PhonePad Version 4 Admin Reference Guide



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PhonePad Version 4

Admin Reference Guide

by Cybercom Software

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1 Welcome

1.1 Introduction

Welcome to PhonePad Admin. PhonePad requires an administrator to look after management of users and the PhonePad system. PhonePad Admin is a tool used by the administrator to perform these functions. With PhonePad Admin, the administrator can easily add, edit and delete users, change their passwords, undelete messages accidentally deleted by users, remove unused messages and repair the PhonePad database.

If you have any suggestions on improvements we can make, or if you have ideas on some new features we could add, please drop us a line at support@cybercom-software.com. We'd love to hear from you.

We hope you enjoy using PhonePad.

Cybercom Software

2 Getting Started

2.1 Do This First

You should read the section on Setting Up PhonePad before doing anything.

2.2 Main Window

The main window of PhonePad Admin features menus, a toolbar, a taskbar, a User List, and a status bar.

😵 PhonePad Admin: Admin						
File Tools Help						
2* 2* 2* 🐍 🕰 🗏 🛞 🤇		1	1 🖸 🗑	🕆 🗈 🕩 🌒 🥹		
Users *	Usemane	Admin	Receptionist	Last Login	Login Enabled	Hidden
Ph 1 111	Adam	No	No	18/09/2009 7:55:27 AM	Yes	No
2 Add User	Admin	Yes	No	4/06/2007 6:55:26 PM	Yes	No
💱 Edit User	Andrew	No	No		Yes	No
💇 Delete User	Angus	Yes	No		Yes	No
2 Import Users	Ebenezer	No	No		Yes	No
5 Receptionist Access	Fred	No	No		No	No
I onio Mada	John S	Yes	Yes	5/08/2004 9:17:02 AM	Yes	Yes
Cognimode	Jordan	No	No	5/08/2004 7:29.04 AM	Yes	No
Message Forwarding	Mary	No	No		No	Yes
😝 Print	Pedro	No	Yes		Yes	No
	Rebecca	No	Yes	28/09/2008 2:16:18 PM	Yes	No
I cols ×	Rikke	No	Yes	18/09/2009 7:55:06 AM	Yes	No
🙀 Start Database	Steve	Yes	Yes	3/04/2010 2:08:14 PM	Yes	No
Shutdown Database						
Se Undelete Messages						
Author Manager						
Archive Messages						
View Archive						
Reports						
Purge Messages						
P Repair Database						
Contractore	N					
4/04/2010 3:04:43 PM						

2.3 Menus

The PhonePad Admin menu bar has 3 menus. Many of the menu items are also available from the toolbarand taskbar.

File menu

Add User	Adds a new PhonePad user.
Edit User	Edits the selected PhonePad user.
Delete User	Deletes the selected PhonePad user.
Import Users	Imports a batch of users from a CSV or XML file.
Receptionist Access	Sets access to user Inboxes for receptionists.
Login Mode	Sets the login mode for PhonePad users.
Message Forwarding	Sets up message forwarding for a user. Allows messages to be forwarded to an email address.
Print	Prints the contents of the User List.
Exit	Exits PhonePad.

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Tools menu

Start Database	Starts the PhonePad database after it has been shutdown. This is only for Local Mode. In Remote Mode you do this by starting the PhonePad Server (DBServer).
Shutdown Database	Shuts down the PhonePad database so maintenance can be performed. This is only for Local Mode. In Remote Mode you do this by stopping the PhonePad Server (DBServer).
Undelete Messages	Undeletes messages for the selected user.
Archive Messages	Archives a selected range of messages from the message database to an archive database.
View Archive	Displays all messages in the archive and allows you to delete or unarchive them.
Reports	Displays a range of reports.
Purge Messages	Permanently removes all unused messages from the PhonePad database.
Repair Database	Repairs any corrupted data in the PhonePad database.
Empty Database	Completely deletes all data from your PhonePad database. Warning: you will LOSE ALL OF YOUR MESSAGES if you use this option. This is normally only used if you were evaluating PhonePad with test data and you wanted to remove it and use real data.
Broadcast Message	Allows you to broadcast a message to all PhonePad users. You can use this to advise them of system maintenance, to logout at a specific time, or even tell them the pizza has arrived! Only users that have PhonePad running will receive the message.
	Please note: you may need to open port 12500 on any network routers/ bridges you have to allow UDP connections.
Logout Users	Select this option to immediately logout all users out of PhonePad. Any users running PhonePad will be kicked out within a few seconds, without any warning.
	Please note: you may need to open port 12500 on any network routers/ bridges you have to allow UDP connections.
Refresh User List	Forces a refresh of the user list so that all fields are correctly displaying the current values.

Help menu

Contents	Displays the online help (which you are now viewing) You can also press F1.
Support Center	Launches the PhonePad Support Center , which allows you to access all support resources from a central location.
Popup Hints	Enables or disables popup hints. These are little yellow tips that are displayed when you move the mouse over toolbar buttons.
About	Displays information about the application.

2.4 The User List

The User List displays all PhonePad users.

	UserName	Admin	Receptionist	Last Login	Login Enabled	Logged In	Hidden	^
	Adam	No	No	28/01/2004 6:22:53 PM	Yes	No	No	
Þ	Admin	Yes	No	28/01/2004 6:22:04 PM	Yes	Yes	No	
	John S	Yes	Yes		Yes	No	Yes	
	Jordan	No	No		Yes	No	No	
	Rebecca	No	Yes	28/01/2004 6:18:44 PM	Yes	No	No	
	Rikke	No	Yes	4/12/2004 3:44:08 PM	Yes	No	No	
	Steve	No	No	10/01/2005 9:51:22 AM	Yes	No	No	

Username	The user's Username.
Admin	Indicates whether or not they are a PhonePad administrator.
Receptionist	Indicates whether or not they are a Receptionist.
Last Login	Indicates the date and time of their last login.
Login Enabled	Indicates whether or not the login is enabled.

Logged In	Indicates whether or not they are currently logged in.
-----------	--

Hidden Indicates whether or not the username is hidden from recipient lists.

You can print a copy of this list by clicking on the *Print* button on the toolbar, or by selecting *Print* from the *File* menu.

2.5 Toolbar

The *Toolbar* provides quick and easy access to many of PhonePad's features. These functions are also available on the menus and taskbar.



2.6 Taskbar

The taskbar appears on the left side of the PhonePad Admin main window. It is an alternative to using the toolbar and menus. If you prefer not to see the taskbar you can close it by clicking on the splitter bar.



2.7 Status Bar

The *Status Bar* is divided into 3 sections. The first section is the main part of the status bar, and it displays status messages as well as hints (eg. when you move the mouse over the toolbar or menu items, their function is displayed on the status bar). The second section displays the current status of the PhonePad database. A green light indicates that the database is running, a red light indicates the database has been shut down. The third section displays the current date and time.



3 Using PhonePad Admin

3.1 Adding a User

You will need to create a PhonePad login ID for each person who intends using the system.

Click on the Add User button on the toolbar, or select Add User from the File menu.

Add User		
User Name: [Password: [Confirm:	Jane	✓ OK ★ Cancel <u>H</u> elp
📄 Admin 🕑 Login Ena	Receptionist	

- 1. Enter a User Name.
- 2. Enter a *Password* for the user (they can change this themselves once they have logged in).
- 3. Enter the same password in the *Confirm* field. The reason for this is to confirm that you typed the password correctly.
- 4. If this person is going to be an administrator, check the *Admin* box. Otherwise, leave it unchecked.
- 5. If this person is going to be an receptionist, check the *Receptionist* box. Otherwise, leave it unchecked.
- 6. The Login Enabled should normally be checked unless you don't want the user logging in yet.
- 7. If you don't want the username to appear in user and recipient lists then check the *Hidden* box.
- 8. Click the OK button to create the user login.

Passwords

If PhonePad users are not logging in using a *Username* and *Password* (see Login Mode) then a password is not required.

Admin Check Box

There are no special Administrator logins - any user can be an Administrator. To make a user an administrator just check the *Admin Check Box*.

Receptionist Check Box

Normally, users can only check their own lnbox for messages. This means that they can only see messages that have been sent to them. A user can be defined as a Receptionist. This allows them to view the lnboxes of other users.

Login Enabled Check Box

There may be times when you want to prevent a user from logging in. There are a number of reasons why you might do this:

- The person is on leave and you want to make sure no one can use their PhonePad login.
- The person no longer works there but you cannot delete their user login because of referential integrity (see Deleting a User for more information).
- Other security reasons.

Hidden Check Box

The *Hidden* check box allows you to hide usernames from the user and recipient lists that you use for addressing phone and text messages. If you don't want the username to appear in these lists then check this box. A typical use for this is receptionists or administrators. You may not need to send messages to receptionists or administrators. By hiding their usernames, users won't be able to select them as recipients for messages.

3.2 Administrators

The function of the PhonePad administrator is to look after the PhonePad system. There is not really much to do for an administrator as PhonePad pretty much runs itself. However, you may be required to perform the following tasks from time to time:

- Add, edit and delete users.
- Undelete messages for users.
- Set the login mode you would probably only ever do this once.
- Remove unused messages from the system. You would probably do this once a month.

• Repair the database. This is only necessary if errors occur in the database. This would not normally happen but can occur if a user's computer crashes or they turn it off without shutting down Windows.

There is no special administrator login - any user can be nominated as an administrator. This means that each administrator can have their own password.

You will need at least one Administrator for PhonePad. It is recommended that you have a minimum of two administrators. In the event that one of the administrators is away for some reason (eg. sick) there will be someone around to perform administrative functions.

A default administrator login is created the first time PhonePad Admin is run. The username is called *Admin* and the password is *admin*. This is provided so that you can login to PhonePad Admin for the first time. Once you have done this you should either delete this login and create your own with the *Admin* attribute set, or change the password.

If you accidentally close down PhonePad Admin with no administrators existing in the system, you will not be able to login to the PhonePad Admin application. This means there will be no PhonePad administrators. If this happens then contact us and we will help you fix the problem.

3.3 Archiving Messages

An alternative to purging messages is to archive them. Archiving moves messages from the main message database to a special archive database. Unlike purging, the messages are not deleted - they are still available. You can retrieve them at any time (see Viewing the Archive for more information).

Archive Messages				
 This option moves messages from the main message table to an archive. Only archive messages that have been deleted from Inboxes, Sent Folders and all other folders Archive messages and remove from Inboxes, etc. 	Archive Cancel			
Archive all messages prior to: 18/04/2009				
Ready.				

You have two options when archiving messages:

Only archive message that have been deleted from Inboxes, Sent folders and other folders.	As the option suggests, only messages that have already been deleted by users (in other words messages that are no longer being used) will be archived.
Archive messages and remove them from Inboxes, etc.	Selecting this option will results in messages being automatically deleted from Inboxes and other folders and moved into the archive.

To archive messages, click on the *Archive Messages* button on the toolbar, select *Archive Messages* from the *Tools* menu, or click on *Archive Messages* on the taskbar. Select a date (or type one in) using the drop-down calendar, and then click on the *Archive* button to start the process. The progress bar provides an indication of the archiving status.

All messages prior to the date you select will be archived. Archiving messages is handy for organizations that want to keep a record of all telephone messages for a period of time (eg. years).

Important Information

When a user deletes a message from their Inbox or another folder, the message isn't actually deleted. Although the user can no longer see or access the message, it still exists in the database until the administrator either purges unused messages or archives them. Archived messages can still be access via PhonePad's search feature, however purged messages are permanently deleted and can't be recovered.

3.4 Automatic Message Forwarding

PhonePad can automatically forward messages to an email address or mobile/cell phone. While users can activate this option within PhonePad and In-Out Board, administrators can also activate this option for users. This comes in handy if a user forgets to do this. They can phone the administrator and ask them to activate or deactivate message forwarding for them.

To activate Message Forwarding for a user, select their name from the user list and click the *Message Forwarding* button on the toolbar, select *Message Forwarding* from the *File* menu, or click on *Message Forwarding* on the taskbar.

Automatic Message Forwarding Options for: Adam	
This facility allows you to automatically forward messages via email and SMS (requires MessageSender to be installed on your network).	Cancel
Send Messages via Email	
Automatically send messages to the following email addresses:	<u> H</u> elp
adam@xyzcorp.com adam1023@yahoo.com	
Each address should be on a separate line.	
Send Messages via SMS Automatically send messages to the following mobile/cell phones:	
614555555 614666666	
Each phone number should be on a separate line.	

To have PhonePad forward messages to an email address, check the Send Messages via Email option, enter one or more valid email addresses, and click OK.

To have PhonePad forward messages to a mobile/cell phone, check the Send Messages via SMS

option, enter one or more mobile/cell phone numbers, and click OK.

IMPORTANT: For message forwarding to work, you need to install the MessageSender application on one computer on your network. MessageSender can be installed by your PhonePad installation program. Complete details are documented in the Installation Manual (INSTALL.PDF), and are also available in the Frequently Asked Questions section of our online forums.

3.5 Broadcast Messages

This facility allows you to send broadcast messages to all PhonePad users. The messages will be automatically displayed when they are received and will appear on top of all windows. Only users that have PhonePad running will receive the message.

B	roadcast Message	X
	A new server will be installed at 4:00pm this afternoon so PhonePad and other systems will be unavailable from this time until it has been completed. Sue	Send Cancel
Ľ		

All you need to do is type the message and click the Send button.

Important: You may need to configure your network to use this facility. If you have routers or bridges on your network (or software firewalls such as ZoneAlarm), you may need to open Port 12500 to allow UDP connections. If you find that the messages aren't being received by PhonePad users (remember, they have to be logged in to PhonePad), then the messages are being blocked somewhere.

3.6 Changing Passwords

A user's password can be changed using the Edit User option. Click on the *Edit User* button on the toolbar, or select *Edit User* from the *File* menu.



The user's current password is hidden, but you can change it by entering a new password in the *Password* field. You will also need to enter the same password in the *Confirm* field (this is to verify that you entered the password you thought you entered). Click *OK* to save the new password.

3.7 Deleting a User

To delete a user, select a user from the User List and click on the *Delete User* button on the toolbar, select *Delete User* from the *File* menu, or click on *Delete User* on the taskbar.

There are a number of options available when deleting a user. Select the appropriate option and click the *Delete* button. You will be asked to confirm the deletion.

Delete User	
This option will permanently delete the selected user. An alternative to deleting is to disable and/or hide the user.	🔥 Delete
 Deletion Options Delete the user but leave their messages intact. Delete the user, as well as their Inbox and Sent Folder. Delete the user, their Inbox, Sent folder, and Private folders. 	<u>elp</u>
Important Information When a user is deleted, any messages that have been sent will remain in the system, ie. any messages they have sent will NOT be deleted.	

Deletion Options

Delete the user but leave their messages intact.	The user will be deleted from the system but their messages will remain in the Inbox, Sent Folder and Private Folders.
Delete the user, as well as their Inbox and Sent Folder.	All messages in the user's Inbox and Sent Folders will be deleted. Messages in their Private folders will not be deleted.
Delete the user, their Inbox, Sent Folder and Private Folders.	All messages in the user's Inbox, Sent Folder, and Private Folders will be deleted. Any messages in Public Folders will not be deleted.

Important

Run a PhonePad database backup before deleting any users.

3.8 Editing a User

To edit a user, click on the *Edit User* button on the toolbar, select *Edit User* from the *File* menu, or click on the *Edit User* button on the taskbar.

Edit User: Re	becca	
User Name: Password:	Rebecca	Cancel
Confirm: Admin Cogin En.	abled Hidden	

Change the appropriate details and click OK.

Admin Check Box

There are no special Administrator logins - any user can be an administrator. To make a user an administrator just check the *Admin* check box.

Receptionist Check Box

Normally, users can only check their own lnbox for messages. This means that they can only see messages that have been sent to them. A user can be defined as a Receptionist. This allows them to view the lnboxes of other users.

Login Enabled Check Box

There may be times when you want to prevent a user from logging in. There are a number of reasons why you might do this:

- The person is on leave and you want to make sure no one can use their PhonePad login.
- The person no longer works there but you cannot delete their user login because of referential integrity (see Deleting a User for more information).
- Other security reasons.

Hidden Check Box

The *Hidden* check box allows you to hide usernames from the user and recipient lists that you use for addressing phone and text messages. If you don't want the username to appear in these lists then check this box. A typical use for this is receptionists or administrators. You may not need to send messages to receptionists or administrators. By hiding their usernames, users won't be able to select them as recipients for messages.

3.9 Importing Users

PhonePad Admin includes a facility for importing batches of users, ie. you can import dozens or even hundreds of users in one go. It also enables you to update existing users. For example, you can update passwords, and Admin and Receptionist status.

To import users, click on the *Import Users* button on the toolbar, select *Import Users* from the *File* menu, or click on the *Import Users* button on the taskbar.

Users can be imported from either a CSV (Comma Separated Value) or an XML file.

Import Users					
Select an import file					💕 Load
Import File: D:\Pho	onePad\ImportFile.xml			- -	🗈 Import
File Type: XML	•	Update Existing U	sers on Import		ML
Loaded Users					🚯 <u>C</u> lose
Username	Password	Admin	Receptionist	▲	
John S Jordan Mary Pedro Rebecca		True False False False False	True False False True True		<u>❷ H</u> elp
Rikke	Rikke False True				
Import Log					
	()%			

Importing a List of Users

- 1. Select the *File Type*: CSV or XML.
- 2. Select the *Import File* by clicking on the ... button
- 3. If you check the *Update Existing Users on Import* checkbox, users that already exist in PhonePad will have their details updated. If this checkbox is unchecked, the import will ignore any users that exist their details won't be updated and they won't be overwritten.
- 4. Click the *Load* button to load the user details from the specified file. This is a good opportunity to check that the information being imported is correct.
- 5. Click the *Import* button to import them into the PhonePad database.

Importing from CSV Files

CSV files should be formatted as follows:

<username>, <password>, <true or false>, <true or false>

For example:

john, secretpassword, false, false

Passwords can be blank, eg. "".

Importing from XML Files

XML files should be in a specific format. You can create an example XML file by clicking on the XML button. This will create an XML file consisting of the current users in the PhonePad database (minus their passwords for security reasons).

Example XML file:

```
<?xml version="1.0" encoding="windows-1252" ?>
- <UserImport>
 - <Data>
     <Username>Adam</Username>
     <Password>secretpassword</Password>
     <Admin>False</Admin>
     <Receptionist>False</Receptionist>
   </Data>
 – <Data>
     <Username>Admin</Username>
     <Password>secretpassword</Password>
     <Admin>True</Admin>
     <Receptionist>False</Receptionist>
   </Data>
 - <Data>
     <Username>Andrew</Username>
     <Password>secretpassword</Password>
     <Admin>False</Admin>
     <Receptionist>False</Receptionist>
   </Data>
 - <Data>
     <Username>Angus</Username>
     <Password>secretpassword</Password>
     <Admin>True</Admin>
     <Receptionist>False</Receptionist>
   </Data>
 </UserImport>
```

3.10 Label Editor

The built-in Label Editor allows you to customize some of the labels used in phone messages. It features a preview of the labels so you can see what they look like as you make changes. You can access the Label Editor by selecting *Label Editor* from the *Tools* menu.

Label Editor 🛛 🔀									
		W	/hile	You	Wei	re O	ut	✓ ×	OK Cancel
	To:	Mary			Date:	12/12/20	002		<u>D</u> efaults
	Caller:	John 9	Smith		Time:	11:04 am	1		Import
	From:	XYZ C	Corporation		Phone:	555 9999		0	<u>H</u> elp
	• Phon	ed		⊙ <u>N</u> o actio	n required	O Want	s to <u>s</u> ee you		
	O <u>R</u> etur	ned yo	our call	🔘 Please p	hone	🔲 Will <u>b</u> e	e in at		
	O <u>C</u> ame	e to se	e you	<u> </u>	ne again	1	After lunch.		
	🗌 Urger	nt		🔘 Will <u>d</u> rop) by again	Privat	e		
	Subject:								
Ме	ssage Title:	:	While You ^y	Were Out					
To	:		То		From:		From		
Ca	Caller: Caller		Subject:		Subject				
<u>P</u> h	Phoned: &Phoned		<u>Will phone again:</u> &Will phone agair		&Will phone again				
<u>R</u> e	turned your	call:	&Returned	your call	Will <u>d</u> rop	by again:	Will &drop by again		
<u>C</u> a	Came to see you: &Came to see you		Wants to see you: Wants		Wants to &see you				
<u>N</u> o	No action required: &No action required		Will be in at: Will &be in at		Will &be in at				
Ple	ase phone:		P&lease ph	one					

To edit a label, click in one of the edit boxes, or click on the label itself and the edit box will be selected. As you change a label, it will also change in the preview part of the window.

There are some things you need to keep in mind when changing the default labels:

• The underlying functionality remains the same. Although you can change the text of the label, it doesn't change how it works.

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- Not all labels can be changed.
- Don't make the labels too long as they may not be displayed correctly.
- Don't add conflicting accelerator keys. They are defined by using an ampersand (&) before a letter.
- If you mess things up you can reset the labels back to their default values.

🗸 ОК	Saves the label changes you have made.
X Cancel	Exits without saving any of the changes you have made.
😰 Defaults	Resets the labels back to their default values. Any changes you have made will be lost if you click the <i>OK</i> button after selecting this option.
(1) <u>A</u> bout	Displays information about this application.
🕐 <u>H</u> elp	Displays online help (which you are now viewing).

3.11 Location of PhonePad Database

The first time you run PhonePad Admin, you will be prompted to either create a new PhonePad database or specify the location of an existing database.

Location of Data		×
	PhonePad Admin could not find the location of the PhonePad database Create database Specify location of database	✓ OK X Cancel ? Help

If you are setting up PhonePad for the first time, you would select "Create database".

Select the appropriate option and then click OK.

3.12 Login Mode

PhonePad users normally login using a Username and Password. However, you can also use the Windows Username as their login ID. In this case, a password is not required (although it is

recommended users still be given one).

Login Mode	
User Login Mode User Defined Login Force Windows Login	OK Cancel
	<u>()</u> <u>H</u> elp

User Defined Login	Users select the method of login they want (under <i>Preferences</i> in PhonePad). Normally, they login via a login dialog that prompts them for their <i>username</i> and <i>password</i> .
Force Windows Login	Users can only login using their Window Username. On a Windows network this is their network login name.

Typically, you would only set this option once.

3.13 Logout Users

By selecting this option from the *Tools* menu, you can immediately log all users out of PhonePad. Use this with caution as the users won't get any warning. It would be good practice to send them a broadcast message before doing this.

Important: You may need to configure your network to use this facility. If you have routers or bridges on your network (or software firewalls such as ZoneAlarm), you may need to open Port 12500 to allow UDP connections. If you find that the users aren't being logged out then the logout messages are being blocked somewhere.

3.14 PhonePad.Ini File

The PhonePad.Ini file is very simple so an alternative way to create it is by using a text editor. Enter the following lines exactly as shown below and save the file as PHONEPAD.INI.

[Settings]

LoginMode=0

A LoginMode of **0** indicates that users can specify their own login method. A LoginMode of **1** indicates that users can only login using the Windows Username.

3.15 Print Preview

20

The *Print Preview* screen features a message preview area and a toolbar along the top of the screen.

🍜 🛩 🖬 🔯 🛤 🖬] [[] []] 100% - ⊠ [?" 🔍 4 4 1 → ▶ Close
a	Prints the contents of the preview.
*	Opens a saved preview.
	Saves the preview to a file.
-20	Exports the preview to PDF, RTF or HTML.
#	Finds text in the preview.
	Displays the whole page on the screen.
	Fits the preview to page width.
I	Displays the preview at 100%.
8	Displays the preview as two pages to a screen.
100% -	Allows you to select the zoom view for the preview.
×	Allows you to change the page orientation and margins
<u></u>	The grab tool allows you to grab the pages and move them around.
•	The zoom tool allows you to vary the zoom view.
	Navigation buttons allow you to navigate through multi-page previews.
Close	Closes the preview.

3.16 Printing the User List

You can print the contents of the User List by clicking on the *Print* button on the toolbar, by selecting *Print* from the *File* menu, or by clicking on *Print* on the taskbar.

3.17 Purging Messages

When you have been using PhonePad for a while, the database may start to get large. Although it is unlikely that you will ever exceed PhonePad's limit of 100 million phone messages, you may want to free up some disk space from time to time. This option removes unused messages from the PhonePad database, ie. messages that are not linked to the Inbox, Sent Messages List, or Personal folders of any user.

Click on *Purge Messages* button on the toolbar, select *Purge Messages* from the *Tools* menu, or click on *Purge Messages* on the taskbar.

Purge Messages	X
This option removes all unused messages from the PhonePad database. Only messages that are no longer linked to Inboxes, Sent folders, and Personal Folders are purged.	ExecuteCancel
Ready.	🕐 <u>H</u> elp

Click on the *Execute* button to remove the unused messages.

Important Note

Once a message has been purged, it cannot be undeleted. We recommend you purge messages once every 6 to 12 months, although this really depends on the number of messages that are added to the system each month. Purging messages is certainly not mandatory - you can keep messages in the system for a long as you like.

An alternative to purging is archiving. When you purge a message it is totally removed from the PhonePad system. When you archive a message, it is moved out of the main message database into an archive database, which means you can still access the messages at any time.

See Archiving Messages for more information.

3.18 Receptionists

A user designated as a Receptionist can access view Inboxes of other users. When a receptionist logs in to PhonePad, a user list appears between the sidebar and the Inbox message list. By selecting names from the list, the receptionist can switch between Inboxes. However, they can only view Inboxes

they have been give access to via the Receptionist Accessoption.



3.19 Receptionist Access

Before a receptionist can view the Inbox of another user, they first need to be given access. This is done using the *Receptionist Access* option, which is available by clicking on the *Receptionist Access* option on the taskbar, clicking on the *Receptionist Access* button on the toolbar, or by selecting *Receptionist Access* from the *File* menu.



The list on the left displays all available PhonePad users. The selected receptionist can access the Inboxes of all users appearing in the right-hand list.

- Adds the selected user to the access list.
- Removes the selected user from the access list.
- Adds all users to the access list.
- Removes all users from the access list.

3.20 Repairing the Database

The PhonePad database is very robust. However, corruption can occur from improper operating system or application shutdown, eg. turning the PC off while PhonePad is still running. This option allows you to repair the database should corruption occur. Before you can repair the database, you will need to shutdown PhonePad.

Click the *Repair Database* button on the toolbar, select *Repair Database* from the *Tools* menu, or click on *Repair Database* on the taskbar. PhonePad Admin will be shut down and the **DBRepair** utility will be run.

💰 DBRepair		
File Database Help		
🖪 🗹 🛠 🤊 🔮	🌣 🖉 🖶 🔤 🏮 🛛	
Actions Backup Verity Verity Repair Optimize Coptimize	24/05/2003 20:03:10 Repair of table Messages completed at 24/05/2003 8:03:10 PM 24/05/2003 20:03:10 Messages.DAT was not corrupted. 24/05/2003 20:03:10 Repair of table Recipients.DAT 24/05/2003 20:03:10 Repair of table Recipients started at 24/05/2003 8:03:10 PM 24/05/2003 20:03:10 Repair of table Recipients completed at 24/05/2003 8:03:10 PM 24/05/2003 20:03:10 Repair of table Sent started at 24/05/2003 8:03:10 PM 24/05/2003 20:03:10 Repair of table Sent started at 24/05/2003 8:03:10 PM 24/05/2003 20:03:10 Repair of table Sent started at 24/05/2003 8:03:10 PM 24/05/2003 20:03:10 Repair of table Sent completed at 24/05/2003 8:03:10 PM 24/05/2003 20:03:10 Repair of table Sent completed at 24/05/2003 8:03:10 PM 24/05/2003 20:03:10 Sent DAT was not corrupted. 24/05/2003 20:03:10 Repair of table TimeZones completed at 24/05/2003 8:03:10 PM 24/05/2003 20:03:10 Repair of table TimeZones started at 24/05/2003 8:03:10 PM 24/05/2003 20:03:10 Repair of table Users started at 24/05/2003 8:03:10 PM 24/05/2003 20:03:10 </th <th></th>	
Rebuild Sent Folder	15 tables were not corrupted. PhonePad database repaired successfully.	
Repairs completed.	100% Local	

Click the *Repair* button to repair the corrupted records.

3.21 Reports

The Reports window allows a *PhonePad Administrator* to run a range of reports. To run a report, click on the *Reports* button on the toolbar, select a report from the report list, and click *Preview*.

Reports	X
Date Range Start Date: 1/01/2005 End Date: 5/08/2005	Report
Select a Report	<u>⊌</u> Help
Description Displays all phone messages for a specified date range in a simplified format. Includes follow up notes.	

Select a report from this list and specify the appropriate date range. Click *Report* to display the report. See Print Preview for information on the report window.

3.22 Restarting PhonePad

After PhonePad has been shutdown for maintenance, you will need to start it again before users can login again.

Restarting the PhonePad Database in Local Mode

Click on the *Start Database* button on the toolbar, select *Start Database* from the *Tools* menu, or click on the *Start Database* button on the taskbar.

Confirm 🛛 🔀						
Start the PhonePad database?						
<u>Y</u> es <u>N</u> o						

Click Yes to start the PhonePad database. The database status indicator on the status bar will change to green.

Restarting the PhonePad Database in Remote Mode

Go to the computer the PhonePad Server (DBServer) is running on and open the server window by double-clicking on the DBServer icon in the system tray. Alternatively, you can run *ServerManager* and start the PhonePad server remotely.



Click on the Start button to start the PhonePad server.

PhonePad Database Server							
Server Session	Server Status						
Server							
Engine:	DBISAM Version 4.15	Memory Usage:	0.20 Mb				
Up Time:	Stopped						
Main Address:	All Addresses	Admin Address:	All Addresses				
Main Port:	12005 Admin Port:	12006 IP:	192.168.0.2				
Stor							
<u>()</u> <u>A</u> bout				Close			

3.23 Shutting Down PhonePad

If you need to repair the PhonePad database, you will first need to shutdown PhonePad.

Shutting Down the PhonePad Database in Local Mode

Click the Shutdown button on the toolbar, select Shutdown Database from the Tools menu, or click on

Shutdown Database on the taskbar.



Click the Yes button to shutdown the PhonePad database. The database status indicator on the status bar will change to red and the following message will be displayed:



All PhonePad users currently logged in will receive a message informing them that PhonePad will shut down in 5 minutes. Once this period has expired, any users still logged in will be immediately logged out of PhonePad.



Any user attempting to login while PhonePad is shut down will receive the following message:



Shutting Down the PhonePad Database in Remote Mode

Go to the computer the PhonePad Server (DBServer) is running on and open the server window by double-clicking on the DBServer icon in the system tray. Alternatively, you can run *ServerManager* and shut down the PhonePad server remotely.



Click on the Stop button to shutdown the PhonePad server. All connections will be terminated.

PhonePad Database Server						
Server Session	Server Status					
Server						
Engine:	DBISAM Version 4.15 Memory Usage: 0.20 Mb					
Up Time:	3 Minutes, 5 Seconds					
Main Address:	All Addresses Admin Address: All Addresses					
Main Port:	12005 Admin Port: 12006 IP: 192.168.0.2					
	Start Stop					
(1) <u>A</u> bout	Close					

3.24 Undeleting Messages

This facility allows administrators to undelete messages that have been deleted from a user's *Inbox* or *Sent Messages List*. If the messages have been purged since the messages were deleted by the user, it will not be possible to undelete them.

Select a user from the User List and click on the *Undelete Messages* button on the toolbar, select *Undelete Messages* from the *Tools* menu, or click the *Undelete Messages* button on the taskbar. A list of all deleted messages for the selected user will be displayed.

De	Deleted Messages for Admin								
	This is a list of all messages deleted by the selected user. Select the messages you want to undelete and click the Undelete button.								
		D	Date	Time	Caller	Deleted From	🚯 <u>C</u> lose		
		4	29/06/00	8:32:00 PM	Mary White	Inbox			
		4	29/06/00	8:32:00 PM	Mary White	Sent Messages			
	✓	11	03/07/00	5:54:01 PM	John Smith	Inbox			
		12	03/07/00	7:46:11 PM	Albert Einstein	Inbox			
	✓	13	03/07/00	8:05:38 PM	John Smith	Inbox			
		14	03/07/00	8:07:01 PM	Your Accountant	Inbox			
		15	03/07/00	8:08:11 PM	Jane Jones	Inbox			
		16	03/07/00	8:09:28 PM	Andrew	Inbox			
-									

Select the messages you want to undelete by putting a check mark in each box in the first column. Click the *Undelete* button to add the messages back to the *Inbox* or *Sent Messages list*.

3.25 Viewing the Archive

Messages that have been archived can be viewed at any time by using the *View Archive* option. All archived messages will be displayed in a list.

With this option, you can also Unarchive and Delete messages.

The Delete option permanently deletes messages from the archive. This option would be used for

messages that are no longer required.

The *Unarchive* option will move the selected messages back to the appropriate users' Inboxes and Sent folders. This option would be used to retrieve messages that a user has a need for.

Vi	View Archived Messages 🛛 🔀								
	This list displays any of these mes	the current ci isages.	ontents of the messag	ge archive. You can	delete or unarchive		<u>J</u> narchive		
	Date	Time	То	Sender	Caller	0	<u>D</u> elete		
	 08/08/00 ✓ 10/08/00 29/09/00 ✓ 29/09/00 	09:07 am 07:06 pm 06:49 pm 06:48 pm	Fallon Damian Fallon Steve	Rikke Rebecca Rebecca	Jane Jones Jared Jane Jones Andrew	0	<u>C</u> lose <u>H</u> elp		
	<						<u>A</u> ll Aļl		

With either option, you first need to select the messages by putting a check mark in the boxes on the left side of the list. Then click either the *Delete* button or *Unarchive* button. You will be asked to confirm your choice.

The two buttons at the right hand corner of the window allow you to select or deselect all messages in the list.

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