

pathways 9 :: multi office considerations

Option 1: Thin Client (Terminal Services)

Far and away the most effective remote access tool for clusters of coordinators wanting a single data source, is to have a central Terminal Server that allows remote users to connect to the server using any internet connection (broadband preferred) and operate Pathways remotely, however connected to a central data file. This functionality is included in all Windows 2000 and Windows 2003 Server implementations out of the box (subject to licencing), or depending on your existing setup can be added via programs such as Citrix Presentation Server or similar.

Advantages:

- 1) Single data file
- 2) Single point of control and configuration
- 3) Easy to add or remove users centrally
- 4) Centralised reporting
- 5) Access from any internet enabled PC (could be home, school, laptop)
- 6) Can be more cost effective if setting up with existing hardware
- 7) Allows remote administration and support by Activ8 to enhance your support services

Disadvantages:

- 1) Requires good internet connections from most sites for most effective use
- 2) Requires an internet connection to function - if it goes down no data access
- 3) Requires appropriate server infrastructure at central office – Windows 2003 with Office 2003 Pro or similar installed and Terminal Services Running
- 4) Can appear slower to the user than the local database option as it is running via the internet
- 5) Makes things like mail-merges and printing locally more complicated as printer drivers for local printers need to be loaded on the central server
- 6) Requires your I.T. support staff to be proficient with Terminal Services already (although we can assist them accordingly where required for Pathways)
- 7) Each user will have access to other user data, even if reporting is separate. Many users and offices like to have their own database system with only their own data. This is more a preference issue.

Recommended Technical Specs for this setup:

- 1) Windows 2003 Server with Dual Processor and 2Gb RAM (or more depending on the number of users)
- 2) Terminal Services setup
- 3) Office 2000 or 2003 Professional (2003 much preferred)
- 4) Broadband connection with sufficient upload speed for remote users (512 MINIMUM)
- 5) Broadband at each site

Option 2: Satellite Sites with Independant Data Files

The most common setup as it is cheaper from an I.T. infrastruture perspective, and also the best for the local Pathways users. In this setup each site has their own Pathways installation on a laptop or designated computer and operates their own local data file. When central data collection is required, users can elect to either run reports and email them, or alternatively send their data files to the central location where the reports can be run there.

Advantages:

- 1) The most common setup in that it is not reliant on internet
- 2) Uses existing I.T. infrastructure in nearly all cases
- 3) Provides the fastest user-experience for the satellite offices as their data is local
- 4) Where laptops are involved allows more portable data access as internet is not needed
- 5) Centralised reporting in the manner which option 1 provides is generally more important in theory than in practice based on our experience unless your organisational processes really support this.
- 6) Report collation is still quite simple if the cluster establishes a set of "favourite" reports which they run on request

Disadvantages:

- 1) Multiple data files
- 2) Need to ensure each site follows backup procedures (very easy in Pathways)
- 3) Central reporting takes additional time (depending on what is required)
- 4) Pathways software costs slightly more than the Terminal Services option

Recommended Technical Specs for this setup:

- 1) See published technical requirements for Pathways
- 2) Office 2003 Professional on all clients (or 2000)
- 3) Windows XP highly recommended
- 4) Broadband at each site