

PhonePad Remote Mode Installation Guide



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PhonePad Remote Mode

Installation Guide

by Cybercom Software

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1 Introduction

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

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

Local Mode

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

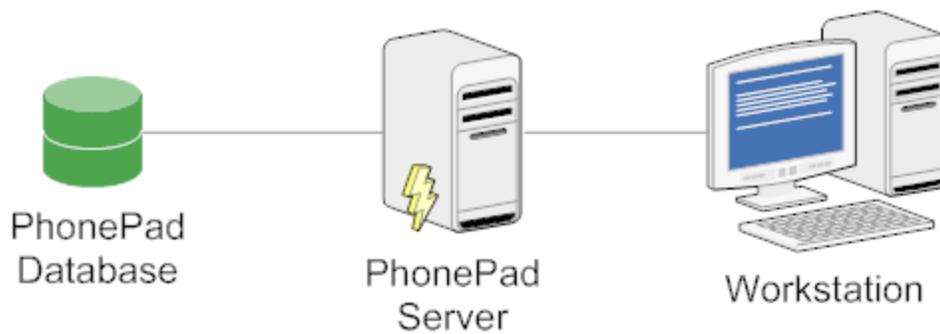


Local Mode

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

Remote Mode

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



Remote Mode

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

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

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

2 Setting Up the PhonePad Server

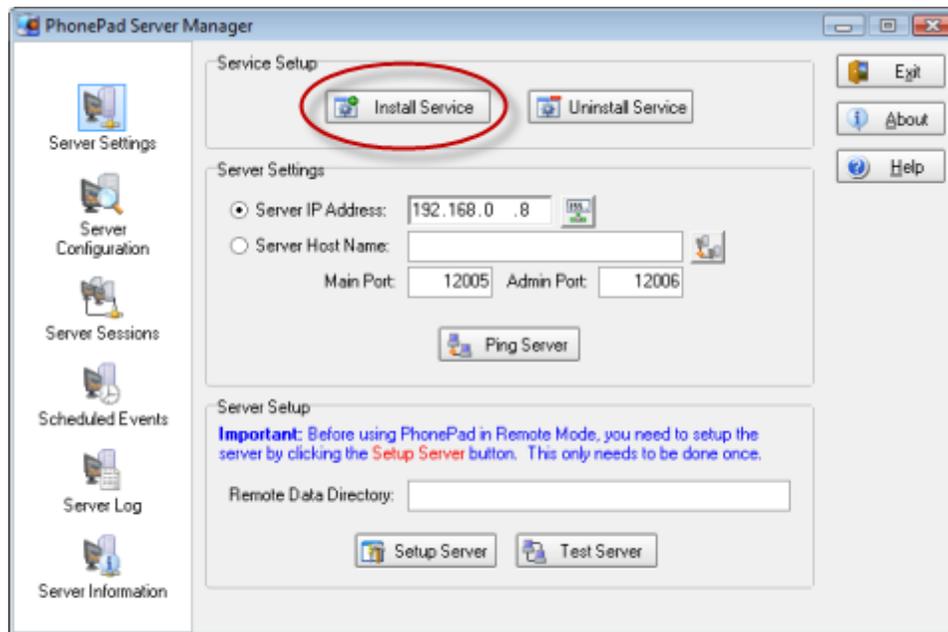
Before you can start using PhonePad in [Remote Mode](#), you need to get the PhonePad Server set up. This only needs to be done once, unless you change the location of the PhonePad database.

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

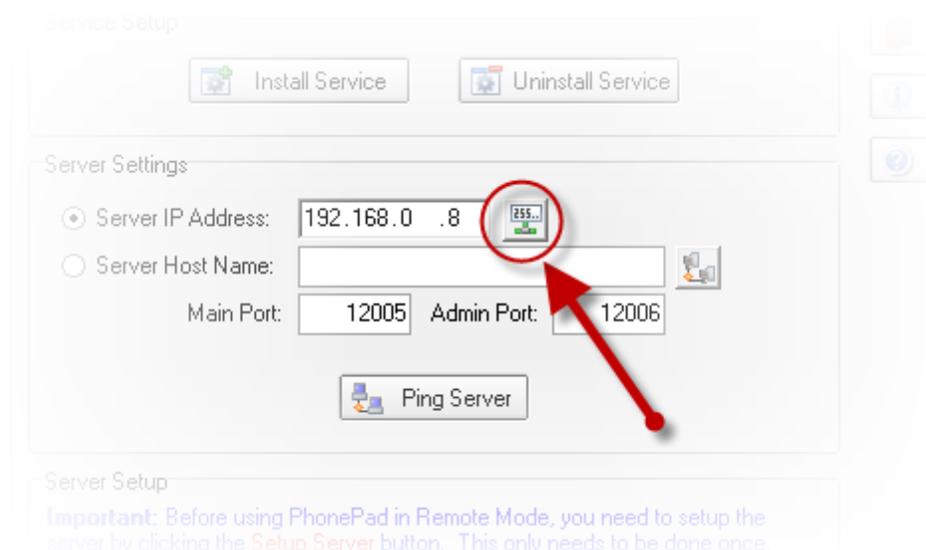
Step 1 - Install the PhonePad Server.

The first step is to install the PhonePad server.

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

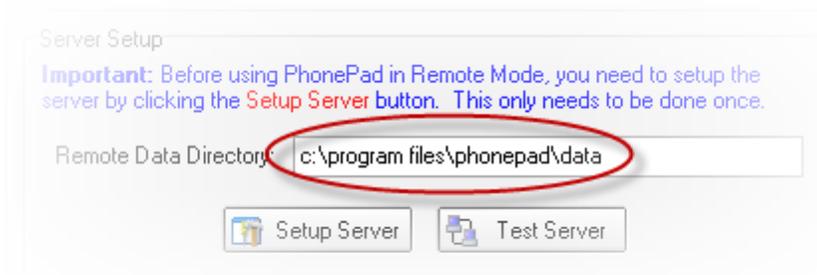


3. Click the button next to the *Server IP Address* field. ServerManager will insert the IP address of the server or host computer you are currently using.



Step 3 - Enter the Location of the PhonePad Database.

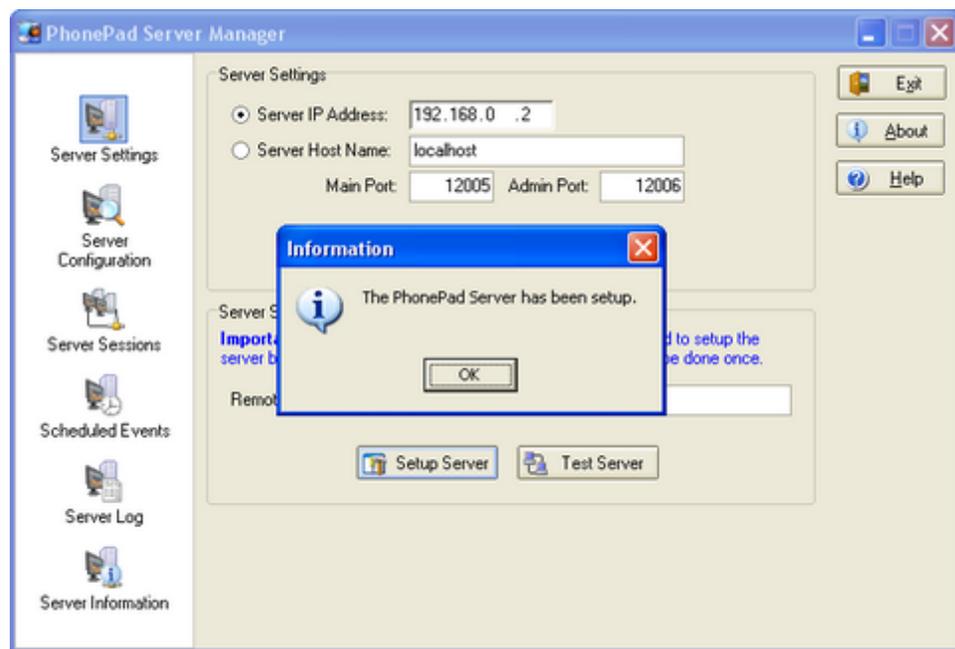
Enter the location of the PhonePad database under [Remote Data Directory](#). The default location is C:\Program Files\PhonePad\Data, but it may be different if you didn't install PhonePad directly on the server or host computer.



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

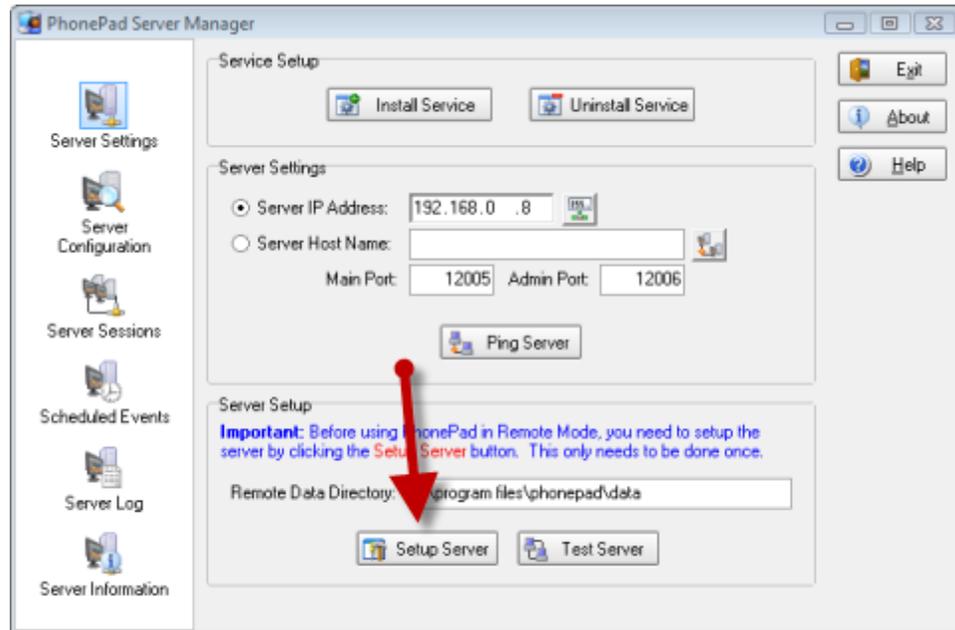
Step 4 - Setup the Server.

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

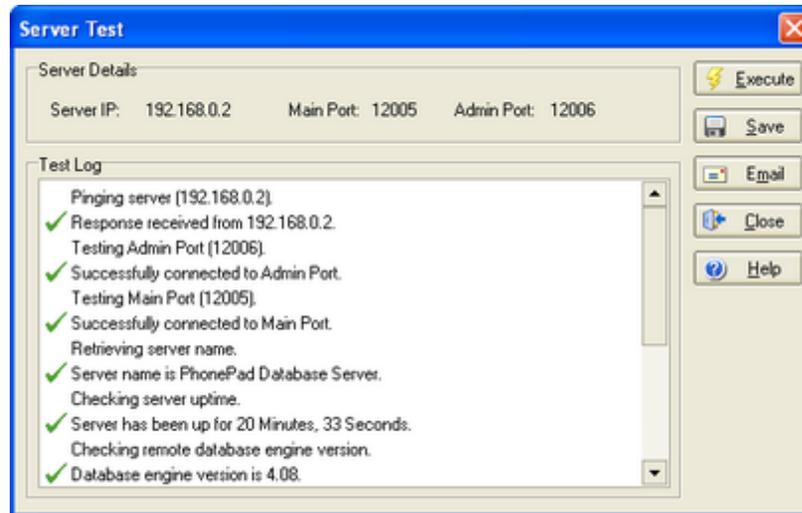


Step 5 - Test the Server Configuration.

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



The [Server Test](#) window will then be displayed. To start testing, click the [Execute](#) button.



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

Execute

Runs the server tests.

Save

Saves the results of the tests to a text file.

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

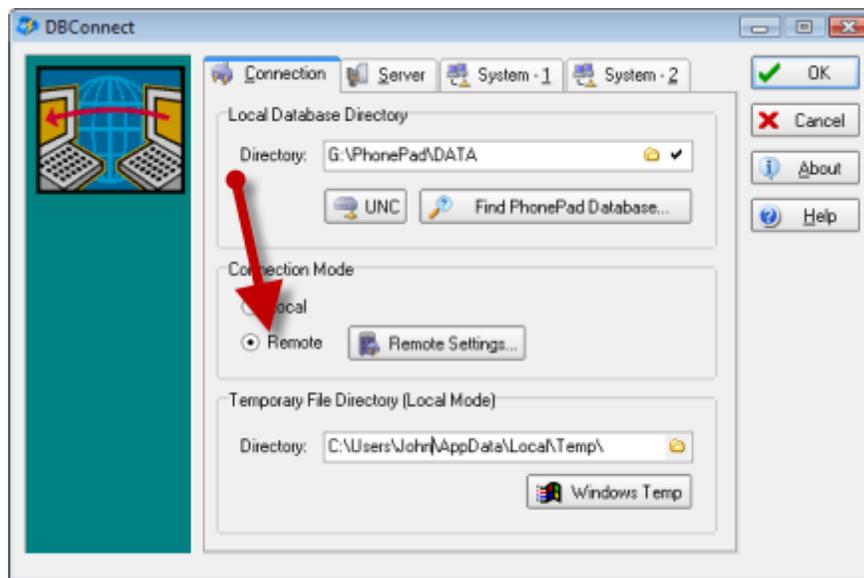
3 Setting Up Remote Mode on Workstations

Follow the steps relevant to your network type.

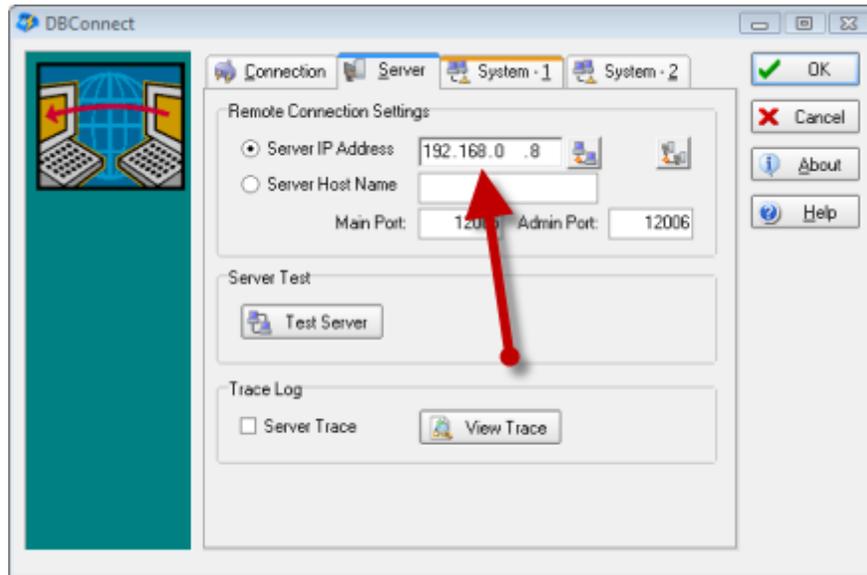
3.1 Local Area Network

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

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



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



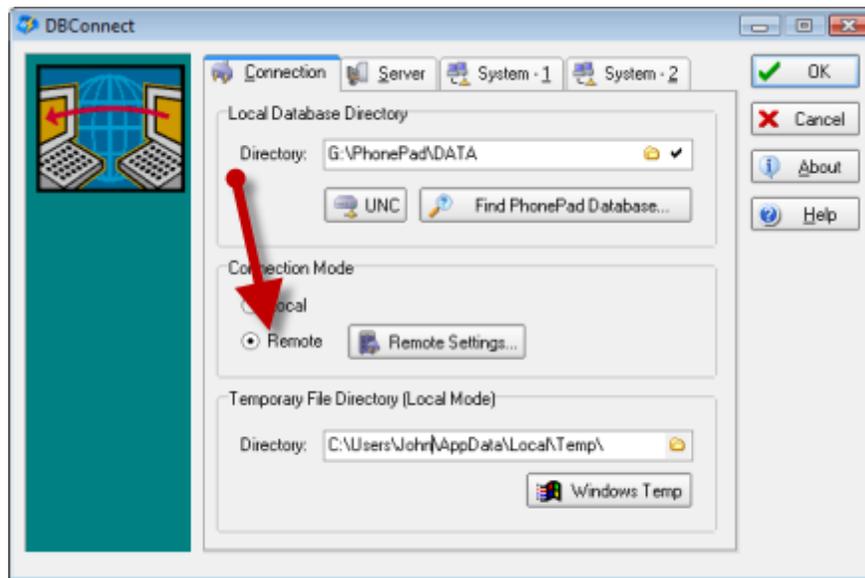
6. You can test the connection to the PhonePad server by clicking the **Test Server** button.

7. Click **OK** to save the settings.

3.2 Peer-to-Peer Network

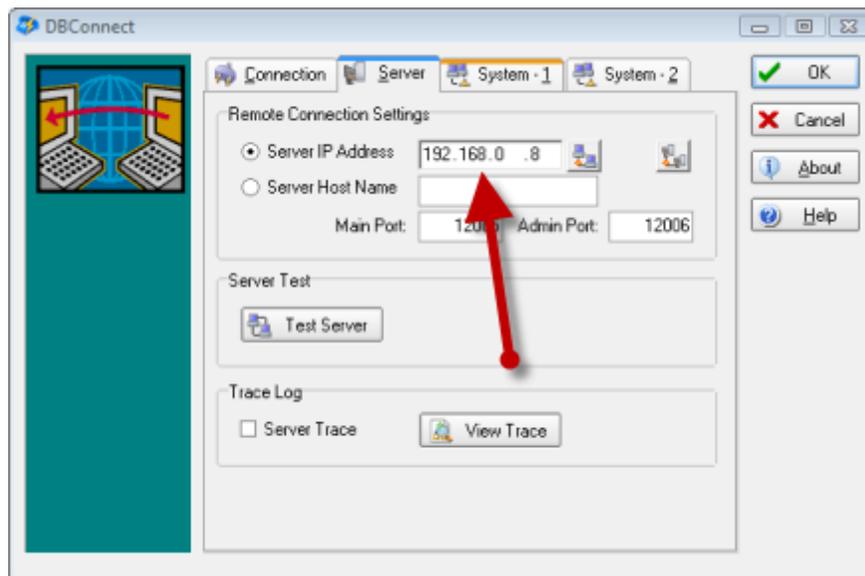
The following steps will need to be performed on each workstation on your network.

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



3. Click the **Server** tab.

4. Enter the **Server IP Address**.



5. You can test the connection to the PhonePad server by clicking the **Test Server** button.

6. Click **OK** to save the settings.

4 Troubleshooting Problems

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

	Problem or Error	Cause	Solution
1.	"Unable to connect to server"	<ul style="list-style-type: none"> The PhonePad server (DBServer) is not running. A firewall, router or bridge is blocking the IP address or ports. 	<ul style="list-style-type: none"> Check to make sure the PhonePad server is running and is online. Check to make sure that any firewalls, routers or bridges between the workstation and server are not blocking the IP address of the server or the ports PhonePad uses to communicate (12005 and 12006).
2.	"Unable to retrieve server name"	<ul style="list-style-type: none"> The PhonePad server hasn't been setup. 	<ul style="list-style-type: none"> Setup the server using the steps detailed under Setting Up the PhonePad Server.
	"Unable to retrieve server uptime"		
	"Unable to retrieve database engine version"		
	"Unable to check for PhonePad database on the server"		
	"Unable to check for default login on the server"		
	"Unable to retrieve remote database location"		
3.	No response from server.		<ul style="list-style-type: none"> Close down both ServerManager and PhonePad server and restart them.

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