PhonePad Remote Mode Installation Guide



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PhonePad Remote Mode

Installation Guide

by Cybercom Software

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1 Introduction

The purpose of this guide is to show you how to set up PhonePad for *Remote Mode*.

At this point you may be thinking "what is *Remote Mode*"? To explain this we should first have a look at *Local Mode*.

Local Mode

Local Mode is the standard way of setting up PhonePad. When you install PhonePad using the setup program (PHONEPAD4SETUP.EXE), PhonePad is by default installed to run in *Local Mode*. PhonePad on your workstation connects to the PhonePad database located in a shared folder somewhere on your network.



Local Mode

On a *Local Area Network (LAN) or Wide Area Network (WAN)*, the PhonePad database will be in a shared folder on your file server. On a *Peer-to-Peer network*, the PhonePad database will be in a shared folder on your *Host* computer. In both scenarios, the PhonePad database is being accessed using file mode, much like you'd access any other file stored in a shared folder. Although in this case the database engine allows simultaneous multi-user access.

Remote Mode

You may have heard of *Remote Mode* by its other name: *Client/Server. Remote Mode* (or *Client/Server*) operates a bit differently. Instead of connecting directly to the PhonePad database like you do with *Local Mode*, PhonePad instead connects to the PhonePad Server application (DBServer). This is done via TCP/IP as opposed to file mode.



Remote Mode

There is no direct connection between workstations and your PhonePad database. All connections are handled by the PhonePad Server. There are a number of advantages to this approach:

- Improved response times. Direct file mode access can slow performance due to multi-user of the Windows file sub-system.
- **Reduced data corruption**. In *Local Mode* a workstation crash can corrupt your PhonePad data, requiring a repair. The chances of this happening in *Remote Mode* are virtually nil.*
- **Easier Administration**. If you need to upgrade or repair your PhonePad database, all users need to be logged out of PhonePad. This can be a problem with *Local Mode* as you need to contact each user and ask them to log out. With *Remote Mode* it's easy you can just get the server to disconnect all users instantly.

* Corruption can occur if the server machine itself crashes, how ever, the same thing can happen in Local Mode.

2 Setting Up the PhonePad Server

Before you can start using PhonePad in Remote Mode, you need to get the PhonePad Server set up. This only needs to be done once, unless you change the location of the PhonePad database.

For these instructions, it's assumed that you will be performing these steps <u>on</u> your server or host computer.

Step 1 - Install the PhonePad Server.

The first step is to install the PhonePad server.

- 1. Run ServerManager.
- 2. Click the Install Service button. The PhonePad Server will be installed as a Windows service.

Service Setup
Server Settings Server Settings Server Configuration Server Sessions Server Setup Important: Before using PhonePad in Remote Mode, you need to setup the server by clicking the Setup Server button. This only needs to be done once. Remote Data Directory: Server Information

3. Click the button next to the *Server IP Address* field. ServerManager will insert the IP address of the server or host computer you are currently using.

Server Setting	gs		~			
 Server I 	P Address:	192.168.0	.8			
 Server I 	Host Name:				20	
	Main Port:	12005	Admin Port	: 1200	06	
				· \		
		2 P	ing Server			

Step 3 - Enter the Location of the PhonePad Database.

Enter the location of the PhonePad database under Remote Data Directory. The default location is C: \Program Files\PhonePad\Data, but it may be different if you didn't install PhonePad directly on the server or host computer.

nportant: Before using erver by clicking the Se	g PhonePad in Remote Mode, you need to setup the tup Server button. This only needs to be done once
Remote Data Directory	c:\program files\phonepad\data
1	Setup Server 🔁 Test Server

The PhonePad database is created and maintained by the DBUpdate utility. This is automatically run when you do a full install of PhonePad. If you have not yet setup your PhonePad database, or if you want to set it up in a different location, run DBUpdate and specify where the PhonePad database should be located.

Step 4 - Setup the Server.

Click the Setup Server button. Within a couple of minutes or so you should get a message that says the server has been setup.

🧿 PhonePad Server	Manager	
Server Settings Server Settings Server Configuration W Server Sessions Server Sessions Server Log Server Log Server Information	Server Settings Server IP Address: 192.168.0 .2 Server Host Name: localhost Main Port: 12005 Admin Port: 12006 Information Server S The PhonePad Server has been setup. Import server b COK Remot Remot Test Server	Egit

Step 5 - Test the Server Configuration.

Click the Test Server button to test the configuration of the server to ensure that it has been setup correctly.

🚰 PhonePad Server Ma	anager	
PhonePad Server M: Server Settings Server Settings Server Configuration Exerver Sessions Server Sessions Scheduled Events Server Log Server Log	Service Setup Service Setup Server Settings Server IP Address: 192.168.0 .8 Server Host Name: Main Port: 12005 Admin Port: 12006 Main Port: 12005 Admin Port: 12006 Server Setup Important: Before using in onePad in Remote Mode, you need to setup the server by clicking the Setu: Server button. This only needs to be done once. Remote Data Directory: Server Button. This only needs to be done once. Remote Data Directory: Server Button. This only needs to be done once. Remote Data Directory: Server Button. This only needs to be done once. Remote Data Directory: Server Button. This only needs to be done once. Remote Data Directory: Server Button. This only needs to be done once. Remote Data Directory: Server Button. This only needs to be done once.	Egit About

The Server Test window will then be displayed. To start testing, click the Execute button.

erver Test	
Server Details Server IP: 192.168.0.2 Main Port: 12005 Admin Port: 12006	<u>Save</u>
Test Log	Email
Pinging server (192.168.0.2).	
Response received from 192.168.0.2.	Ose
Testing Admin Port (12006).	
✓ Successfully connected to Admin Port.	🕑 <u>H</u> elp
Testing Main Port (12005).	
✓ Successfully connected to Main Port.	
Retrieving server name.	
✓ Server name is PhonePad Database Server.	
Checking server uptime.	
✓ Server has been up for 20 Minutes, 33 Seconds.	
Checking remote database engine version.	
✓ Database engine version is 4.08.	

All successful tests will be marked with a green check mark. Failed tests will be marked with a red cross.

Execute	Runs the server tests.
Save	Saves the results of the tests to a text file.

Email	Emails the test results to Cybercom Software support.
Close	Close the Server Test window.
Help	Display online help (which you are now viewing).

3 Setting Up Remote Mode on Workstations

Follow the steps relevant to your network type.

3.1 Local Area Network

The following steps only need to be performed once, unless you have physically installed PhonePad on each workstation.

- 1. From a workstation, navigate to the PhonePad folder on your shared drive.
- 2. Run **DBConnect** (it's located in the PhonePad folder).
- 3. Select Remote Mode under Connection Mode.

DBConnect		
	Connection Server System · 1 System · 2 Local Database Directory Directory: G:\PhonePad\DATA Image: Connection Mode Image: Server Image: Server Find PhonePad Database Connection Mode Image: Server Image: Server Image: Server Im	 ✓ OK ✓ Cancel (1) About (2) Help

- 4. Click the Server tab.
- 5. Enter the Server IP Address.

DBConnect		
	Image: Server System • 1 System • 2 Remote Connection Settings Image: Server IP Address 192.168.0 8 Image: Server IP Address Image: Server IP Address 192.168.0 8 Image: Server IP Address Image: Server IP Address Image: Server Host Name Image: Server IP Address 192.168.0 8 Image: Server IP Address Main Port: 120.0 Admin Port: 12006 Server Test Image: Test Server Image: Trace Log Image: Server Trace Image: View Trace	Cancel About
		1

- 6. You can test the connection to the PhonePad server by clicking the **Test Server** button.
- 7. Click **OK** to save the settings.

3.2 Peer-to-Peer Network

The following steps will need to be performed on each workstation on your network.

- 1. Run **DBConnect** (it's located in the PhonePad folder).
- 2. Select Remote Mode under Connection Mode.

OBConnect		- • •
	Connection Server System · 1 System · 2 Local Database Directory Directory: G: VPhonePad\DATA Image: Connection Mode Image: Connection Mode Image: Connection Mode Image: Connection Mode Image: Connection Mode Image: Connection Mode Image: Connection Mode Image: Connection Mode Image: Connection Mode Image: Connection Mode Image: Connection Mode Image: Connection Mode Image: Connection Mode Image: Connection Mode Image: Connection Mode Image: Connection Mode Image: Connection Mode Image: Connection Mode Image: Connection Mode Image: Connection Mode Image: Connection Mode Image: Connection Mode Image: Connection Mode Image: Connection Mode Image: Connection Mode Image: Connection Mode Image: Connection Mode Image: Connection Mode Image: Connection Mode Image: Connection Mode Image: Connection Mode Image: Connection Mode Image: Connection Mode Image: Connection Mode Image: Connection Mode Image: Connection Mode Image: Connection Mode Image: Connection Mode Image: Connection Mode Image: Connection Mode	✓ OK X Cancel () About () Help

- 3. Click the **Server** tab.
- 4. Enter the Server IP Address.

DBConnect		
	Connection Server System · 1 System · 2 Remote Connection Settings • Server IP Address 192.168.0 .8 Server • Server Host Name • • Server 12006 Server Test • • 12006 Trace Log • Server Trace View Trace	✓ OK ズ Cancel ③ About ④ Help

- 5. You can test the connection to the PhonePad server by clicking the **Test Server** button.
- 6. Click **OK** to save the settings.

4 Troubleshooting Problems

If you experience any problems communicating with the PhonePad server using ServerManager, or receive error messages, please check the following list for possible solutions. If you are unable to resolve the problem please contact support@cybercom-software.com.

	Problem or Error	Cause	Solution
1.	"Unable to connect to server"	 The PhonePad server (DBServer) is not running. A firewall, router or bridge is blocking the IP address or ports. 	 Check to make sure the PhonePad server is running and is online. Check to make sure that any firewalls, routers or bridges between the workstation and server are not blocking the IP address of the server or the ports PhonePad uses to communicate (12005 and 12006).
2.	"Unable to retrieve server name" "Unable to retrieve server uptime" "Unable to retrieve database engine version" "Unable to check for PhonePad database on the server"	The PhonePad server hasn't been setup.	 Setup the server using the steps detailed under <u>Setting</u> <u>Up the PhonePad Server</u>.
	"Unable to check for default login on the server" "Unable to retrieve remote database location"		
3.	No response from server.		 Close down both ServerManager and PhonePad server and restart them.

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