AutoAdmin™

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AutoAdmin™ for Act! by KEYSTROKE

User's Guide

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Welcome To AutoAdmin™ for Act!

AutoAdmin™ for Act! by KEYSTROKE

Keep your ACT! data safe and healthy with the #1 unattended backup and maintenance tool!

AutoAdmin™ effortlessly backs up and maintains all your ACT! data on a schedule you control, so you know you're protected from disastrous data loss and costly interruptions. AutoAdmin™ is the #1 unattended administration software that ACT! administrators, ACCs and ACT! users have counted on for years to ensure their valuable ACT! data is safe and healthy.

System Requirements

ACT! Minimum System Requirements

Client Installation:

- AutoAdmin follows the Act! System Requirements for your version of Act!

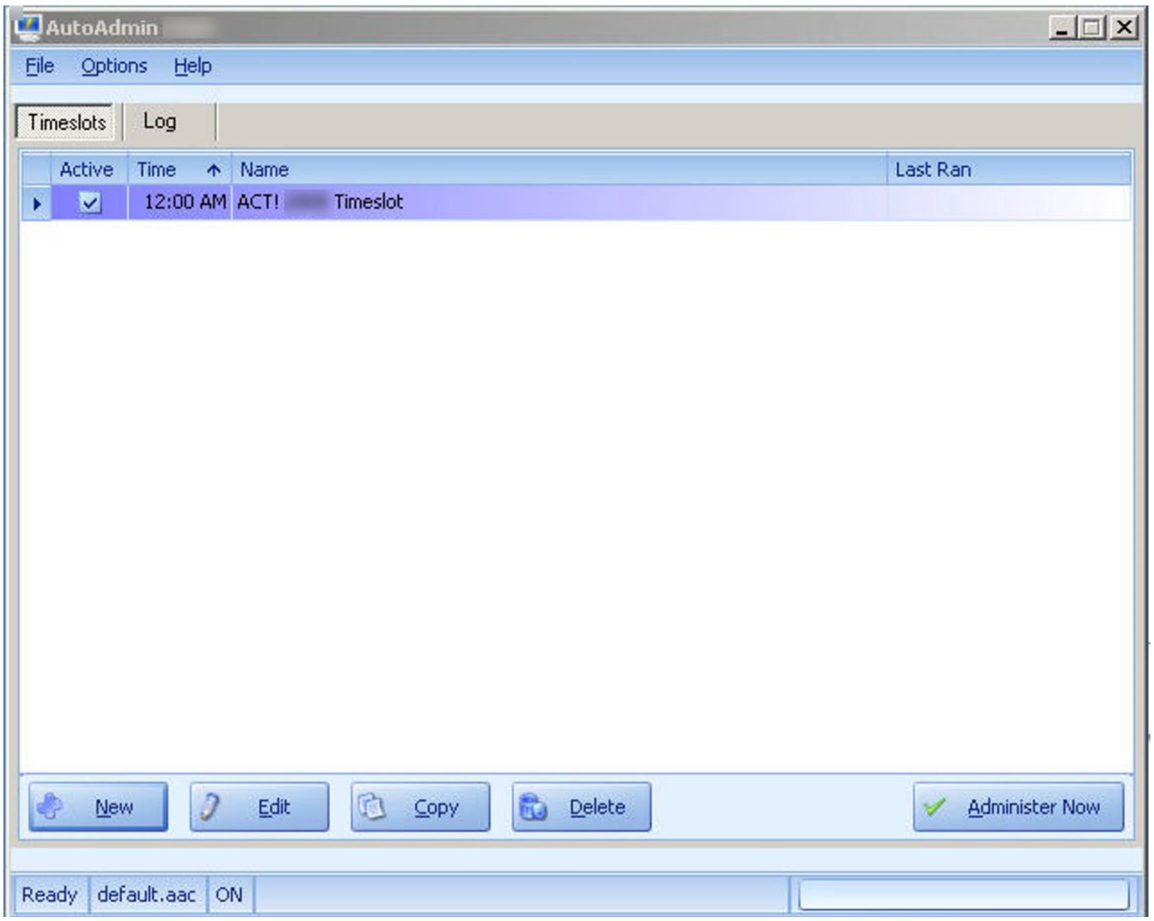
AutoAdmin Requirements

- ACT! v18 or higher

Program Screen

Timeslot Display Screen

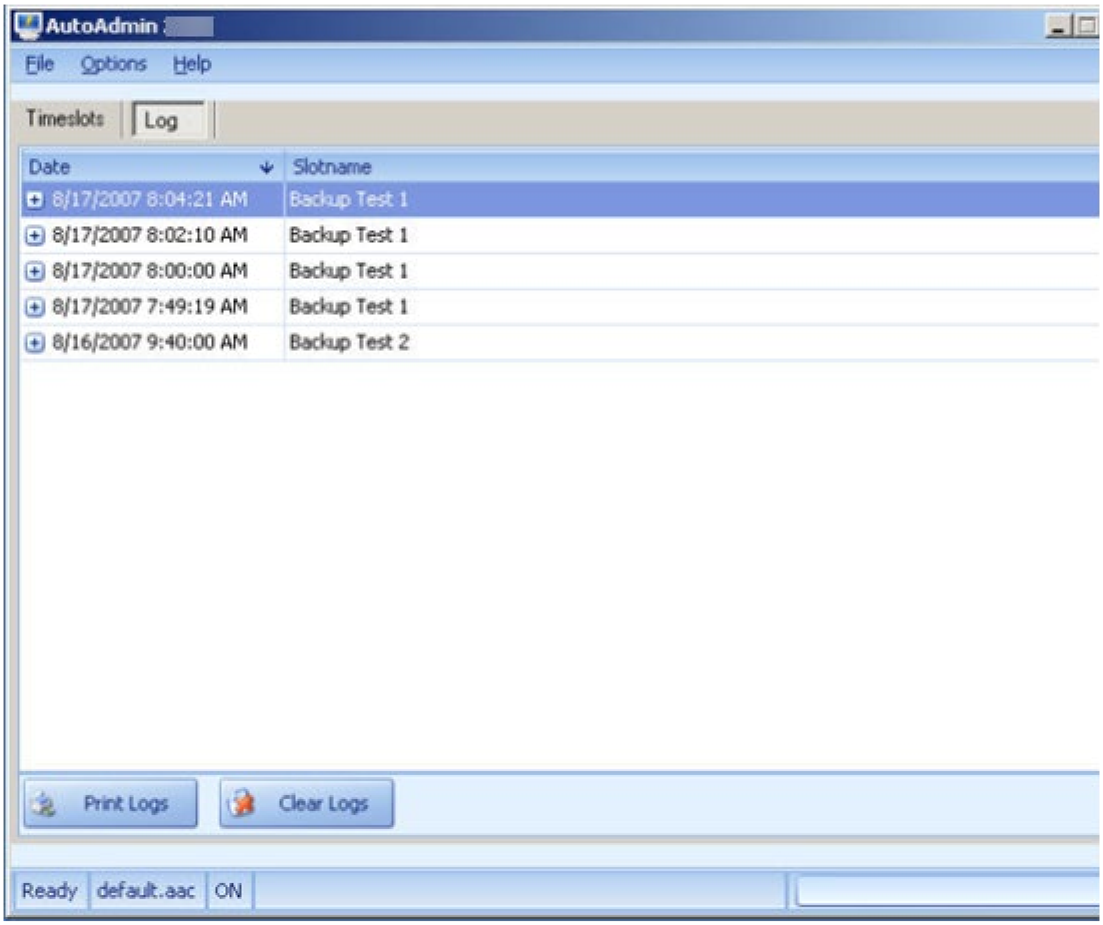
When you first open up to AutoAdmin for Act! you will be presented with the timeslots display screen. This screen will list any timeslots you have configured as well as when they were last run. From this screen you have several options available to you. These options are detailed below.



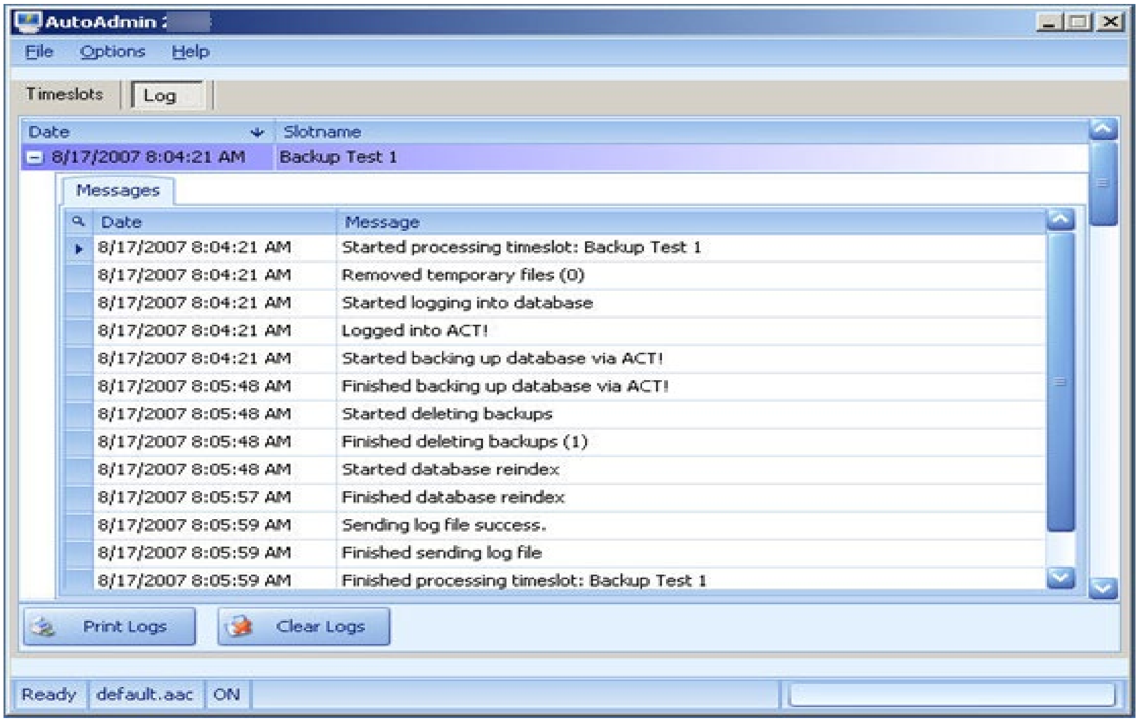
Active Checkbox: This checkbox is used to either make your timeslot active or inactive.
New: This button is used to create a new timeslot.
Edit: This button is used to edit a selected timeslot.
Copy: This button is used to make a copy of a selected timeslot. Use this button to avoid having to re-enter all of the database information when creating a new timeslot for an existing database.
Delete: This button is used to delete a selected timeslot.
Administer Now: This button is used to administer the timeslot manually.

Log Screen

The Log screen allows you to see full details about your timeslots as they have run. When you first click on the "Log" tab you will see the log screen as it appears below with the details of the log entry collapsed.



By pressing the "+" button on the log entry you will see in detail what occurred. See the example below:



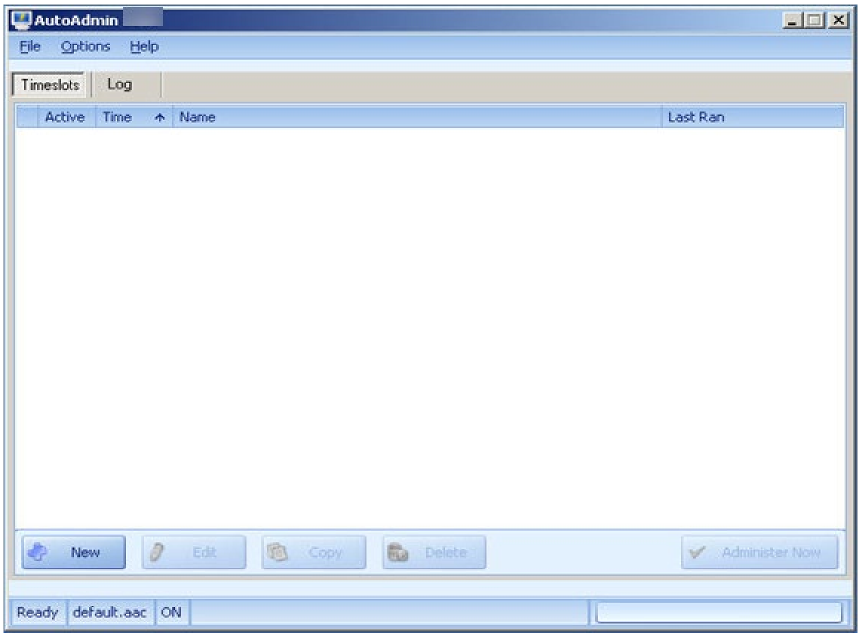
Printing your Logs
You can print your logs by pressing the "Print Logs" button. This will take you to a print preview screen in which you can print out the logs in full detail.

Clearing your Logs
You can also clear your logs if you wish by pressing the "Clear Logs" button.

Adding a Timeslot

1. Adding a Timeslot

When you first load AutoAdmin for Act! you will see the screen below. This is the "Timeslots" view on the main program screen. To add a new timeslot click the "**New**" button on the lower portion of the screen.



2. Main Tab

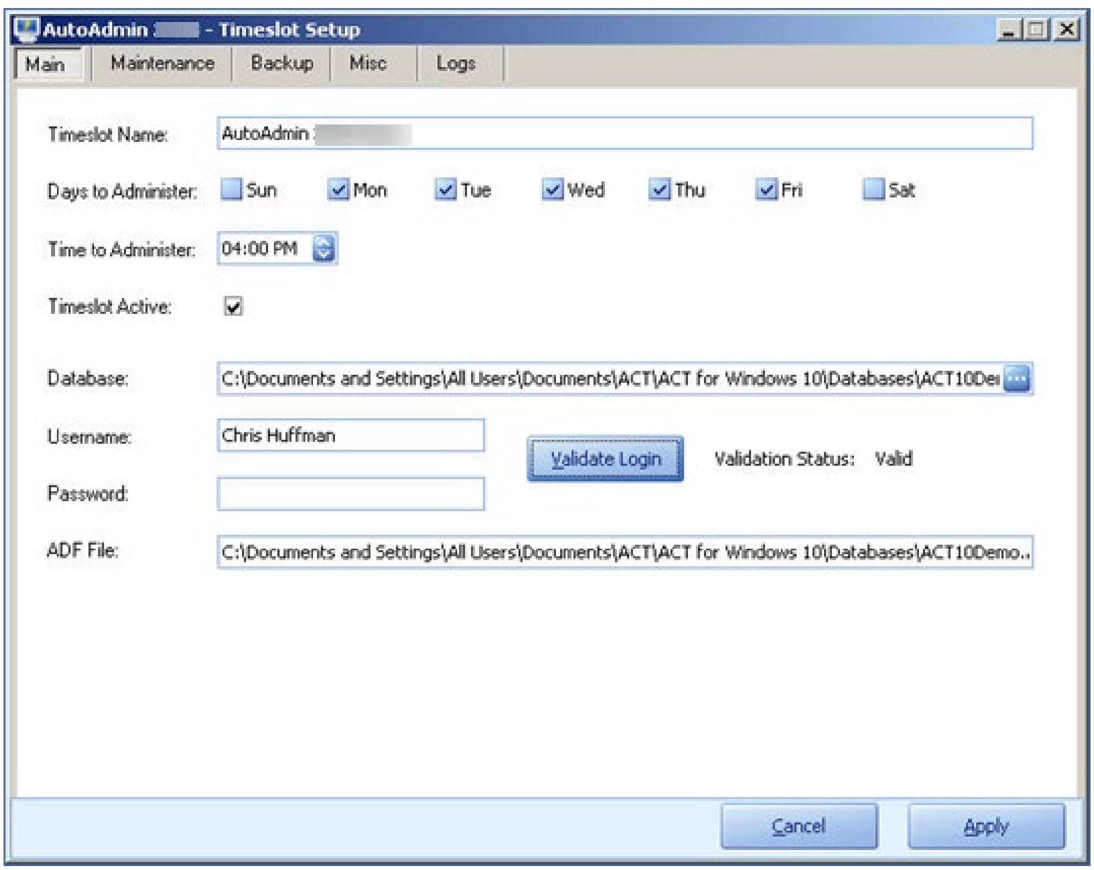
This topic will help you configure the "Main" tab for your timeslot. The main tab is where you will specify the days and times as well as which database you will be Administering. The main tab is where you will specify the login information for AutoAdmin for Act! to use for the specified database. Fill out the "Main" tab with the following information:

1. **Timeslot Name:** Enter a name or description of what the timeslot does.
2. **Days to Administer:** Here you will choose which days the timeslot will run.
3. **Time to Administer:** Use this box to set the time in which this timeslot will run.
4. **Timeslot Active:** Use this check box to set this timeslot to be an active timeslot.

6. **Username:** Enter the Username for the database you specified above.
7. **Password:** Enter the Password if required for the Username you entered above.
8. **Validate Login:** This will verify the database login information you provided. (This step is required)

Once your database has been validated, you will see the path to the 'ADF' file listed below the login credentials.

Here is an example of a completed Main tab:



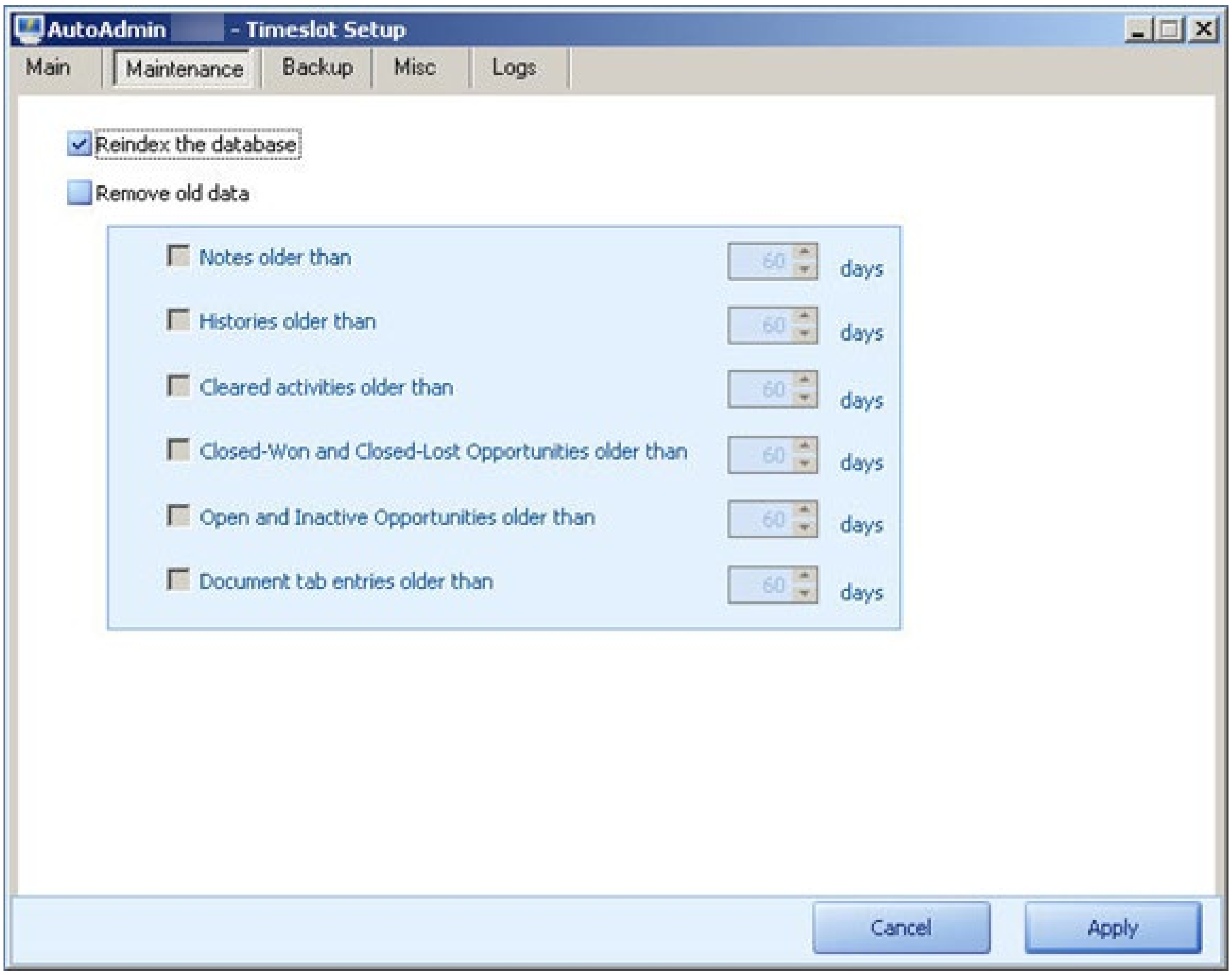
3. Maintenance Tab

This topic will help you configure the "Maintenance" tab for your timeslot. The maintenance tab has several options to help keep your database in good working order.

Reindex the Database: By checking this box the database will be reindexed as part of this timeslot.

Remove old data: By checking these options, items will be removed using the number of days selected.

Here is an example of the maintenance tab filled out:



4. Backup Tab

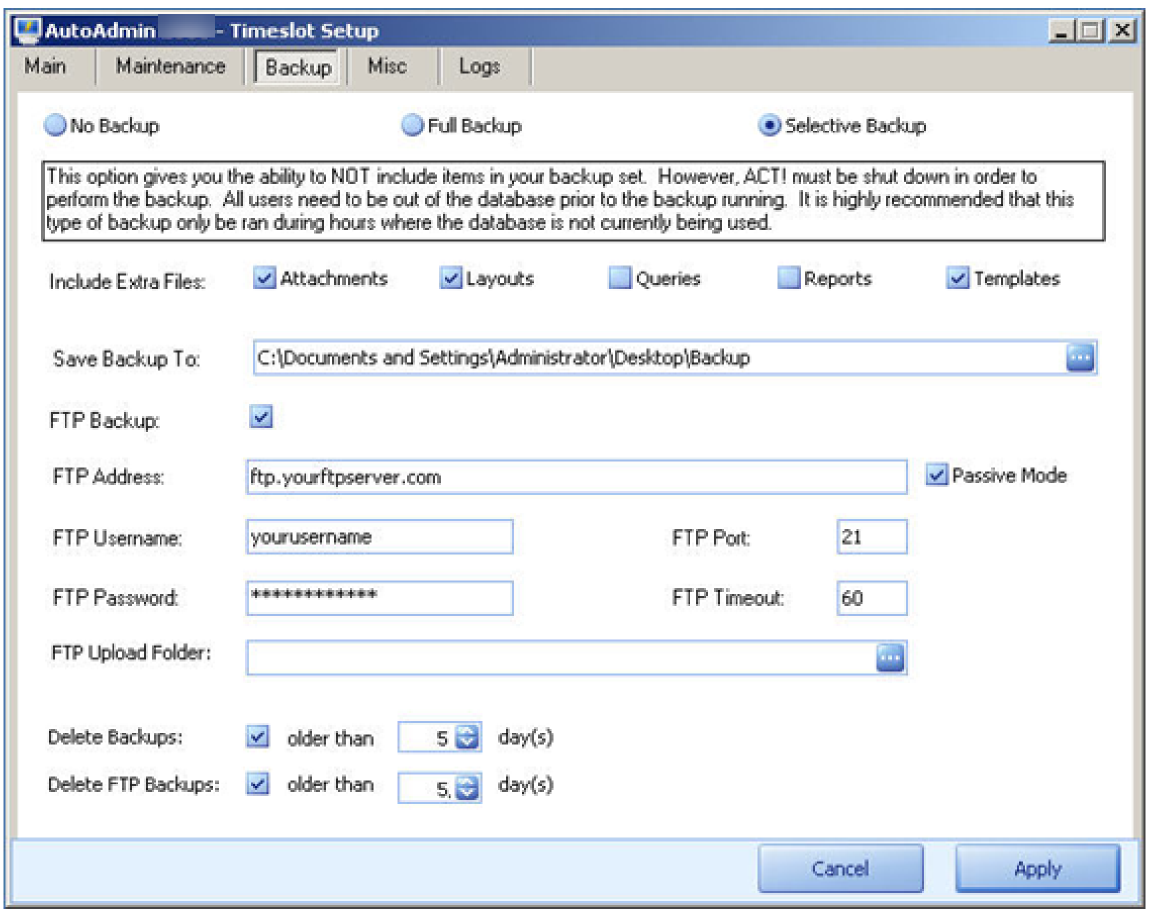
This topic will help you configure the "Backup" tab for your timeslot. On this tab you will have a few different options for backing up your database. You must select which radio button you would like for the backup type to do.

No Backup: This option excludes backup as being part of your timeslot.

Full Backup: This option performs a full backup of the database, including all supplemental files using ACT!'s built in backup system. With this type of backup, you do NOT need to log your users out or have ACT! closed. The "Include Extra Files" section is disabled with this option.

Selective Backup: This option backs up your database, however, you have the flexibility to NOT include certain supplemental files. *IMPORTANT! When using this option, you must have all of your users logged out and ACT! must be closed. It is highly recommended to use this type of backup when you do not need to have users in the database.*

After you have decided which backup type you will use, you will then need to browse your machine to find where you will save your backups to. In the example below, the backups will be saved to "C:\Documents and Settings\Administrator\Desktop\Backup".



For **FTP Backup** you will first need to set the type of backup to perform as seen above, then check the option for "FTP Backup" and fill out the server information also shown above. The standard FTP port is 21. Change the port only when necessary. The default timeout for connection to the FTP server is 60 seconds. Increase this value for extremely slow servers.

Deleting Backups:
To delete backup files on your local drive or network, select the "Delete Backups" option and specify the number of days. To delete backup files from your FTP server, select the "Delete FTP Backup" option and specify the number of days.

IMPORTANT! Some FTP server connections may require the use of "Passive Mode". If this is the case you can check that option above. Typically if you are experiencing problems connecting to your FTP server, try checking that option.

5. Misc Tab

This topic will help you configure the 'Misc' tab for your timeslot. On this tab you will see several options as shown below.

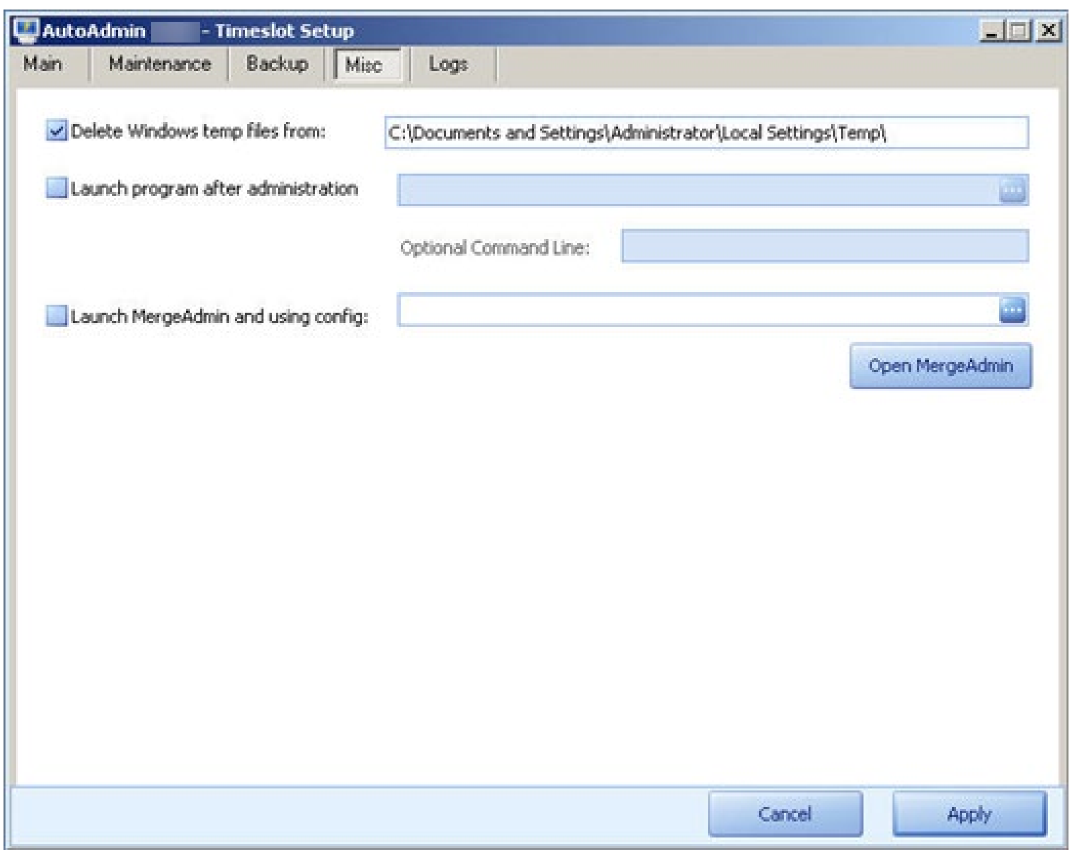
Delete Windows temp files from: This option is turned on by default. If you wish, you can clear the checkmark from this option to turn it off. The default path is pulled from your Windows settings. However, you can edit the path in this box if you wish or require to.

Launch program after administration: This option lets you select an application to be loaded automatically after the timeslot is completed. Below is an example of Windows notepad being set to start after the timeslot.

Launch MergeAdmin and using config: This option is used to automatically run an import into ACT! using our MergeAdmin software. This gives you the flexibility to run an import at a time specified. ***IMPORTANT! Your import file must already be stored in the location that is referenced in your MergeAdmin setup. AutoAdmin for Act! will not automatically get an import file for you.***

Open MergeAdmin button: You can use this button to load MergeAdmin should you need to make any changes to your setup prior to saving the AutoAdmin for Act! settings. If no config file is specified or if a config file is specified, but does not exist, MergeAdmin will open; however the settings will be blank.

Here is an example of the Misc tab filled out:



6. Logs Tab

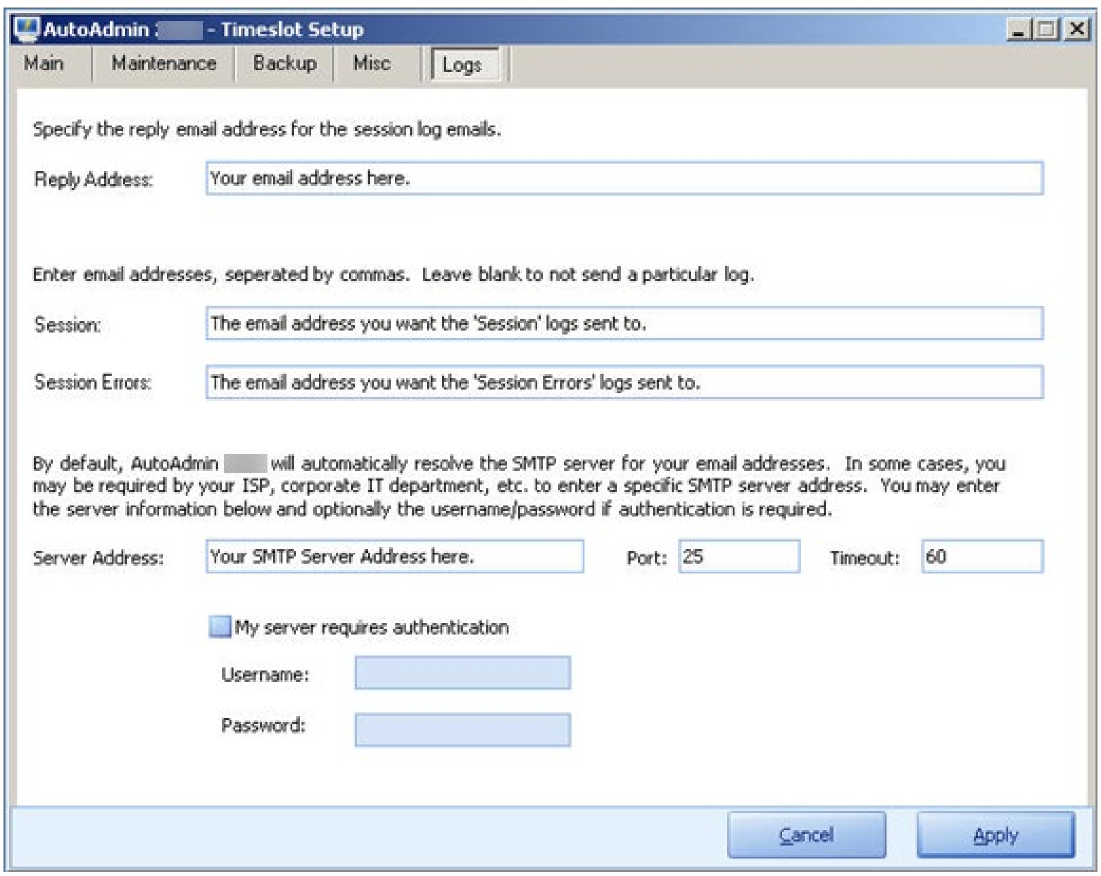
This topic will help you configure the "Logs" tab for your timeslot. This tab is used to specify email address to send the following information to.

Reply Address: This is the email address from which the logs are being sent from. *IMPORTANT! Most servers nowadays require a "Reply Address" in order for the email to go through. We receive many calls that this is not working and it is always due to a missing "Reply Address".*

Session: The email addresses entered here will receive a log of the timeslot being completed.

Session Errors: The email address entered here will receive only error logs of the timeslot being completed.

Server Address: This is where you enter your SMTP server information. Although AutoAdmin for Act! can resolve most email hosts for you, it is highly recommended that you enter your ISP's SMTP server info into this box to avoid delays or problems with sending your log files.



Configuration Files

Configuration Files

AutoAdmin for Act! makes use of configuration files. These files are used to store your current timeslots and their settings to a file. This can be used for backup purposes or even to move your timeslot settings to a new computer.

Creating a New Configuration File
Creating a new configuration file will give you a blank timeslots page for your to create new timeslots. This would be basically starting from scratch, so to speak. You can create a new configuration file by using the steps below:

1. Go to **FILE** > **New Config File.**
2. Browse to the desired location to save this file to.
3. Give your configuration file a name.
4. Click the **SAVE** button to complete the save.

Opening a Configuration File
To open a previously saved configuration file, use the steps below:

1. Go to **FILE** > **Open Config File**.
2. Browse to the location your configuration files are saved to.
3. Choose the desired configuration file.
4. Click the **OPEN** button to open the configuration file.

Saving a Configuration File
To save your current timeslots settings etc. to a file, use the steps below:

1. Go to **FILE** > **Save Config File As...**
2. Browse to the desired location to save this file to.
3. Give your configuration file a name.
4. Click **SAVE** button to complete the save.

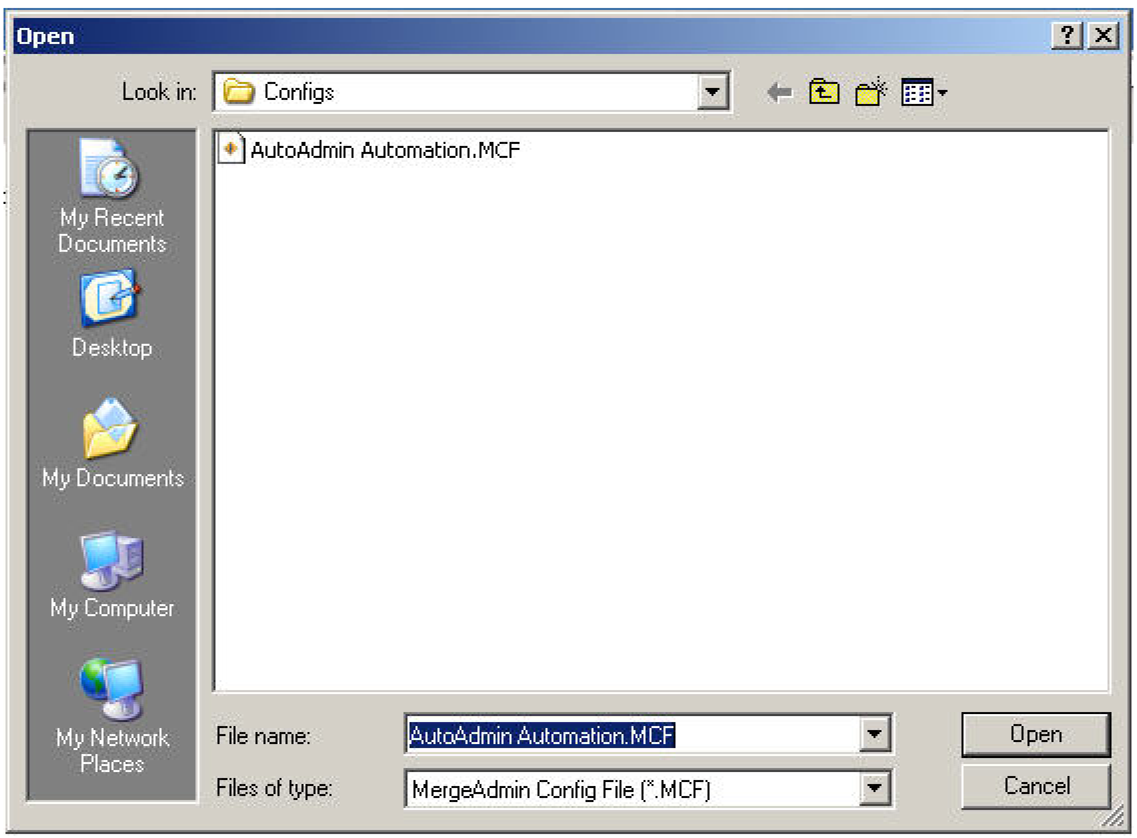
Automating MergeAdmin

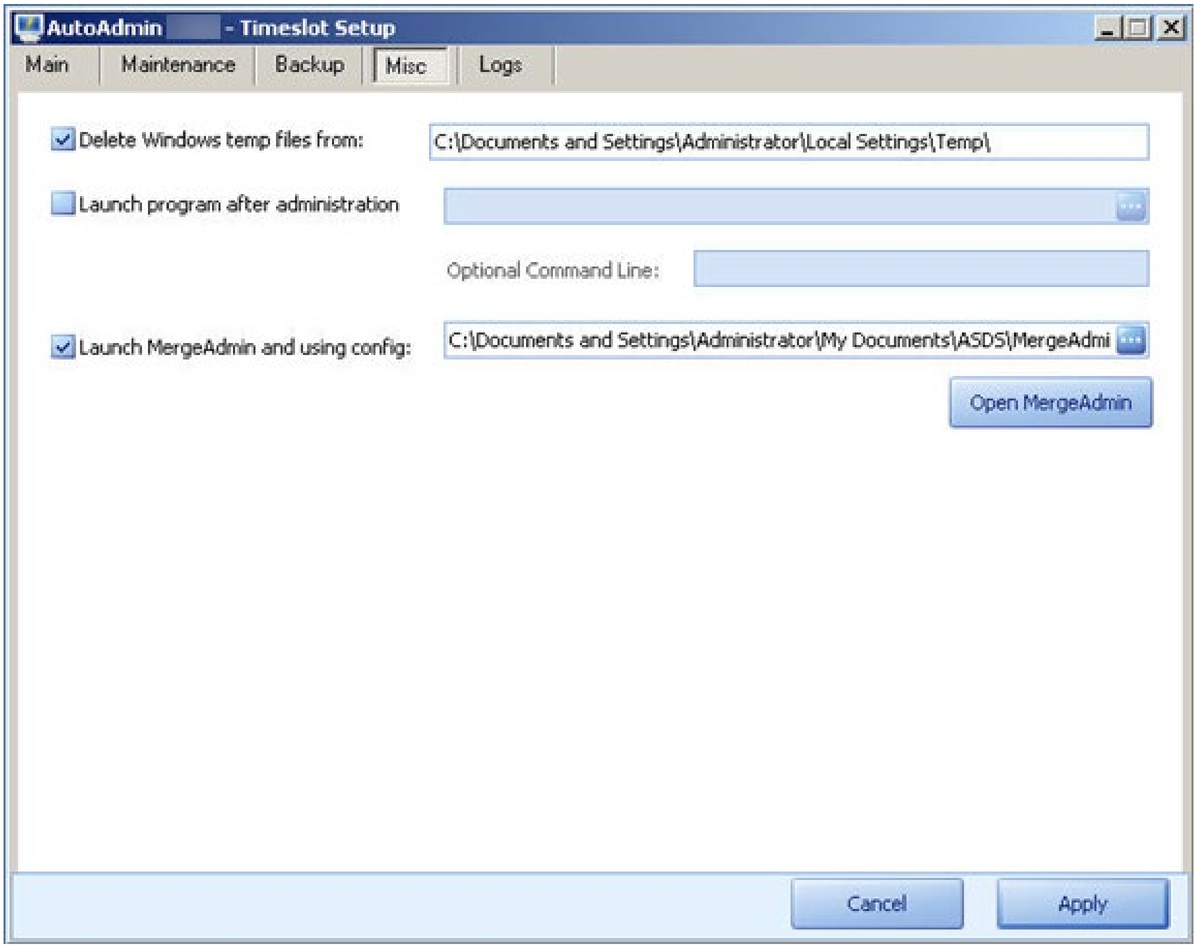
Automating MergeAdmin

With the latest update of AutoAdmin for Act! you now have the ability to automate imports in ACT! using our MergeAdmin software. By using MergeAdmin to setup an import, you can set AutoAdmin for Act! to automatically launch and execute your saved MergeAdmin configuration. See the steps below:

1. You must first use MergeAdmin to set all of the parameters of the import and then save the configuration using the save option in MergeAdmin.
2. Create a new timeslot in AutoAdmin for Act! following the steps found in this help file.
3. Under the "Misc" tab, select the option for "Launch MergeAdmin using config:" See the example below:

5. Click the **Apply** button to save the changes. See the examples below:





This completes the setup to automate your MergeAdmin import using AutoAdmin for Act!.

Running As A Service

Running As A Service

1. Remove the AutoAdmin for Act! Startup Icon
You must remove the AutoAdmin for Act! icon from your startup group. To do this, go to **START** > **PROGRAMS** > **STARTUP**. Then right-click the 'AutoAdmin for Act!' icon and choose 'Delete'.

2. Enable the AutoAdmin for Act! Service
The following steps will guide you through the enabling of the AutoAdmin for Act! Service.

1. Go to **START** > **RUN** and type 'Services.msc' and click OK.
2. Locate the 'AutoAdmin Service' and right-click and choose 'Properties'.
3. Change the 'Startup Type' to 'Automatic' and click APPLY.
4. Click the 'Log On' tab and ensure 'Local System Account' is selected.
5. Click OK to close the Properties box for the AutoAdmin for Act! Service.
6. Right-click the 'AutoAdmin Service' item and choose 'Start'. This will launch AutoAdmin for Act! as the System user.

At this point you are finished. AutoAdmin for Act! is now running as a service on Windows. This will prevent logging off the profile from keeping AutoAdmin for Act! from running.

NOTE: To confirm it is running as a service and not the local user, you should open Task Manager, and look for 'KEYSTROKE.AutoAdmin.exe' and 'AutoAdminService.exe' and these should BOTH be running as the 'SYSTEM' user.

3. Modifying or Updating Timeslots and Checking the AutoAdmin for Act! Log
Once you have enabled the service mode for AutoAdmin for Act!, you must use the following steps in order to modify or create a new timeslot or check the logs. Failure to follow these steps will result in the AutoAdmin for Act! service no longer functioning.

The following steps will guide you through this process.

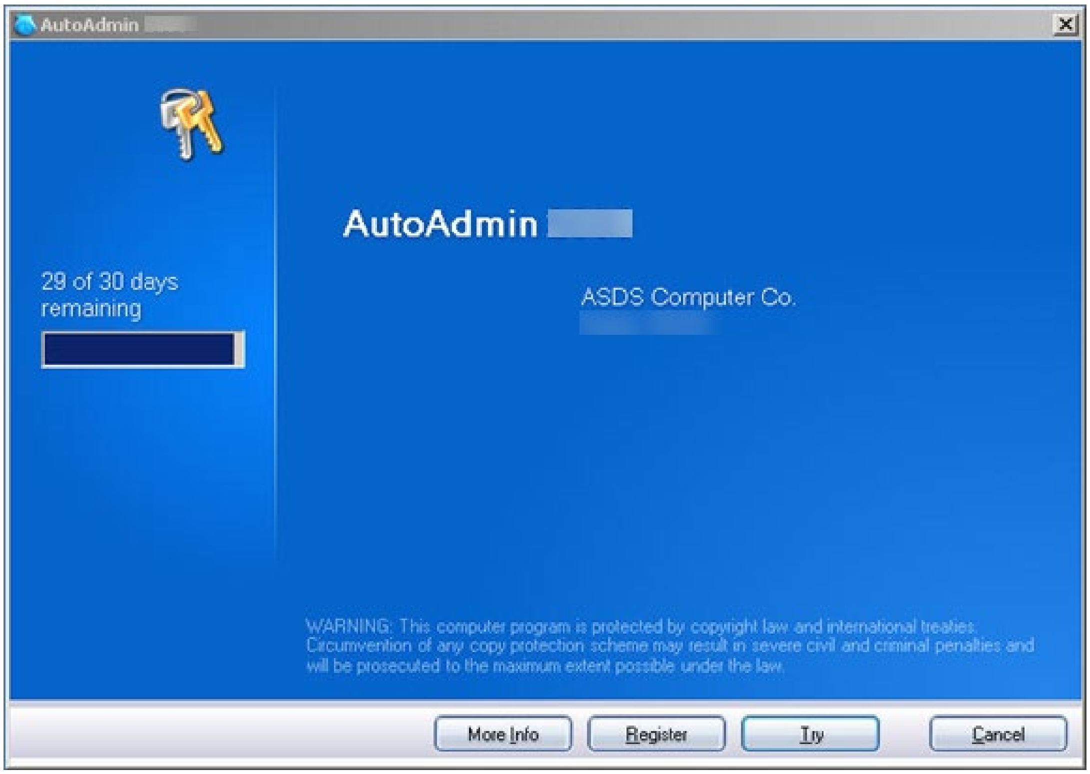
1. Press 'Control-Alt-Delete' to bring up 'Task Manager'.
2. Right-click 'KEYSTROKE.AutoAdmin.exe' and choose 'End Process'.
3. Right-click 'AutoAdminService.exe' and choose 'End Process'.
4. Open AutoAdmin for Act! from START > PROGRAMS > KEYSTROKE > AutoAdmin for Act! and make your changes or check the logs.
5. Exit AutoAdmin for Act!.
6. From the services manager, right-click the 'AutoAdminService' service and choose 'Start'.
7. Exit services manager.

AutoAdmin for Act! is now running as a service and will process your timeslots accordingly.

Trial Ware Information

Trial Ware Information

When you are using a trial version of AutoAdmin for Act! you will receive a startup screen informing you of how many days are left in your trial. The trial version of AutoAdmin for Act! consists of 30 days of use prior to its expiration. See an example of the screen below:



Registration

Registration

Upon your trial expiration, you must purchase, register and activate your copy of AutoAdmin for Act! to continue using it. By clicking the option to register your copy, you will receive the following screen.

You will need to follow the steps on this screen in order to register your copy of AutoAdmin for Act!.

Activation

Activation

Once you have filled out your registration information including your serial number, you will be presented with the screen shown below. You must click on 'Activate online now' to finish the process.

NOTE: If you are still within your trial window, you can click "Activate Later" and continue using the trial version.

Technical Support

Contact Us

Technical support is available by visiting the KEYSTROKE support site. We offer several services to meet your technical support needs. Please visit us today @ www.Keystroke.ca/support to check any reported issues for your product.