder that was copied across from the client:
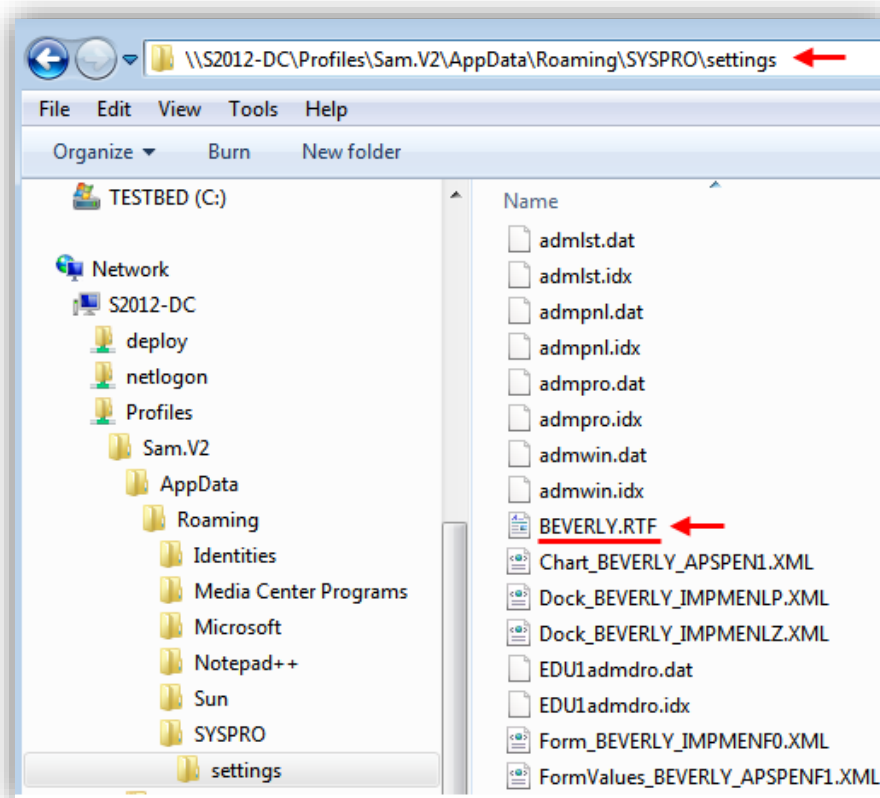
When a user signs on to the domain, Windows copies the user profile from the central location to the local computer.

When the user logs off, Windows copies the profile changes from the client computer to the central storage location. Naturally this will include the SYSPRO settings.

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