PhonePad
Version 4

Installation Guide

Cybercom Software

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PhonePad Version 4

Quick Install Guide

by Cybercom Software

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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.

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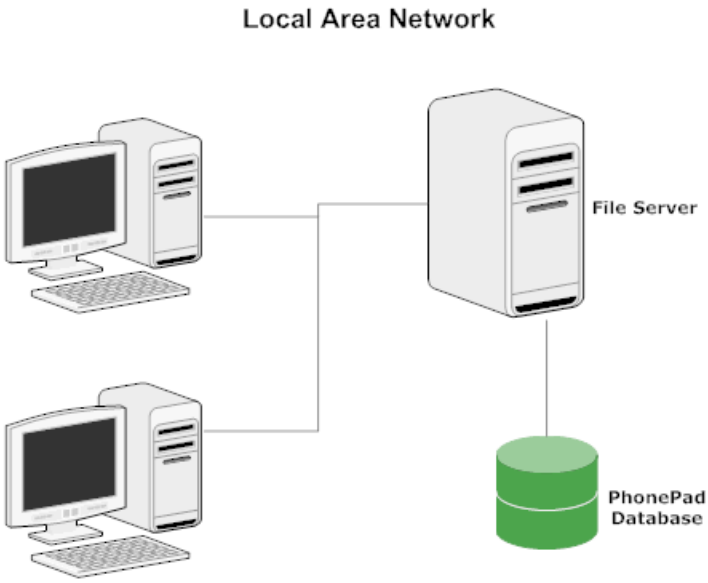
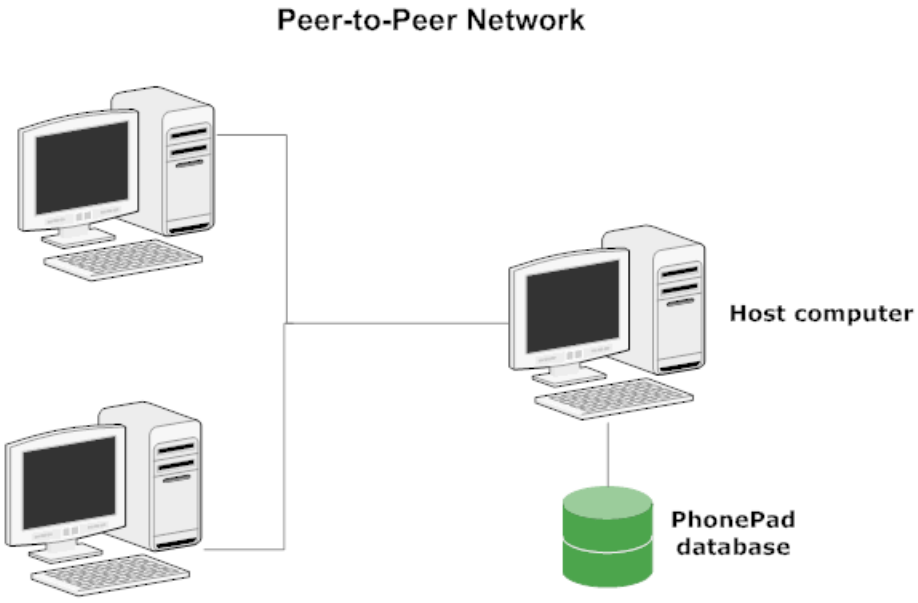


What is a Peer-to-Peer Network?

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.



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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.

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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.

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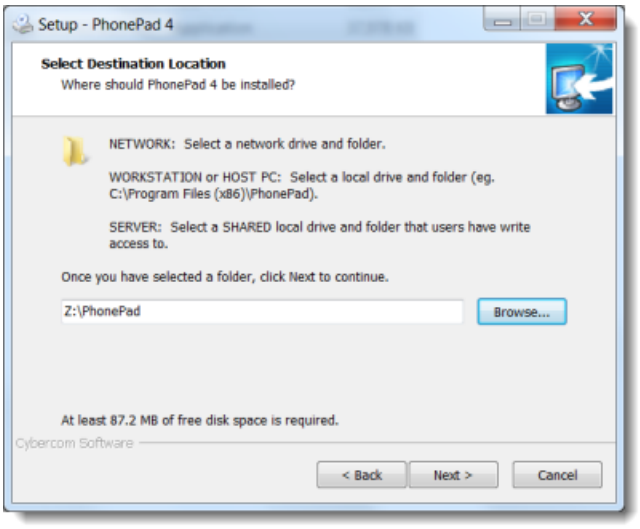
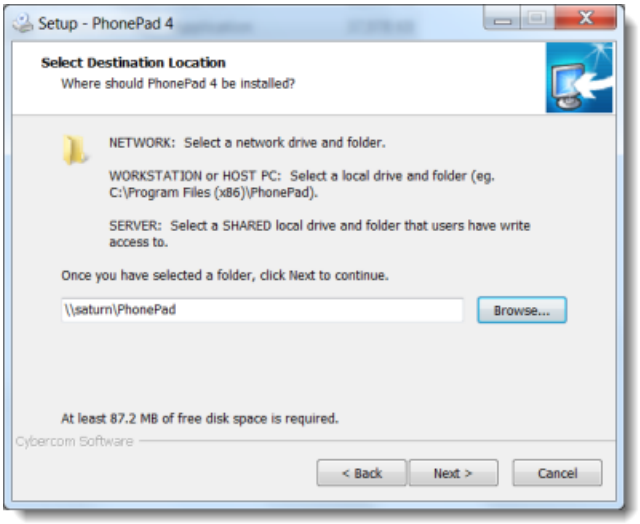


You could use a UNC path instead of a drive letter if you wish:



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**.

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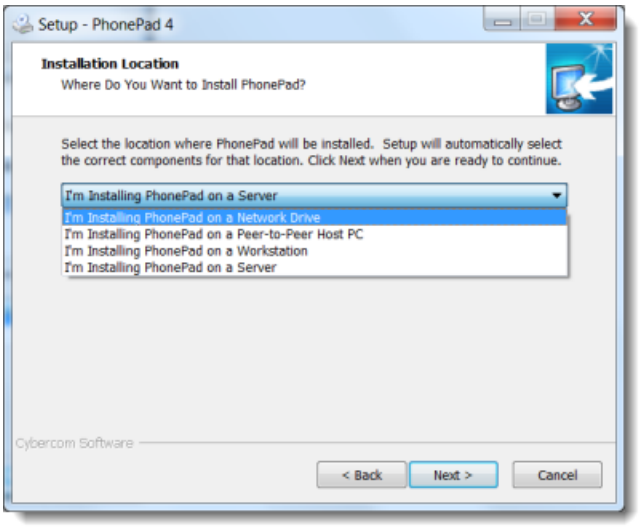
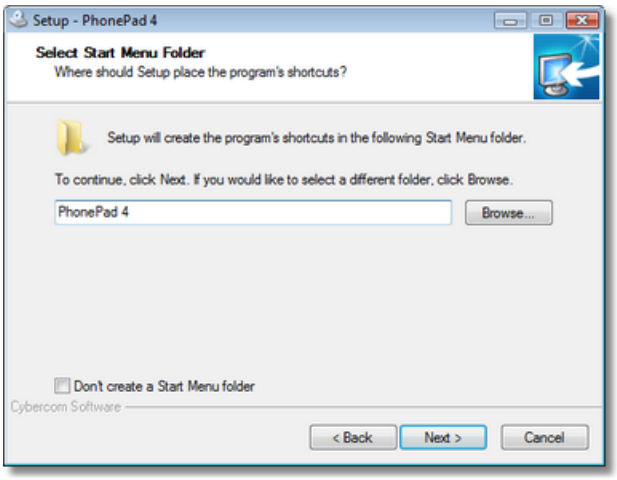


9. You have the option of specifying a *Start Menu Folder*, or you can just accept the default setting. Click **Next** when you're ready to continue.



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**.

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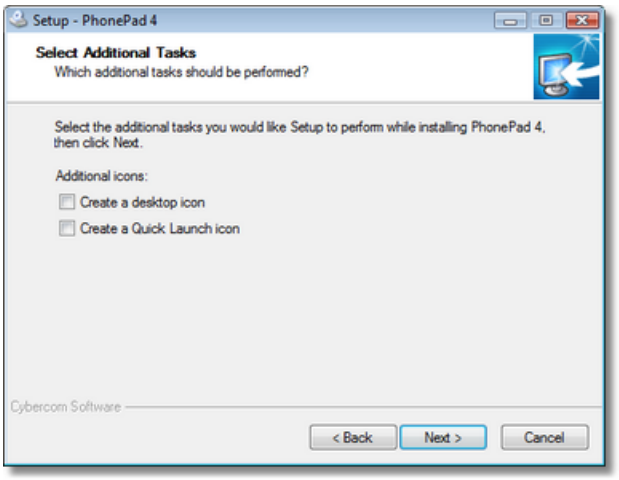
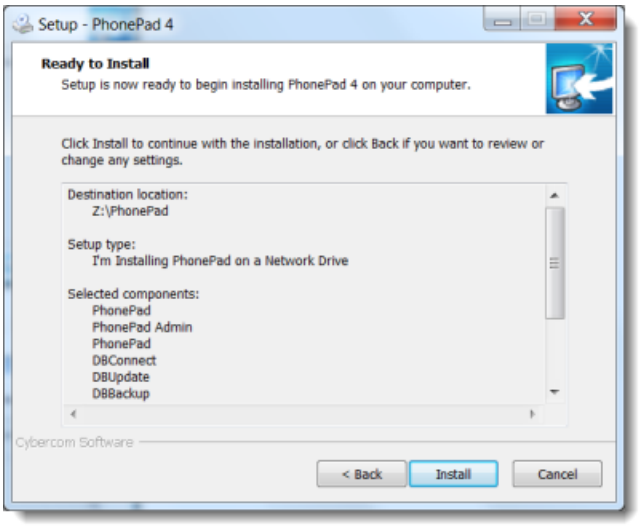


11. You are now ready to install PhonePad. Click the **Install** button.



12. PhonePad will be installed on your network drive.

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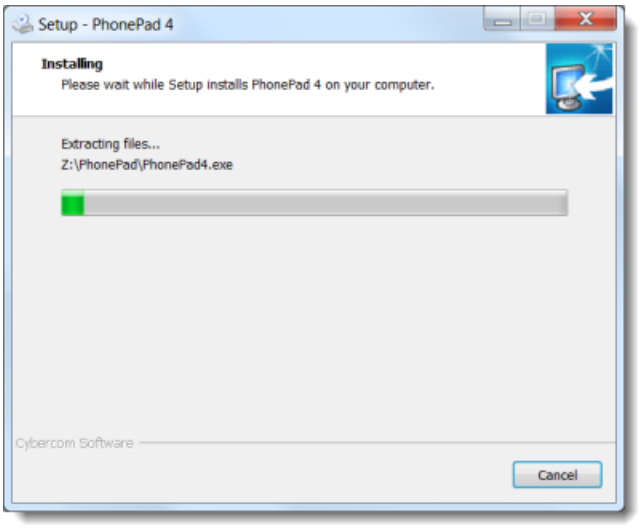
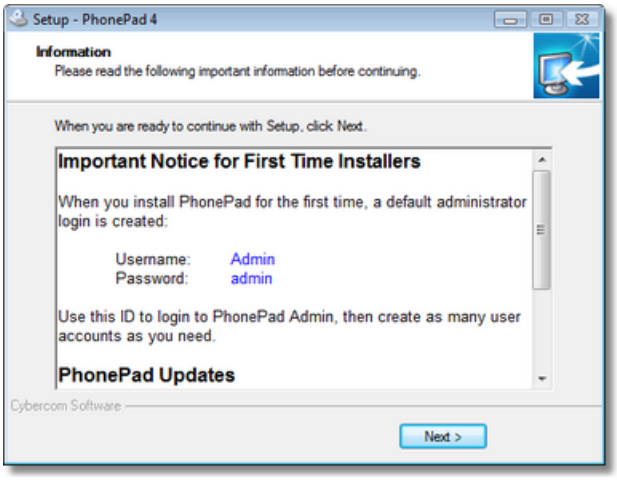


13. Once the installation has been completed, an **Information** screen will be displayed. Read the information and then click **Next** to continue.



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

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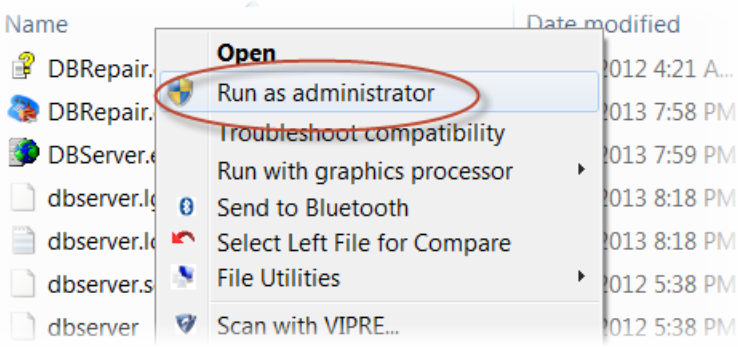
We are now ready to proceed to the next step.

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**.



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.

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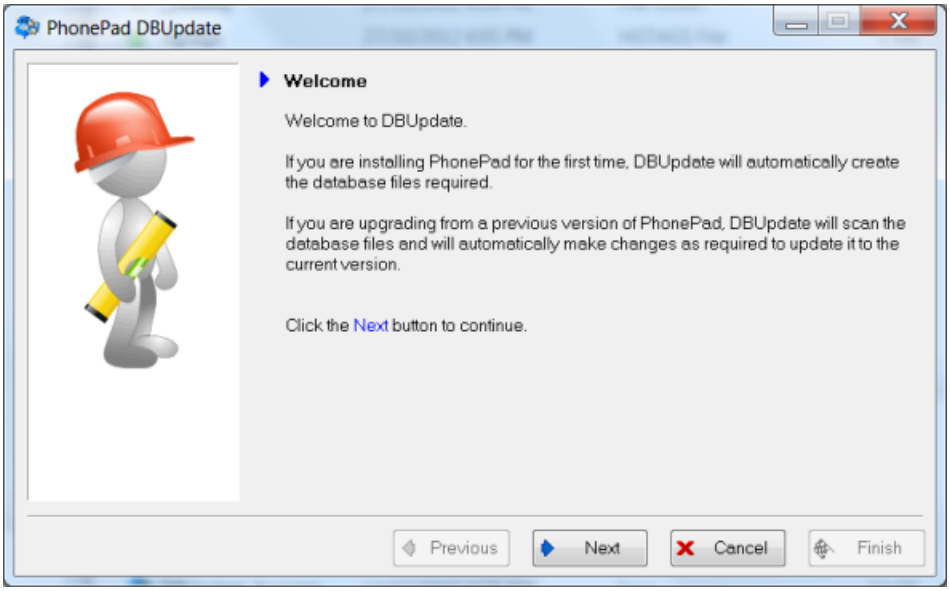
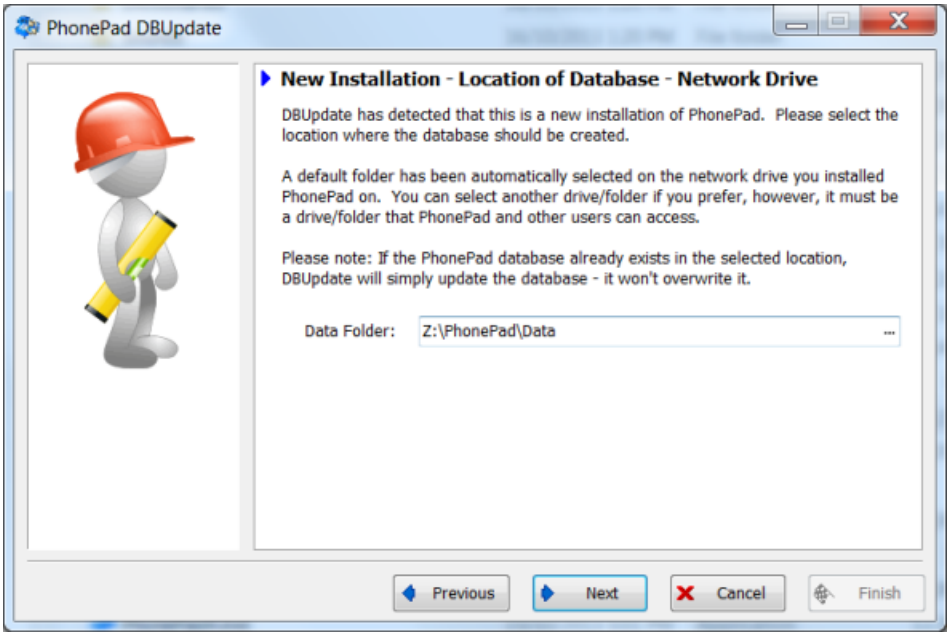
If the **Run DBUpdate Wizard** checkbox was checked in the last step of **Part 2**, the **DBUpdate** program should have automatically started when you clicked the **Finish** button. If you can't see it on your screen then check the Windows taskbar as it may be minimized. If the **Run DBUpdate Wizard** 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.



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.



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

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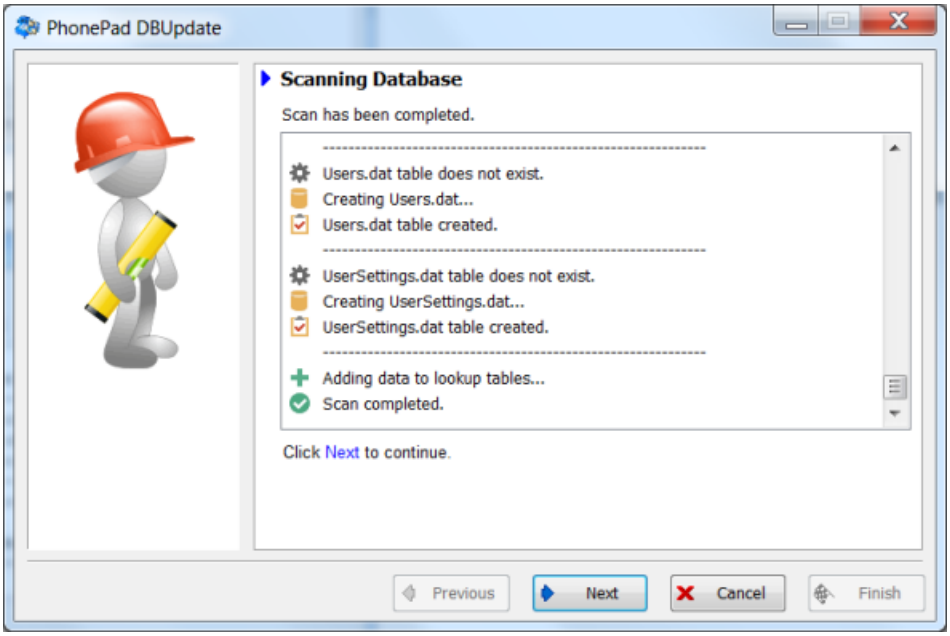
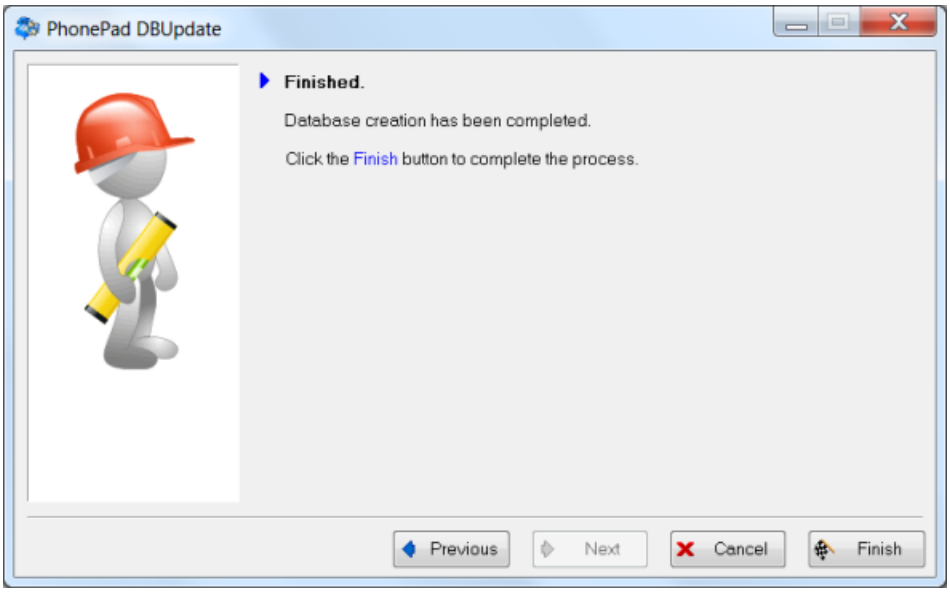
seconds. Click **Next** when it has finished.



4. Click **Finish** to close DBUpdate.



Important Note About Access Rights

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

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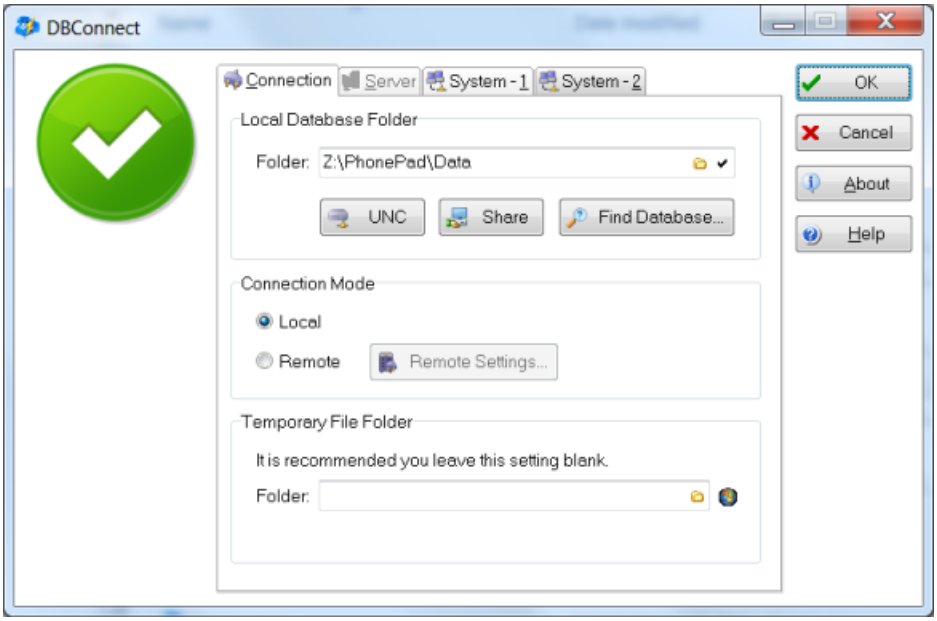
Part 4 - Setting Up Your Data Folder

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

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



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.

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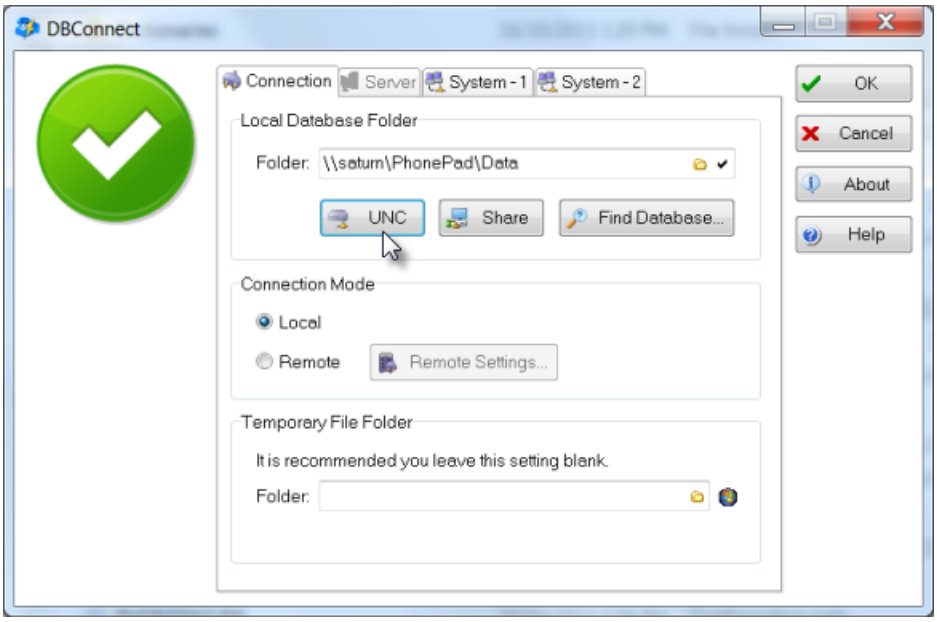


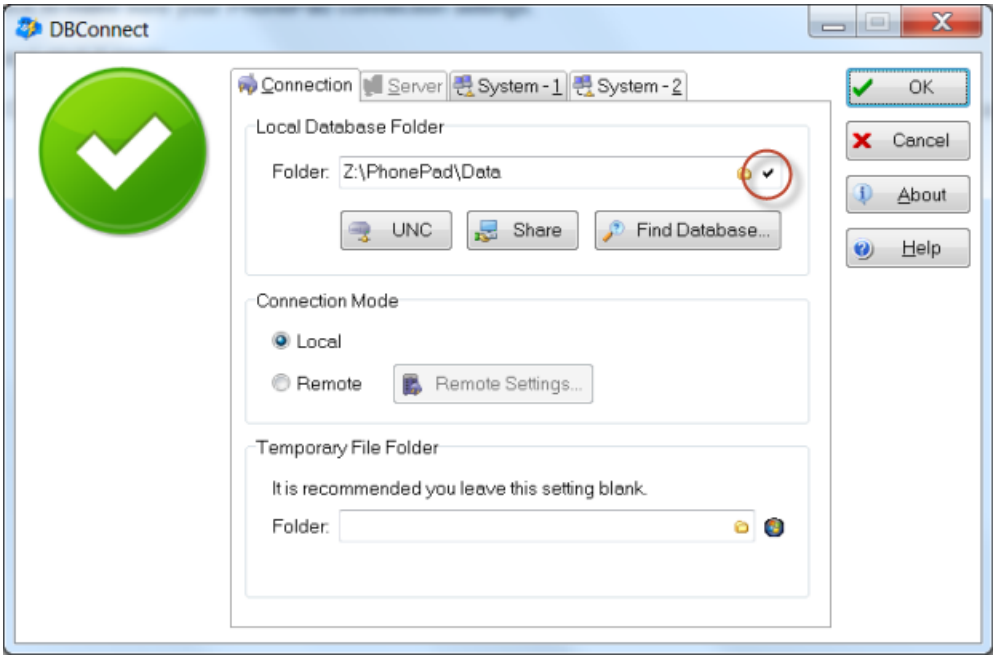
6. Click **OK** to save the settings. Clicking **Cancel** will cancel any changes you have made.

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.



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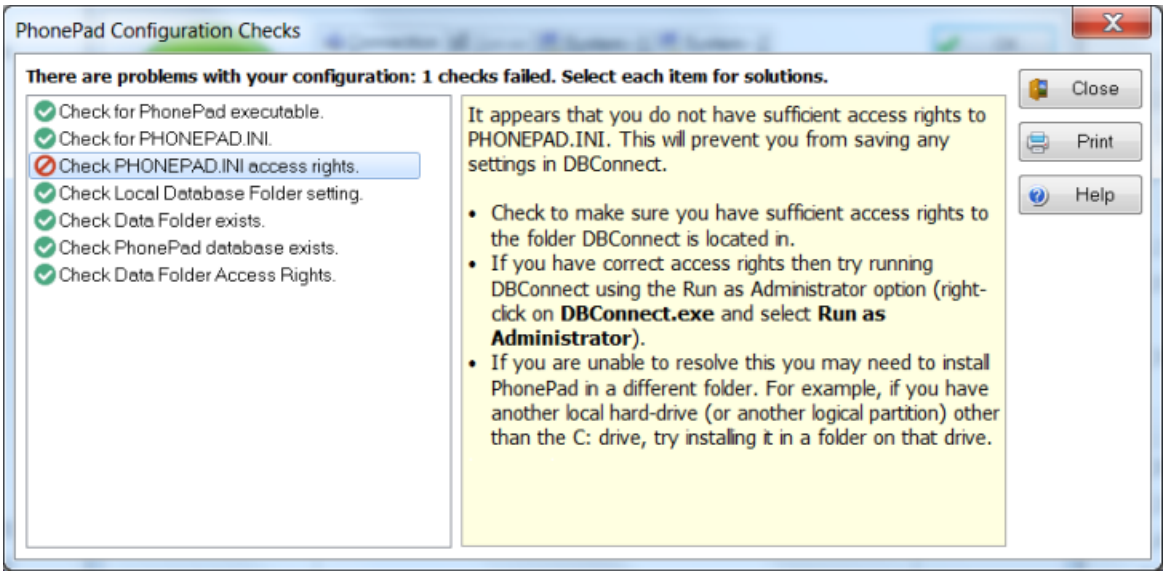
3. Click this button.

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.

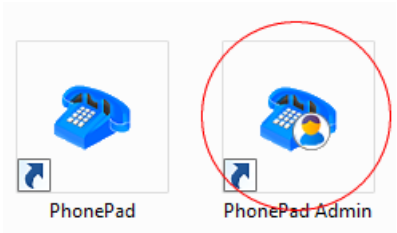
Once you have all green ticks, you are ready to proceed to **Part 6**.

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**.

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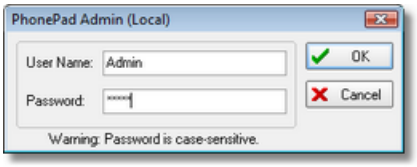
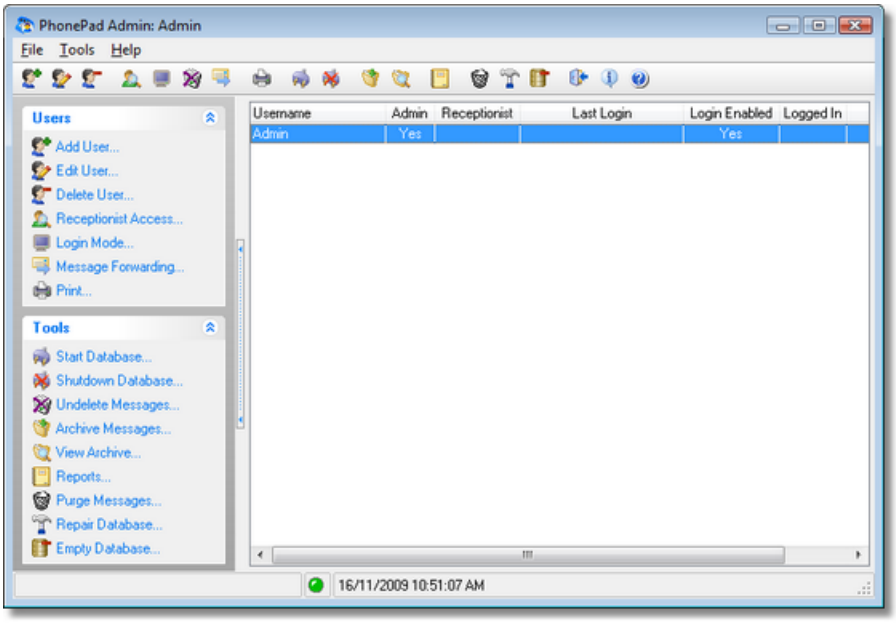
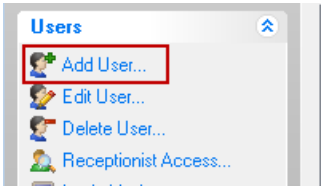


3. PhonePad Admin's main screen should be displayed.



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.

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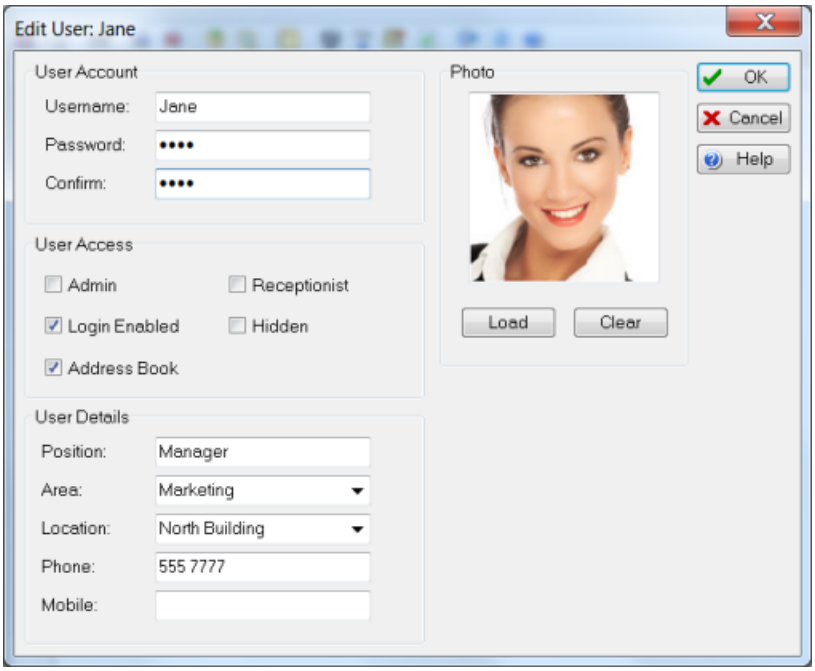
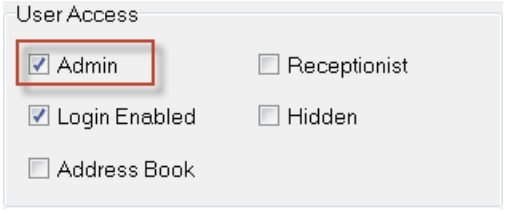


7. You'll notice that the password is masked - this is for security reasons. Instead of displaying the letters you enter, it displays an asterix in place of each letter. Because you can't see the password to visually confirm you entered it correctly, you need to enter it in a second time to verify that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

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.



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,

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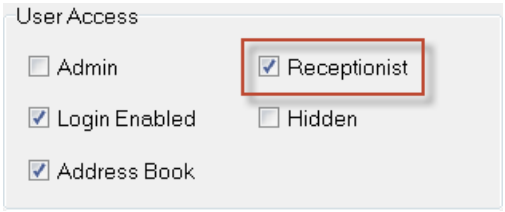
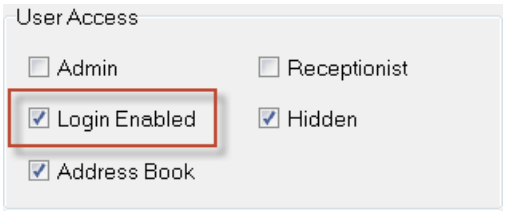
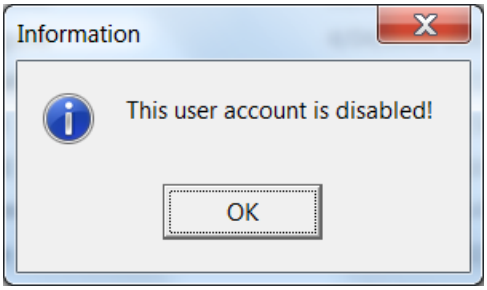


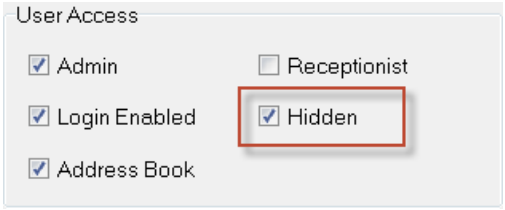
10. The **Login Enabled** checkbox should normally be checked, unless you don't want the user to login.



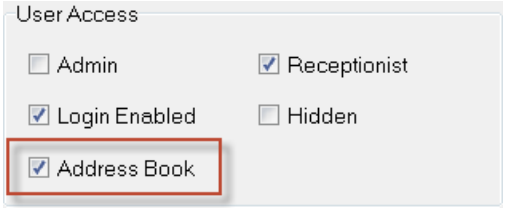
If this checkbox is unchecked, when the user attempts to login the following message will be displayed:



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.



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.



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

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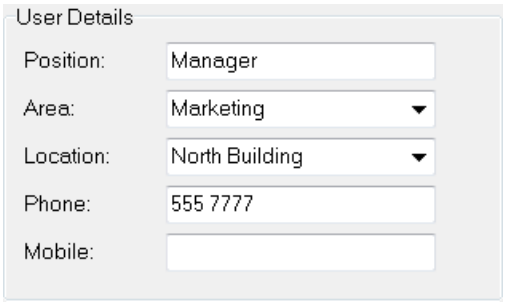
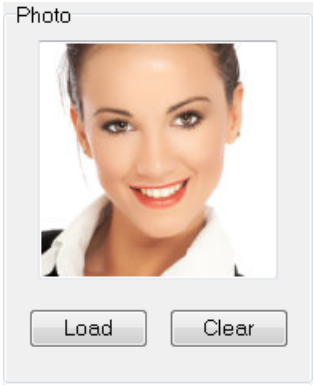
lists will initially be blank. But as you enter information in these fields it will be automatically added to your PhonePad database, so you only have to re-enter it once. After that you can select the information instead of entering it.



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.



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.

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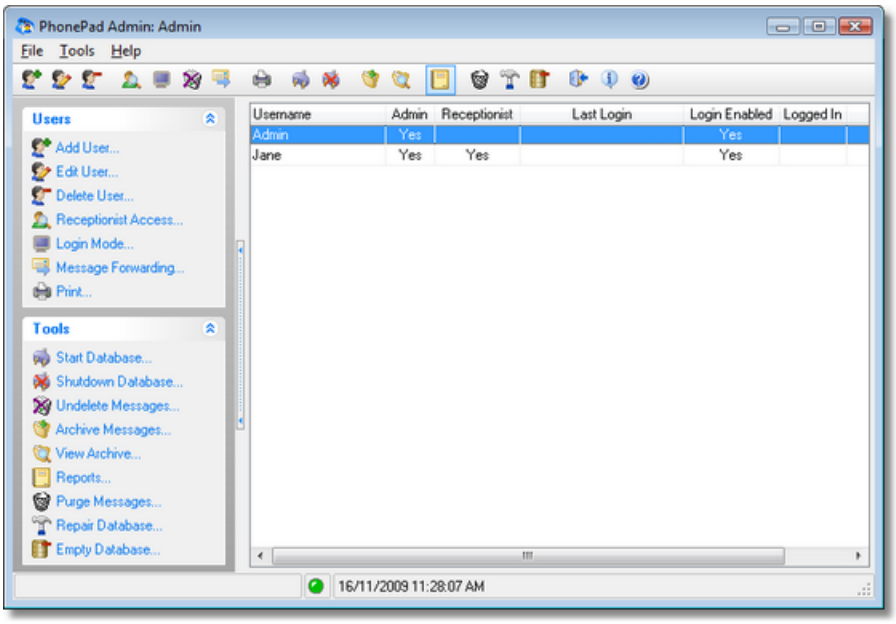
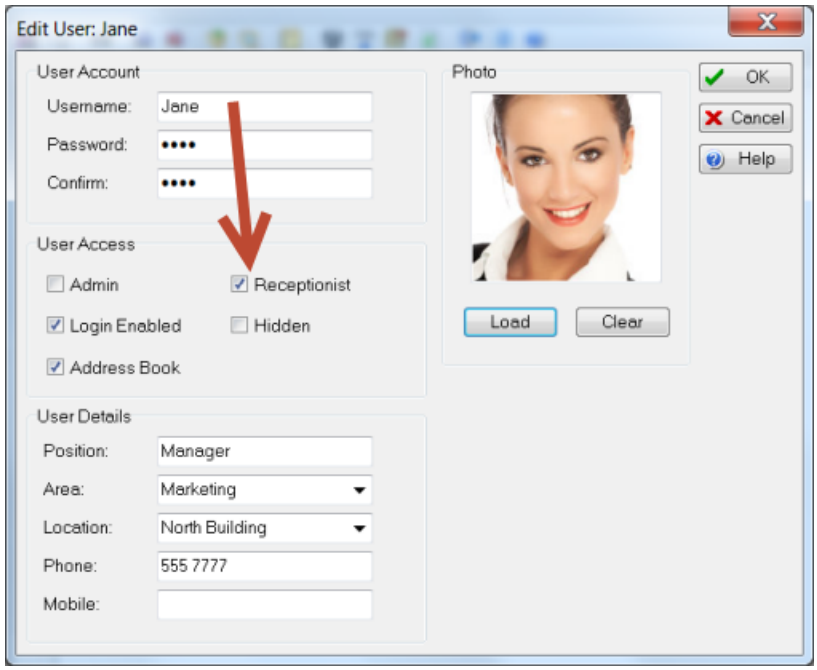


Let's move on to **Part 8** and see what this Receptionist stuff is all about.

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

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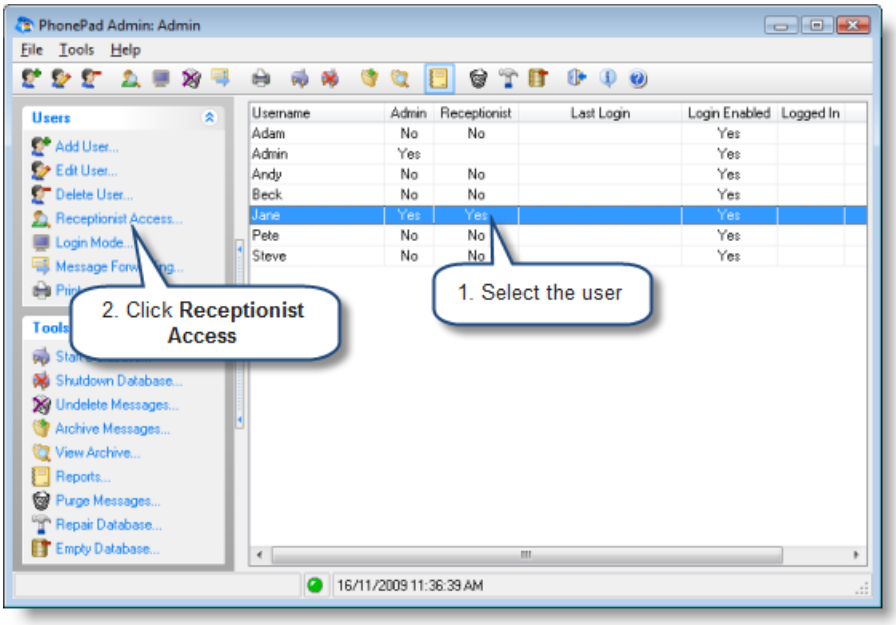
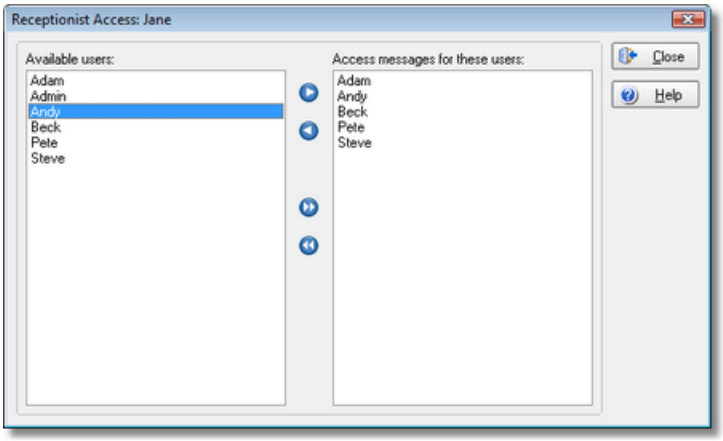
user list and click on **Receptionist Access**.



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



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.

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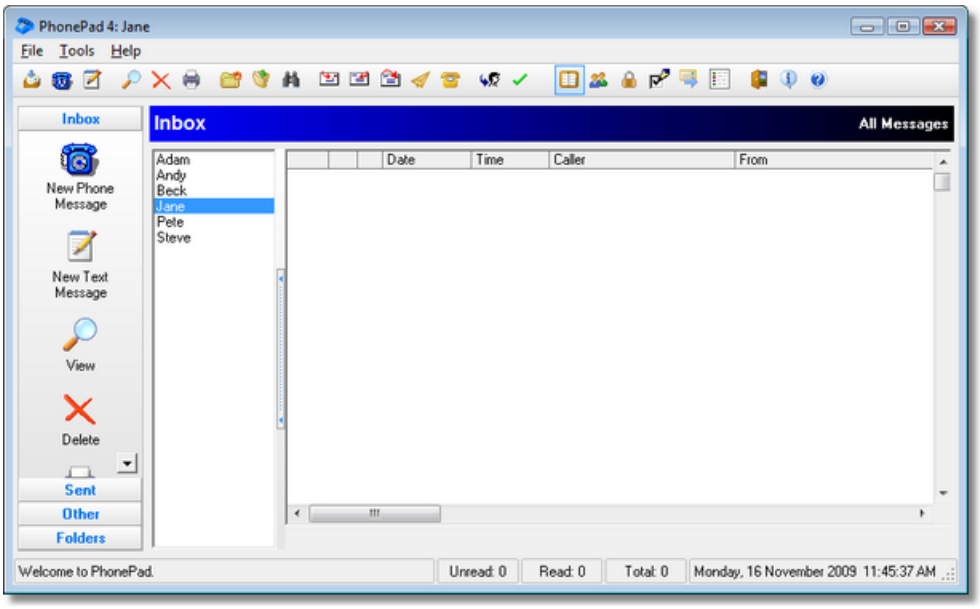
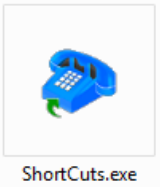


Part 9 - Setting Up Shortcuts

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.

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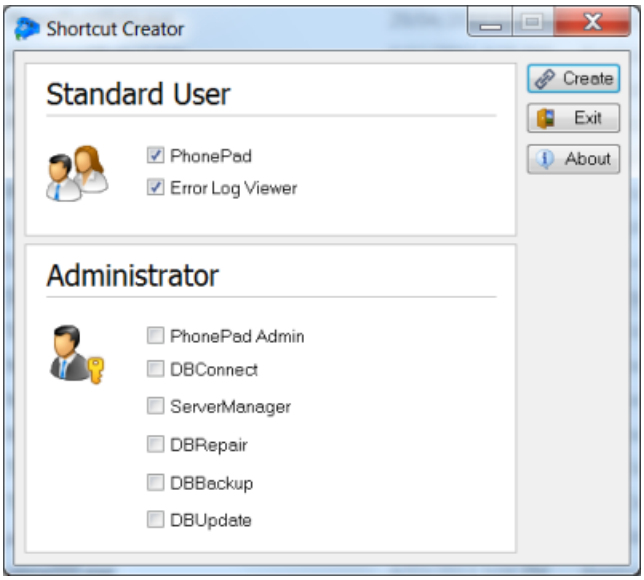

3. Click **Create** to create the shortcuts.

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*.

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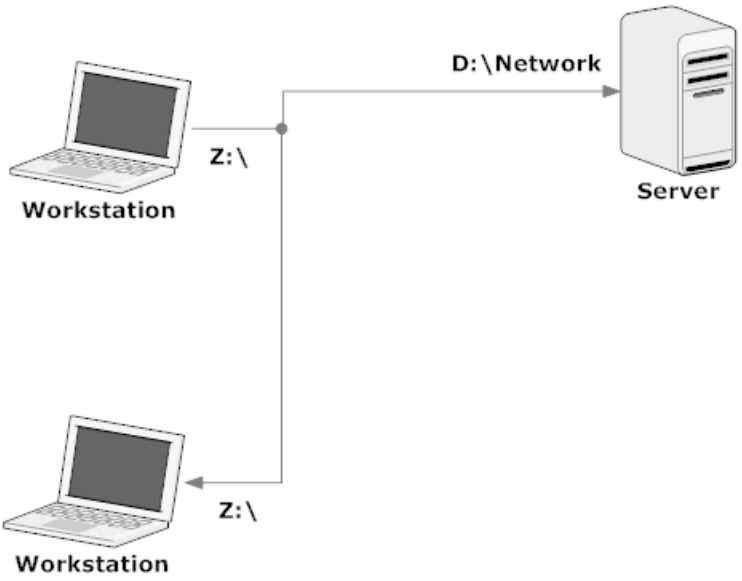

Part 1 - Selecting a Location

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.

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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, we have entered *D:\PhonePad* as the destination location.

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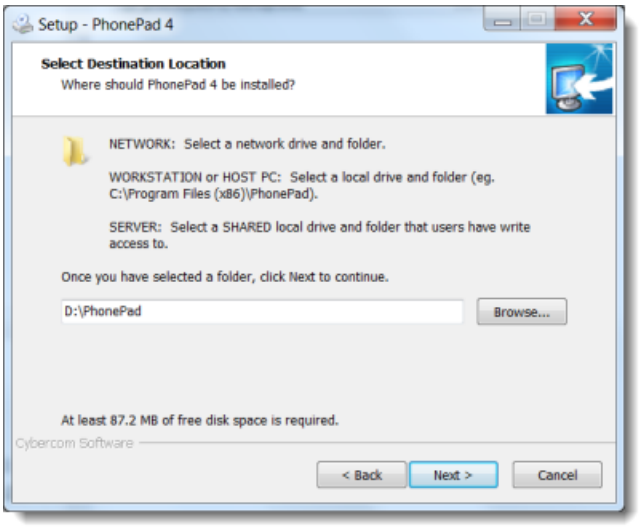
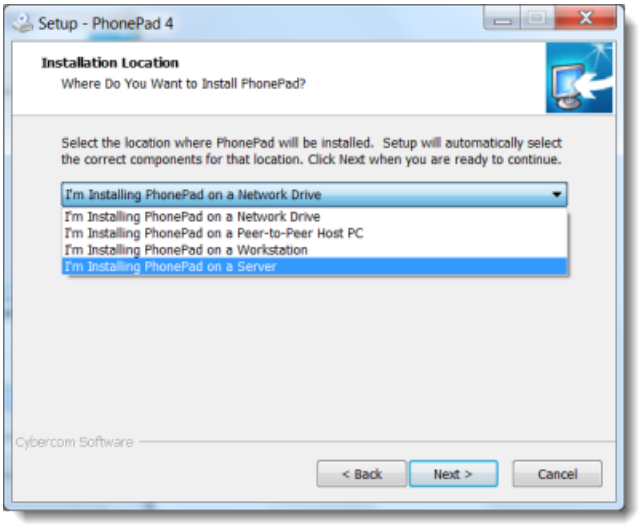


7. Enter the location you decided on and click **Next**.

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.

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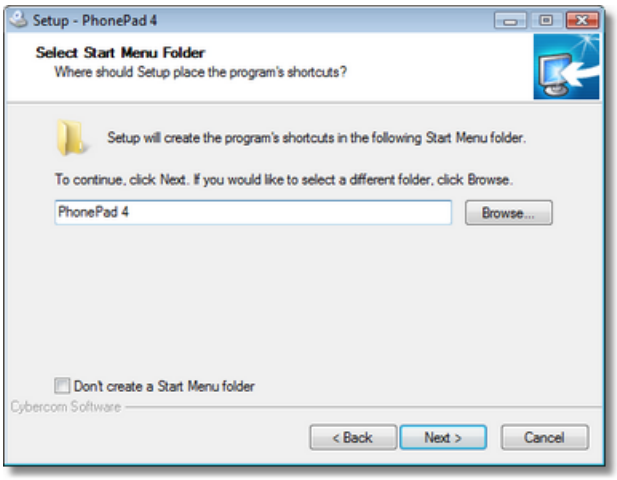
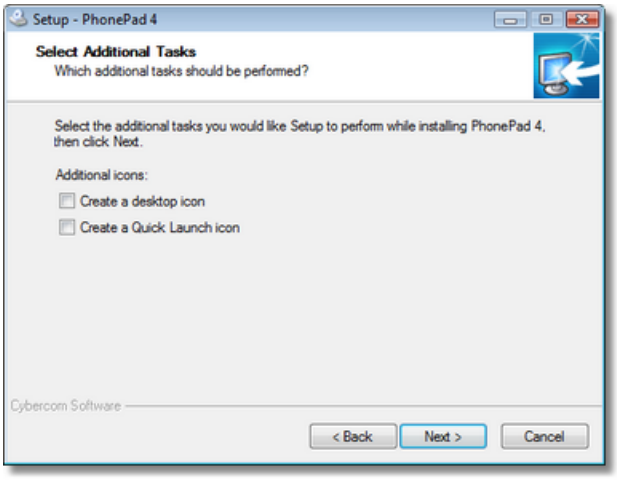


10. When prompted to add desktop and Quick Launch icons, unselect these as we will use a different method to set these up. Click **Next**.



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

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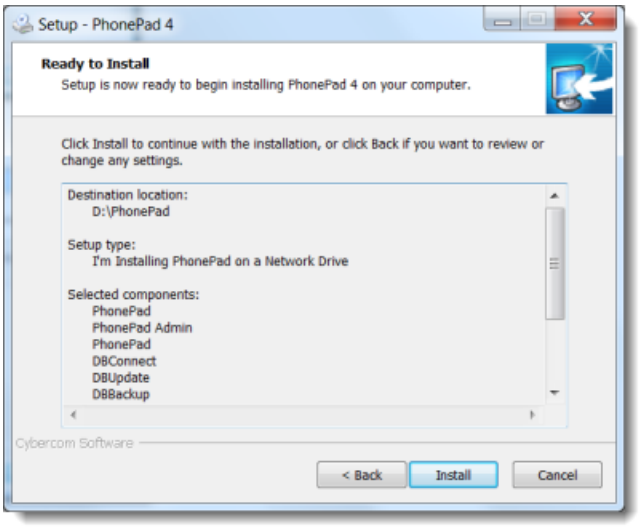
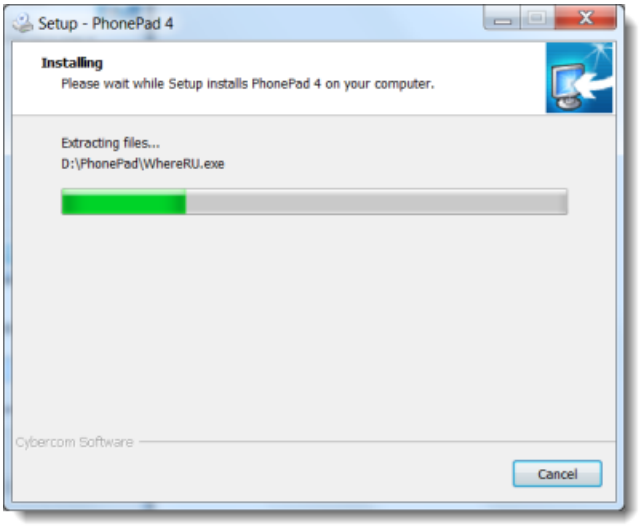


12. PhonePad will be installed on your network drive.



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

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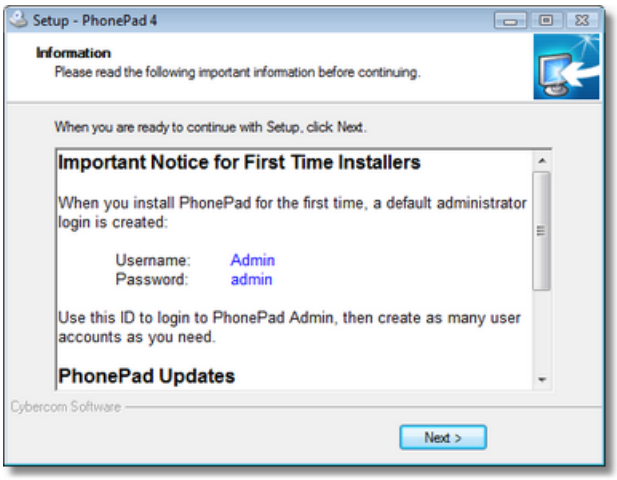

14. The final screen of the wizard will be displayed. It's important that the **Run DBUpdate Wizard** option is checked. Click **Finish**.

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**.

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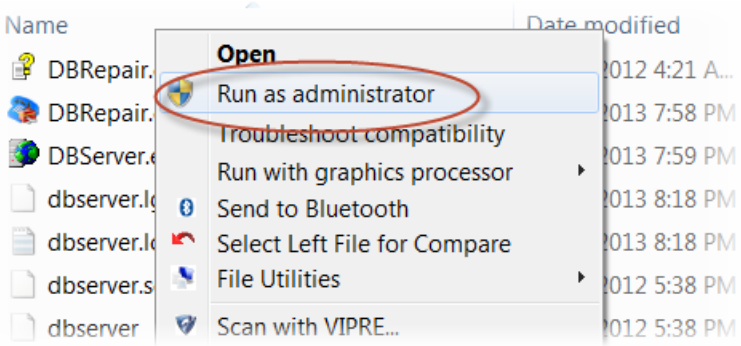


Part 3 - Creating Your PhonePad Database_2

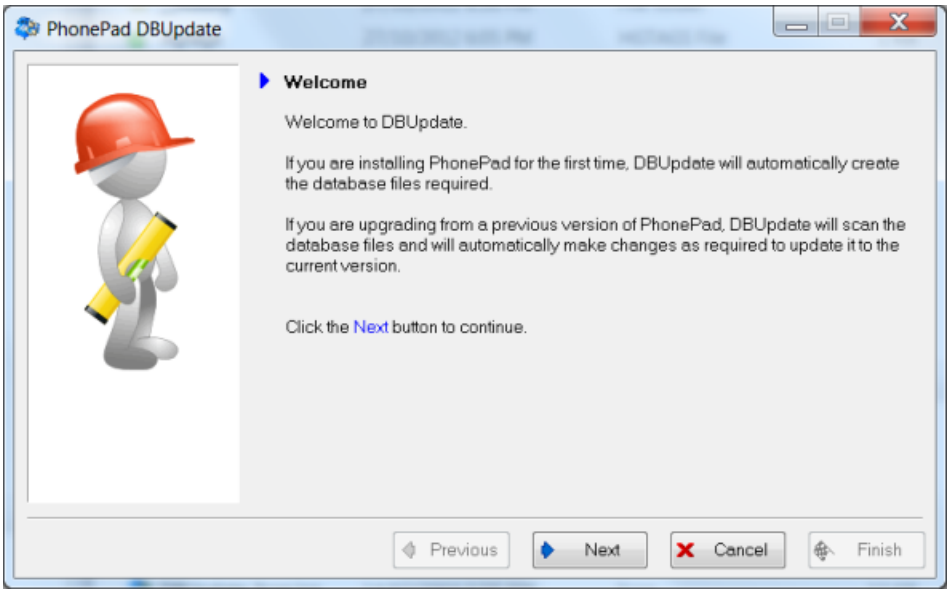
Now that PhonePad has been installed on your network, we need to create your PhonePad database. The database is where all of your messages will be stored, as well as caller information, users, etc. It's an important and vital piece of your PhonePad installation.

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.



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

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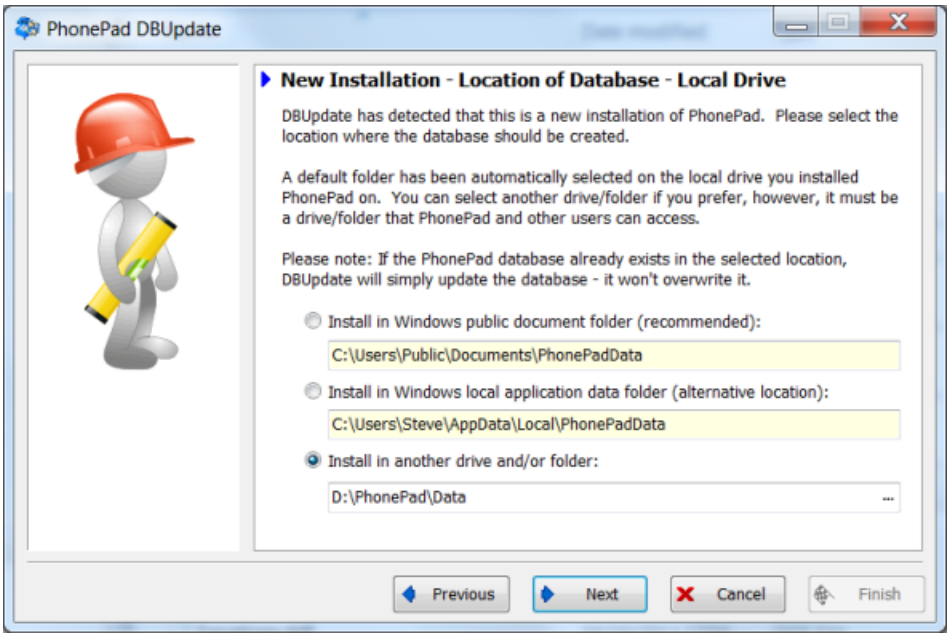
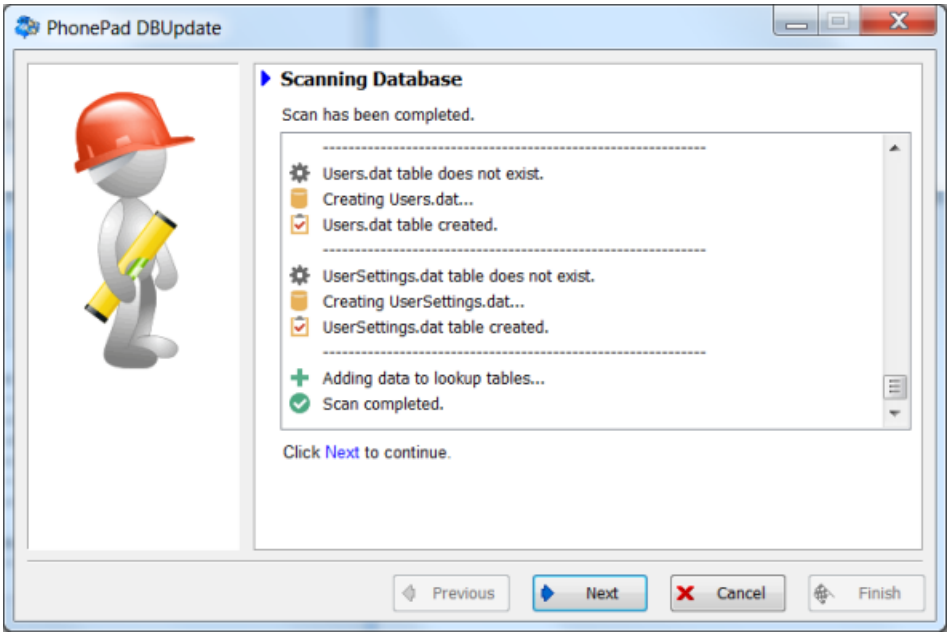
database in the Windows Public Document folder is also a good choice, as long as all users have read/write or modify access to the folder. You could create a network share for the folder (more information is in **Part 4**.

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



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.



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

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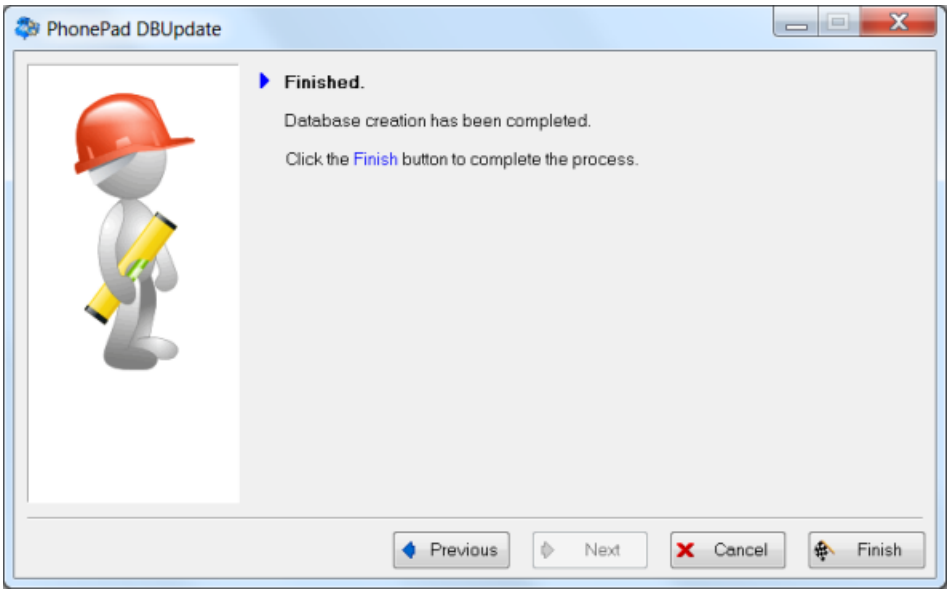

Important Note About Access Rights

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**.

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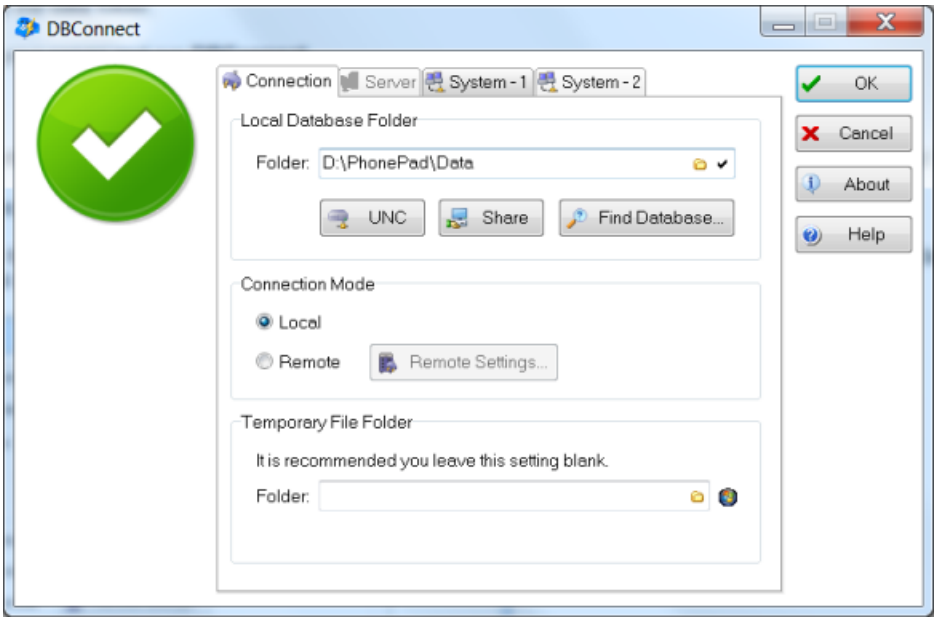
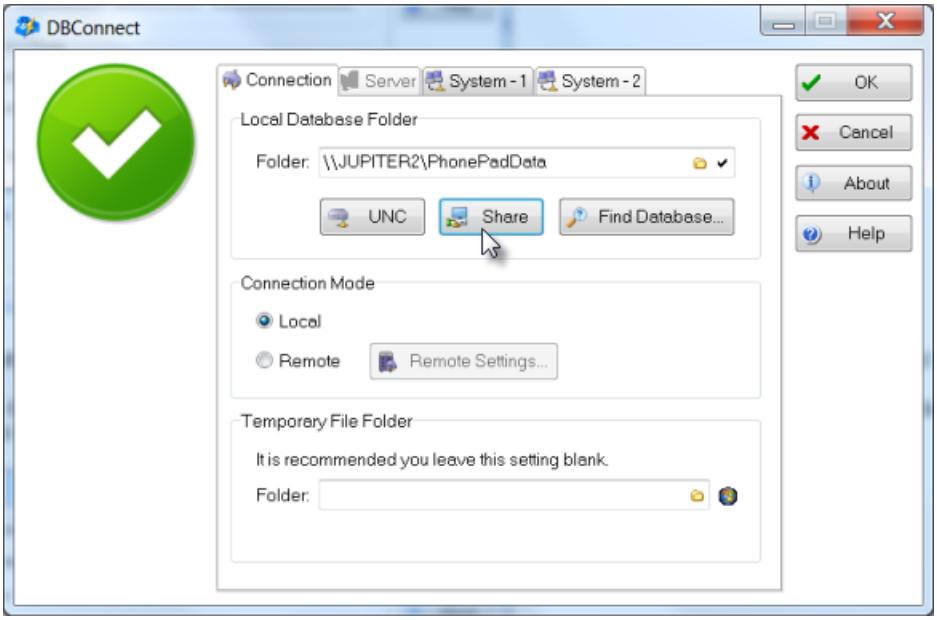


2. The **Local Database Folder** setting should display the PhonePad data folder created by **DBUpdate** in **Part 3**. If not, you will need to select it by clicking on the button.

3. 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. Important Note: This can only be done to a local drive on the server.



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

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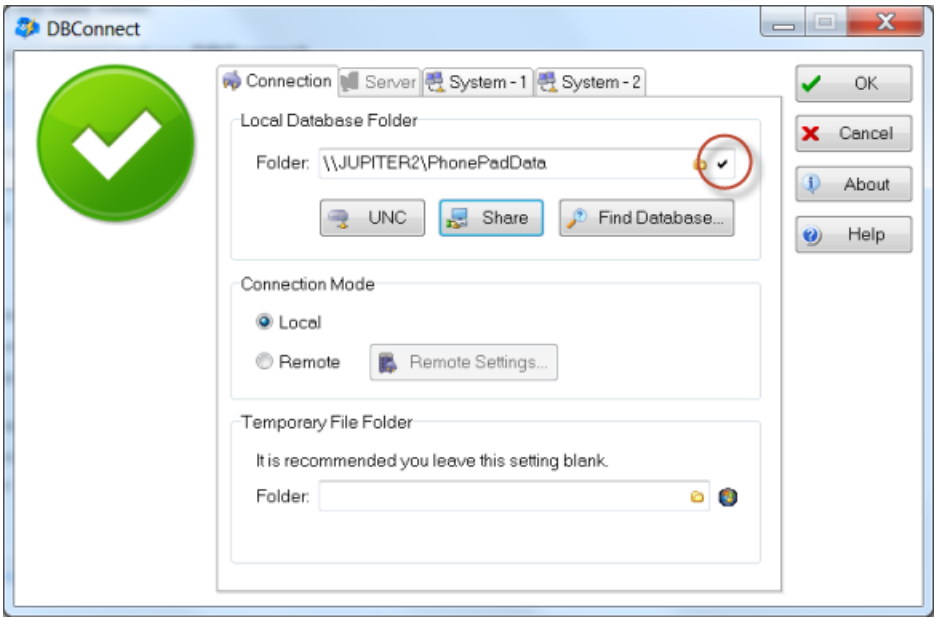
Part 5 - Check Your PhonePad Connection Settings_2

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

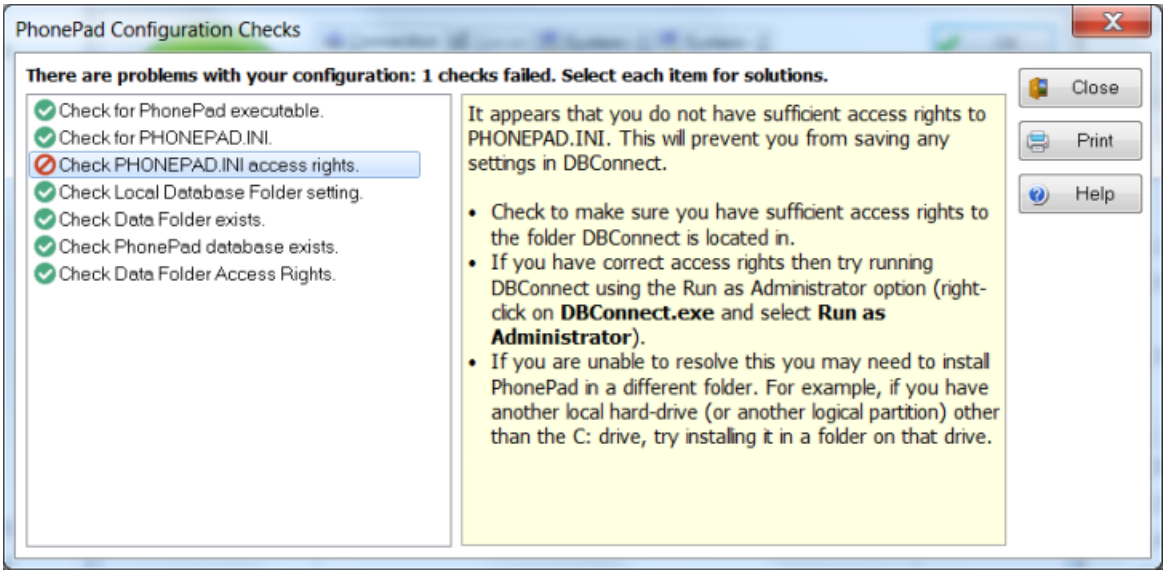
1. If **DBConnect** isn't running, go and start it again.

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.



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

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

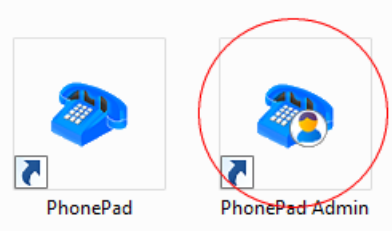
Once you have all green ticks, you are ready to proceed to **Part 6**.

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**.

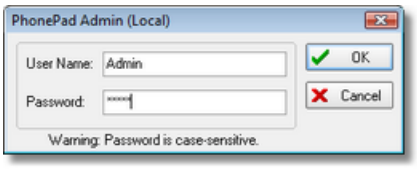
Part 7 - Adding Users

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**.



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

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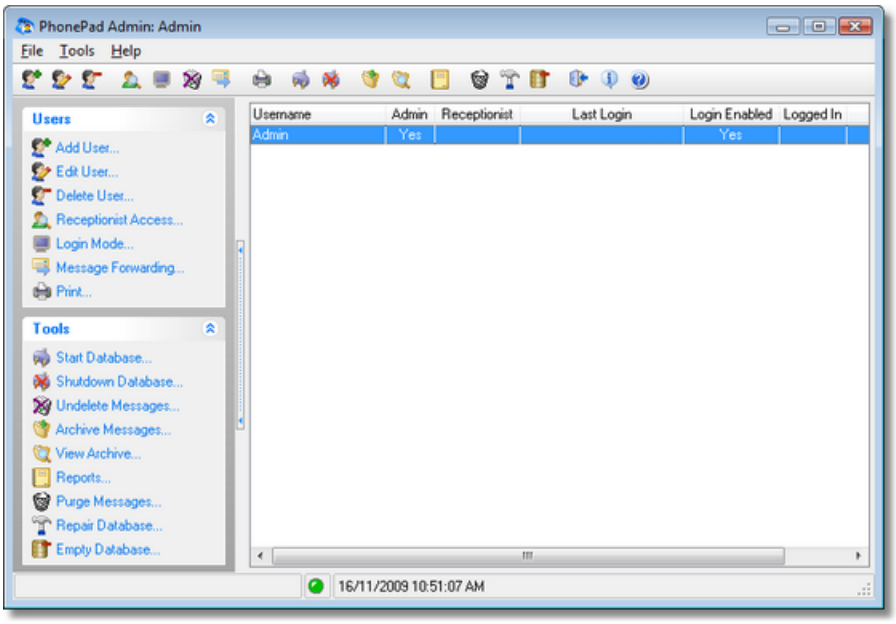
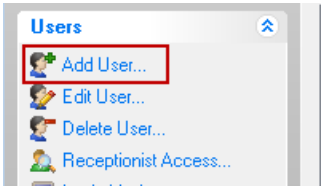


4. At this stage there will be only one user account - the default administrator account. Let's create another.

5. Click **Add User**.



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

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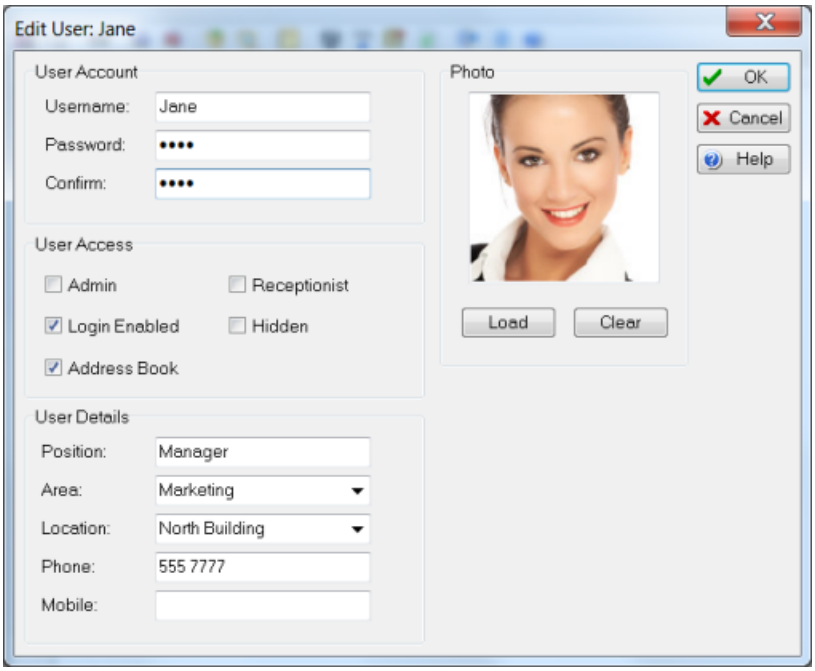
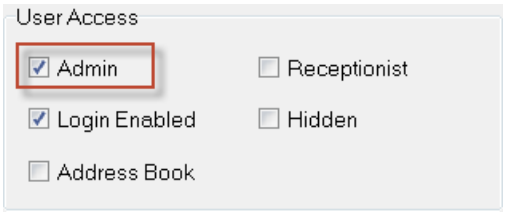


7. You'll notice that the password is masked - this is for security reasons. Instead of displaying the letters you enter, it displays an asterix in place of each letter. Because you can't see the password to visually confirm you entered it correctly, you need to enter it in a second time to verify that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

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.



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,

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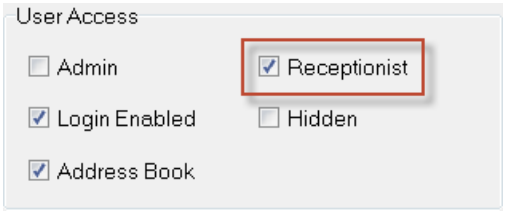
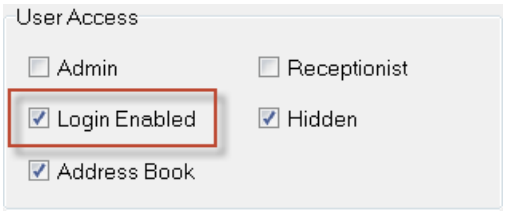
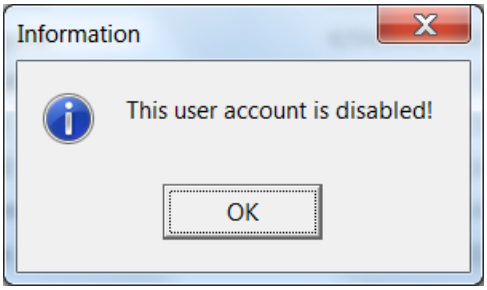


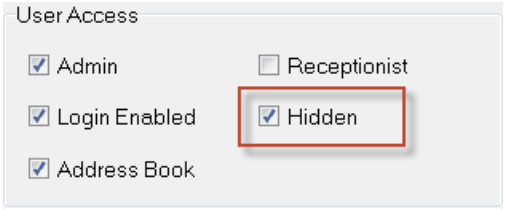
10. The **Login Enabled** checkbox should normally be checked, unless you don't want the user to login.



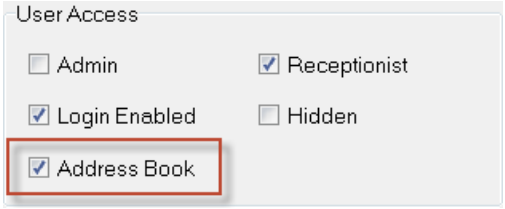
If this checkbox is unchecked, when the user attempts to login the following message will be displayed:



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.



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.



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

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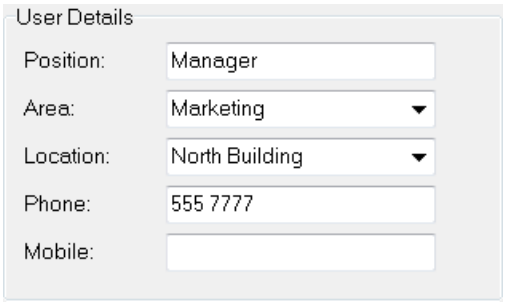
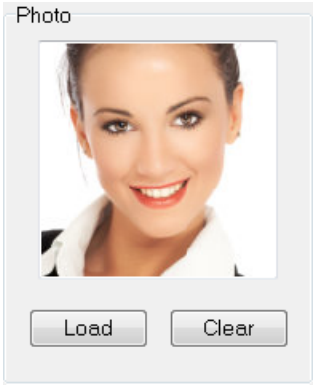
lists will initially be blank. But as you enter information in these fields it will be automatically added to your PhonePad database, so you only have to re-enter it once. After that you can select the information instead of entering it.



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.



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.

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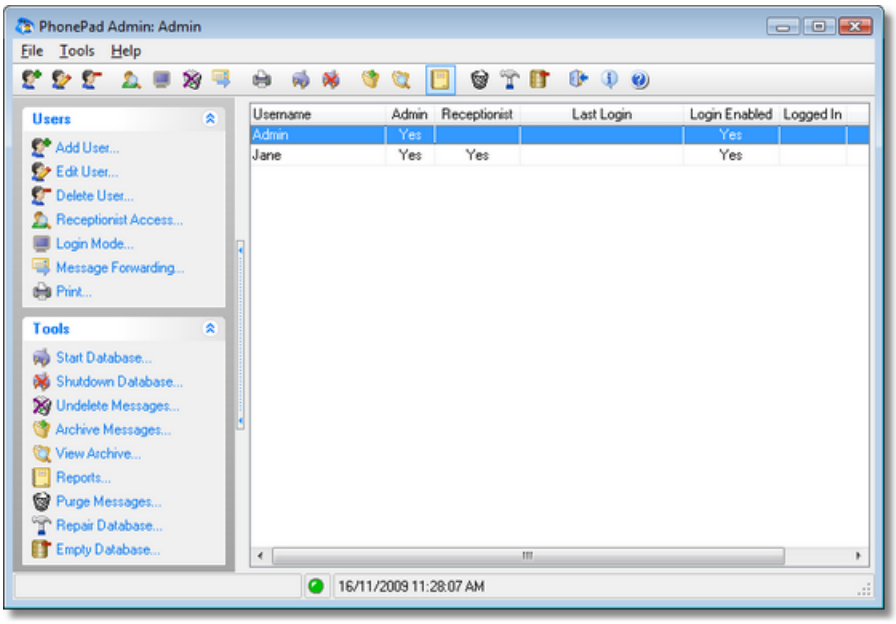
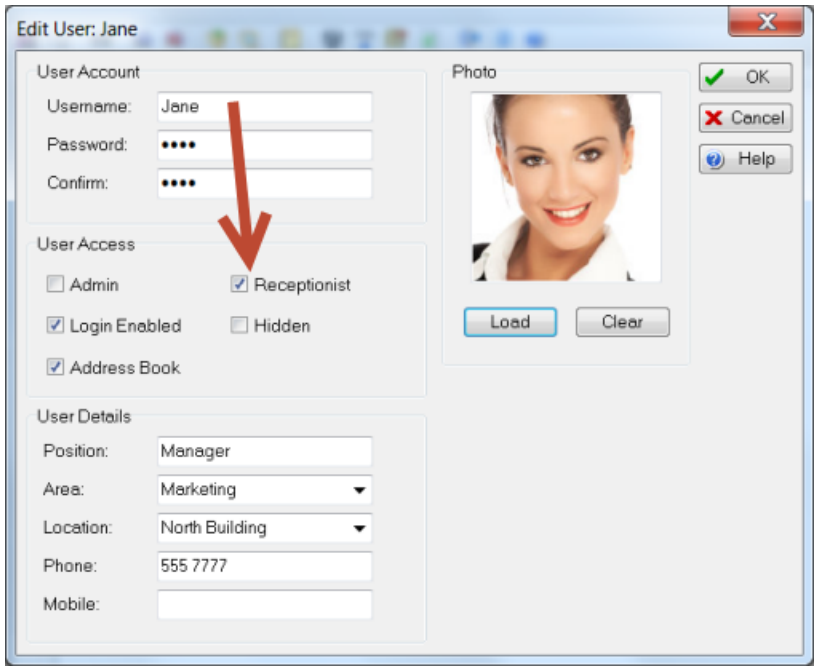


Let's move on to **Part 7** and see what this Receptionist stuff is all about.

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

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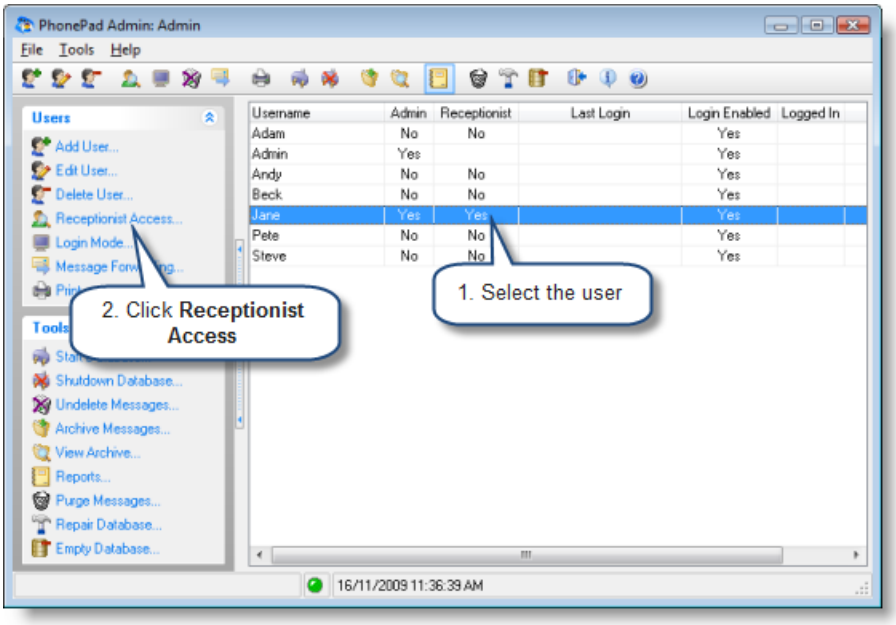
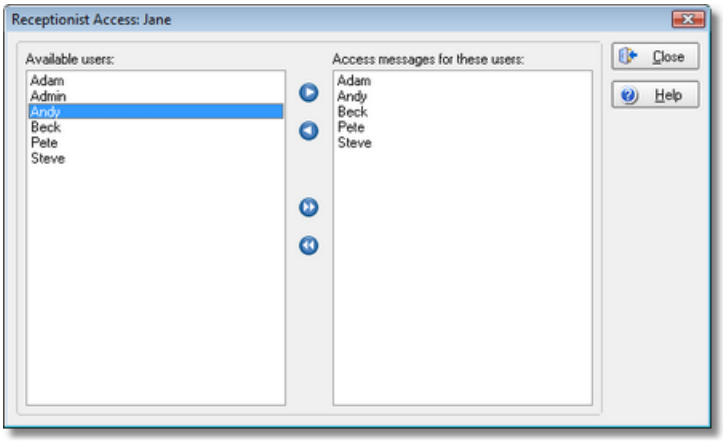
user list and click on **Receptionist Access**.



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



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.

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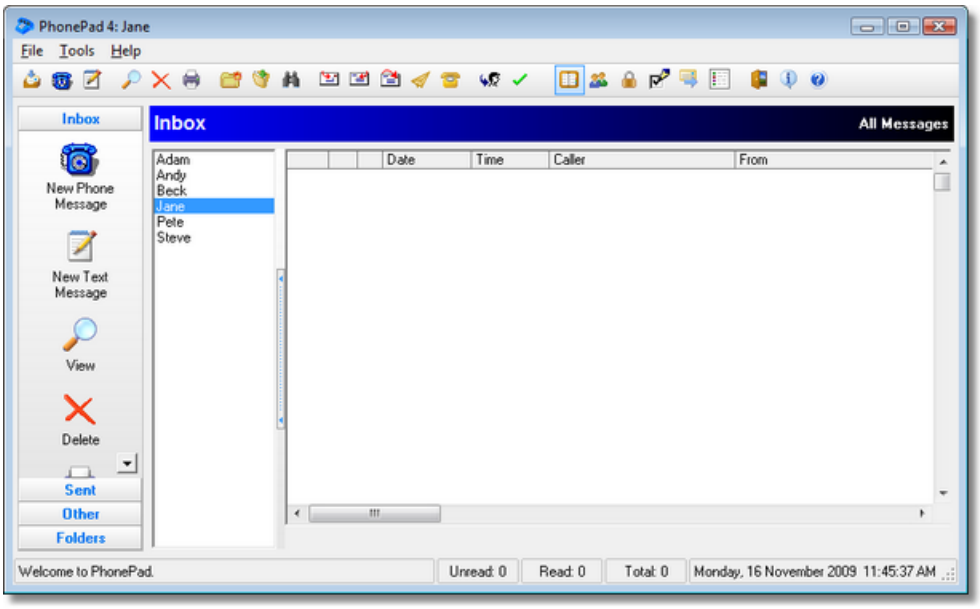
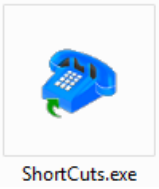


Part 9 - Setting Up Shortcuts

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.

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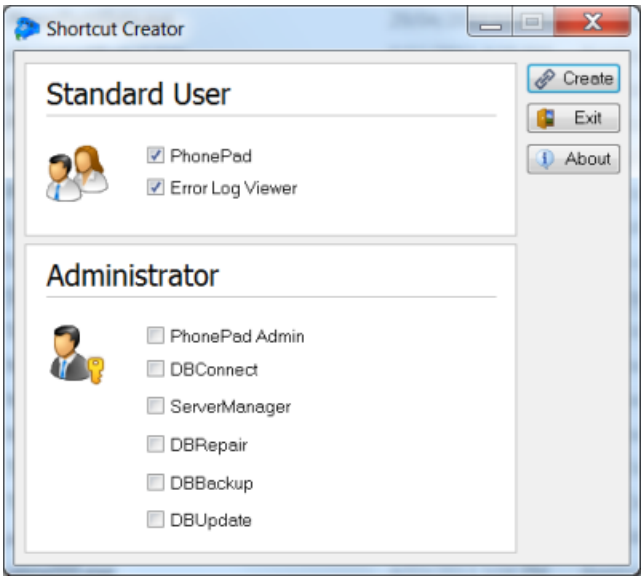


3. Click **Create** to create the shortcuts.

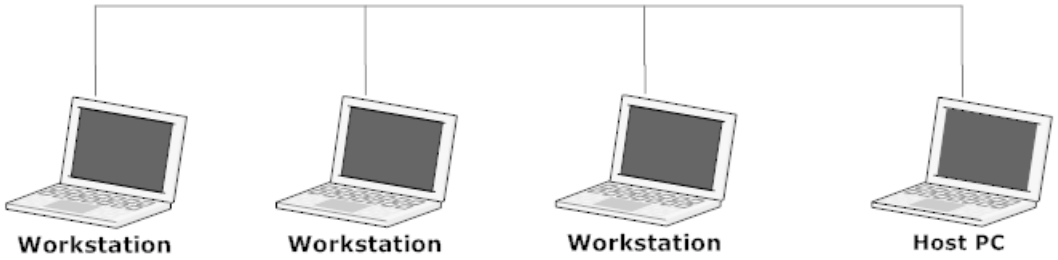
Installing PhonePad on a Peer-to-Peer Network

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.



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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.

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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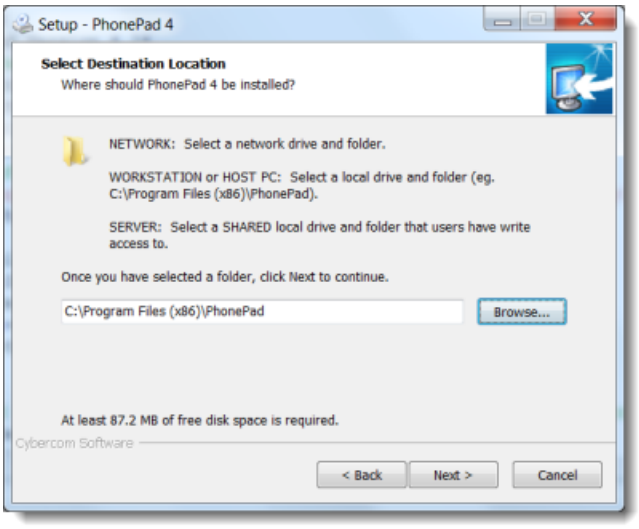
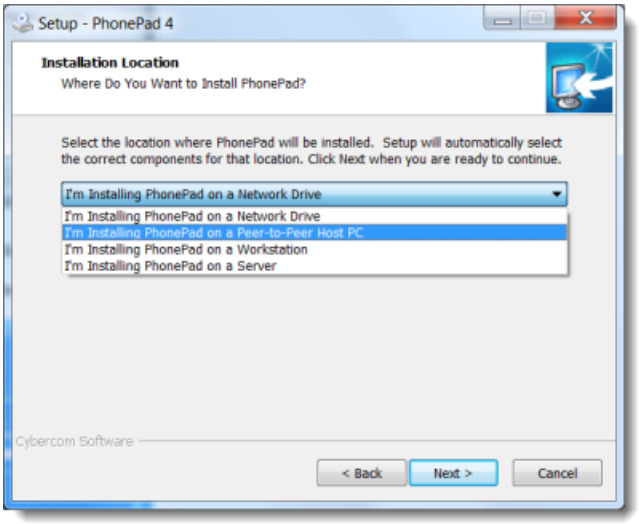


7. Enter the location you decided on and click **Next**.

8. On the **Select Components** screen, select **Peer-to-Peer Host** from the drop-down list, then click **Next**.



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.

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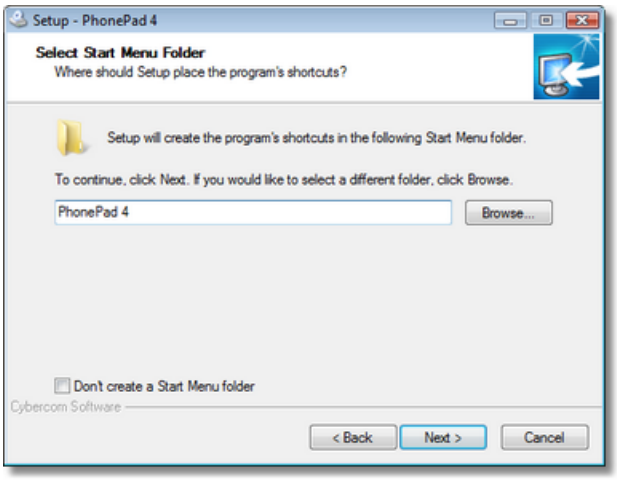
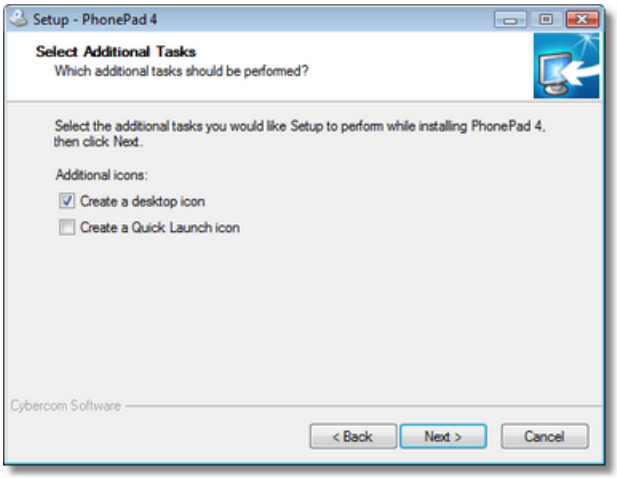


10. This screen allows you to automatically create desktop and Quick Launch icons for PhonePad. Once you have selected the options you want click **Next**.



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

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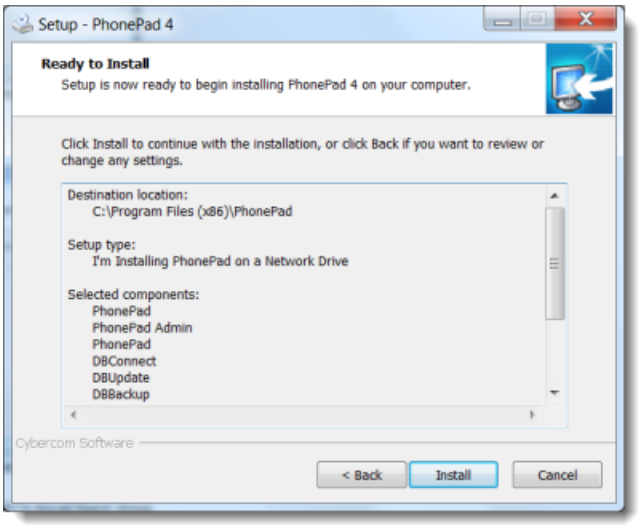
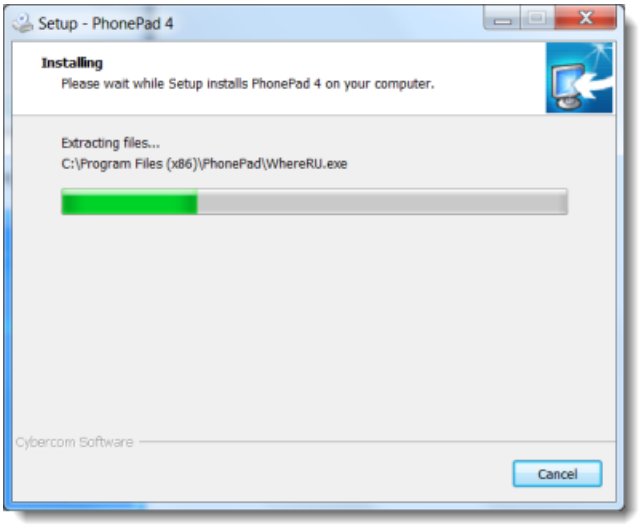


12. PhonePad will be installed on the Host PC's local hard drive.



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

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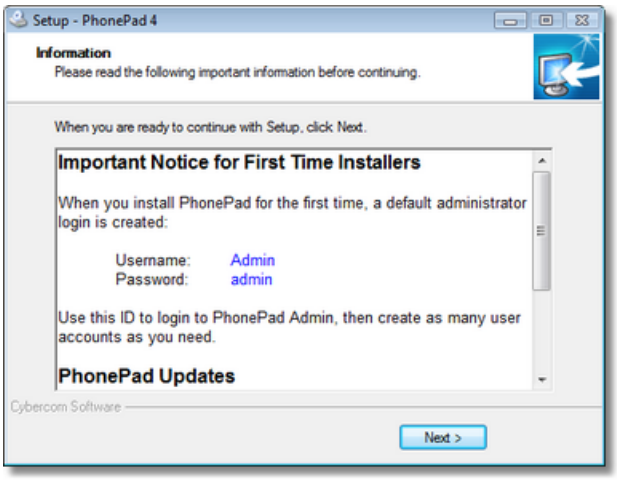

14. The final screen of the wizard will be displayed. It's important that the **Run DBUpdate Wizard** option is checked. Click **Finish**.

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.

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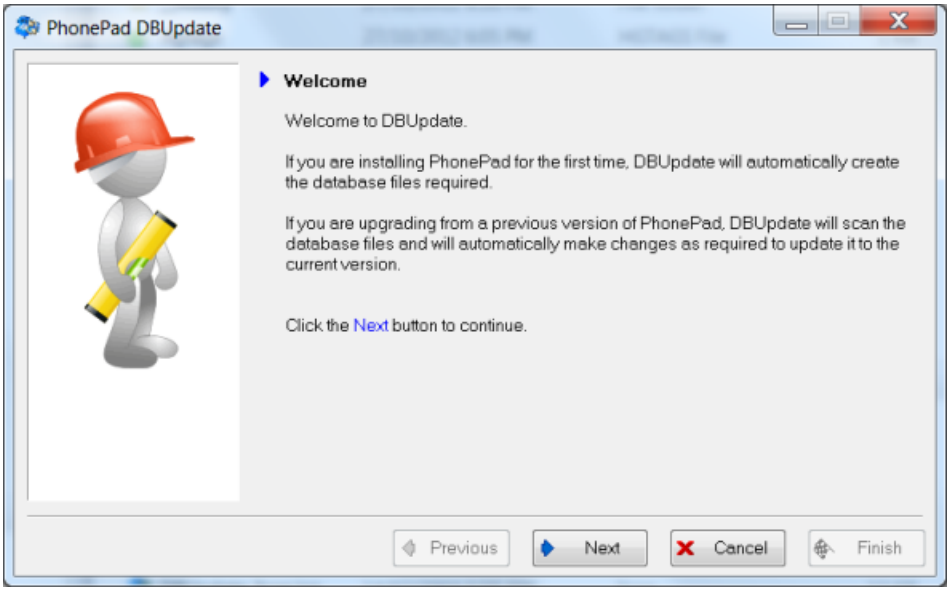
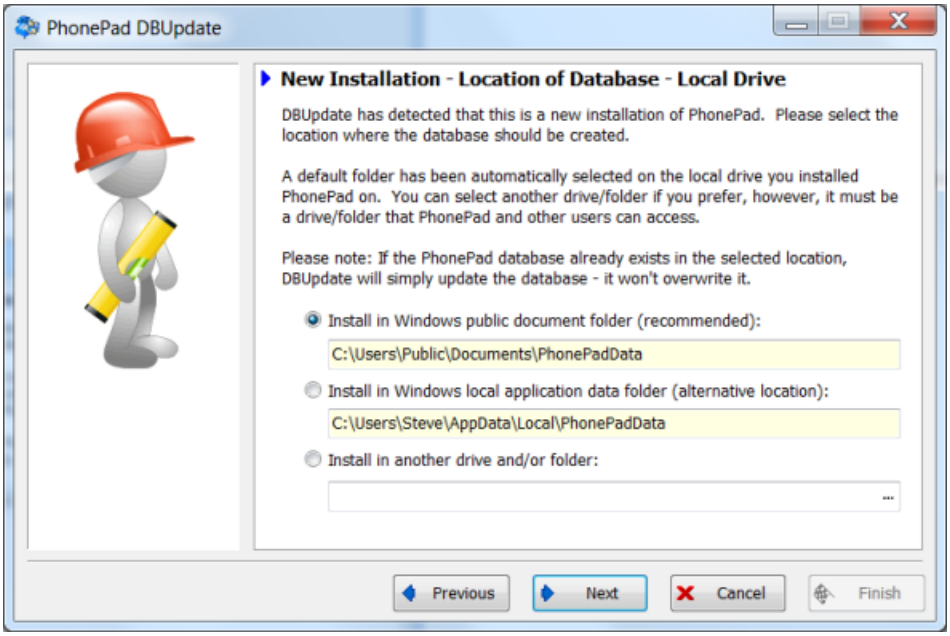
If the **Run DBUpdate Wizard** checkbox was checked in the last step of Part 2, the **DBUpdate** program should have automatically started when you clicked the **Finish** button. If you can't see it on your screen then check the Windows taskbar as it may be minimized. If the **Run DBUpdate Wizard** checkbox 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.



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.



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

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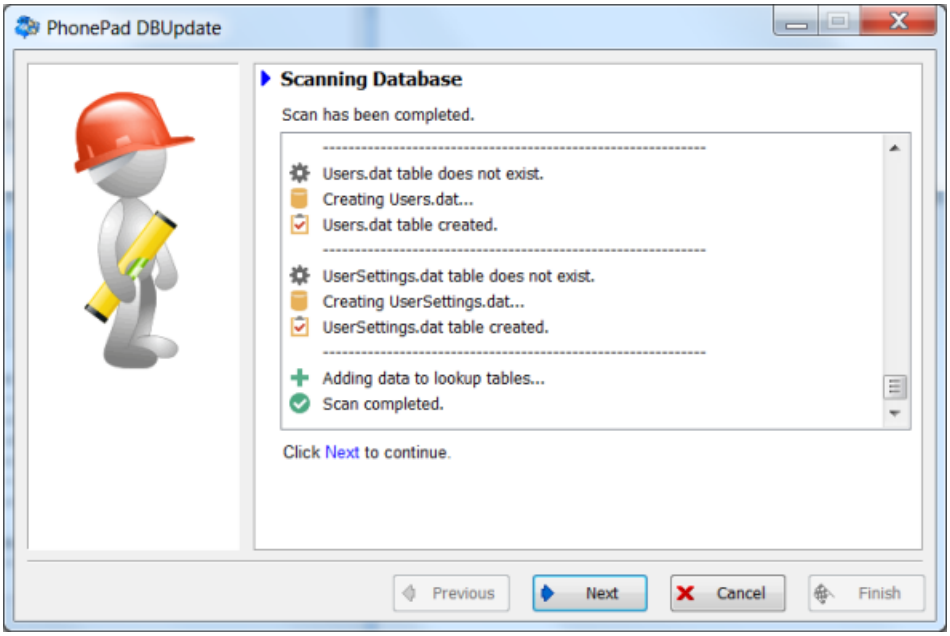
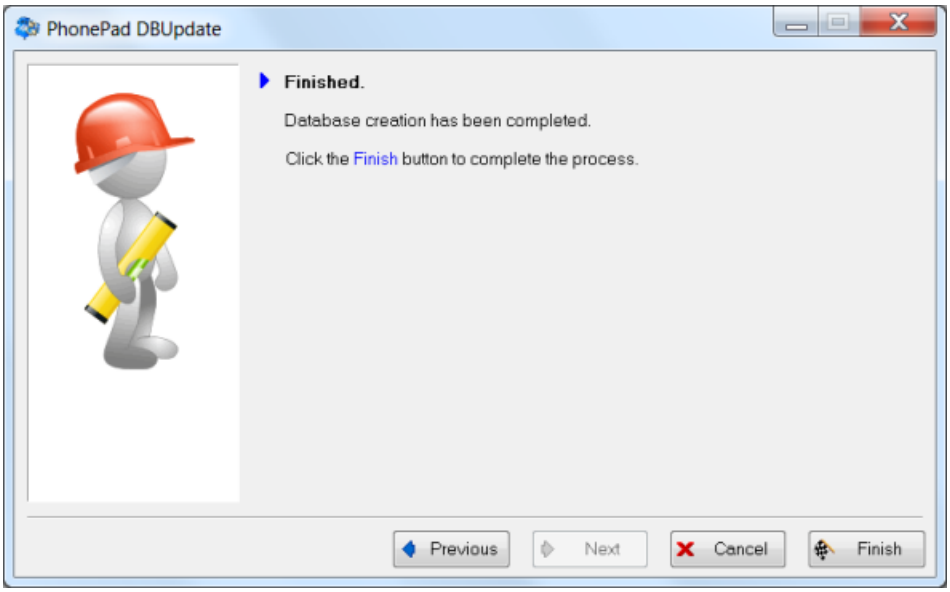
seconds. Click **Next** when it has finished.



4. Click **Finish** to close DBUpdate.



Important Note About Access Rights

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

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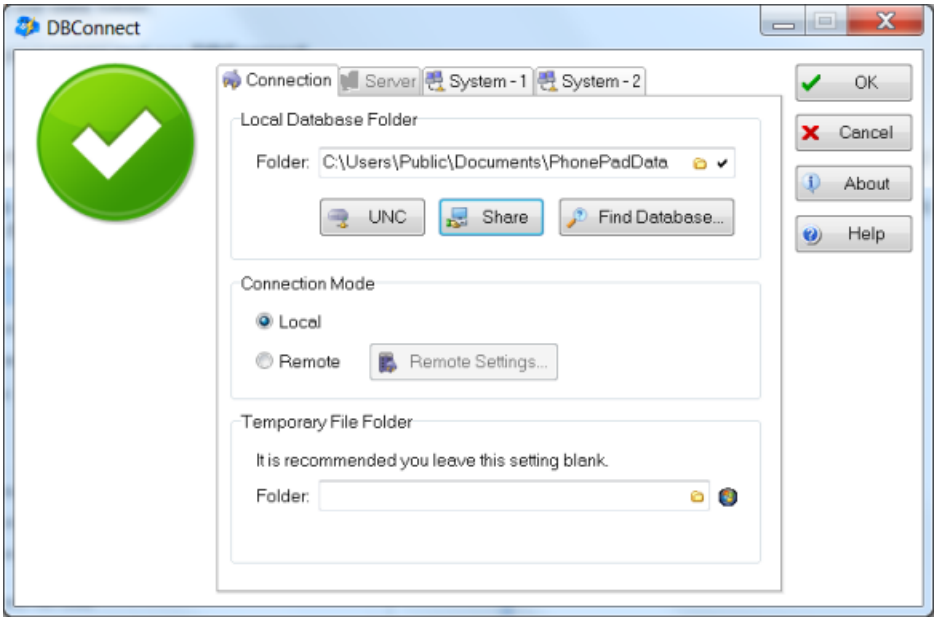
Part 4 - Setting Up Your Data Folder

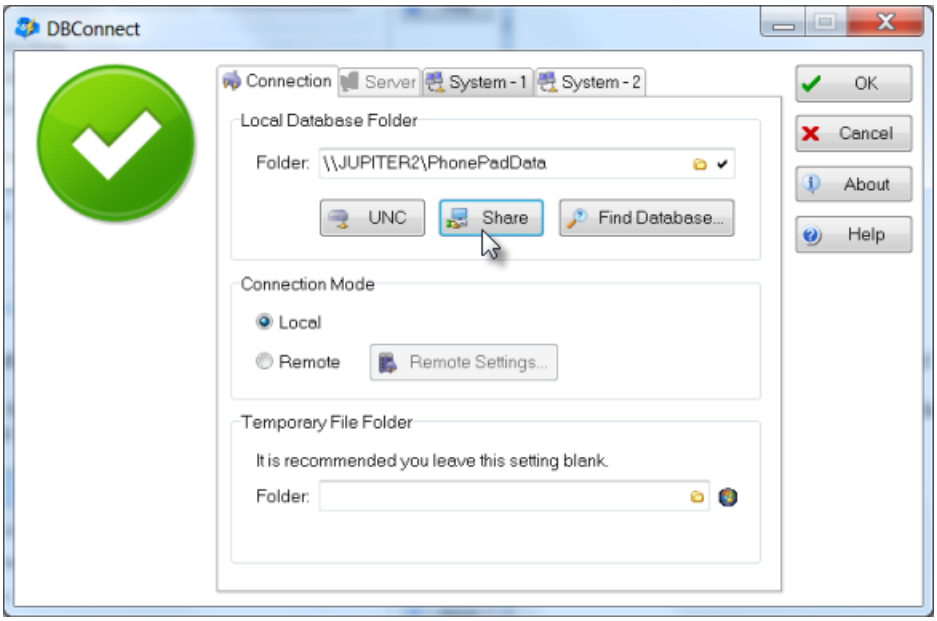
The next step is to finish setting up the data folder.

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



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. 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. Important Note: This can only be done to a local drive on the Host PC.



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

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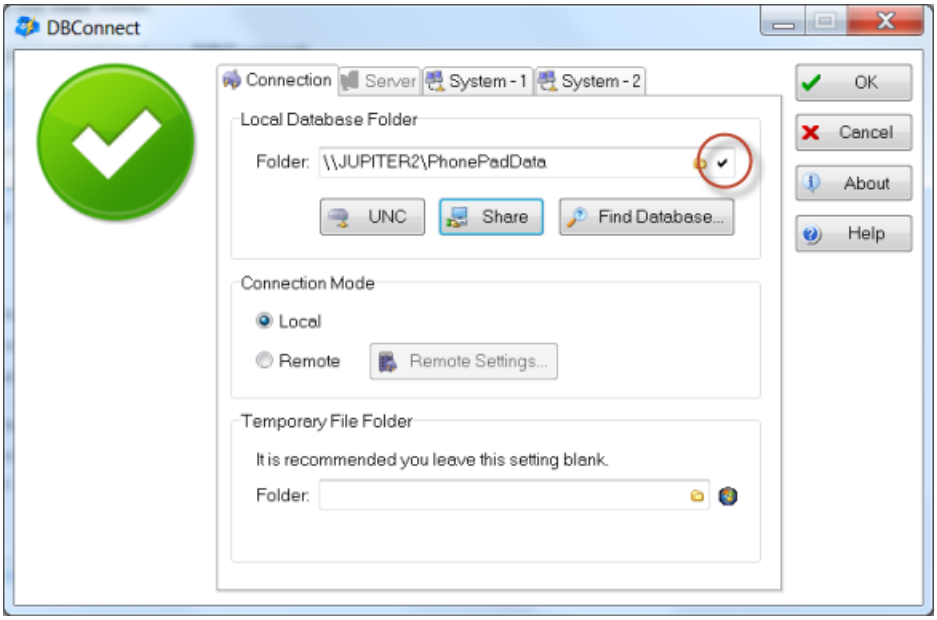
Part 5 - Check Your PhonePad Connection Settings_2_2

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

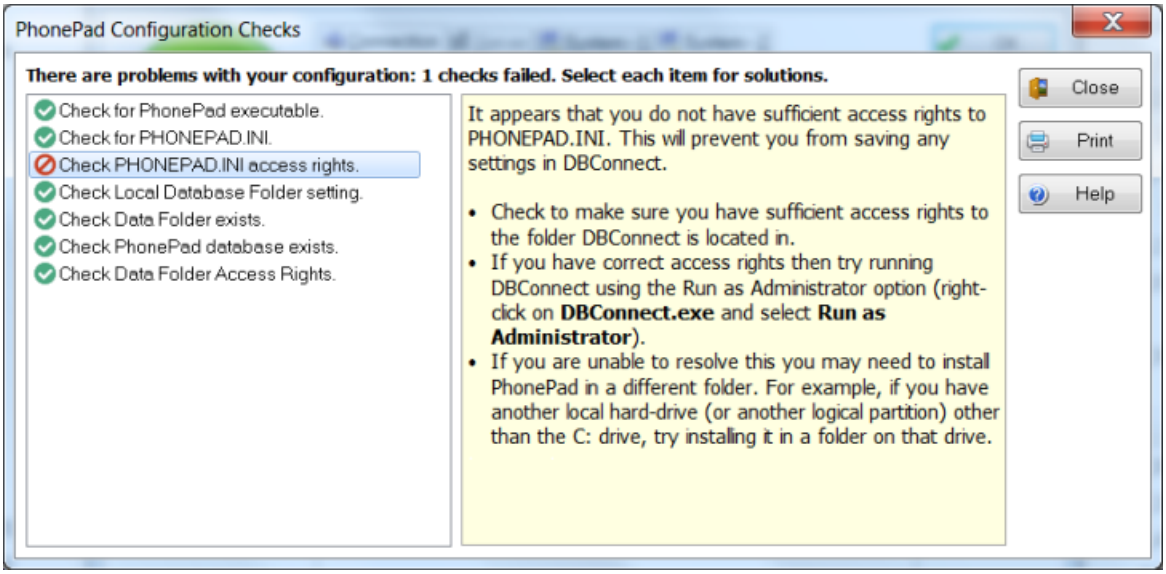
1. If **DBConnect** isn't running, go and start it again.

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.



3. Click this button.

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



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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.

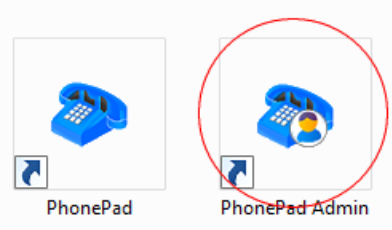
Once you have all green ticks, you are ready to proceed to **Part 6**.

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**.

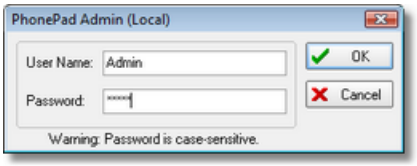
Part 7 - Adding Users

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.



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

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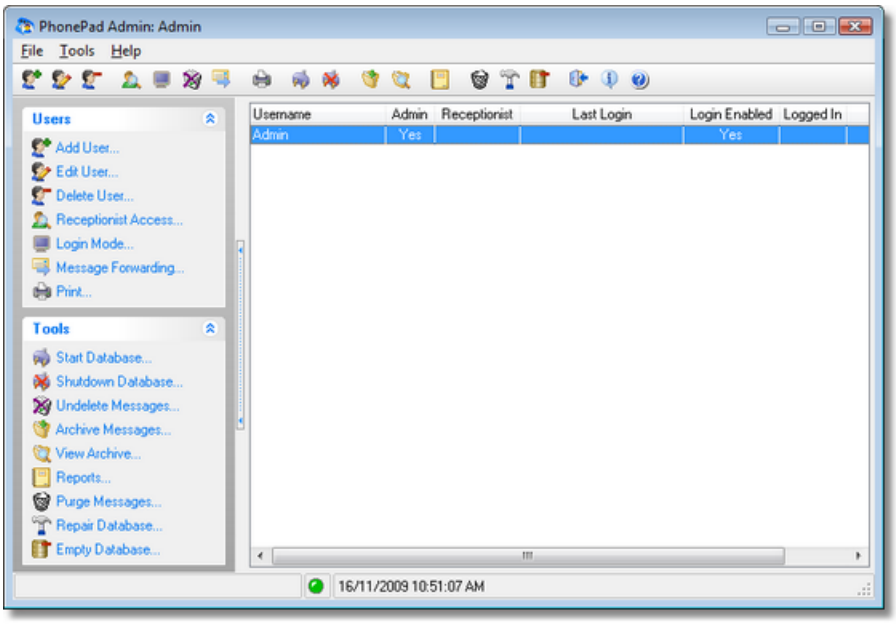
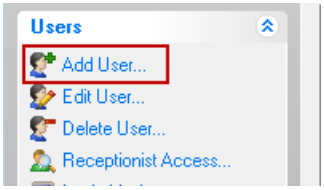
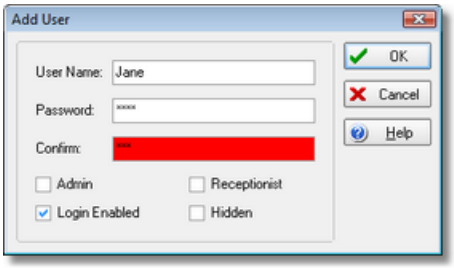


4. At this stage there will be only one user account - the default administrator account. Let's create another.

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.



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.

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

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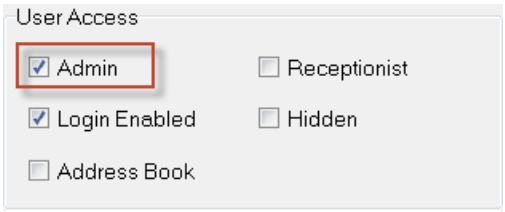
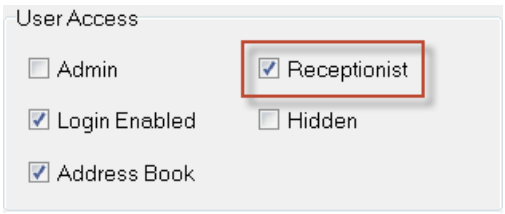
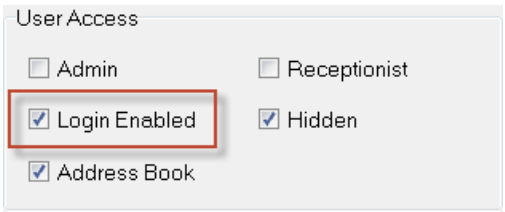
able to login to PhonePad Admin and perform administrative functions. If you don't want to give the user administrator access this leave the checkbox unchecked.



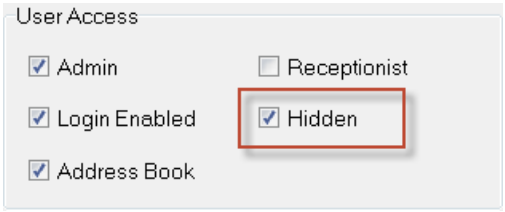
9. Checking the **Receptionist** checkbox will enable "Receptionist Mode" for the user and give them access to the Inboxes of other user accounts (there is another step you have to do which is covered in Part 6 of these instructions). In this example, we are going to check the Receptionist checkbox so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



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



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.



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

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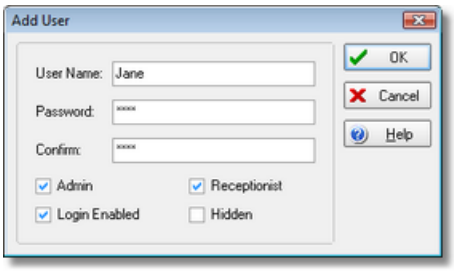
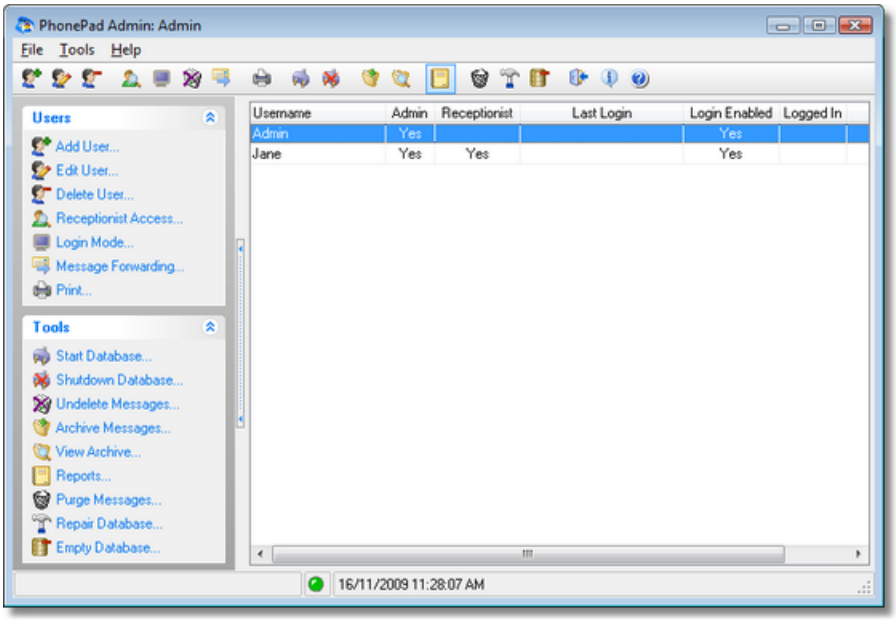


13. That's it. The user is now listed in the user list. Repeat these steps for each user you want to add. It may seem like a few steps but it's actually quite quick to do, and you don't really have to do it that often.



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.

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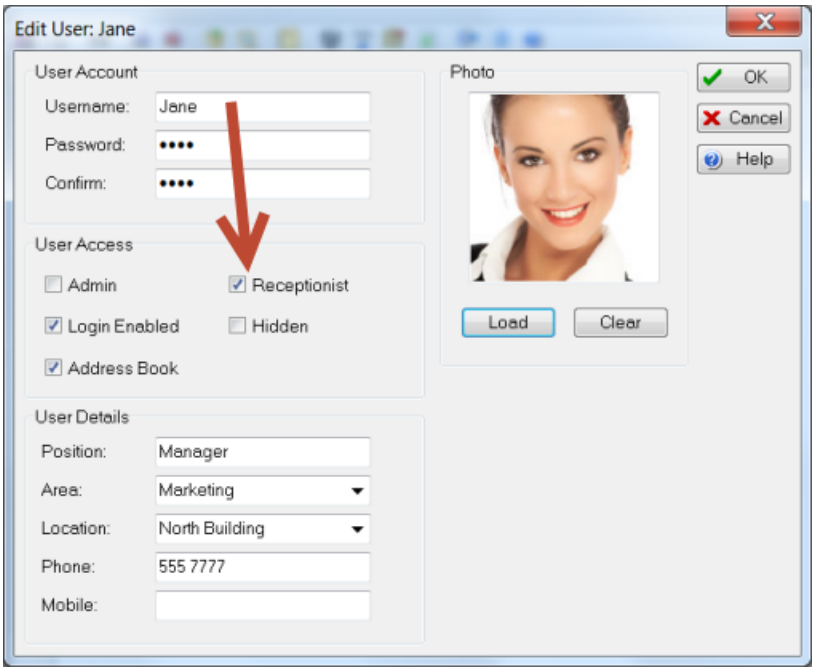
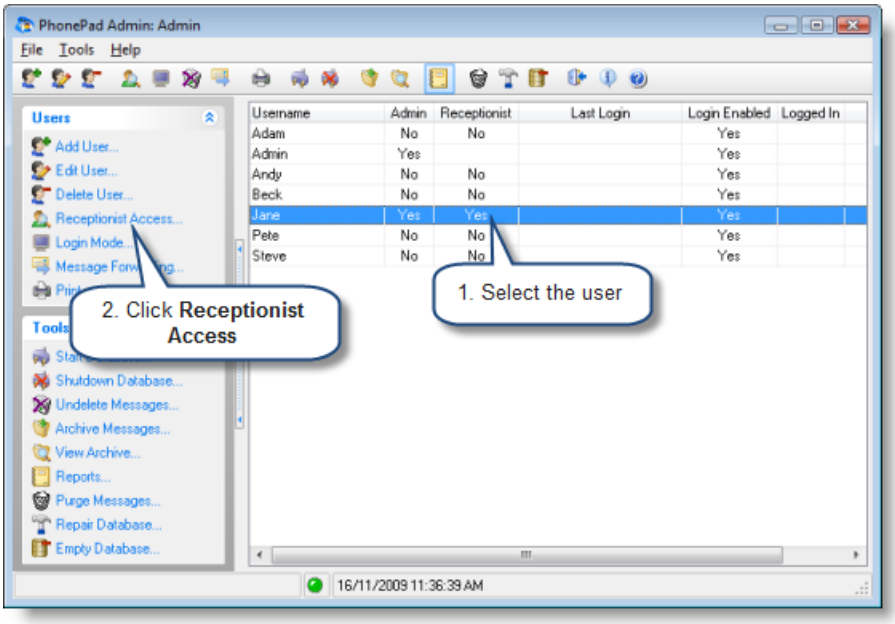


2. In our example, we have added a few more users so you can see how this option works. Select the user in the user list and click on Receptionist Access.



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

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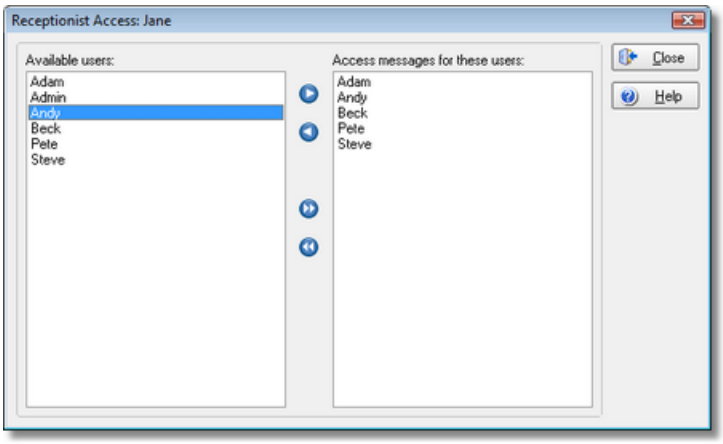
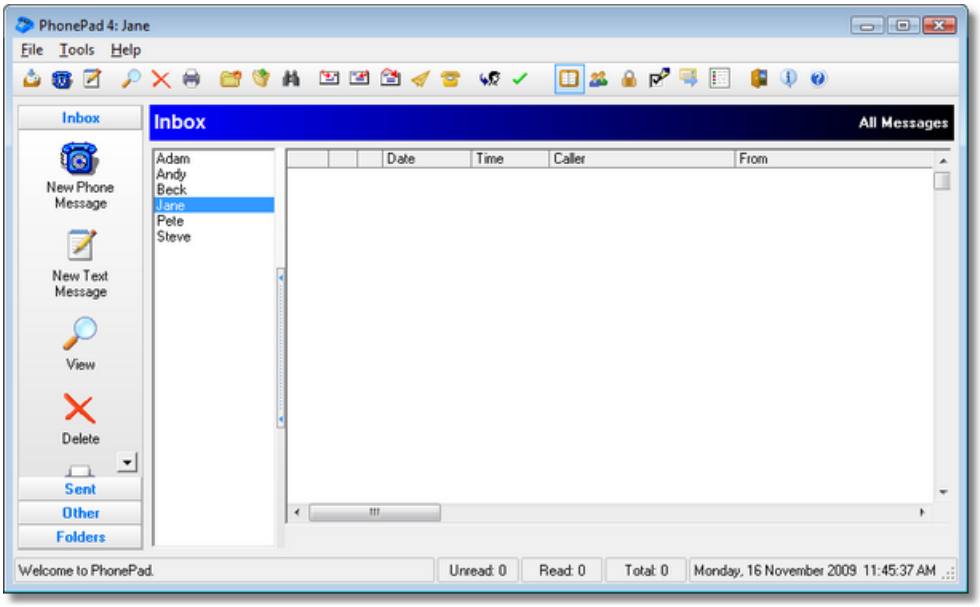


4. Click **Close** to close the window.

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.



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.

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Part 1 - PhonePad Installation

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

2. The installation wizard should start.

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).

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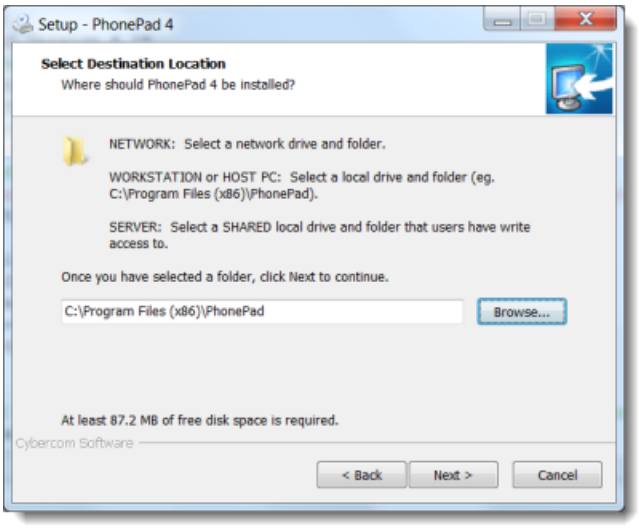
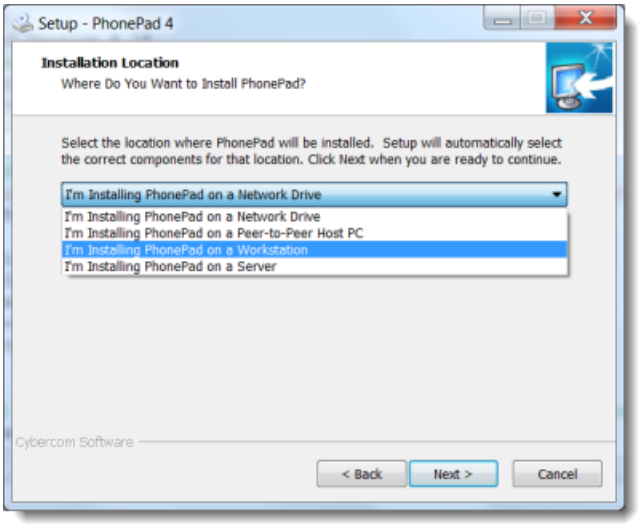


7. Enter the location you decided on and click **Next**.

8. On the **Select Components** screen, select **Peer-to-Peer Workstation** from the drop-down list, then click **Next**.



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.

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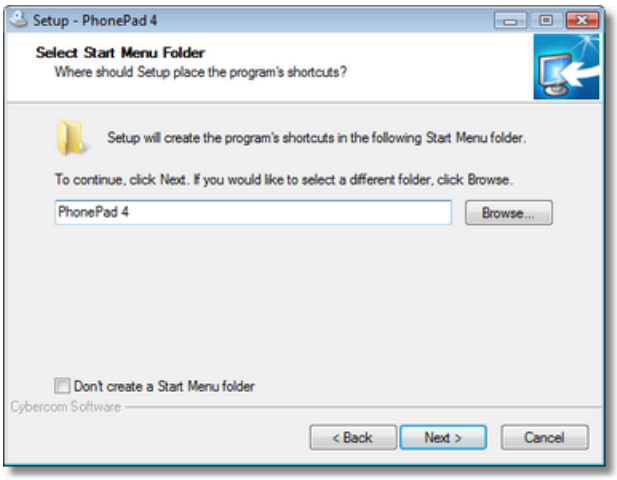
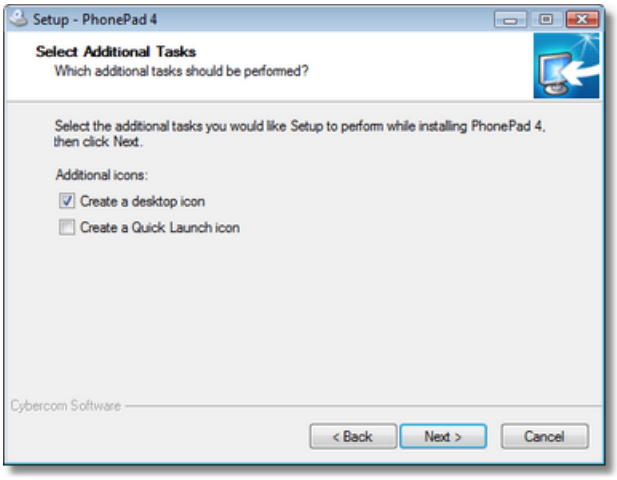


10. This screen allows you to automatically create desktop and Quick Launch icons for PhonePad. Once you have selected the options you want click **Next**.



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

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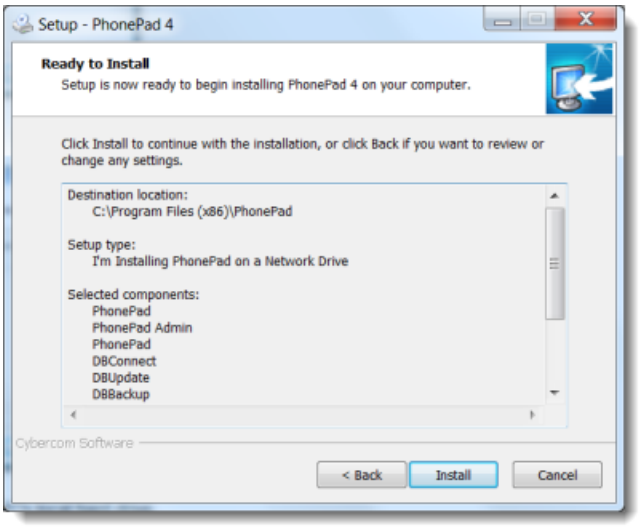
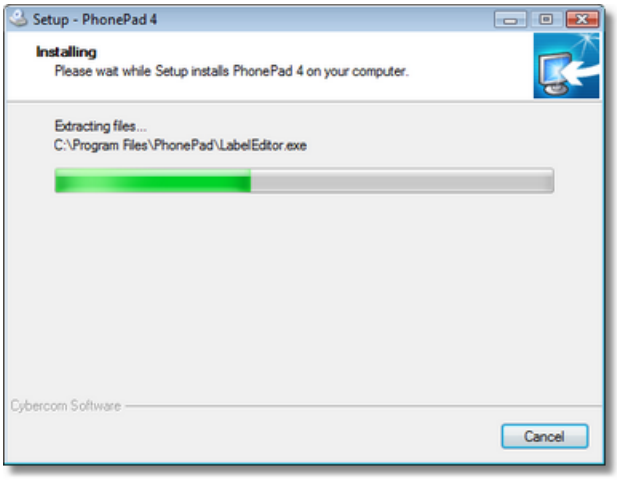


12. PhonePad will be installed on your local hard drive.



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

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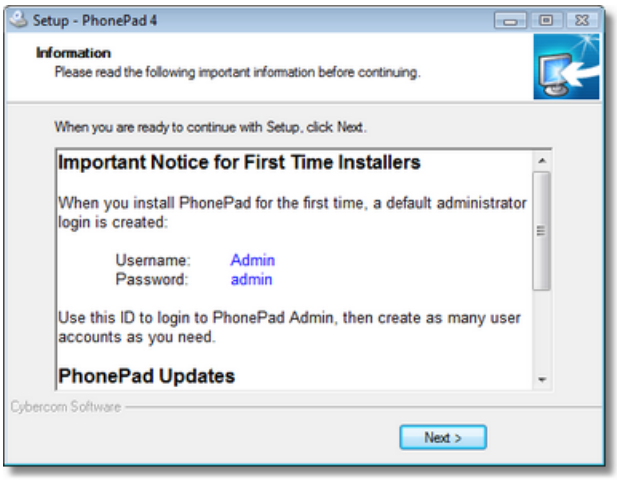
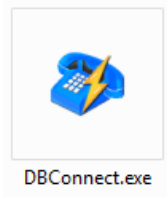


14. Click **Finish** when the final screen is displayed.

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.



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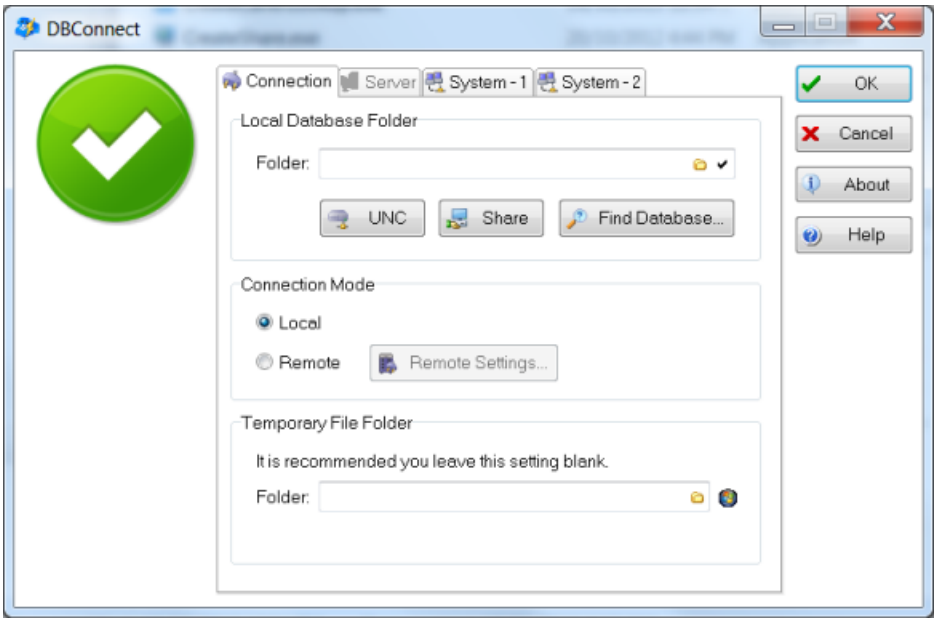
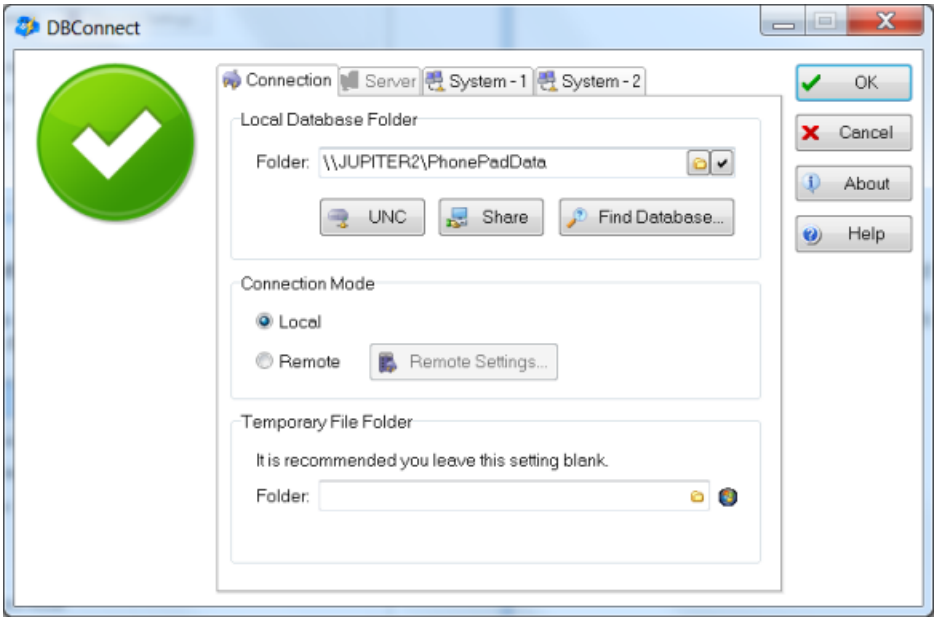
1. Run **DBConnect**.



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**.



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

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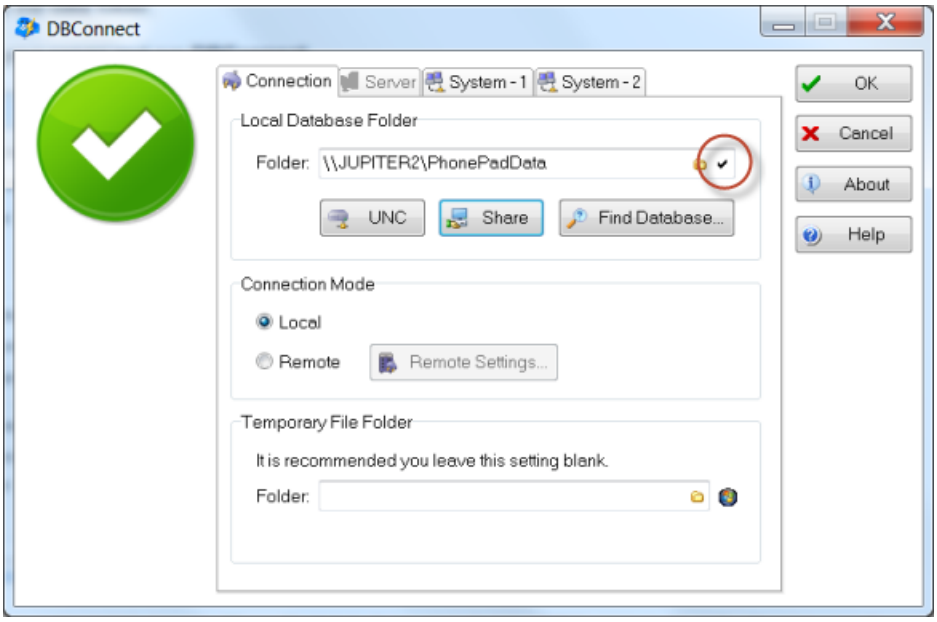
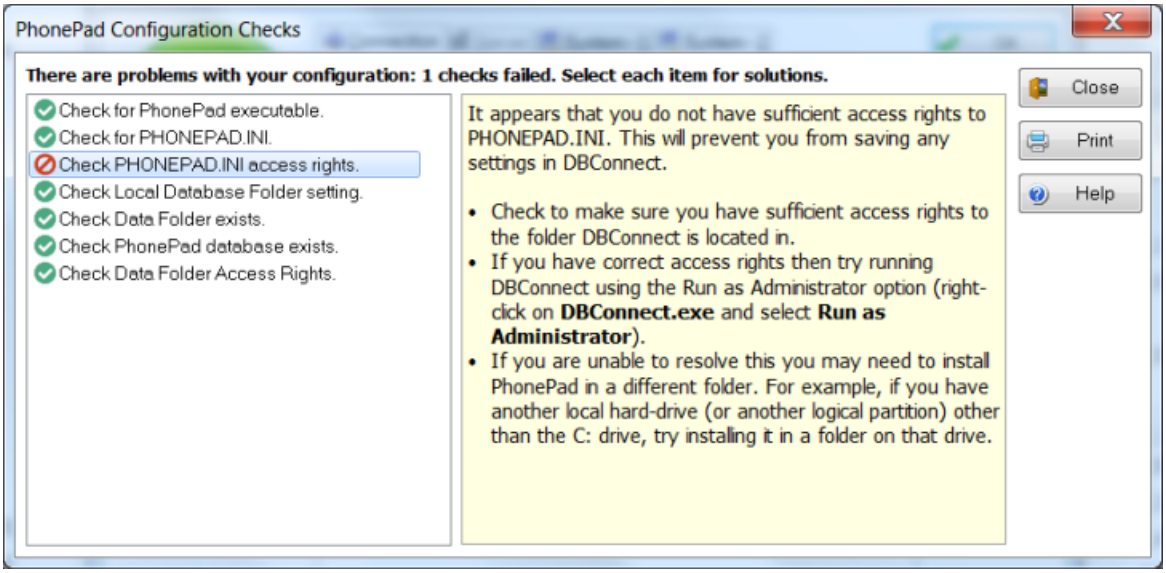


4. **DBConnect** will perform some tests to make sure everything has been set up correctly.



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.

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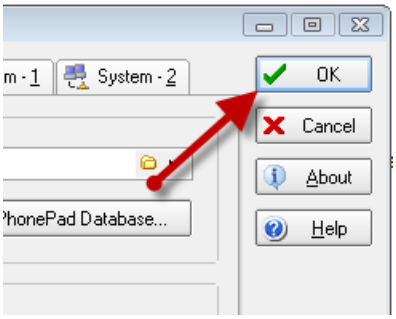

That's it. The workstation is now set up. Repeat these steps (Parts 1 and 2) for each workstation.

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:

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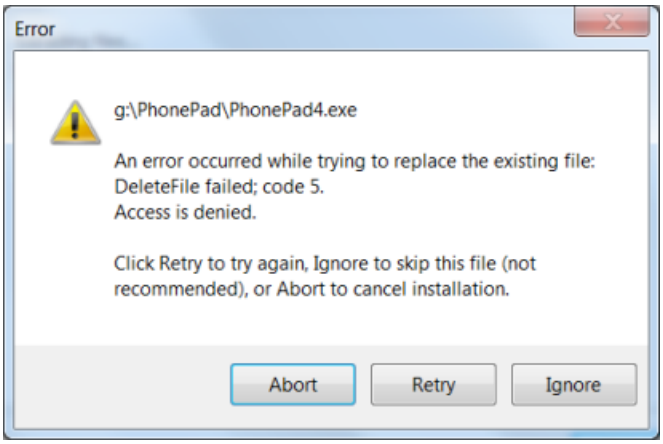

- The message will display the name of the file that is still in use. Windows will **not** allow you to replace a file that is being used. If you get this error, get all users to logout of PhonePad and then click the **Retry** button.
- When you run DBUpdate, make sure that your PhonePad data folder 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

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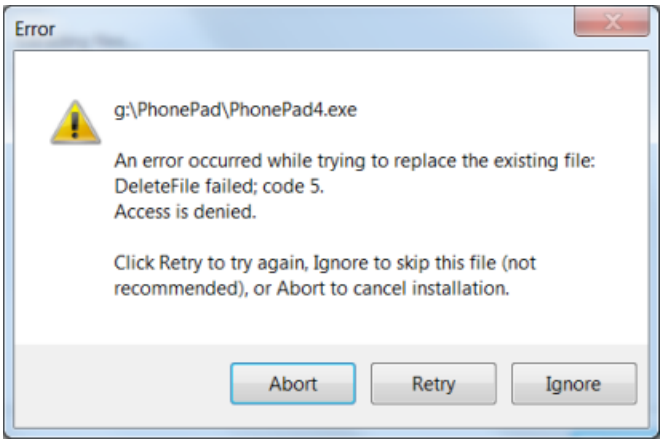
- Your existing version will be updated to the new version. **Before you begin**, make sure all users are logged out of PhonePad (and any other PhonePad application), otherwise the upgrade will fail.

- 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 **not** 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

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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**:

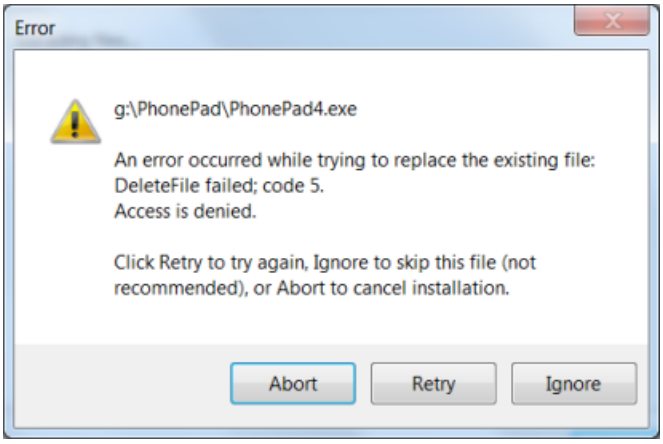
- Part 2 - Installing PhonePad
- Part 3 - Creating Your PhonePad database.

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:



- The message will display the name of the file that is still in use. Windows will **not** 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.

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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.

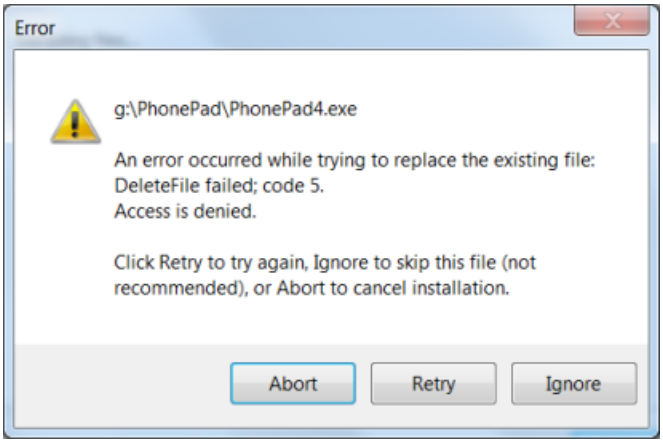
Updating PhonePad on Your Workstations

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:



- The message will display the name of the file that is still in use. Windows will **not** 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.

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Virus Scanners

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

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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 ***DBConnect*** on each computer PhonePad is physically installed on and check the ***Local Database Directory*** setting - it should be pointing to the PhonePad data folder. It's highly recommended that you use a ***UNC*** 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 ***DBConnect*** on each computer PhonePad is physically installed on and check the ***Local Database Directory*** setting - each workstation should be pointing to the same PhonePad data folder.
PhonePad is prompting for a username and password but I don't know what it is.	PhonePad automatically creates a default administrator account for you: Username: Admin Password: admin Check **Part 5** of the installation process as you have probably skipped this step.
PhonePad is running really slow or freezes.	See the section on Virus Scanners.

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