Contents

General Information
Verify Duration/Due Time
Comment ID Regeneration
Path Update Utility
Database Integrity Check
Database Repair
Packet Viewer
Rejected Records Viewer
Using the TeleMagic Template Maker

For Help on Help, Press F1

General Information

TeleMagic Utilities is a package of tools intended to facilitate the management of your TeleMagic installations. Help topics are provided for the utilities developed by TeleMagic. Contact your reseller for information concerning utilities not included in this help project. The Contents screen of this help project contains a complete list of all utilities and functions provided with TeleMagic Utilities.

In order to use these utilities the files DBUTIL.EXE and FFIX_50.FLL must be located in your TeleMagic \PROGRAMS directory.

Path Update Utility

{ewc rhgbtn32.dll, BlueSkyHelpButton, g<NOTEUP01.BMP|
NOTEDN01.BMP<JumpId(dbutil.hlp>thirdï¿½DBUTILX_Note_for_Path_Update_Utility)<<1}

TeleMagic contains an internal reference to the location of its global directory. If you move TeleMagic from its original path, it will be unable to locate its directories. When this occurs, you will not be able to access TeleMagic.

The Path Update Utility allows you to tell TeleMagic the new path to the TeleMagic root directory after it has been moved.

To Update the Path of a Relocated Installation of TeleMagic:

1. From the **Global** menu, select **Path Update**.

   The Path Update dialog box will open. This will display both the actual location of the TeleMagic root directory and the path where TeleMagic's internal reference indicates the root directory is located.

2. Verify these paths and click **Path Update** if they are correct.

or Click **Close** if the paths are not correct.

When you click **Path Update**, a status bar will appear as TeleMagic's internal path references are updated with the new location. When it is complete, the path will be correctly referenced in TeleMagic and you will be able to launch the program.

Continue…

{ewl rhgbtn32.dll, BlueSkyHelpButton, g<_____153.bmp|
_____154.BMP<JumpId(dbutil.hlpï¿½DBUTIL_Path_Update_Utility)<<1} The Path Update Dialog Box

Database Integrity Check

TeleMagic uses a special Contact ID that is assigned to a contact record when the record is first created. In addition, a record may have a fixed relationship with other records. For example, it may be a level 2 child record of a level 1 parent record.

Under certain circumstances the TeleMagic database may become corrupted. This corruption could result in Contact IDs being damaged, or links to related records being broken. Records with the latter condition are referred to as "orphans". Records can become corrupted for many reasons. Some of the most common causes are:

- Using add-on products that do not comply with TeleMagic's published standards.
- Closing TeleMagic improperly, such as by turning off the computer without first exiting TeleMagic. This may damage TeleMagic files, or leave one or more TeleMagic files open.
- Experiencing a power outage or other power fluctuation, which could result in damage to TeleMagic files.

The Database Integrity Check allows you to fix any Contact IDs that might have been damaged in your databases. In addition, you can identify orphaned records and reconnect them to the proper parent record. If a file has become an orphan due to a bad Contact ID, it will not automatically be reconnected to its original parent. A new parent will be created and the file will be associated with the newly created parent.

To Check the Integrity of Your Installation of TeleMagic:

1. From the **Contact** menu, select **Database Integrity Check**.

   The Database Integrity Check dialog box will open.

2. In the Available Databases window, highlight the database you wish to check and click **Add** to move the database to the Selected Databases window.

   or Click **Add All** to move all databases to the Selected Databases window.

3. Select what you want to have the integrity utility check:
   - Mark the Incomplete/Empty Contact IDs check box if you wish to check the integrity of Contact IDs in the selected databases.
   - Mark the Orphaned Records check box if you wish to check for orphaned records. This option is not available if you are only checking Level 1.
   - Mark the Duplicate Contact IDs check box to check for duplicate contact IDs.
   - Mark the Check Level Only check box to restrict the integrity check to a single level. Open the drop-down list and select the level you want to check.

4. Select what you want the integrity utility to do:
   - Mark Repair Records to repair any corrupted records the utility locates.
   - Mark Tag Records for User to tag any records that are

identified as corrupted. Open the drop-down list and select the user who will be viewing the tagged records.

- Mark Add "Record Number" index to add a new index, called Record Number to your Index list. Since the report generated by TeleMagic Utilities refers to damaged records by the record number, adding this index to your database will facilitate accessing these records. This index will only be added if errors or actually found.
- Mark Rebuild Indexes to automatically rebuild indexes upon completion of the integrity check. The indexes must be rebuilt before the Record Number index will become available.

5. Select the desired reporting option. There are three reporting options: None, View, and Print. View is the default and will send the report to your monitor.

6. Click **Process** to begin the integrity check.

The utility will process the database(s) you selected, based on the procedures you requested. A report will be generated and presented according to your selection.

Continue…

{ewl rhgbtn32.dll, BlueSkyHelpButton, g<_____153.bmp|
_____154.BMP<JumpId(dbutil.hlpï¿½DBUTIL_TeleMagic_Database_Integrity_Report)<<1} The TeleMagic Database Integrity Report

Database Repair

The Database Repair function will analyze and attempt to fix any problems within a .DBF file. It was primarily designed to fix corrupt headers in .DBF files.

Use Database Repair only if you have tried rebuilding the file(s) with no success. If Database Repair is unsuccessful, you will have to restore the database file(s) from an earlier backup. Database Repair should never be run on a database which is currently in use. It is highly recommended that all users exit any database being repaired, even if you are only generating a report and not attempting repairs.

WARNING!   We strongly recommend that you create a backup of the installation before using the Database Repair function.

To Repair a Database:

1. From the **Contact** menu, select **Database Integrity Check**.

    The Database Repair dialog box will open.

2. In the Available Databases window, highlight the database you wish to check and click **Add** to move the database to the Databases to Check window.

or Click **Add All** to move all databases to the Databases to Check window.

3. Verify that only databases you intend to repair are listed in the Databases to Check window.

    To remove a database from the Databases to Check list, highlight it and click **Remove**.

or Click **Remove All** to remove all databases from the list.

4. Select which files to include in the repair procedure by marking either the Check Global Files, the Check User Files, the Check DSS Files check boxes, or any combination of the three. At least one of these check boxes must be marked to process the database.

5. Mark the Repair Damaged Files check box to automatically attempt to repair any problems encountered. Leave this check box unmarked to generate a report of problems identified without attempting to repair them.

6. Select the desired reporting option. There are three reporting options: None, View, and Print. View is the default and will send the report to your monitor.

7. Mark the Report Errors Only check box to exclude a listing of error-free file groups from your report. (This check box is marked by default.)

8. Click on **Process**.

A status bar will be displayed while the Database Repair function is being performed. A report will be generated at the end of the procedure based on the options selected in steps 6 and 7.

Continue…

{ewl rhgbtn32.dll, BlueSkyHelpButton, g<_____153.bmp|
_____154.BMP<JumpId(dbutil.hlpï¿½DBUTIL_Database_Repair_Dialog_Box)<<1} The Database Repair Dialog Box

Verify Duration/Due Time

If your activity table contains invalid times or durations which have been replaced with an asterisk, this utility will automatically detect and repair them. To run this utility, select it from the Activity menu. There are no user inputs associated with this utility. While running, a status bar will be displayed. You will be informed when the utility has finished and what errors were found, if any.

Comment ID Regeneration

{ewc rhgbtn32.dll, BlueSkyHelpButton, g<NOTEUP01.BMP|
NOTEDN01.BMP<JumpId(dbutil.hlp>thirdï¿½DBUTILX_Note_for_Comment_ID_Regeneration)<<1}

It is possible for activity comment IDs to be duplicated. This condition will occur when a site is initially synchronized and whose site ID is, or has been, identical to another site under synchronization. This will result in some activities being associated with the wrong comments. To avoid this, the site ID of one of the sites must be changed and the Comment ID Regeneration utility run prior to initial synchronization.

To Regenerate Activity Comment IDs:

1. From the **Activity** menu, select **Comment ID Regeneration.**

2. Identify the directory or directories containing the comments whose IDs are to be regenerated by checking the appropriate check box or boxes: Global, Database, and/or User.

3. Click **OK.**

A status bar will be displayed. When the procedure is complete, a message will be displayed.

Continue…

{ewl rhgbtn32.dll, BlueSkyHelpButton, g<_____153.bmp|
_____154.BMP<JumpId(dbutil.hlpï¿½DBUTIL_Activity_Comment_ID_Repair_Dialog_Box)<<1} The Activity Comment ID Repair Dialog Box

The Activity Comment ID Repair Dialog Box

Global
Mark this check box to include Global comment files.

Database
Mark this check box to include comment files associated with any databases. If no such files exist, this option will not be available.

User
Mark this check box to include comment files associated with any users. If no such files exist, this option will not be available.

Continue…
{ewl rhgbtn32.dll, BlueSkyHelpButton, g<_____153.bmp|
_____154.BMP<JumpId(dbutil.hlpï¿½DBUTIL_Comment_ID_Regeneration)<<1} Comment ID Regeneration

The Path Update Dialog Box

Path Information
The Path Update dialog box will display the current path for TeleMagic's global directory and TeleMagic's internal reference. If these are the same, you will not be able to run the Path Update utility.

Path Update
Click on this button to begin the path update procedure.

Close
Click on this button to take no further action and exit the Path Update utility.

Continue…
{ewl rhgbtn32.dll, BlueSkyHelpButton, g<_____153.bmp|
_____154.BMP<JumpId(dbutil.hlpï¿½DBUTIL_Path_Update_Utility)<<1} Path Update Utility

Packet Viewer

Packet Viewer allows you to view the contents of your Data Synchronization packets. This is useful in situations where the records do not appear to be updating as expected after being synchronized. Packet Viewer examines the packet and generates a report which provides general data concerning the system, site, users, deleted records, security groups, and scripts. The report also provides descriptive data of records and e-mail, but does not reveal content. Packets going from a satellite to a central site will not include detailed information concerning the central site, but will indicate that the target is a central site. Once generated, the report can be printed or saved as a text file.

To View a Data Synchronization Packet:

Note
These instructions assume you have accessed this help from within the Utilities program.
If you have not, launch the file DBUTIL.EXE in the TeleMagic /PROGRAMS directory.

1.   From the **DSS** menu select **Packet Viewer**.

     An Open dialog box will open.

2.   Identify the file name and path of the packet you wish to
     view in the Open dialog box.

     A Status dialog box will appear which indicates the Packet
     Viewer's current activity. When complete the Packet
     Viewer Report dialog box will open.

To Print the report, click on the **Print** button. To save the report as a text file, click on the **Save As…** button.

Continue…
{ewl rhgbtn32.dll, BlueSkyHelpButton, g<_____153.bmp|
_____154.BMP<JumpId(dbutil.hlpï¿½DBUTIL_Packet_Viewer_Report_Dialog_Box)<<1} The Packet Viewer Report Dialog Box

The Rejected Records Viewer

Records may be rejected during the synchronization process for any of several reasons:

- The record was changed at the remote after being deleted at the central site.
- The record did not meet a filter requirement.
- The record is an orphan. (It is a subordinate level record with no valid parent.)
- The site is not accepting new records.

The contents of rejected records will be saved in TeleMagic's /DATA directory in files. These rejected files will be named according to the convention REJECTx.DBF, where x indicates the level (1, 2, or 3).

The Rejected Records Viewer allows you to examine the contents of these rejected files. You will then be able to assess the value of the rejected data and take steps to retrieve or reconstruct it, if appropriate.

To View Rejected Records:

1. From the **DSS** menu select **Rejected Records**, **View Records**.

   The View Rejected Contacts dialog box will open.

2. Select the database which is the source of the rejected records from the drop-down list in the Darabase: field.

3. Select the level containing the rejected records from the drop-down list in the Level: field.

4. Select the desired index from the drop-down list in the Index: field.

5. Click **OK**.

   A Rejected Records browse window will open.

When you have retrieved the desired data from the rejected records, you may wish to purge these records from your DATA directory.

To Purge Rejected Records:

1. From the **DSS** menu select **Rejected Records**, **Purge Records**.

   The Select Databases from which to Purge Rejected Contact Records dialog box will open.

2. Select the database(s) containing the rejected records from the Available Databases list.

3. Click **Ok**.

Continue…

{ewl rhgbtn32.dll, BlueSkyHelpButton, g<_____153.bmp|
_____154.BMP<JumpId(dbutil.hlpï¿½DBUTIL_View_Rejected_Contacts_Dialog_Box)<<1} The View Rejected Contacts Dialog Box
{ewl rhgbtn32.dll, BlueSkyHelpButton, g<_____153.bmp|

_____154.BMP<JumpId(dbutil.hlpï¿½DBUTIL_Select_Databases_to_Purge_Records_From_Dialog_Box
)<<1} The Select Databases from which to Purge Rejected Contact Records Dialog Box

The Database Integrity Check Dialog Box

Available Databases
This window contains the databases that are available for integrity checking.

Selected Databases
This window contains the databases that have been selected for integrity checking.

Add
To move a database from the Available Databases list to the Selected Databases list, highlight it in the Available Databases list and click this button.

Add All
Click this button to move all databases from the Available Databases list to the Selected Databases list.

Remove
To remove a database from the list of selected databases, highlight it in the Selected Databases list and click this button.

Remove All
Click here to remove all databases from the Selected Databases list.

Incomplete/Empty Contact IDs
Mark this to check the selected database(s) for records with incomplete or empty contact IDs.

Orphaned Records
Mark this to check for orphaned records. This option is not available if you are only checking Level 1.

Repair Records
Mark this to repair any corrupted record the utility finds.

Tag Records for User
Mark this to tag any records that are identified as corrupted. Open the drop-down list and select the user who will be viewing the tagged records.

> **Note**
> Tags are user specific.

Add "Record Number" index
Mark this to create a new TeleMagic index called Record Number.

Rebuild Indexes
Mark this to automatically rebuild indexes upon completion of the integrity check.

> **Note**
> Indexes must be rebuilt before the Record Number index will become available.

Report
Select the desired reporting option from the three available: None, View, and Print.

Note
If you choose Vɪᴇᴡ (the default) you will be given the option of printing the report when it is displayed.

Process
Click this to begin checking the integrity of the database(s) selected.

Cancel
Click this to close the list box without selecting an item.

Continue…
{ewl rhgbtn32.dll, BlueSkyHelpButton, g<_____153.bmp|
_____154.BMP<JumpId(dbutil.hlpï¿½DBUTIL_Database_Integrity_Check)<<1} Database Integrity Check
{ewl rhgbtn32.dll, BlueSkyHelpButton, g<_____153.bmp|
_____154.BMP<JumpId(dbutil.hlpï¿½DBUTIL_TeleMagic_Database_Integrity_Report)<<1} The
TeleMagic Database Integrity Report

The Database Repair Dialog Box

Available Databases

This window contains the list of databases associated with this TeleMagic installation which have not been added to the list of databases to check.

Databases to Check

This window contains the list of databases which have been selected for testing and/or repair.

Add

To move a database from the Available Databases list to the Databases to Check list, highlight it in the Available Databases list and click this button.

Add All

Clicking on this button will add all databases in the Available Databases list to the Databases to Check list and remove them from the Available Databases list.

Remove

Clicking on this button will remove the highlighted database in the databases to check list from that list and add it to the available databases list.

Remove All

Clicking on this button will remove all databases from the Databases to Check list and add them to the Available Databases list.

Check Global Files

Mark this check box to include global files in the repair process.

Check User Files

Mark this check box to include user files in the repair process.

Check DSS Files

Mark this check box to include DSS files in the repair process.

Repair Damaged Files

Mark this check box to repair problems with files as they are encountered.

Report

Select the desired reporting option from the three available: None, View, and Print.

Note

If you choose View (the default) you will be given the option of printing the report when it is displayed.

Report Errors Only

Mark this check box to limit reporting to detected errors (default). If this check box is unmarked, the report will include a list of file groups which contained no errors.

Note

In this case, 'file groups' refers to categories describing a set of files. Global is a file group, and each user would have an associated file group.

Process
Click on this button to begin the database repair process.

Cancel
Click on this button to return to the TeleMagic Utilities main screen without checking files.

Continue…
{ewl rhgbtn32.dll, BlueSkyHelpButton, g<_____153.bmp|
_____154.BMP<JumpId(dbutil.hlpï¿½DBUTIL_Database_Repair)<<1} Database Repair

The Packet Viewer Report Dialog Box

Print
Click this button to print the report.

Save As…
Click this button to save the report as a text file.

Continue…
{ewl rhgbtn32.dll, BlueSkyHelpButton, g<_____153.bmp|
_____154.BMP<JumpId(dbutil.hlpï¿½DBUTIL_Packet_Viewer)<<1} Packet Viewer

The View Rejected Contacts Dialog Box

Database
Select the database which is the source of the rejected records you wish to view from this drop-down list.

Level
Select the level you wish to view from this drop-down list.

Index
Select the desired index from this drop-down list.

OK
Click on this button to view the selected rejected records.

Cancel
Click on this button to return to the TeleMagic Utilities main screen without viewing rejected records.

Continue…
{ewl rhgbtn32.dll, BlueSkyHelpButton, g<_____153.bmp|
_____154.BMP<JumpId(dbutil.hlpï¿½DBUTIL_The_Rejected_Records_Viewer)<<1} The Rejected Records Viewer

The Select Databases from which to Purge Rejected Contact Records Dialog Box

Available Databases
This list contains all databases which are available and have not been selected for purging of rejected records.

Selected Databases
This list contains all databases which have been selected to be purged of rejected records.

Add
Click on this button to add the highlighted database in the Available Databases list to the Selected Databases list. The database will be removed from the Available Databases list.

Add All
Click on this button to add all databases in the Available Databases list to the Selected Databases list. All databases will be removed from the Available Databases.

Remove
Click on this button to remove the highlighted database from the Selected Databases list and add it to the Available Databases list.

Remove All
Click on this button to remove all databases from the Selected Database list and add them to the Available Databases list.

Purge
Click on this button to purge rejected records from the selected databases.

Cancel
Click on this button to return to the TeleMagic Utilities main screen without purging records.

Continue…
{ewl rhgbtn32.dll, BlueSkyHelpButton, g<_____153.bmp|
_____154.BMP<JumpId(dbutil.hlpï¿½DBUTIL_The_Rejected_Records_Viewer)<<1} The Rejected Records Viewer

The TeleMagic Database Integrity Report

{ewc rhgbtn32.dll, BlueSkyHelpButton, g<NOTEUP01.BMP|
NOTEDN01.BMP<JumpId(dbutil.hlp>thirdï¿½DBUTILX_Note_for_the_TeleMagic_Database_Integrity_R
eport)<<1}

The Database Integrity Check utility produces a report upon completion of its function. This report consists of two parts. The first part is a summary of the settings selected for the check, a list of databases tested, and whether or not any errors were identified in each database.

The second part includes specific problems found in each database tested. These are broken down by level for each database. Within each level, records with problems are identified by name and record number. To access records by record number, it is recommended that you select the Add "Record Number" index option from the Database Integrity Check dialog box when you run the integrity check.

Continue…

{ewl rhgbtn32.dll, BlueSkyHelpButton, g<_____153.bmp|
_____154.BMP<JumpId(dbutil.hlpï¿½DBUTIL_Database_Integrity_Check_Dialog_Box)<<1} Database
Integrity Check

Adding Databases From Templates

Adding, copying, and deleting databases is subject to TeleMagic security access. See your network administrator for information on your security rights.

TeleMagic allows you to create a database, then take a "snapshot" of that database, which can be moved to other installations of TeleMagic. This "snapshot" is called a template. (Creating a template from your database is accomplished using the Template Maker. See the Converting a Database into a New Template

Installing a database from a template is a two step process:

● First, you must install the template in TeleMagic. See: To Add a Template to TeleMagic

This process only installs the template, not the actual database. (Templates cannot be installed directly as databases; you must first install them as templates.)

● Once the template exists in TeleMagic, a database can be added based on the template. See: To Install a Database Based on an Existing Template

Continue…
{ewl rhgbtn32.dll, BlueSkyHelpButton, g<_____153.bmp|
_____154.BMP<JumpId(TM.HLPï¿½MANAGE_Copying_Existing_Databases)<<1} Copying Existing Databases
{ewl rhgbtn32.dll, BlueSkyHelpButton, g<_____153.bmp|
_____154.BMP<JumpId(TM.HLPï¿½MANAGE_Adding_a_Blank_Database)<<1} Adding a Blank Database
{ewl rhgbtn32.dll, BlueSkyHelpButton, g<_____153.bmp|
_____154.BMP<JumpId(dbutil.hlpï¿½DBUTIL_Using_the_TeleMagic_Template_Maker)<<1} Using the TeleMagic Template Maker

To Add a Template to TeleMagic:

It is possible to use the Template Maker to create a "snapshot" of a TeleMagic database that can be installed in other installations of TeleMagic V4. (See Using the TeleMagic Template Maker for instructions on creating templates from your databases.)   The Template Maker creates three files: DBTYPES.CDX, DBTYPES.DBF, and DBTYPES.FPT. Before adding a new database from a template, you must install these template files in TeleMagic.

All three files should exist in the same path for the installation to proceed. If you have received the files on a disk, it is recommended that you copy them to a local or network drive. You may have to decompress the files if they were compressed to fit on disk. Make sure you can access the path to these files before proceeding.

1. Choose **File**, **Select Database** from the TeleMagic Main menu.

    The Select Database selection box will open.

2. Click **Add**.

    The Add a Database dialog box will open.

3. Highlight Add New Template and click **Install**.

    The Install a Template dialog box will open.

4. Type the path to the DBTYPES.* files. (Do not enter the file names.)   Example: **c:\template**

WARNING!
When a template is created, it is given a name. If there is an existing database in your installation with the same name as the template being installed, it will be overwritten.

5. Click **OK**.

    There will be a pause while TeleMagic converts the DBTYPES files into a template. A status bar will open with the message "inserting additional templates into the list". When complete, a message will appear informing you that the template has been installed and that you may now install a database based on the template.

6. Click **OK**.

    The template will now be available from the Add a Database list.

    You must now install a database based on the template.

{ewc rhgbtn32.dll, BlueSkyHelpButton, g<contup01.bmp|
contdn01.BMP<JumpId(dbutil.hlpï¿½DBUTIL_To_Install_a_Database_Based_on_an_Existing_Template)
<<1}

To Install a Database Based on an Existing Template:

TeleMagic allows you to create templates from your databases that can be installed on other installations of TeleMagic. Installing templates is a two step process: first you must install the template in TeleMagic, then you must install a database based on that template. These instructions will walk you through adding a database once you have installed your template. (For instructions on installing templates, see the To Add a Template to TeleMagic: topic.)

1. From the Main menu choose **File**, **Select Database**.

    The Select Database selection box will appear.

2. Select **Add**.

    The Add a Database screen will open, showing all currently-installed templates.

3. Choose a database template from the list and click **Install**.

    A second Add a Database dialog box will open.

4. In the New Name: field, enter a description for the database that will appear in the Select Database selection box.

    The **Directory** field will already be partially filled in with the \DATA sub-directory off the current global drive and directory.

5. At the end of the default path, enter a directory location for the database. You must either enter an existing empty directory, or enter a new directory name and TeleMagic will create it. (If you are working on a network, you must have network access rights to add a directory.) If you do not want to add the directory to the TeleMagic global directory path (where TeleMagic is installed), enter the complete path in the **Directory** field.

    or Choose the **Directory** button to select the path from a Windows Select Directory dialog box. (You must select an empty directory.)

6. Click **OK**.

    TeleMagic will create the new database.

    When finished, you will be given a rebuild warning.

7. Click **OK** to close the rebuild message.

    You will be returned to the Select Database selection box.

8. Click **No Database**, then perform a rebuild. (See To Rebuild a New Database for instructions on rebuilding a single database.)

9. From the Main menu, select **File**, **Select Database**.

10. At the Select Database dialog box, highlight your new database on the list and click **Open**.

Continue…

{ewl rhgbtn32.dll, BlueSkyHelpButton, g<_____153.bmp|
_____154.BMP<JumpId(TM.HLPï¿½MANAGE_Customizing_a_Database_Database_Preferences)<<1}
Customizing a Database: Database Preferences
{ewl rhgbtn32.dll, BlueSkyHelpButton, g<_____153.bmp|
_____154.BMP<JumpId(TM.HLPï¿½MANAGE_Copying_Existing_Databases)<<1} Copying Existing
Databases
{ewl rhgbtn32.dll, BlueSkyHelpButton, g<_____153.bmp|
_____154.BMP<JumpId(TM.HLPï¿½MANAGE_Adding_a_Blank_Database)<<1} Adding a Blank
Database
{ewl rhgbtn32.dll, BlueSkyHelpButton, g<_____153.bmp|
_____154.BMP<JumpId(dbutil.hlpï¿½DBUTIL_Using_the_TeleMagic_Template_Maker)<<1} Using the
TeleMagic Template Maker
{ewl rhgbtn32.dll, BlueSkyHelpButton, g<_____153.bmp|
_____154.BMP<JumpId(TM.HLPï¿½MANAGE_Database_List_Maintenance)<<1} Database List
Maintenance

Using the TeleMagic Template Maker

{ewc rhgbtn32.dll, BlueSkyHelpButton, g<NOTEUP01.BMP|
NOTEDN01.BMP<JumpId(dbutil.hlpï¿½DBUTILX_Hint_for_Using_the_TeleMagic_Template_Maker)<<1
}

The purpose of the Template Maker is to allow you to create "snapshots" or "templates" of your own TeleMagic databases, which can then be installed onto another copy of TeleMagic. If you have multiple installations of TeleMagic, this allows you the convenience of performing design work only once.

Continue…

{ewl rhgbtn32.dll, BlueSkyHelpButton, g<_____153.bmp|
_____154.BMP<JumpId(dbutil.hlpï¿½DBUTIL_What_is_Included_in_a_Template)<<1} What is Included
in a Template?
{ewl rhgbtn32.dll, BlueSkyHelpButton, g<_____153.bmp|
_____154.BMP<JumpId(dbutil.hlpï¿½DBUTIL_Converting_a_Database_into_a_New_Template)<<1}
Converting a Database into a New Template

What is Included in a Template?

Any settings that are user-specific or installation-specific (for example, security settings) will not be included in the template. Any settings that are database-specific will be included in the template:

Customized Views	Field Structure
Contact Records	Database Notepad-only Records
Indexes	Filters
Import/Export Format Files	Custom Reports
Quick Lists	Reports Menu Configuration

In Directory preferences, if the following are set to database-specific for any users, they will also be included in the Template:

Toolbar Configuration	Function Keys	List Boxes

Activities linked to contacts in the database will not be included in the template. If you want to include linked activities, you can do so through Data Synchronization Server (if the installation in which the database currently exists is the central site, and the template is being sent to an installation that is a remote site). Alternatively, when you create the template, do not elect to include contact records. You can then export the contact records with the linked activities to a file which can be imported into any new databases created from the template.

Continue…

{ewl rhgbtn32.dll, BlueSkyHelpButton, g<_____153.bmp|
_____154.BMP<JumpId(TM.HLPï¿½DBUTIL_Using_the_TeleMagic_Template_Maker)<<1} Using the TeleMagic Template Maker
{ewl rhgbtn32.dll, BlueSkyHelpButton, g<_____153.bmp|
_____154.BMP<JumpId(dbutil.hlpï¿½DBUTIL_Converting_a_Database_into_a_New_Template)<<1}
Converting a Database into a New Template

Converting a Database into a New Template

Once you have designed and created the database from which you want to build a template, you can start the Template Maker.

You must exit TeleMagic before using the Template Maker. Any other users in TeleMagic must be out of the database from which you are creating the template.

To Create a Template:

1. From the Taskbar, select **Start**, then select **Run** from the Start menu.

   The Windows Run dialog box will open.

2. In the Open: field, enter the path to the TeleMagic global directory (C:\TMWIN by default) followed by TEMPLATE.EXE:

3. Click **OK**.

   The TeleMagic Template Maker dialog box will open.

4. In the Where is TeleMagic? field, type the path to your TeleMagic installation.

   or Use the **Find** button to locate the program from a Windows Select Directory dialog box.

5. In the Where should the template be created? field, type the path of the desired target location. You can enter an existing directory, or type a new directory name and TeleMagic will create it.

   or If necessary, use the **Find** button to locate the target directory from a Windows Select Directory dialog box.

   WARNING!
   If you enter an existing directory, it is highly recommended that you select one that does not already contain a file named DBTYPES.DBF (template file). If you do so, instead of creating a new DBTYPES.DBF, the database will be added to the existing file. This may result in a DBTYPES.DBF that is too large to fit on a disk when being moved to another installation.

   The scroll box will be populated with the list of databases available in the installation of TeleMagic you specified in step 4.

6. Highlight the database on which you want to base the template.

7. In the Name for the template: field, give the template a unique name. (Make sure that the name you choose is unique; if not, any existing template in the target directory or installation of TeleMagic with the same name will be overwritten by the new one.)

8. If you want to include the contact records in the database as part of the template, leave the Include Contact Records check box marked.

or If you do not want to include contact records, unmark this check box.

9. Choose **Create**.

   You will be prompted to confirm that you have selected the correct database.

10. Click **Yes**.

    The template maker will create the template and place it in the directory specified in step 5. When finished, a message will appear informing you that the template has been created and that you should distribute the DBTYPES.* files to distribute the database.

11. Click **OK**.

    The Template Maker will close.

The Template Maker creates DBTYPES.* files when it builds a template. These files are all you need to have with you to install the template at another location. Either copy the files onto a floppy disk, or use any standard compression program to make the files small enough to fit on a disk. (If you use a compression program, make sure you copy the file to the PC or network containing the target installation of TeleMagic and decompress the file before attempting to install the template.) Follow the instructions under the <u>To Add a Template to TeleMagic:</u> topic.
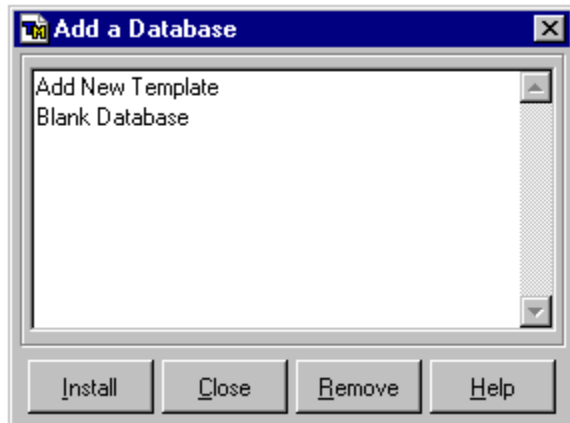
Continue…

{ewl rhgbtn32.dll, BlueSkyHelpButton, g<_____153.bmp|
_____154.BMP<JumpId(dbutil.hlpï¿½DBUTIL_What_is_Included_in_a_Template)<<1} <u>What is Included in a Template?</u>

{ewl rhgbtn32.dll, BlueSkyHelpButton, g<_____153.bmp|
_____154.BMP<JumpId(TM.HLPï¿½MANAGE_Customizing_a_Database_Database_Preferences)<<1} <u>Customizing a Database: Database Preferences</u>

{ewl rhgbtn32.dll, BlueSkyHelpButton, g<_____153.bmp|
_____154.BMP<JumpId(TM.HLPï¿½MANAGE_Copying_Existing_Databases)<<1} <u>Copying Existing Databases</u>

{ewl rhgbtn32.dll, BlueSkyHelpButton, g<_____153.bmp|
_____154.BMP<JumpId(dbutil.hlpï¿½DBUTIL_Adding_Databases_From_Templates)<<1} <u>Adding Databases From Templates</u>

{ewl rhgbtn32.dll, BlueSkyHelpButton, g<_____153.bmp|
_____154.BMP<JumpId(TM.HLPï¿½MANAGE_Adding_a_Blank_Database)<<1} <u>Adding a Blank Database</u>

{ewl rhgbtn32.dll, BlueSkyHelpButton, g<_____153.bmp|
_____154.BMP<JumpId(TM.HLPï¿½MANAGE_Database_List_Maintenance)<<1} <u>Database List Management</u>

Sample Select Database Selection Box

Add a Database Screen
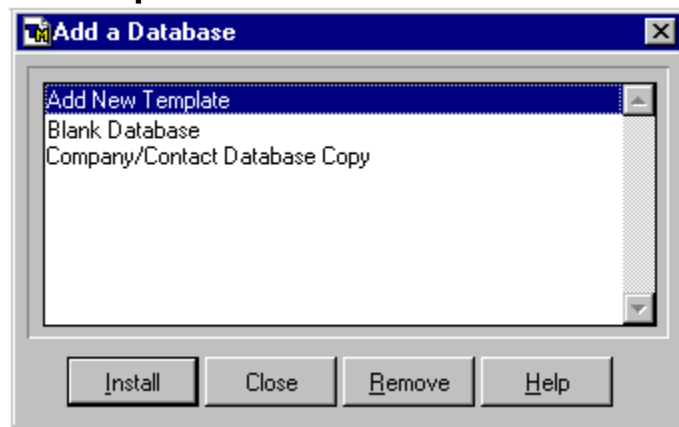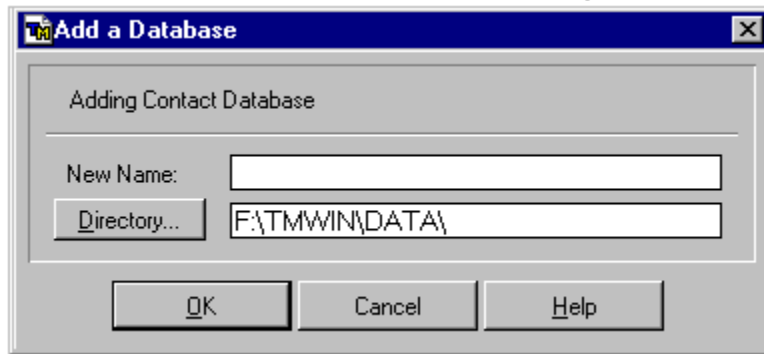
Add a Database

Add New Template
Blank Database

Install   Close   Remove   Help

Install a Template Dialog Box

Install a Template

Please enter the path to the Template Files (DBtypes):

| OK | Cancel | Browse | Help |
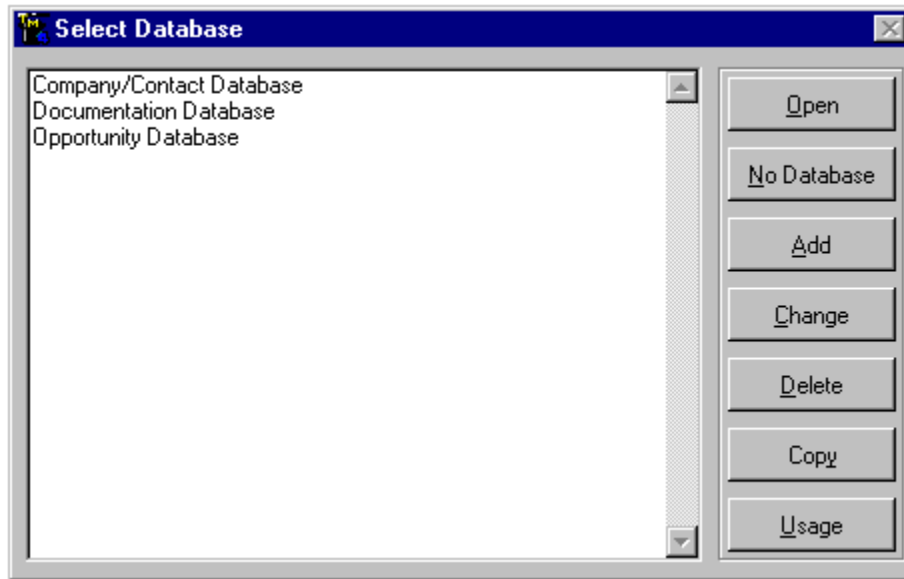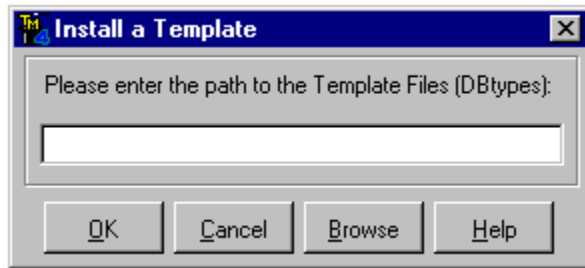
Sample Add a Database Screen with Templates

Sample Add a Database Dialog Box (Based on Template)

Add a Database

Adding Contact Database

New Name: [   ]

Directory... | F:\TMWIN\DATA\

| OK | Cancel | Help |

Sample Template Maker Dialog Box

TeleMagic Template Maker ☒

Where is TeleMagic?

C:\TM\   [Find...]

Where should the template be created?

C:\TM\TEMPLATE\   [Find...]

Available Databases

```
Documentation Database
Company/Contact Database
TeleMagic DOS Style Database
```

Name for the template:

Documentation Database

☑ Include Contact Records

[Create]   [Exit]   [Help]

Note for Path Update Utility

This utility does not actually move your installation of TeleMagic. You must move TeleMagic to the desired target location before updating the path.

Note for Step 2

If you are on a network and any of your users are using node installations, the workstation setup should be performed again to update the nodes with the new path.

Note for Step 1

These instructions assume you have accessed this help from within the Utilities program. If you have not, launch the file DBUTIL.EXE in the TeleMagic /PROGRAMS directory.

Note for Step 4

Tags are user specific.

Note for Step 5

If you choose View you will be given the option of printing the report after it has been displayed.

Note for Step 6

If you choose View you will be given the option of printing the report after it has been displayed.

Note for Comment ID Regeneration

To avoid this the system ID has been included as part of the comment ID. This feature was implemented in comment IDs generated on activity import in version 3.5a.

Note for the TeleMagic Database Integrity Report

Each section of the report will occupy, at a minimum, one page. Therefore, when viewing the report on your monitor, be aware that the second part of the report will be displayed when you click on **OK** in the Page Preview dialog box after viewing the first part.

Note for Step 4
You must select an installation of TeleMagic that has been opened at least once.

Note for Step 5

The Template Maker can create a directory if it does not exist, but it will not create more than one level deep. This means that if you enter C:\NEWDIR\TEMPLATE, for example, and NEWDIR does not exist, the Template Maker will not be able to create it.

Hint for Using the TeleMagic Template Maker

If you are using Data Synchronization Server with your installations of TeleMagic, using the Template Maker may not be necessary. If the database exists in your central site, the entire template can be copied to remote installations of TeleMagic through synchronization. If the database exists in a remote site, use the Template Maker to transfer the database to your central site, then synchronize it to any other installations of TeleMagic.

Note for Step 3
If you have no rejected records, you will receive a message that there are no records to purge.

Note for Step 5

The name of the directory cannot exceed 8 characters, including the period (.) character (if used).