



# Installation Guide

## **Cybercom Software**

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## **PhonePad Version 4**

## **Quick Install Guide**

by Cybercom Software

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## **Table of Contents**

Foreword	0
Welcome	1
Which Network Type Do I Have?	1
What is a Local Area Network?	
What is a Peer-to-Peer Network?	2
Installing PhonoPad on a Local Area Notwork	<u>ح</u>
instailing FhoheFau on a Local Area Network	5
Installing PhonePad on a Network Drive	3
Part 1 - Selecting a Location	3
Part 2 - Installing PhonePad	3
Part 3 - Creating Your PhonePad Database	
Part 4 - Setting Up Your Data Folder	12
Part 5 - Check Your PhonePad Connection Settings	13
Part 6 - What's Next?	14
Part 7 - Adding Users	
Part 8 - Receptionist Access	
Part 9 - Setting Up Shortcuts	
Installing PhonePad on a Server	22
Part 1 - Selecting a Location	23
Part 2 - Installing PhonePad	
Part 3 - Creating Your PhonePad Database_2	
Part 4 - Setting Up Your Data Folder_2	
Part 5 - Check Your PhonePad Connection Settings_2	33
Part 6 - What's Next?	
Part 7 - Adding Users	
Part 8 - Receptionist Access	
Part 9 - Setting Up Shortcuts	41
Installing PhonePad on a Peer-to-Peer Network	42
Installing PhonePad on the Host Computer	42
Part 1 - Selecting a Host Computer	
Part 2 - Installing PhonePad on a Host Computer	43
Part 3 - Creating Your PhonePad Database	47
Part 4 - Setting Up Your Data Folder	50
Part 5 - Check Your PhonePad Connection Settings_2_2	51
Part 6 - What's Next?	52
Part 7 - Adding Users	52
Part 8 - Receptionist Access	55
Installing PhonePad on Workstations	57
Part 1 - PhonePad Installation	
Part 2 - Setting Up the Data Connection	
Installing PhonePad Updates	65
Indating PhonePad on a Network Drive	65

#### PhonePad Quick Installation Guide

Updating PhonePad on a Server	66
Updating PhonePad on a Peer-to-Peer Network	67
Updating PhonePad on a Host PC	
Updating PhonePad on Your Workstations	
Remote Mode Setup	69
Virus Scanners	70
Problems?	70
Index	72

## Welcome

Thank you for downloading PhonePad. Now all you need to do is install PhonePad and set it up. That's where these instructions come in. By following them you will have PhonePad up and running in no time.

Please don't get overwhelmed by the size of this user guide. There are multiple installation options in this guide but you don't need to use all of them! It may look like a lot of pages but that's because we go step-by-step through every part of the process, complete with screenshots. That takes up a lot of pages. The installation and set up process is fairly straight forward and not difficult. If you follow each step of the process and don't skip anything, you should be fine.

However, if you do end up tying yourself into a knot and getting yourself into strife, please know that we are here to help you. Get in touch with us and we will get it all sorted out for you quickly. We can even remotely connect to your computer and set everything up for you if needed.

As part of the preparation, you may want to get a cup, glass or mug of your favorite beverage so you'll be ready to go, although I don't recommend alcohol at this stage. We do want to finish getting everything installed, after all!

Now, before we get started, we need to work out what type of network you have. If you are thinking "there are network types?" then please continue to read this section.

If you know the difference between local area networks (LANs) and peer-to-peer networks (P2P), and you know which type of network you have, then skip straight to the relevant section.

## Which Network Type Do I Have?

Ok, let's look at the two types of networks so together we can work out what you have. This is an important step as it will avoid confusion and wasting a large amount of time going up the wrong garden path.

## What is a Local Area Network?

The general definition of a Local Area Network is a network of computers that has a dedicated file server. Typically this file server will be running a server version of Windows, eg. Windows Server 2003, 2008, 2012, etc. and is not used as a workstation (hence "dedicated").

File servers make it easy for network users to share resources such as printers, files, etc. On most LANs, applications and other files (eg. documents) are stored on a shared drive (eg. G: drive) so that all network users can access them.

The simplest method for LANs is to install everything on the file server. In the instructions that follow later in this guide we're going to install the PhonePad applications in a folder on a shared drive on the file server, and the PhonePad database (which is where your PhonePad messages are stored) in a sub-folder under the PhonePad folder.

We'll also create shortcuts on each workstation's desktop (using the provided utility) so users can easily access PhonePad.



#### Local Area Network

#### What is a Peer-to-Peer Network?

Peer-to-peer networks don't have a dedicated file server. Instead they consist of a number of computers interconnected in some fashion. Resources can be shared between computers. For example, the printer connected to one computer can be shared by the other computers.

On this type of network you nominate one of your workstations to act as the PhonePad "Host" computer (we will refer to this as a Host PC). It will host the PhonePad database (which is where your PhonePad messages are stored) that the other workstations will connect to, either via a network share or TCP/IP. PhonePad is physically installed on each workstation. The workstation can continued to be used as a normal workstation if desired as the user will be able to access PhonePad in the same way users access it on the workstations.



## Installing PhonePad on a Local Area Network

These step-by-step instructions will help you install PhonePad on your **Local Area Network**. If you haven't yet downloaded PhonePad then you should download it from our website before continuing. You can download it from www.cybercom-software.com/phonepaddownload.

It is highly recommended that you install PhonePad from a workstation to a network drive on your server. These instructions are under Installing PhonePad on a Network Drive.

However, if you would prefer to install directly on the server, those instructions are under **Installing PhonePad** on a Server.

## Installing PhonePad on a Network Drive

The installation instructions in this section are for installing PhonePad from a workstation to a network drive on your server.

#### Part 1 - Selecting a Location

The first thing you need to do is decide where you are going to install PhonePad. This should be a folder on a shared network drive. All of your PhonePad users should have access to this folder.

For example, say you had a Z: drive on your network. To keep things simple, you might decide to install PhonePad in Z:\PhonePad (or whatever drive letter is appropriate for your network).

Once you have decided where on your network you are going to install PhonePad, please proceed to the Part 2.

#### Part 2 - Installing PhonePad

Now that you've selected where you want to install PhonePad, it's time to do the actual installation.

- 1. Run the PhonePad installation program (PHONEPAD4SETUP.EXE) that you downloaded from the website. It is highly recommended that you do this from a workstation with access to the network drive.
- 2. The installation wizard should start.

🍛 Setup - PhonePad 4	- • •
	Welcome to the PhonePad 4 Setup Wizard
	This will install PhonePad Version 4.13 on your computer.
	It is strongly recommended that you close all other applications you have running before continuing. This will help prevent any conflicts during the installation process.
	WARNING: This program is protected by copyright laws and International treaties.
	Unauthorised reproduction or distribution of this program, or any portion of it, may result in severe civil and criminal penalties, and will be prosecuted to the maximum extent possible under law.
0	Click Next to continue, or Cancel to exit Setup.
	Next > Cancel

- 3. Click Next to continue.
- 4. The License Agreement will be displayed. Once you are ready to proceed select I accept the agreement and click Next.
- 5. The Information screen will be displayed. Click Next.



6. The **Select Destination Location** screen will prompt you to specify where you want PhonePad installed. This is the location you decided on in **Part 1**. This is where you enter or select the folder you want PhonePad installed on your shared drive. In the example below, the PhonePad folder on the *Z*: drive has been entered as the destination location.



You could use a UNC path instead of a drive letter if you wish:



- 7. Enter the location you decided on and click Next.
- 8. On the Select Components screen, select I'm Installing PhonePad on a Network Drive from the drop-down list, then click Next.



9. You have the option of specifying a *Start Menu Folder*, or you can just accept the default setting. Click **Next** when you're ready to continue.

🍛 Setup - PhonePad 4	
Select Start Menu Folder Where should Setup place the program's shortcuts?	<b>R</b>
Setup will create the program's shortcuts in the following Start I	Menu folder.
To continue, click Next. If you would like to select a different folder, click	k Browse.
Phonerad 4	Browse
Don't create a Start Menu folder	
Cybercom Software	
< Back Next :	Cancel

10.When prompted to add desktop and Quick Launch icons, unselect these as we will use a different method to set these up. Click **Next**.

Setup - PhonePad 4	- • •
Select Additional Tasks Which additional tasks should be performed?	R
Select the additional tasks you would like Setup to perform while installing f then click Next.	honePad 4.
Additional icons:	
Create a desktop icon	
Create a Quick Launch icon	
Cubercom Software	
< Back Next >	Cancel

11. You are now ready to install PhonePad. Click the Install button.



12.PhonePad will be installed on your network drive.



13. Once the installation has been completed, an **Information** screen will be displayed. Read the information and then click **Next** to continue.



14. The final screen of the wizard will be displayed. It's important that the **Run DBUpdate Wizard** option is checked. Click **Finish**.

🍛 Setup - PhonePad 4	
CC-	Completing the PhonePad 4 Setup Wizard Setup has finished installing PhonePad 4 on your computer. The application may be launched by selecting the installed icons. Click Finish to exit Setup. Image: Run DBUpdate wizard (STRONGLY RECOMMENDED) Image: Important Upgrade Instructions
	< Back Finish

We are now ready to proceed to the next step.

#### Problems with DBUpdate?

If you click **Finish** and get an error message similar to this "Create Process Failed; Code 740 the requested process required elevation", it's Windows reporting that it is unable to run **DBUpdate** due to current user access settings. This is usually caused by over-restrictive Windows **User Access Control** settings and can even occur if you have administrator access.

To get around this, navigate to the **PhonePad** folder, right-click on **DBUpdate.exe**, and select **Run as Administrator** from the popup menu. Then follow the steps in **Part 3 - Creating Your PhonePad Database**.

Name			Date m	odified
BRenair		Open		012 4·21 A
	J	Run as administrator		
🐲 Овкеран.		Iroubleshoot compatibility		1013 7:58 PIVI
😨 DBServer.		Run with graphics processor		2013 7:59 PM
dbserver.l	0	Send to Bluetooth		2013 8:18 PM
📄 dbserver.le	-	Select Left File for Compare		2013 8:18 PM
dbserver.s	8	File Utilities	•	2012 5:38 PM
dbserver	Ø	Scan with VIPRE		012 5:38 PM

#### Part 3 - Creating Your PhonePad Database

Now that PhonePad has been installed on your network, we need to create your PhonePad database. The database is where all of your messages will be stored, as well as caller information, users, etc. It's an important and vital piece of your PhonePad installation.

You should create the PhonePad database in a location that can be accessed by all users, typically a shared network folder on your server. The default name is **Data**, but you can name it anything you like.

Let's create the database now.

If the Run DBUpdate Wizard checkbox was checked in the last step of Part 2, the DBUpdate program should have automatically started when you clicked the Finish button. If you can't see it on your screen then check the Windows taskbar as it may be minimized. If the Run DBUpdate Wizard checkbox wasn't checked then you will need to run it manually. It is located in the PhonePad folder.

1. When the **DBUpdate** wizard appears, click **Next** to get started.

PhonePad DBUpdate	
	<ul> <li>Welcome</li> <li>Welcome to DBUpdate.</li> <li>If you are installing PhonePad for the first time, DBUpdate will automatically create the database files required.</li> <li>If you are upgrading from a previous version of PhonePad, DBUpdate will scan the database files and will automatically make changes as required to update it to the current version.</li> <li>Click the Next button to continue.</li> </ul>
	Previous Next Cancel

2. You will be prompted to select a location for the PhonePad data folder (directory). On a network drive, it's recommended you accept the default which will be a folder entitled Data under your PhonePad folder. In our example below it's Z:\PhonePad\Data. Click Next to continue.

PhonePad DBUpdate		
	New Installat DBUpdate has det location where the A default folder hi PhonePad on. Yo a drive/folder that Please note: If the DBUpdate will sim Data Folder:	tion - Location of Database - Network Drive tected that this is a new installation of PhonePad. Please select the le database should be created. has been automatically selected on the network drive you installed up can select another drive/folder if you prefer, however, it must be it PhonePad and other users can access. He PhonePad database already exists in the selected location, haply update the database - it won't overwrite it. Z:\PhonePad\Data
		Previous Next X Cancel 🚯 Finish

3. DBUpdate will create the data folder and then create the PhonePad database. This should only take a few

seconds. Click <b>Next</b> when it has f	finished.
--	-----------

PhonePad DBUpdate		X	
	<ul> <li>Scanning Database</li> <li>Scan has been completed.</li> <li>Users.dat table does not exist.</li> <li>Creating Users.dat</li> <li>Users.dat table created.</li> <li>UserSettings.dat table does not exist.</li> <li>Creating UserSettings.dat</li> <li>UserSettings.dat table created.</li> </ul>	•	
	Adding data to lookup tables Scan completed. Click Next to continue.	•	
	Previous Next Cancel	inish	

4. Click Finish to close DBUpdate.

PhonePad DBUpdate		<u> </u>
	<ul> <li>Finished.</li> <li>Database creation has been completed.</li> <li>Click the Finish button to complete the process.</li> </ul>	
P.		
	Previous     Next     Cance	əl 🚯 Finish

	Important Note About Access Rights
2	All PhonePad users will need a minimum of read and write, or modify, access to the PhonePad data folder.

#### Part 4 - Setting Up Your Data Folder

12

The next step is to finish setting up the data folder.

1. Go to the **PhonePad** folder on your server and run **DBConnect**.

DBConnect	(an extent	_ <b>X</b>
	Connection Server System - 1 System - 2 Local Database Folder Folder: Z:\PhonePad\Data UNC Share Find Database Connection Mode Connection Mode Remote Remote Settings	<ul> <li>✓ OK</li> <li>X Cancel</li> <li>① About</li> <li>④ Help</li> </ul>
	Temporary File Folder It is recommended you leave this setting blank. Folder:	

- 2. The Local Database Folder setting should display the PhonePad data folder created by DBUpdate in Part 3. If not, you will need to select it by clicking on the button.
- 3. If all users use the same drive mapping to the network drive and folder, then you can leave the Local Database Folder as is. In our example, the network drive and folder is *Z*:\*PhonePad\Data*.
- 4. If users map the drive differently then you will have problems. For example, say Mary has the drive mapped as *Z*: but Andrew has the drive mapped as *Y*:. Andrew will get errors when trying to run PhonePad because his workstation won't be able to find *Z*:\*PhonePad\Data*. It knows the path as *Y*:/*PhonePad/Data*. To get around this problem you can set the Local Data Folder up as a UNC path. That way, it won't matter what drive letters users use.
- 5. Click the UNC button to convert the Local Database Folder setting to a UNC path. This is preferable to using a map drive letter because the drive letter can vary from workstation to workstation, causing connection issues. By the way, the UNC button only works when you are doing this from a workstation.

DBConnect		_ 🗆 🗙
	Connection Server System - 1 System - 2 Local Database Folder Folder: \\satum\PhonePad\Data UNC Share Find Database Connection Mode Connection Mode Connection Mode Remote Remote Settings	OK     Cancel     About     Help
	Temporary File Folder It is recommended you leave this setting blank. Folder:	

6. Click **OK** to save the settings. Clicking **Cancel** will cancel any changes you have made.

#### Part 5 - Check Your PhonePad Connection Settings

Before we go any further, let's check to make sure your PhonePad connection settings are all correct.

- 1. If **DBConnect** isn't running, go and start it again.
- 2. We're going to check the **Local Database Folder** to make sure everything is set up correctly. To the right of this field, you will see a small button that has a check mark or tick.

DBConnect	<u> </u>
Connection Server System - 1 System - 2 Local Database Folder Folder: Z:\PhonePad\Data	V OK Cancel
Temporary File Folder It is recommended you leave this setting blank. Folder:	

- 3. Click this button.
- 4. DBConnect will perform a number of tests to make sure everything has been set up correctly.



5. All successful checks will have a green check mark or tick next to it. Any checks that failed will have a red circle with a line through it. Select a check will display information to on the right side of the window, with advice on how to fix the problem where the check failed.

Once you have all green ticks, you are ready to proceed to Part 6.

#### Part 6 - What's Next?

Let's review where we're up to. PhonePad has been installed and your PhonePad database has been created. It's all ready to go. Almost. The next step is to create some user accounts so people can log in. So let's move on to **Part 7**.

#### Part 7 - Adding Users

User accounts are managed in the PhonePad Admin module. In the PhonePad folder, you should be able to see the PhonePad Admin icon.



- 1. Run PhonePad Admin.
- 2. When PhonePad was installed, it automatically created a default administrator account for you. Login to PhonePad Admin using this account Username: Admin, Password: admin.

PhonePad Ad	min (Local)	
User Name:	Admin	🗸 ОК
Password:		X Cancel
Warning	Password is case-sensitive.	

3. PhonePad Admin's main screen should be displayed.



- 4. At this stage there will be only one user account the default administrator account. Let's create another.
- 5. Click Add User.



6. We'll enter some details for our user. The Username is the name they will use when logging in.

User Accoun	t	Photo	V OK
Usemame:	Jane		X Cance
Password:	••••	120	A Help
Confirm:	••••	1 and 1	
User Access	Becentionist		
	abled E Hidden		lear
	abied 🔄 Hidden		
Address	Book		
User Details			
Position:	Manager		
Area:	Marketing 🗸		
Location:	North Building 🔹		
	555 7777		
Phone:			

7. You'll notice that the password is masked - this is for security reasons. Instead of displaying the letters you enter, it displays an asterix in place of each letter. Because you can't see the password to visually confirm you entered it correctly, you need to enter it in a second time to verify that the password you entered is what you intended to enter. When the two passwords match, the confirm edit box will change to white.

Password:	****
Confirm:	XXX

8. If we want this user to be a PhonePad administrator, we check the **Admin** checkbox. This means they will be able to login to PhonePad Admin and perform administrative functions. If you don't want to give the user administrator access then leave the checkbox unchecked.

User Access	
🗹 Admin	Receptionist
🗹 Login Enabled	📃 Hidden
🔲 Address Book	

9. Checking the **Receptionist** checkbox will enable "Receptionist Mode" for the user and give them access to the Inboxes of other user accounts (there is another step you have to do which is covered in Part 6 of these instructions). In this example, we are going to check the Receptionist checkbox so we can see how it works in Part 6,

User Access		
Admin	Receptionist	
🗹 Login Enabled	Hidden	
🗹 Address Book		

10. The Login Enabled checkbox should normally be checked, unless you don't want the user to login.

User Access	
🔲 Admin	Receptionist
Login Enabled	✓ Hidden
🗹 Address Book	

If this checkbox is unchecked, when the user attempts to login the following message will be displayed:

Informat	ion
1	This user account is disabled!
	ОК

11. When checked, the **Hidden** checkbox hides the user account from the user, and the recipient lists that you use for addressing phone and text messages. For example, you may want to hide the default Admin account so other users can't send messages to it.

User Access	
🗹 Admin	🔲 Receptionist
🗹 Login Enabled	🗹 Hidden
🗹 Address Book	

12. When checked, the **Address Book** checkbox allows the user to access PhonePad's Address Book. If you don't want this user to access the Address Book then uncheck the checkbox. The user will still be able to select users from the recipient list in phone or text messages.

User Access	
🔲 Admin	🗹 Receptionist
🗷 Login Enabled	🔲 Hidden
✓ Address Book	

13. Under User Details, you can enter optional information about the user. The Area and Location drop-down

lists will initially be blank. But as you enter information in these fields it will be automatically added to your PhonePad database, so you only have to re-enter it once. After that you can select the information instead of entering it.

User Details	
Position:	Manager
Area:	Marketing 🗸
Location:	North Building 🛛 👻
Phone:	555 7777
Mobile:	

14. You can also assign an image to the user if you wish. Click the **Load** button to load an image for the user. Click the **Clear** button to remove the image. Currently only JPG photos can be used.

Photo	
6	6
	/
Load	Clear

15. When you have entered all of the relevant details, click OK.

16. That's it. The user is now listed in the user list. Repeat these steps for each user you want to add. It may seem like a few steps but it's actually quite quick to do, and you don't really have to do it that often.

ile 100is Help		<b>N</b> N	s 😗 🕱		• 🗊 🚯 🛛	0	
Users *	Use	mame	Adm	in Receptionist	Last Lo	igin Login Enable	d Logged In
C* Add liner	Adm	in 👘	Ye	:		Yes	
E Ediller	Jan	8	Ye	s Yes		Yes	
Delete Liter							
Becentionist Access							
I orin Mode	-						
Massage Ecowarding	1						
Ap Message Forwarding							
egi rink							
Tools *							
🐳 Start Database							
🐞 Shutdown Database							
🛞 Undelete Messages							
🎯 Archive Messages	1						
💘 View Archive							
Reports							
Purge Messages							
TRepair Database							
Empty Database	1				111		

Let's move on to Part 8 and see what this Receptionist stuff is all about.

#### Part 8 - Receptionist Access

As mentioned in Part 7, "Receptionist Mode" allows one or more users to access the Inboxes of other users.

1. To give a user this access, the first step is to check the **Receptionist** checkbox under the **Add User** or **Edit User** window.



2. In our example, we have added a few more users so you can see how this option works. Select the user in the

user list and click on Receptionist Access.

* 😰 😰 🔔 🗏 🖉 🍕	🗎 🖗 🏘 🔇	' 🔍 📴 🗑 🖀 🛙	1 🕩 🔍 🥘		
Users 8	Username	Admin Receptionist	Last Login	Login Enabled	Logged In
N	Adam	No No		Yes	
Add User	Admin	Yes		Yes	
Edit User	Andy	No No		Yes	
Delete User	Beck.	No No		Yes	
Receptionist Access	Jane	Yes Yes		Yes	
Login Mode	Pete	No No		Yes	
Message Form pg Price 2. Click Recept Access	otionist	No No 1. Select	the user	Yes	
Message Forv Print 2. Click Recept Access State State Shutdown Database Undelete Messages View Archive Reports Prove Print Construction Construct	otionist	No No 1. Select	the user	Yes	
Message Forv Prin 2. Click Recept Access State Undelete Messages View Archive Reports Purge Messages Purge Messages Reports Reports	otionist	No No 1. Select	the user	Yes	

3. The **Receptionist Access** window will be displayed. Access is given by simply adding the users to the righthand list.

Available users:		Access messages for these users:	Ose
Adam Admin	•	Adam Andy Beak	🕑 <u>H</u> elp
Beck Pete Steve	0	Pete Steve	
	٥		
	٩		

4. Click **Close** to close the window.

In this example, we gave the user Jane access to everyone else's Inbox. When she logs in to PhonePad she will have a list of users on the side of the screen. She can easily switch between Inboxes by selecting a name in the user list.

PhonePad 4: Jan	e										- • •
<u>File Tools H</u> elp											
🍐 🚳 🗹 🔎	×e	<b>e</b> 🌾	A 🗅	3 💌	🗎 🦪	😑 📢	<ul> <li>Image: a set of the set of the</li></ul>	🗳 🔒 🖻	' 💷 🗉	🕼 (l) 🔘	
Inbox	Inbox										All Messages
New Phone Message New Text Message View View Delete Sent Other	Adam Andy Beck Jane Pete Steve				Date	Time	Caller		F	rom	
Folders Welcome to PhonePa	 ad.					Unread: 0	Read: 0	Total: 0	Monday,	16 November 2	009 11:45:37 AM:

### Part 9 - Setting Up Shortcuts

The final step is to create icons on each users' desktop so that they can easily access PhonePad.

1. From each user's computer, go to the PhonePad folder and run the Shortcuts utility



2. Select the shortcuts the user should have. Each user should have the **PhonePad** icon. It is recommended you also include the **Error Log Viewer** icon as it helps with support. There are additional icons for administrators. For this example, administrators will only need the **PhonePad** and **PhonePad Admin** icons. You can easily add other icons later by running this utility again.



3. Click Create to create the shortcuts.

## Installing PhonePad on a Server

These instructions are for installing PhonePad directly onto your server (not a Host PC).

#### An Important Thing to Remember About Network Drives

A network drive is actually a server's local drive/local folder that has been mapped to a shared drive/folder.

For example, say the server has a D: drive and you install all network applications in a folder called *D*:/*Network*. Workstations can't directly access a local drive on the server, so they wouldn't be able to access *D*:/*Network* directly. To get around this, we make *D*:/*Network* a shared folder and on the workstation map (in this case) the *Z*: drive letter to that folder. Workstations would access *D*:/*Network* as *Z*:/, or they may access the folder as a UNC path (eg. \*MyServer\PhonePad*).

So in this scenario PhonePad is installed in *D:\Network\PhonePad*, and users on their workstations access it as *Z:\PhonePad*.



#### Part 1 - Selecting a Location

The first thing you need to do is decide where you are going to install PhonePad. This should be a folder on your server that all users have access to.

Although PhonePad will default to installing under *C:\Program Files (x86)\PhonePad*, it is recommended you select another folder. The reason for this is because *C:\Program Files (x86)* is tightly controlled by Windows and you will likely get a headache trying to get it working properly because of permission issues.

If you have another local **hard-drive** (or logical partition), eg. a *D*: drive, then it is recommended you install PhonePad in a shared folder on that drive. Otherwise, try installing it in a folder on the C: drive other than *C*: *Program Files* (*x86*), *C*: *Program Files* or *C*: *ProgramData*. Remember, it needs to be **shared** so that users can access it from their workstations.

We do **not** recommend installing PhonePad on a USB drive or NAS drive due to performance issues associated with these types of drives.

Once you have decided where on your network you are going to install PhonePad, please proceed to the Part 2.

#### Part 2 - Installing PhonePad

Now that you've selected where you want to install PhonePad, it's time to do the actual installation.

1. Run the PhonePad installation program (PHONEPAD4SETUP.EXE) that you downloaded from the website.

2. The installation wizard should start.

🍛 Setup - PhonePad 4	- • •
	Welcome to the PhonePad 4 Setup Wizard
	This will install PhonePad Version 4.13 on your computer.
	It is strongly recommended that you close all other applications you have running before continuing. This will help prevent any conflicts during the installation process.
	WARNING: This program is protected by copyright laws and International treaties.
	Unauthorised reproduction or distribution of this program, or any portion of it, may result in severe civil and criminal penalties, and will be prosecuted to the maximum extent possible under law.
0	Click Next to continue, or Cancel to exit Setup.
	Next > Cancel

3. Click Next to continue.

24

- 4. The License Agreement will be displayed. Once you are ready to proceed select I accept the agreement and click Next.
- 5. The Information screen will be displayed. Click Next.



6. The **Select Destination Location** screen will prompt you to specify where you want PhonePad installed. This is the location you decided on in **Part 1**. This is where you enter or select the folder you want PhonePad installed on your shared drive. In the example below, we have entered *D:\PhonePad* as the destination location.



- 7. Enter the location you decided on and click Next.
- 8. On the Select Components screen, select I'm Installing PhonePad on a Server from the drop-down list, then click Next.



9. You have the option of specifying a *Start Menu Folder*, or you can just accept the default setting. Click **Next** when you're ready to continue.



10.When prompted to add desktop and Quick Launch icons, unselect these as we will use a different method to set these up. Click **Next**.



11. You are now ready to install PhonePad. Click the **Install** button.

Setup - PhonePad 4  Ready to Install Setup is now ready to begin installing PhonePad 4 on your computer.	
Click Install to continue with the installation, or click Back if you want t change any settings.	to review or
Destination location: D:\PhonePad	*
Setup type: I'm Installing PhonePad on a Network Drive	H
Selected components: PhonePad PhonePad Admin PhonePad OBConnect DBUpdate OBBackup	
<	Þ
Cybercom Software	Cancel

12. PhonePad will be installed on your network drive.

Setup - PhonePad 4	_ 🗆 🗙
Installing Please wait while Setup Installs PhonePad 4 on your computer.	<b>R</b>
Extracting files D:\FhonePad\WhereRU.exe	
Cybercom Software	
	Cancel

13. Once the installation has been completed, an **Information** screen will be displayed. Read the information and then click **Next** to continue.



14. The final screen of the wizard will be displayed. It's important that the **Run DBUpdate Wizard** option is checked. Click **Finish**.

🍛 Setup - PhonePad 4	
	Completing the PhonePad 4 Setup Wizard
	Setup has finished installing PhonePad 4 on your computer. The application may be launched by selecting the installed icons.
	Click Finish to exit Setup.
	Run DBUpdate wizard (STRONGLY RECOMMENDED)
	IMPORTANT Upgrade Instructions
	< Back Finish

We are now ready to proceed to the next step.

#### Problems with DBUpdate?

If you click **Finish** and get an error message similar to this "Create Process Failed; Code 740 the requested process required elevation", it's Windows reporting that it is unable to run **DBUpdate** due to current user access settings. This is usually caused by over-restrictive Windows **User Access Control** settings and can even occur if you have administrator access.

To get around this, navigate to the **PhonePad** folder, right-click on **DBUpdate.exe**, and select **Run as Administrator** from the popup menu. Then follow the steps in **Part 3 - Creating Your PhonePad Database**.

Name			Date m	odified
PBRenair		Open		012 4·21 A
	J	Run as administrator		012 121 7
😻 овкеран.		Iroubleshoot compatibility		1013 7:38 PIVI
DBServer.		Run with graphics processor	•	2013 7:59 PM
dbserver.l	0	Send to Bluetooth		2013 8:18 PM
📄 dbserver.le	10	Select Left File for Compare		.013 8:18 PM
dbserver.s	8	File Utilities	+	2012 5:38 PM
dbserver	Ø	Scan with VIPRE		012 5:38 PM

#### Part 3 - Creating Your PhonePad Database\_2

Now that PhonePad has been installed on your network, we need to create your PhonePad database. The database is where all of your messages will be stored, as well as caller information, users, etc. It's an important and vital piece of your PhonePad installation.

You should create your PhonePad database in a location that can be accessed by all users, typically a shared network folder on your server. The default name is **Data**, but you can name it anything you like.

Let's create the database now.

If the **Run DBUpdate Wizard** checkbox was checked in the last step of **Part 2**, the **DBUpdate** program should have automatically started when you clicked the **Finish** button. If you can't see it on your screen then check the Windows taskbar as it may be minimized. If the **Run DBUpdate Wizard** checkbox wasn't checked then you will need to run it manually. It is located in the PhonePad folder.

1. When the **DBUpdate** wizard appears, click **Next** to get started.

PhonePad DBUpdate	_ <b>_</b> X
	<ul> <li>Welcome</li> <li>Welcome to DBUpdate.</li> <li>If you are installing PhonePad for the first time, DBUpdate will automatically create the database files required.</li> <li>If you are upgrading from a previous version of PhonePad, DBUpdate will scan the database files and will automatically make changes as required to update it to the current version.</li> <li>Click the Next button to continue.</li> </ul>
	Previous Next Cancel & Finish

2. You will be prompted to select a location for the PhonePad data folder (directory). You could either create the PhonePad database in a folder under the PhonePad folder, like we have in the example below (*D: \PhonePad\Data*) or you can install it in another folder as long as users are able to access it. Creating the

database in the Windows Public Document folder is also a good choice, as long as all users have read/write or modify access to the folder. You could create a network share for the folder (more information is in **Part 4**.

3. Once you have decided to Click **Next** to continue.

PhonePad DBUpdate	
	New Installation - Location of Database - Local Drive
	DBUpdate has detected that this is a new installation of PhonePad. Please select the location where the database should be created.
	A default folder has been automatically selected on the local drive you installed PhonePad on. You can select another drive/folder if you prefer, however, it must be a drive/folder that PhonePad and other users can access.
	Please note: If the PhonePad database already exists in the selected location, DBUpdate will simply update the database - it won't overwrite it.
	Install in Windows public document folder (recommended):
	C:\Users\Public\Documents\PhonePadData
	Install in Windows local application data folder (alternative location):
	C:\Users\Steve\AppData\Local\PhonePadData
	Install in another drive and/or folder:
	D:\PhonePad\Data
	◆ Previous ◆ Next X Cancel ⊕ Finish

4. DBUpdate will create the data folder and then create the PhonePad database. This should only take a few seconds. Click **Next** when it has finished.

PhonePad DBUpdate	
Scanning Database	
Scan has been completed.	
Users.dat table does no	t exist.
Creating Users.dat	
UserSettings.dat table of Creating UserSettings.d	oes not exist. at
Sersetungstat table t     Adding data to lookup ta	ibles
Click Next to continue.	v
Previous	Next X Cancel

5. Click **Finish** to close DBUpdate.

PhonePad DBUpdate		_ <b>_</b> X
	<ul> <li>Finished.</li> <li>Database creation has been completed.</li> <li>Click the Finish button to complete the process.</li> </ul>	
	Previous     Next     X     Cance	əl 🚯 Finish

### Important Note About Access Rights

All PhonePad users will need a minimum of read and write access to the PhonePad data folder.

#### Part 4 - Setting Up Your Data Folder\_2

The next step is to finish setting up the data folder.

1. Go to the **PhonePad** folder on your server and run **DBConnect**.

DBConnect		_ 🗆 🗙
	Connection Server System - 1 System - 2 Local Database Folder Folder: D:\PhonePad\Data	V OK Cancel About Help
	<ul> <li>♥ Local</li> <li>♥ Remote Settings</li> </ul>	
	Temporary File Folder It is recommended you leave this setting blank. Folder:	

- 2. The Local Database Folder setting should display the PhonePad data folder created by DBUpdate in Part 3. If not, you will need to select it by clicking on the le button.
- 3. You can click the **Share** button to create a network share for the PhonePad folder. The **Local Database Folder** setting will be updated with the share path. <u>Important Note:</u> This can only be done to a local drive on the server.

DBConnect	Connection Server System - 1 System - 2 Local Database Folder Folder: \\JUPITER2\PhonePadData UNC Share Find Database Connection Mode Local	Cancel Cancel About
	Temporary File Folder It is recommended you leave this setting blank. Folder:	

4. Click **OK** to save the settings. Clicking **Cancel** will cancel any changes you have made.
## Part 5 - Check Your PhonePad Connection Settings\_2

Before we go any further, let's check to make sure your PhonePad connection settings are all correct.

- 1. If **DBConnect** isn't running, go and start it again.
- We're going to check the Local Database Folder to make sure everything is set up correctly. To the right of this field, you will see a small button that has a check mark or tick.

DBConnect	_ 🗆 🗙
Connection Server System - 1 System - 2 Local Database Folder Folder: \\JUPITER2\PhonePadData UNC Share Find Database Connection Mode Local Remote Remote Settings	OK     Cencel     About     Help
Temporary File Folder It is recommended you leave this setting blank. Folder:	

- 3. Click this button.
- 4. DBConnect will perform a number of tests to make sure everything has been set up correctly.



5. All successful checks will have a green check mark or tick next to it. Any checks that failed will have a red circle with a line through it. Select a check will display information to on the right side of the window, with

advice on how to fix the problem where the check failed.

Once you have all green ticks, you are ready to proceed to Part 6.

#### Part 6 - What's Next?

Let's review where we're up to. PhonePad has been installed and your PhonePad database has been created. It's all ready to go. Almost. The next step is to create some user accounts so people can log in. So let's move on to **Part 7**.

#### Part 7 - Adding Users

User accounts are managed in the PhonePad Admin module. In the PhonePad folder, you should be able to see the PhonePad Admin icon.



- 1. Run PhonePad Admin.
- 2. When PhonePad was installed, it automatically created a default administrator account for you. Login to PhonePad Admin using this account Username: **Admin**, Password: **admin**.

Line Manage	Autor	OK
User Name:	Admin	
Password	www	X Cance

3. PhonePad Admin's main screen should be displayed.

PhonePad Admin: Admin			
ile Loois Help	🖶 🤞 😽 🔇	🔍 📋 🎯 🕆 📴 🚱	1 0
Users *	Usemame	Admin Receptionist Last	Login Login Enabled Logged In
💇 Add User	Admin	Yes	Yes
🐓 Edit User			
💇 Delete User			
2 Receptionist Access			
📕 Login Mode	-		
Server Stress And Server Stress And Server S			
😝 Print			
Tools *			
🐳 Start Database			
🐞 Shutdown Database			
🛞 Undelete Messages			
🎯 Archive Messages	8		
💘 View Archive			
Reports			
Purge Messages			
T Repair Database			
Empty Database	٠.	III	
	(2) 16/11/2	009 10:51:07 AM	

4. At this stage there will be only one user account - the default administrator account. Let's create another.

5. Click Add User.



6. We'll enter some details for our user. The **Username** is the name they will use when logging in.

User Account	t	Photo	V OK
Usemame:	Jane		× Cance
Password:	••••	120	- Help
Confirm:	••••	1 and -	
User Access	Receptionist		
🗷 Login Er	abled 🗌 Hidden	Load	ear
Address	Book		
User Details			
Position:	Manager		
	Marketing -		
Area:	manag		
Area: Location:	North Building -		
Area: Location: Phone:	North Building		

7. You'll notice that the password is masked - this is for security reasons. Instead of displaying the letters you enter, it displays an asterix in place of each letter. Because you can't see the password to visually confirm you entered it correctly, you need to enter it in a second time to verify that the password you entered is what you intended to enter. When the two passwords match, the confirm edit box will change to white.

Password:	****
Confirm:	XXX

8. If we want this user to be a PhonePad administrator, we check the **Admin** checkbox. This means they will be able to login to PhonePad Admin and perform administrative functions. If you don't want to give the user administrator access then leave the checkbox unchecked.

User Access	
🗹 Admin	Receptionist
🗹 Login Enabled	📃 Hidden
🔲 Address Book	

9. Checking the **Receptionist** checkbox will enable "Receptionist Mode" for the user and give them access to the Inboxes of other user accounts (there is another step you have to do which is covered in Part 6 of these instructions). In this example, we are going to check the Receptionist checkbox so we can see how it works in Part 6,

User Access	
Admin	Receptionist
🗹 Login Enabled	Hidden
🗹 Address Book	

10. The Login Enabled checkbox should normally be checked, unless you don't want the user to login.

User Access	
🔲 Admin	Receptionist
🗹 Login Enabled	✓ Hidden
🗹 Address Book	

If this checkbox is unchecked, when the user attempts to login the following message will be displayed:

Informat	ion
1	This user account is disabled!
	ОК

11. When checked, the **Hidden** checkbox hides the user account from the user, and the recipient lists that you use for addressing phone and text messages. For example, you may want to hide the default Admin account so other users can't send messages to it.

User Access	
🗹 Admin	🔲 Receptionist
🗹 Login Enabled	🗹 Hidden
🗹 Address Book	

12. When checked, the **Address Book** checkbox allows the user to access PhonePad's Address Book. If you don't want this user to access the Address Book then uncheck the checkbox. The user will still be able to select users from the recipient list in phone or text messages.

User Access	
🔲 Admin	🗷 Receptionist
🗹 Login Enabled	🔲 Hidden
🗹 Address Book	

13. Under User Details, you can enter optional information about the user. The Area and Location drop-down

lists will initially be blank. But as you enter information in these fields it will be automatically added to your PhonePad database, so you only have to re-enter it once. After that you can select the information instead of entering it.

User Details	
Position:	Manager
Area:	Marketing 🔹
Location:	North Building 🗸
Phone:	555 7777
Mobile:	

14. You can also assign an image to the user if you wish. Click the **Load** button to load an image for the user. Click the **Clear** button to remove the image. Currently only JPG photos can be used.

Photo	
6	6
	/
Load	Clear

15. When you have entered all of the relevant details, click OK.

16. That's it. The user is now listed in the user list. Repeat these steps for each user you want to add. It may seem like a few steps but it's actually quite quick to do, and you don't really have to do it that often.

ile 100is Help		<b>N</b> N	s 😗 🕱		• 🗊 🚯 🛛	0	
Users *	Use	mame	Adm	in Receptionist	Last Lo	igin Login Enable	d Logged In
C* Add llow	Adm	in 👘	Ye	:		Yes	
E Ediller	Jan	8	Ye	s Yes		Yes	
Delete Liter							
Becentionist Access							
I orin Mode	-						
Massage Ecowarding	1						
Ap Message Forwarding							
egi rink							
Tools *							
🐳 Start Database							
🐞 Shutdown Database							
🛞 Undelete Messages							
🎯 Archive Messages	1						
💘 View Archive							
Reports							
Purge Messages							
TRepair Database							
Empty Database	1				111		

Let's move on to Part 7 and see what this Receptionist stuff is all about.

#### Part 8 - Receptionist Access

As mentioned in Part 7, "Receptionist Mode" allows one or more users to access the Inboxes of other users.

1. To give a user this access, the first step is to check the **Receptionist** checkbox under the **Add User** or **Edit User** window.



2. In our example, we have added a few more users so you can see how this option works. Select the user in the

user list and click on Receptionist Access.

* 😰 😰 🔔 🗏 🖉 🍕	🗎 🖗 🏘 🔇	' 🔍 📴 🗑 🖀 🛙	1 🕩 🔍 🥘		
Users 8	Username	Admin Receptionist	Last Login	Login Enabled	Logged In
N	Adam	No No		Yes	
Add User	Admin	Yes		Yes	
Edit User	Andy	No No		Yes	
Delete User	Beck.	No No		Yes	
Receptionist Access	Jane	Yes Yes		Yes	
Login Mode	Pete	No No		Yes	
Message Form pg Price 2. Click Recept Access	otionist	No No 1. Select	the user	Yes	
Message Forv Print 2. Click Recept Access State State Shutdown Database Undelete Messages View Archive Reports Prove Print Print Color Co	otionist	No No 1. Select	the user	Yes	
Message Forv Prin 2. Click Recept Access State Undelete Messages View Archive Perge Messages Perge Messages Perge Messages Reparts Perge Messages Perge Messages Perge Messages Perge Messages Perge Messages	otionist	No No 1. Select	the user	Yes	

3. The **Receptionist Access** window will be displayed. Access is given by simply adding the users to the righthand list.

Available users:		Access messages for these users:	Ose
Adam Admin	•	Adam Andy Beak	🕑 <u>H</u> elp
Beck Pete Steve	0	Pete Steve	
	٥		
	٥		

4. Click **Close** to close the window.

In this example, we gave the user Jane access to everyone else's Inbox. When she logs in to PhonePad she will have a list of users on the side of the screen. She can easily switch between Inboxes by selecting a name in the user list.

PhonePad 4: Jan	e										- • •
<u>File Tools H</u> elp											
🍐 🚳 🗹 🔎	×e	<b>e</b> 🌾	A 🗅	3 💌	🗎 🦪	😑 📢	<ul> <li>Image: a set of the set of the</li></ul>	🗳 🔒 🖻	' 💷 🗉	🕼 (l) 🔘	
Inbox	Inbox										All Messages
New Phone Message New Text Message View View Delete Sent Other	Adam Andy Beck Jane Pete Steve				Date	Time	Caller		F	rom	
Folders Welcome to PhonePa	 ad.					Unread: 0	Read: 0	Total: 0	Monday,	16 November 2	009 11:45:37 AM:

# Part 9 - Setting Up Shortcuts

The final step is to create icons on each users' desktop so that they can easily access PhonePad.

1. From each user's workstation, go to the PhonePad folder and run the Shortcuts utility



2. Select the shortcuts the user should have. Each user should have the **PhonePad** icon. It is recommended you also include the **Error Log Viewer** icon as it helps with support. There are additional icons for administrators. For this example, administrators will only need the **PhonePad** and **PhonePad Admin** icons. You can easily add other icons later by running this utility again.

42



3. Click **Create** to create the shortcuts.

# Installing PhonePad on a Peer-to-Peer Network

These step-by-step instructions will help you install PhonePad on your **Peer-to-Peer Network**. If you haven't yet downloaded PhonePad then you should download it from our website before continuing. You can download it from www.cybercom-software.com/download.

# Installing PhonePad on the Host Computer

#### Part 1 - Selecting a Host Computer

The first thing that needs to be done is to decide which computer on your network is going to be the "Host" computer. As you don't have a dedicated file server, we need to nominate one of your computers to act as the server. This can be any computer but should be one that is normally left on as users won't be able to access PhonePad if the computer is turned off.



## Part 2 - Installing PhonePad on a Host Computer

Now that a Host computer has been selected, it's time to do the installation. These steps are done on the Host computer.

- 1. Run the PhonePad installation program (PHONEPAD4SETUP.EXE) that you downloaded from the website.
- 2. The installation wizard should start.

🍛 Setup - PhonePad 4	- • •
110	Welcome to the PhonePad 4 Setup Wizard
	This will install PhonePad Version 4.13 on your computer.
	It is strongly recommended that you close all other applications you have running before continuing. This will help prevent any conflicts during the installation process.
	WARNING: This program is protected by copyright laws and International treaties.
	Unauthorised reproduction or distribution of this program, or any portion of it, may result in severe civil and criminal penalties, and will be prosecuted to the maximum extent possible under law.
U	Click Next to continue, or Cancel to exit Setup.
	Next > Cancel

- 3. Click Next to continue.
- 4. The License Agreement will be displayed. Once you are ready to proceed select I accept the agreement and click Next.
- 5. The Information screen will be displayed. Click Next.



6. The **Select Destination Location** screen will prompt you to specify where you want PhonePad installed. This is the location you decided on in **Part 1**. This is where you enter or select the folder you want PhonePad installed in on your shared drive. In the example below, we have used the default location (C:\Program Files\PhonePad).

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44



- 7. Enter the location you decided on and click Next.
- 8. On the Select Components screen, select Peer-to-Peer Host from the drop-down list, then click Next.

Setup - PhonePad 4
Installation Location Where Do You Want to Install PhonePad?
Select the location where PhonePad will be installed. Setup will automatically select the correct components for that location. Click Next when you are ready to continue.
I'm Installing PhonePad on a Network Drive
I'm Installing PhonePad on a Network Drive
I'm Instaling PhonePad on a Peer-to-Peer Host PC I'm Installing PhonePad on a Workstation I'm Installing PhonePad on a Server
Cybercom Software

9. You have the option of specifying a Start Menu Folder, or you can just accept the default setting. Click **Next** when you're ready to continue.

Setup - PhonePad 4	- • •
Select Start Menu Folder Where should Setup place the program's shortcuts?	<b>R</b>
Setup will create the program's shortcuts in the following Start Men To continue, click Next. If you would like to select a different folder, click Bro	u folder. wwse.
PhonePad 4	Browse
Don't create a Start Menu folder	
Cybercom Software	Cancel

10. This screen allows you to automatically create desktop and Quick Launch icons for PhonePad. Once you have selected the options you want click **Next**.



11. You are now ready to install PhonePad. Click the Install button.

46



12. PhonePad will be installed on the Host PC's local hard drive.

Setup - PhonePad 4	_ 🗆 🗙
Installing Please wait while Setup installs PhonePad 4 on your computer.	<b>R</b>
Extracting files C:\Program Files (x86)\PhonePad\WhereRU.exe	
Cybercom Software	Cancel

13. Once the installation has been completed, an **Information** screen will be displayed. Read the information and then click **Next** to continue.

Setup - PhonePad 4	
Information	
riease read the following important information before continuing.	9
When you are ready to continue with Setup, click Next.	
Important Notice for First Time Installers	Â
When you install PhonePad for the first time, a default administrator	
login is created:	=
Username: Admin	
Password: admin	
Use this ID to login to PhonePad Admin, then create as many user accounts as you need.	
PhonePad Updates	-
bercom Software	
Next >	

14. The final screen of the wizard will be displayed. It's important that the **Run DBUpdate Wizard** option is checked. Click **Finish**.

🍛 Setup - PhonePad 4	
	Completing the PhonePad 4 Setup Wizard
	Setup has finished installing PhonePad 4 on your computer. The application may be launched by selecting the installed icons.
	Click Finish to exit Setup.
	Run DBUpdate wizard (STRONGLY RECOMMENDED)
	IMPORTANT Upgrade Instructions
G	
	< Back Finish

We are now ready to proceed to the next step.

# Part 3 - Creating Your PhonePad Database

Now that PhonePad has been installed on your Host computer, we need to create your PhonePad database. The database is where all of your messages will be stored, as well as caller information, users, etc. It's an important and vital piece of your PhonePad installation.

We recommend you create your PhonePad database in a sub-folder below your PhonePad folder. The default name is DATA, but you can name it anything you like.

Let's create the database now.

If the Run DBUpdate Wizard checkbox was checked in the last step of Part 2, the DBUpdate program should have automatically started when you clicked the Finish button. If you can't see it on your screen then check the Windows taskbar as it may be minimized. If the Run DBUpdate Wizard checkbox wasn't checked then you will need to run it manually. It is located in the PhonePad folder.

1. When the **DBUpdate** wizard appears, click **Next** to get started.

PhonePad DBUpdate	
	<ul> <li>Welcome</li> <li>Welcome to DBUpdate.</li> <li>If you are installing PhonePad for the first time, DBUpdate will automatically create the database files required.</li> <li>If you are upgrading from a previous version of PhonePad, DBUpdate will scan the database files and will automatically make changes as required to update it to the current version.</li> <li>Click the Next button to continue.</li> </ul>
	Previous     Next     Cancel     Finish

2. You will be prompted to select a location for the PhonePad data folder (directory). It's recommended you accept the default - Install in Windows public document folder. Later on, we're going to make sure this folder is shared so all users can access it. Click Next to continue.

PhonePad DBUpdate	
	<ul> <li>New Installation - Location of Database - Local Drive         DBUpdate has detected that this is a new installation of PhonePad. Please select the location where the database should be created.         A default folder has been automatically selected on the local drive you installed PhonePad on. You can select another drive/folder if you prefer, however, it must be a drive/folder that PhonePad and other users can access.     </li> <li>Please note: If the PhonePad database already exists in the selected location, DBUpdate will simply update the database - it won't overwrite it.</li> <li>Install in Windows public document folder (recommended):         C:\Users\Public\Documents\PhonePadData     </li> <li>Install in Windows local application data folder (alternative location):         C:\Users\Steve\AppData\Local\PhonePadData     </li> <li>Install in another drive and/or folder:        </li></ul>
	Previous Next X Cancel & Finish

3. DBUpdate will create the data folder and then create the PhonePad database. This should only take a few

49

seconds. Click <b>Next</b> when it has f	finished.
--	-----------

PhonePad DBUpdate		X	
	<ul> <li>Scanning Database</li> <li>Scan has been completed.</li> <li>Users.dat table does not exist.</li> <li>Creating Users.dat</li> <li>Users.dat table created.</li> <li>UserSettings.dat table does not exist.</li> <li>Creating UserSettings.dat</li> </ul>	*	
	UserSettings.dat table created.  Adding data to lookup tables  Scan completed.  Click Next to continue.	4	
	🔄 Previous 🕨 Next 🗶 Cancel 🕀 F	inish	

4. Click Finish to close DBUpdate.

PhonePad DBUpdate		<b>D</b> X
	<ul> <li>Finished.</li> <li>Database creation has been completed.</li> <li>Click the Finish button to complete the process.</li> </ul>	
	Previous 🕼 Next 🗙 Cano	el 🚯 Finish

	Important Note About Access Rights
2	All PhonePad users will require a minimum of read and write access to the PhonePad data folder.

# Part 4 - Setting Up Your Data Folder

50

The next step is to finish setting up the data folder.

1. Go to the **PhonePad** folder on your server and run **DBConnect**.

DBConnect		_ 🗆 🗙
	Connection Server System - 1 System - 2 Local Database Folder Folder: C:\Users\Public\Documents\PhonePadData O < UNC Share Find Database Connection Mode O Local Remote Remote Settings	V OK X Cancel About V Help
	Temporary File Folder It is recommended you leave this setting blank. Folder:	

- 2. The Local Database Folder setting should display the PhonePad data folder created by DBUpdate in Part 3. If not, you will need to select it by clicking on the <a>b</a> button.
- 3. Click the **Share** button to create a network share for the PhonePad folder. The **Local Database Folder** setting will be updated with the share path. <u>Important Note:</u> This can only be done to a local drive on the Host PC.

DBConnect		_ <b>_ x</b>
	Connection Server System - 1 System - 2 Local Database Folder Folder: \\JUPITER2\PhonePadData UNC Share Find Database Connection Mode Connection Mode Connection Mode Remote Remote Settings	OK     Cancel     About     Help
	Temporary File Folder It is recommended you leave this setting blank. Folder:	

4. Click **OK** to save the settings. Clicking **Cancel** will cancel any changes you have made.

## Part 5 - Check Your PhonePad Connection Settings\_2\_2

Before we go any further, let's check to make sure your PhonePad connection settings are all correct.

- 1. If **DBConnect** isn't running, go and start it again.
- We're going to check the Local Database Folder to make sure everything is set up correctly. To the right of this field, you will see a small button that has a check mark or tick.

DBConnect	X
Connection Server System - 1 System - 2 Local Database Folder Folder: \\JUPITER2\PhonePadData UNC Share Find Database. Connection Mode Connection Mode Connection Mode Connection Mode Connection Mode Connection Mode	OK     Cancel     About     Help
Temporary File Folder It is recommended you leave this setting blank. Folder:	•

- 3. Click this button.
- 4. DBConnect will perform a number of tests to make sure everything has been set up correctly.



5. All successful checks will have a green check mark or tick next to it. Any checks that failed will have a red circle with a line through it. Select a check will display information to on the right side of the window, with advice on how to fix the problem where the check failed.

Once you have all green ticks, you are ready to proceed to Part 6.

#### Part 6 - What's Next?

Let's review where we're up to. PhonePad has been installed and your PhonePad database has been created. It's all ready to go. Almost. The next step is to create some user accounts so people can log in. So let's move on to **Part 7**.

#### Part 7 - Adding Users

User accounts are managed in the PhonePad Admin module. In the PhonePad folder, you should be able to see the PhonePad Admin icon.



#### 1. Run PhonePad Admin.

2. When PhonePad was installed, it automatically created a default administrator account for you. Login to **PhonePad Admin** using this account - Username: Admin, Password: admin.

			0K
User Name:	Admin		U.S.
	[wood]	¥	Cancel
Password:	10000	×	Cance

3. PhonePad Admin's main screen should be displayed.

Add User	🔒 🦗 🕸 🥎 Username Admin	💘 📃 🥪 🕆 📭 🕪 🌒 🥹 Admin Receptionist Last Login	Login Enabled Logged In
Add User Edit User	Usemane Admin	Admin Receptionist Last Login	Login Enabled Logged In
Add User Edit User	Admin		
Edit User		Tes	Yes
Delete User			
Receptionist Access			
Login Mode	4		
Message Forwarding			
B Print			
ools *			
Start Database			
Shutdown Database			
👸 Undelete Messages			
Archive Messages	≤		
🔍 View Archive			
Reports			
Purge Messages			
🖀 Repair Database			
Empty Database	•	m	
	9 16/11/2	009 10:51:07 AM	

- 4. At this stage there will be only one user account the default administrator account. Let's create another.
- 5. Click Add User.



6. We'll enter some details for our user. The User Name is the name they will use when logging in.

Llose Marrow	200	OK
User Name.	ane	Carrier
Password:	2004	Cance
Confirm		😗 <u>H</u> elp
Admin	Receptionist	
🖌 Login Enab	led Hidden	

7. You'll notice that the password is masked - this is for security reasons. Instead of displaying the letters you enter, it displays an asterix in place of each letter. Because you can't see the password to visually confirm you entered it correctly, you need to enter it in a second time to verify that the password you entered is what you intended to enter. When the two passwords match, the confirm edit box will change to white.

Password:	****
Confirm:	XXX

8. If we want this user to be a PhonePad administrator, we check the Admin checkbox. This means they will be

54

able to login to PhonePad Admin and perform administrative functions. If you don't want to give the user administrator access this leave the checkbox unchecked.

User Access	
🗹 Admin	Receptionist
🗹 Login Enabled	📃 Hidden
🔲 Address Book	

9. Checking the **Receptionist** checkbox will enable "Receptionist Mode" for the user and give them access to the Inboxes of other user accounts (there is another step you have to do which is covered in Part 6 of these instructions). In this example, we are going to check the Receptionist checkbox so we can see how it works in Part 6,

User Access	
🔲 Admin	Receptionist
🗹 Login Enabled	🗌 Hidden
📝 Address Book	

10. The Login Enabled checkbox should normally be checked, unless you don't want the user to login.

User Access	
🔲 Admin	Receptionist
🗷 Login Enabled	✓ Hidden
🗹 Address Book	

11. When checked, the **Hidden** checkbox hides the user account from the user and recipient lists that you use for addressing phone and text messages. For example, you may want to hide the default Admin account so other users can't send message to it.

User Access		
🗹 Admin	Receptionist	
🗷 Login Enabled	🗹 Hidden	
🗹 Address Book		

12. When you have entered all of the relevant details, click OK.

Line Marrie	lass	🗸 ок
User Name.	Jane	Cancel
Password:	10001	<ul> <li>Cancer</li> </ul>
		🕜 <u>H</u> elp
Confirm	ACCORT	
🗸 Admin	Receptionist	
L ania En	abled Diddee	

13. That's it. The user is now listed in the user list. Repeat these steps for each user you want to add. It may seem like a few steps but it's actually quite quick to do, and you don't really have to do it that often.

PhonePad Admin: Admin File Tools Help				-	- 0 2
2* 2* 2* 🛕 🗏 🛞 🤜	🖨 🤞 🕸 🔇	🔍 📋 🗑 🕆 🗊	00		
Users 🎗	Usemame	Admin Receptionist	Last Login	Login Enabled	Logged In
CP Add Hear	Admin	Yes		Yes	
Co Col Harr	Jane	Yes Yes		Yes	
Collosel					
Delete Oser					
Receptionist Access	_				
Logn Mode					
Message Forwarding					
eija Prink					
Tools 🎗					
🐳 Start Database					
🗱 Shutdown Database					
🛞 Undelete Messages					
Y Archive Messages					
View Archive					
Reports					
Purge Messages					
P Repair Database					
Empty Database	4	***			-
-					
	16/11/     16/11/	2009 11:28:07 AM			

Let's move on to Part 6 and see what this Receptionist stuff is all about.

# Part 8 - Receptionist Access

As mentioned in Part 7, "Receptionist Mode" allows one or more users to access the Inboxes of other users.

1. To give a user this access, the first step is to check the **Receptionist** checkbox under the **Add User** or **Edit User** window.

56

Edit User: Jane			×
User Account		Photo	V OK
Usemame:	Jane		X Cancel
Password:	••••	20	Help
Confirm:			S
User Access			
Admin	Receptionist		
💌 Login End	abled 📃 Hidden	Load Clear	
Address	Book		
User Details			
Position:	Manager		
Area:	Marketing -		
Location:	North Building 🗸 👻		
Phone:	555 7777		
Mobile:			

2. In our example, we have added a few more users so you can see how this option works. Select the user in the user list and click on Receptionist Access.

* 🌮 💇 🔔 🗏 🔌 🤜	े 🖨 🤿 🖗 🔇	। 🕱 📴 😰 🕆	🕒 🖟 🕕		
Users 🎗	Username	Admin Receptionist	Last Login	Login Enabled	Logged In
På Additure	Adam	No No		Yes	
Add User	Admin	Yes		Yes	
Edit User	Andy	No No		Yes	
2 Delete User	Beck	No No		Yes	
Receptionist Access	Jane	Yes Yes		Yes	
Login Mode	_ Pete	No No		Yes	
Message Form pp Print 2. Click Rece Access	tionist	No No	ct the user	Yes	
Message Forw Print 2. Click Rece Access Start Undelete Messages Archive Messages View Archive Purgo Messages	Steve	No No 1. Selec	t the user	Yes	
Message Forw Print 2. Click Rece Access Star Undelete Messages Archive Messages View Archive Purgo Messages Purgo Messages Repair Database	Steve	No No 1. Selec	t the user	Yes	

3. The **Receptionist Access** window will be displayed. Access is given by simply adding the users to the right-hand list.

Available users:		Access messages for these users:	Ose
Adam Admin Andy Beck Pete Steve	00	Adam Andy Beck Pete Steve	🕑 <u>H</u> elp
	0		

4. Click Close to close the window.

In this example, we gave the user Jane access to everyone else's Inbox. When she logs in to PhonePad she will have a list of users on the side of the screen. She can easily switch between Inboxes by selecting a name in the list.

PhonePad 4: January File Tools Help	e											
🍐 🕲 🗹 🔎	×e	<b>C</b>	н	<b>E B</b>	🖹 🦪	😑 🦃	- 🗆	<b>25</b> 🔒	P 🔍		00	
Inbox	Inbox											All Messages
New Phone Message New Text Message View View Neete Sent Other Folders	Adam Andy Beck Jane Pete Steve				Date	Time	Caller	I		From		, , , , , , , , , , , , , , , , , , ,
Welcome to PhonePa	d.					Unread: 0	Read: 0	Tota	at 0 M	onday, 16 N	ovember 20	009 11:45:37 AM .:

# Installing PhonePad on Workstations

Now that PhonePad has been installed and set up on the Host (or Server) computer, we need to install PhonePad and set it up on each workstation. It is recommended that you install PhonePad on each workstation and not use shortcuts to a shared folder on the Host PC.

#### Part 1 - PhonePad Installation

- 1. Run the PhonePad installation program (PHONEPAD4SETUP.EXE) that you downloaded from the website.
- 2. The installation wizard should start.

🍛 Setup - PhonePad 4	- • •
110	Welcome to the PhonePad 4 Setup Wizard
	This will install PhonePad Version 4.13 on your computer.
	It is strongly recommended that you close all other applications you have running before continuing. This will help prevent any conflicts during the installation process.
	WARNING: This program is protected by copyright laws and International treaties.
	Unauthorised reproduction or distribution of this program, or any portion of it, may result in severe civil and criminal penalties, and will be prosecuted to the maximum extert possible under law.
0	Click Next to continue, or Cancel to exit Setup.
	Next > Cancel

- 3. Click **Next** to continue.
- 4. The License Agreement will be displayed. Once you are ready to proceed select I accept the agreement and click Next.
- 5. The Information screen will be displayed. Click Next.



6. The **Select Destination Location** screen will prompt you to specify where you want PhonePad installed. This is the location you decided on in **Step 1**. This is where you enter or select the folder you want PhonePad installed in on your shared drive. In the example below, we have used the default location (C:\Program Files\PhonePad).



- 7. Enter the location you decided on and click Next.
- 8. On the Select Components screen, select Peer-to-Peer Workstation from the drop-down list, then click Next.

Setup - PhonePad 4	_ <b>0</b> _ X
Installation Location Where Do You Want to Install PhonePad?	<b>R</b>
Select the location where PhonePad will be installed. Setup will autor the correct components for that location. Click Next when you are read	natically select dy to continue.
I'm Installing PhonePad on a Network Drive	-
I'm Installing PhonePad on a Network Drive I'm Installing PhonePad on a Peer-to-Peer Host PC I'm Installing PhonePad on a Workfathing	
I'm Installing PhonePad on a Server	
Cybercom Software	Cancel

9. You have the option of specifying a Start Menu Folder, or you can just accept the default setting. Click **Next** when you're ready to continue.

60



10. This screen allows you to automatically create desktop and Quick Launch icons for PhonePad. Once you have selected the options you want click **Next**.



11. You are now ready to install PhonePad. Click the **Install** button.

Setup - PhonePad 4 Ready to Install	
Setup is now ready to begin installing PhonePad 4 on your computer.	<u>s</u>
Click Install to continue with the installation, or click Back if you want t change any settings.	o review or
Destination location: C:\Program Files (x86)\PhonePad	*
et (rogram nics (xoo)) noner au	
Setup type: I'm Installing PhonePad on a Network Drive	=
Selected components: PhonePad PhonePad Admin PhonePad DBConnect DBUpdate DBBackup	-
•	Þ
Cybercom Software Sack Install	Cancel

12. PhonePad will be installed on your local hard drive.



13. Once the installation has been completed, an **Information** screen will be displayed. Read the information and then click **Next** to continue.



14.Click Finish when the final screen is displayed.



We are now ready to proceed to the next step.

# Part 2 - Setting Up the Data Connection

Now that PhonePad has been installed we need to tell it where the PhonePad database is located. In the PhonePad folder you will find the **DBConnect** utility.



1. Run **DBConnect**.

DBConnect	and and a second second second	_ <b>_</b> X
	Connection Server System - 1 System - 2 Local Database Folder Folder: UNC Share Find Database Connection Mode O Local Remote Remote Settings	V OK X Cancel About
	Temporary File Folder It is recommended you leave this setting blank. Folder:	

2. Remember the network share we created earlier? This is where we use the shared path. Under Local Database Folder, enter the shared path under Folder.

DBConnect		_ 🗆 🗙
	Connection Server System - 1 System - 2 Local Database Folder Folder: \\JUPITER2\PhonePadData UNC Share Find Database Connection Mode O Local Remote Remote Settings	OK     Cancel     About     Help
	Temporary File Folder It is recommended you leave this setting blank. Folder:	

3. Next to this field there is a small button with a check mark (or tick). Click this button.

DBConnect		<u> </u>
	Connection Server System - 1 System - 2 Local Database Folder Folder: \\JUPITER2\PhonePadData UNC Share Find Database Connection Mode Connection Mode Connection Mode Connection Mode Connection Mode Remote Remote Settings Temporary File Folder It is recommended you leave this setting blank. Folder:	V OK X Cancel About

4. **DBConnect** will perform some tests to make sure everything has been set up correctly.



- 5. All successful checks will have a green check mark or tick next to it. Any checks that failed will have a red circle with a line through it. Selecting a check will display information to on the right side of the window, with advice on how to fix the problem where the check failed.
- 6. Once you have all green ticks, you are all done. Click OK to save the settings.



That's it. The workstation is now set up. Repeat these steps (Parts 1 and 2) for each workstation.

# **Installing PhonePad Updates**

When new versions of PhonePad are released, you may want to consider updating to take advantage of new features and any bug fixes that may be included.

# Updating PhonePad on a Network Drive

If you installed PhonePad on a network drive, follow the steps for a new installation and install the new version in the existing PhonePad folder as outlined under **Installing PhonePad on a Network Drive**:

- Part 2 Installing PhonePad
- Part 3 Creating Your PhonePad database.

Once this has been done there is nothing else you need to do. All workstations will now have the latest version of PhonePad.

#### **Update Notes**

- Your existing version will be updated to the new version. **Before you begin**, make sure all users are logged out of PhonePad (and any other PhonePad application), otherwise the upgrade will fail.
- If someone is still logged into PhonePad when you attempt to upgrade, you will get a message similar to the following:



- The message will display the name of the file that is still in use. Windows will <u>not</u> allow you to replace a file that is being used. If you get this error, get all users to logout of PhonePad and then click the **Retry** button.
- When you run DBUpdate, make sure that your PhonePad data folder is selected and that it is the correct folder. If you accidentally select another folder DBUpdate will create a brand new, empty database. This could be confusing and may make you think you have lost all of your data.
- When DBUpdate is run against your PhonePad data folder, it will not overwrite your existing data. It will
  examine your PhonePad database and determine what changes are required. It will need make these changes
  while leaving your existing data intact.
- It's highly recommended that you backup your PhonePad data folder before updating PhonePad just in case something goes wrong. To play it safe you may also want to make a backup copy of your PhonePad application folder.

#### Important

As there may have been changes to the PhonePad database since the last version, it's important that you run DBUpdate when you upgrade PhonePad. If there have been any changes, DBUpdate will automatically upgrade your database.

# Updating PhonePad on a Server

If you installed PhonePad directly onto a server, follow the steps for a new installation and install the new version in the existing PhonePad folder as outlined under **Installing PhonePad on a Server**:

- Part 2 Installing PhonePad
- Part 3 Creating Your PhonePad database.

Once this has been done there is nothing else you need to do. All workstations will now have the latest version of PhonePad.

#### Update Notes

- Your existing version will be updated to the new version. **Before you begin**, make sure all users are logged out of PhonePad (and any other PhonePad application), otherwise the upgrade will fail.
- If someone is still logged into PhonePad when you attempt to upgrade, you will get a message similar to the following:

Error	
	g:\PhonePad\PhonePad4.exe
	An error occurred while trying to replace the existing file: DeleteFile failed; code 5. Access is denied.
	Click Retry to try again, Ignore to skip this file (not recommended), or Abort to cancel installation.
	Abort Retry Ignore

- The message will display the name of the file that is still in use. Windows will <u>not</u> allow you to replace a file that is being used. If you get this error, get all users to logout of PhonePad and then click the **Retry** button.
- When you run DBUpdate, make sure that your PhonePad data folder is selected and that it is the correct folder. If you accidentally select another folder DBUpdate will create a brand new, empty database. This could be confusing and may make you think you have lost all of your data.
- When DBUpdate is run against your PhonePad data folder, it will not overwrite your existing data. It will
  examine your PhonePad database and determine what changes are required. It will need make these changes
  while leaving your existing data intact.
- It's highly recommended that you backup your PhonePad data folder before updating PhonePad just in case something goes wrong. To play it safe you may also want to make a backup copy of your PhonePad application folder.



## Important

As there may have been changes to the PhonePad database since the last version, it's important that you run DBUpdate when you upgrade PhonePad. If there have been any changes, DBUpdate will automatically upgrade your database.

# Updating PhonePad on a Peer-to-Peer Network

## Updating PhonePad on a Host PC

If you installed PhonePad on a network drive, follow the steps for a new installation and install the new version in the existing PhonePad folder as outlined under **Installing PhonePad on a Host Computer**:

- Part 2 Installing PhonePad
- Part 3 Creating Your PhonePad database.

Once this has been done, each workstation will also need to be updated.

#### **Update Notes**

- Your existing version will be updated to the new version. **Before you begin**, make sure all users are logged out of PhonePad (and any other PhonePad application), otherwise the upgrade will fail.
- If PhonePad is running when you attempt to upgrade, you will get a message similar to the following:

Error	X
	g:\PhonePad\PhonePad4.exe
	An error occurred while trying to replace the existing file: DeleteFile failed; code 5. Access is denied.
	Click Retry to try again, Ignore to skip this file (not recommended), or Abort to cancel installation.
	Abort Retry Ignore

- The message will display the name of the file that is still in use. Windows will **<u>not</u>** allow you to replace a file that is being used. If you get this error, close down all PhonePad applications and then click the **Retry** button.
- When you run DBUpdate, make sure that your PhonePad data folder is selected and that it is the correct folder. If you accidentally select another folder DBUpdate will create a brand new, empty database. This could be confusing and may make you think you have lost all of your data.
- When DBUpdate is run against your PhonePad data folder, it will not overwrite your existing data. It will
  examine your PhonePad database and determine what changes are required. It will need make these changes
  while leaving your existing data intact.
- It's highly recommended that you backup your PhonePad data folder before updating PhonePad just in case something goes wrong. To play it safe you may also want to make a backup copy of your PhonePad application folder.
#### Important

As there may have been changes to the PhonePad database since the last version, it's important that you run DBUpdate when you upgrade PhonePad. If there have been any changes, DBUpdate will automatically upgrade your database.

#### **Updating PhonePad on Your Workstations**

Follow the steps for a new installation and install the new version in the existing PhonePad folder as outlined under **Installing PhonePad on Workstations**:

• Part 1 - Installing PhonePad

#### **Update Notes**

- The Host PC should be updated **before** updating workstations. You may get error messages if you don't do this.
- Your existing version will be updated to the new version. **Before you begin**, make sure all of your PhonePad applications are closed, otherwise the upgrade will fail.
- If PhonePad is running when you attempt to upgrade, you will get a message similar to the following:

Error	X
4	g:\PhonePad\PhonePad4.exe An error occurred while trying to replace the existing file: DeleteFile failed; code 5. Access is denied. Click Retry to try again, Ignore to skip this file (not recommended), or Abort to cancel installation.
	Abort Retry Ignore

• The message will display the name of the file that is still in use. Windows will <u>not</u> allow you to replace a file that is being used. If you get this error, close down all PhonePad applications and then click the **Retry** button.

#### **Remote Mode Setup**

PhonePad can be configured to operate in Remote Mode, also known as client/server. This involves install the PhonePad Server (DBServer) service on your server or Host PC, and configuring each workstation to connect to the server. Please refer to the separate Remote Mode Installation Guide for more instructions.

#### **Virus Scanners**

70

Many virus scanners have a real-time scanning feature (sometimes known as Active Protection) where files are scanned every time a file is accessed. This can have a serious impact on system performance, especially for database-based applications like PhonePad where data files can be accessed several times per second.

Like with *any* database-based application, real-time scanning can slow PhonePad to a crawl or can even make it appear as though it has "frozen" or "locked up". This is because the scanner blocks access to the data files while they are being scanned, preventing PhonePad from reading or writing from/to the files. If the virus scanner takes too long, PhonePad may lose its connection to the database and be left in a state of limbo, possibly becoming unresponsive.

#### PhonePad Data Folder

We highly recommend you do one of the following:

- Exclude the PhonePad data folder from being scanned by real-time scanning.
- Exclude the following file types from being scanned by real-time scanning: \*.dat, \*.idx and \*.blb.
- Disable real-time scanning altogether (as a last resort).

This may need to be done on each workstation as well as your server or Host PC.

#### Windows Temp Folder

The Windows temp folder is used by Windows and applications to temporarily store files for various purposes. PhonePad automatically creates and deletes its own temporary files in this folder. Real-time scanning can also impact performance in this area by scanning the temporary files whenever they are created or accessed. We recommend you do one of the following:

- Exclude the Windows temp folder from being scanned by real-time scanning.
- Exclude the following file types from being scanned by real-time scanning: \*.dat, \*.idx and \*.blb.
- Disable real-time scanning altogether (as a last resort).

This may need to be done on each workstation as well as your server or Host PC.

#### Scheduled Virus Scanning

Please note that we are NOT suggesting that you disable virus scanning altogether. If you decide to disable anything, only disable real-time scanning, not your regular scheduled scans.

#### **Problems?**

Here's a list of common problems that are generally caused by missing steps in the installation process.

Error message: "A table is missing from the database:

This error message indicates that PhonePad is unable to locate the PhonePad database. This

DBISAM Error # 11010 Table or backup file 'Messages' does not exist."	usually occurs if you forget to run DBUpdate to create the database, or PhonePad is looking in the wrong location.
	If your PhonePad database has been created then run <b>DBConnect</b> on each computer PhonePad is physically installed on and check the <b>Local</b> <b>Database Directory</b> setting - it should be pointing to the PhonePad data folder.
	It's highly recommended that you use a <b>UNC</b> path rather than a drive mapping.
Users can login but the messages they send are not received by other users.	You have most likely created multiple PhonePad databases. Run <b>DBConnect</b> on each computer PhonePad is physically installed on and check the <b>Local Database Directory</b> setting - each workstation should be pointing to the <u>same</u> PhonePad data folder.
PhonePad is prompting for a username and password but I	PhonePad automatically creates a default administrator account for you:
	Username: Admin
	Password: admin
	Check <b>Part 5</b> of the installation process as you have probably skipped this step.
PhonePad is running really slow or freezes.	See the section on Virus Scanners.

# Index

# - A -

Access 55 access rights 9, 29, 47, 62 Active Protection 70 Add User 14, 19, 34, 39, 52, 55 Admin 52 administrators 21, 41

#### - C -

Code 740 3, 23 Create Process Failed 3, 23 CreateShare 50

#### - D -

9, 29 data folder DBConnect 62 DBServer 69 3, 9, 23, 29, 47, 65 DBUpdate DBUpdate Wizard 3, 9, 23, 29, 43, 47 DBUpdate.exe 3, 23 dedicated file server 1, 42 default administrator account 14, 34 desktop 3, 23, 43, 58 Directory 62 3, 42 download

### - E -

Edit User 19, 39, 55

# - F -

file server 3, 23 Folder to Share 50

### - H -

Hidden 14, 34, 52 Host 2, 42, 43, 57 Host computer 43

## - | -

21, 41, 52 icon icons 21, 41, 58 19, 39, 55 Inboxes Install 3, 23 Install in Windows Local Application Data Folder 9, 29 Install in Windows Public Document Folder 9.29 installation 3, 23 installation program 3, 23 installation wizard 3, 23, 43, 58 interconnected 2

#### - L -

LAN 1 LANS 1 License Agreement 3, 23, 43, 58 Local Area Network 1, 3, 23 Local Database Directory 62 local hard drive 43, 58 location 3, 23 Login Enabled 14, 34, 52

### - N -

network 3, 9, 23, 29 network drive 3, 23 network share 2, 50, 62

#### - P -

password 14, 34, 52 Peer-to-Peer Host 43 peer-to-peer network 42, 50 Peer-to-peer networks 2 Peer-to-Peer Workstation 58 performance 70 21, 41, 42 PhonePad PhonePad Admin 14, 21, 34, 41, 52 PhonePad data folder 9, 29, 50 PhonePad database 1, 2, 9, 14, 29, 34, 47, 50, 52, 62,65 PhonePad Database Check 62

73

PhonePad folder 3, 9, 14, 21, 23, 29, 34, 41, 47, 52, 65 PhonePad installation program 43, 58 PhonePad Server 69 PhonePad updates 65 PhonePadData 50

### - Q -

Quick Launch icons 3, 23, 43, 58

### - R -

real-time scanning 70 Receptionist 14, 19, 34, 39, 52, 55 Receptionist Access 19, 39, 55 Receptionist Mode 19, 39, 55 Remote Mode 69 Resources 2 Run as Administrator 3, 23

## - S -

Server 1, 57 share 1 Share Path 50 shared drive 1, 3, 23 Shortcuts 1, 21, 41 Start Menu Folder 3, 23, 43, 58 system performance 70

### - T -

TCP/IP2tests62two types of networks1

# - U -

unresponsive 70 updates 65 User Access Control 3, 23 user accounts 14, 34, 52 user list 52 User Name 14, 34, 52 users 3, 23

# - V -

virus scanners 70

## - W -

website 3, 23, 42, 58 workstation 2, 57



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