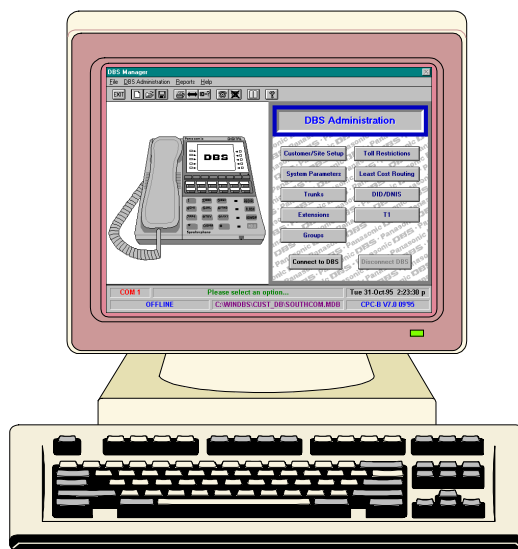


DBS Manager™

User Guide

Panasonic®



VB-43993

Please read these instructions completely before using DBS Manager.

Section 550
Part Number 552X00201
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Overview

Introduction

DBS Manager™ is a Windows-based software application that lets you manage Panasonic DBS telephone systems from a personal computer. With **DBS Manager**, you can connect to a DBS system via modem or direct connection and modify the DBS' programming parameters from your PC or laptop. You can also maintain programming databases for any number of different phone systems in your PC and make modifications to a database for uploading to that phone system at a later time. **DBS Manager** replaces the need for most on-site FF key programming procedures (you will still need to use FF keys for programming new features, "any keys", Call Forwarding ID digits, etc.).

How DBS Manager works

DBS Manager stores the programming information for a DBS system in *database files* based on the Microsoft Access™ format. Using **DBS Manager**, you can easily view or modify a system's programming parameters *as stored in the database* and then upload any changes to that DBS either immediately or at a later time. You can also download a DBS' programming parameters to **DBS Manager** for analysis and modification, or for use as a system backup.

It is important to understand that a database for a particular phone system exists in **DBS Manager** independently from the actual system programming for that DBS. If programming for the system is changed in a DBS database, the phone system will be unaffected unless you are connected to the DBS at the time the changes are made, or those changes are uploaded to it from your PC.

Likewise, if any system parameters are changed via on-site FF key programming, those changes will not be reflected in the **DBS Manager** database for that system until the changes are downloaded from the DBS to your PC, or you open that database in **DBS Manager** and make the same changes.

Note: It is not necessary that a database exist in **DBS Manager** in order to make changes to a DBS' programming. If desired, you can connect to the DBS using **DBS Manager** and modify its programming without maintaining a copy of its database in the **DBS Manager** application.

Using this manual

This manual is designed to assist you in getting started with **DBS Manager**. It is not intended to replace **DBS Manager's** extensive interactive On-line Help files.

Users should have a thorough working knowledge of Panasonic DBS programming procedures and terminology and a good understanding of modem functionality. Users should also be familiar with basic PC and Windows functionality and terminology.

Conventions used in this manual

The following conventions are used throughout this manual:

1. Items to be selected from a menu are indicated as follows:

Select **File** > **Exit** to exit the application (Choose the **File** menu, then click on **Exit**).

2. Names of menus and menu items are printed in **boldface**. Letters that you can use to access the menu and menu item from the keyboard are underlined.
3. Reference to **DBS Manager** and its features appear in **boldface**.
4. Words requiring special emphasis are *italicized*.

Installation Procedures

System requirements

DBS Manager is a powerful application which requires a powerful PC in order to run effeciently. The following are *minimum* system requirements.

- A 486-33 or higher IBM-compatible PC with a 3.5" floppy drive.
- 8 MB or more RAM.
- 20 MB or more free disk space - see Note 1.
- Windows-compatible Mouse.
- VGA or higher resolution Monitor.
- Hayes-compatible modem (required for remote connections - see Note 2).
- Microsoft Windows version 3.1 or higher.

Note 1: Installation of **DBS Manager** requires about 6 MB of disk space. You will also need at least 10 MB free work space on your hard disk to be used during database conversions. In addition, each phone system database to be administered through **DBS Manager** requires an additional 3.0 MB of disk space. **Example:** If you are administering three different DBS databases, you will need at least 25 MB of disk space - 6.0 MB for **DBS Manager**, 10 MB to be used during database conversions, and 9.0 (3.0 MB each) for the three phone system databases being administered.

Note 2. A modem is not required if you have the End-User version of DBS Manager, or if you have the Dealer version but intend to do only direct (i.e., not remote) connections.

Before you begin

Check the following before you begin installation of the **DBS Manager** software.

1. If running Windows 3.1 or 3.11, make sure your virtual memory (swap file) is set to Permanent (not Temporary). The recommended size for virtual memory is 25 MB or greater.
2. For Windows 3.1 and 3.11, set the Buffers parameter in your *config.sys* file to 40 (unless you use applications which require a higher setting).
3. If you are running Windows 3.1 (not 3.11), DBS Manager requires the presence on your system of a file named *share.exe*. DBS Manager will install this file during the installation process, but you must manually edit your *autoexec.bat* file to add the following line:

```
share.exe /L:500
```

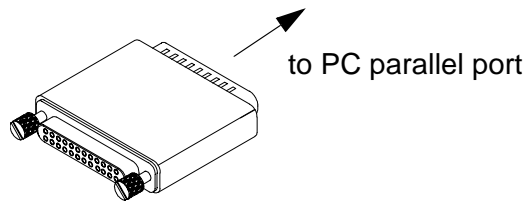
Refer to your DOS and Windows user guides if you need help making the above changes.

Installing the DBS Manager hardware key

DBS Manager is supplied with a hardware key which attaches to your PC's parallel port via a 25-pin connector. This hardware key must be installed in order to use **DBS Manager** to connect to a DBS.

If using a printer, attach the hardware key to the parallel port, then plug the printer cable into the hardware key. (On some computers, if the printer is turned off when using **DBS Manager**, the system will not recognize the hardware key and will therefore not allow a communication session to be established.)

Figure 1. The DBS Manager Hardware Key



Note: Two different versions of the hardware key are available: a dealer version and an end-user version. The dealer version allows remote connections to a DBS. The end-user version is limited to local (on-site) connections only (i.e., no external modem communications with a DBS are allowed). Both versions allow full database functionality. The version type is displayed just above the phone graphic on the **DBS Manager** Main window.

Installing the DBS Manager software

You should make backup copies of the **DBS Manager** disks before beginning the installation procedure. Use the backup disks for the installation.

1. Close out all other Windows applications.
2. Insert Disk 1 into floppy drive A or B.
3. For Windows 3.1, select **File**, then **Run** from the Program Manager screen. For Windows 95, select **Start**, then **Run** from the Windows desktop. In the Command Line box, type **a:setup** or **b:setup** (depending on which drive you placed the disk in), then press <ENTER>. You will be asked to confirm the directory **DBS Manager** should be installed to.
4. After the installation is complete, you should open **DBS Manager** using the default User ID (**System**) and password (**System**) and immediately set up a new user account. See page 27 for information on setting up and modifying user accounts.

Note 1: The default User ID and password are case-sensitive and must be entered exactly as shown above.

Note 2: To protect against unauthorized use of **DBS Manager**, you may want to change the default password (**System**) after your new user account is established. Be aware however that once the default password is changed, there is no way to open **DBS Manager** should you forget your personal User ID and/or password.

DBS Manager Communications Addendum

Introduction

DBS Manager provides the ability to connect to the DBS and DBS 824 either directly or by using modem connections. Modem connection allows for easy remote maintenance without having to travel to the phone system site.

Figure 1. Direct Communications

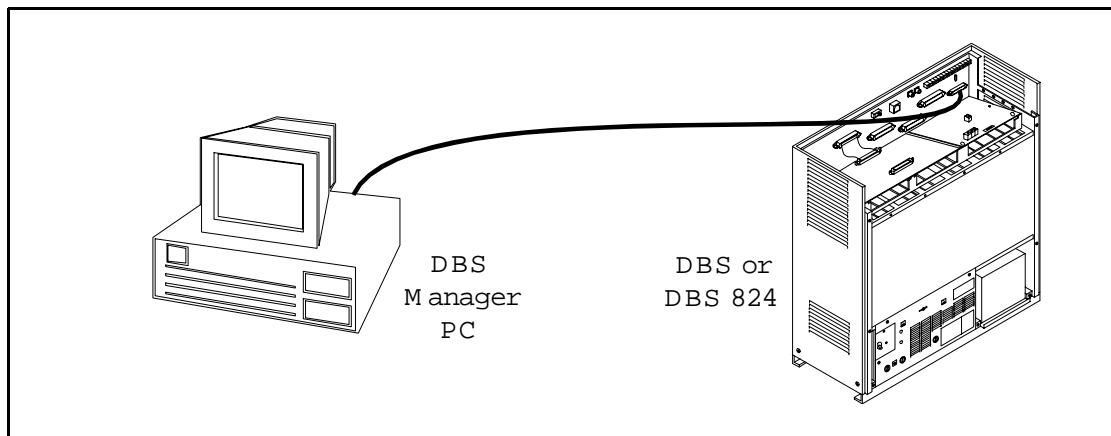
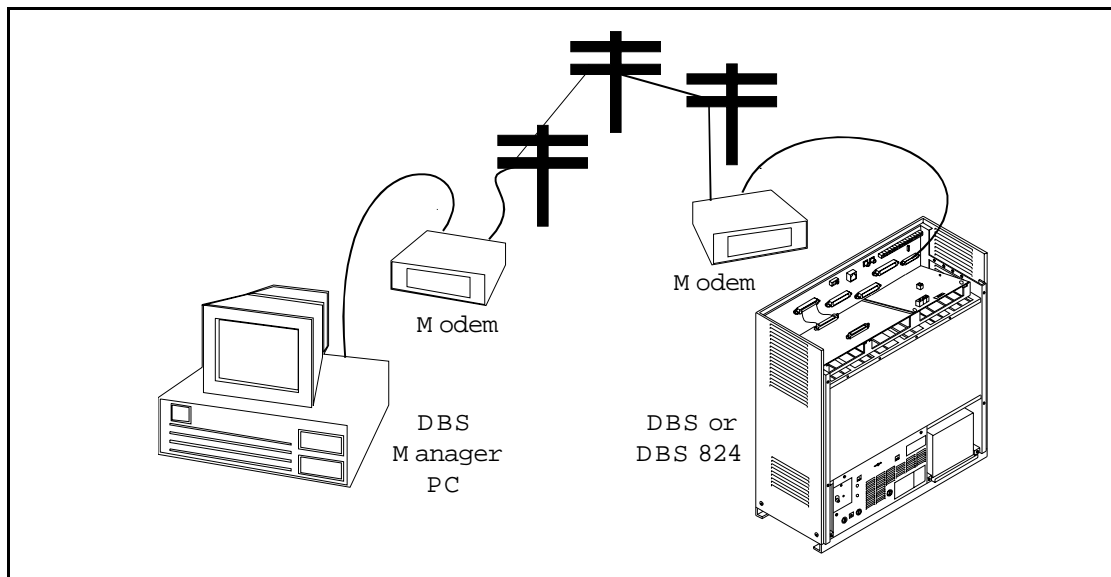


Figure 2. Remote Communications



Connecting remotely to the DBS or DBS 824 involves two modems; 1) a modem at the DBS Manager PC and 2) a modem at the DBS or DBS 824. With the DBS, the modem may be either the internal modem built into the RAI card, or an external modem connected to the DBS external serial port

(CN6). With the DBS 824, an external modem must be connected to the SIU “MAINT” connector CN2.

Regardless of your configuration, **the modems at both ends must be properly configured to communicate**. There are often differences in configuration commands between various modem models. Fortunately, DBS Manager contains custom-tailored modem setup configurations to reduce or eliminate modem-related problems. However, if you have a modem with dip switches that control setup, they must be set to support DBS Manager communications.

Note: Make certain you have complete documentation on the modems you use. There are certain settings that must be correctly set to operate.

Connecting either directly or by an external modem to the DBS or DBS 824 requires special customized modem cables. These cables are described later in this document.

Note: Make sure to use cables configured as described in this document. The cables listed here differ from previously defined cables.

Requirements

The following items are required for DBS Manager to communicate with the DBS or DBS 824.

DBS Manager PC Requirements:

DBS Manager Version 1.1 or later (with hardware key)

Internal, PCMCIA, or External Modem (if connecting remotely)

Standard Modem Cable (if using an external modem)

DBS Requirements for Direct Communications:

Customized Direct Connection Cable

DBS Requirements for Remote Communications:

RAI or External Modem

Customized Modem Cable (if using an external modem)

Trunk Access to Modem (if calling unassisted) (i.e, DISA trunk, dedicated modem trunk, voice mail, automated attendant, etc.)

MFR (if using DISA)

DBS 824 Requirements for Direct Communications:

Serial Interface Unit (SIU)

Customized Direct Connect Cable

DBS 824 Requirements for Remote Communications:

Serial Interface Unit (SIU)

External Modem

Customized Modem Cable

Direct Connection

Customizing the Direct Connection Cables

A customized cable must be used with a direct connection. The cable required to connect to the DBS is shown in Figure 3. The cable required to connect to the DBS 824 is shown in Figure 4.

Figure 3. DBS Customized Direct Connection Cable

Note: Some PC COM ports require a 9 pin connector and others require a 25 pin connector. Choose the appropriate cable for your PC.

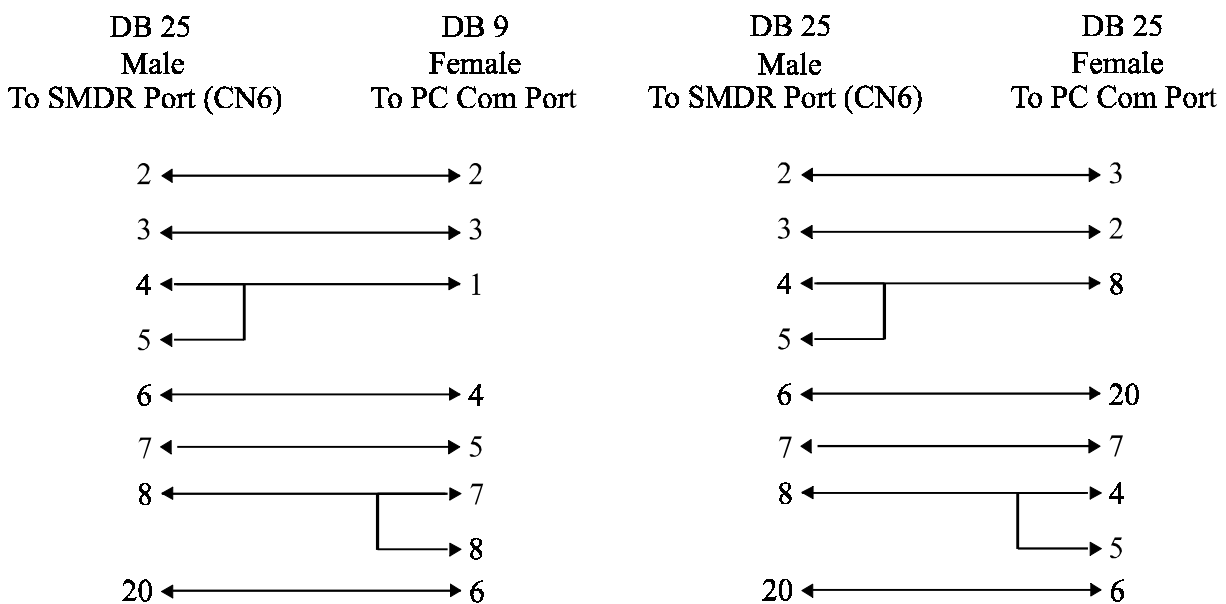
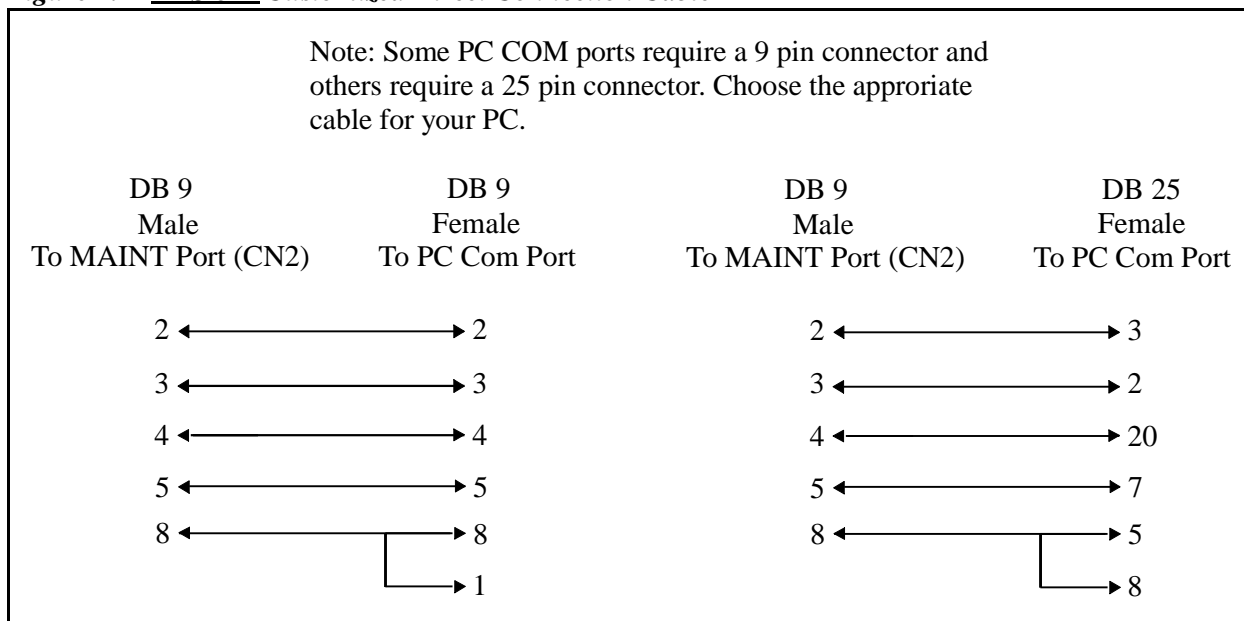


Figure 4. DBS 824 Customized Direct Connection Cable

Operation

Note: Prior to connecting to the DBS 824, dial **#91** at an attendant telephone to disable SMDR and set the DBS 824 serial communications port to CN2 - "Maint".

1. Attach the appropriate direct connection cable to the DBS or DBS 824. See "Customizing the Direct Connection Cables" on page -11.
2. Start DBS Manager and login.
3. Select **File** then **Communications**.
4. Select the PC COM Port for the direct connect cable.
5. Select **9600** Baud, **8** bit data length, **1** stop bit, **None** for parity.

Note: The above values **MUST** match the DBS FF1 2#,2#,1-4# or the DBS 824 FF1 2#,9#,1-4# settings. The default settings in the DBS is **even** parity and should be changed if DBS Manager is set up for no parity.

6. Select **RTS/CTS** for Flow Control.
7. Select **Direct Connection**.
8. Select **Save**. DBS Manager will return to **Communication Setup**.
9. Select **Cancel** to return to the main menu.
10. Select **Connect to DBS**.
11. Select **Connect**.

Remote Communications

DBS Manager Modem Considerations

Before any remote connection to the phone system can be made, the DBS Manager modem must be configured and installed. (This procedure is only required before the first connection, it does not have to be repeated for each connection.)

Note: The DBS Manager modem must be configured one way for connecting to a DBS or DBS 824 with an external modem and another way for connecting to a DBS with an RAI card. DBS Manager provides a way to support two settings that may be used for the same modem - **Modem #1 Setup** and **Modem #2 Setup** (see step 10 below). If the DBS manager modem requires both configurations, it is recommend that the following steps be performed twice with **Modem #1 Setup** used for connecting to an RAI and **Modem #2 Setup** used for connecting to an External Modem. Then connecting to a DBS only requires selecting the correct Modem Setup before connection.

1. If using an external modem, attach the DBS Manager Modem to a PC communication port (usually COM1 or COM2) using a standard modem cable.
2. If using an internal modem, follow the modem installation instruction to install the modem in the DBS Manager PC.
3. Start DBS Manager and login.
4. Select **File** then **Communications**.
5. Select the PC COM Port for the modem.
6. If connecting to a DBS or DBS 824 external modem, select 9600 Baud, 8 bit data length, 1 stop bit, none for parity. (These values **MUST** match the DBS FF1 2#,2#,1-4# or the DBS 824 = FF1 2#,9#,1-4# settings. The default settings in the DBS is **even** parity and must be changed if DBS Manager is set up for no parity.)

or

If connecting to a DBS RAI, select the RAI Baud rate (1200 or 300 Baud for RAI-B or 300 Baud for RAI-A), 8 bit data length, 1 stop bit and none for parity. (The baud rate **MUST** match the DBS FF1 2#,2#,10# setting. The default setting in the DBS is **300** baud.)

7. Select **RTS/CTS** for Flow Control.
8. If connecting to a DBS with an external modem, select **Operator Assisted External Modem** or **Unassisted External Modem**. If connecting to a DBS using the internal RAI, select either **Unassisted RAI** or **Operator Assisted RAI**.

9. Select **Save**.
10. Select **Modem #1 Setup** or **Modem #2 Setup**.
11. Select the modem manufacturer from the modem manufacturer list.
12. Select the correct modem. (Make sure to check the entire list for your modem. Some modems are not in alphabetical order.)
13. Select **Advanced Setup**.
14. Check the Initialization string. If necessary, make changes. It should not be necessary to make changes unless you are setting up to connect to an RAI modem and no preconfigured RAI setup is available. See *RAI Considerations* below for more information.
15. Select OK.
16. Select **Configure Modem**. When DBS Manager has configured the modem, it will display “**Configuration completed successfully**”.
17. Select **OK**. DBS Manager will return to **Communication Setup**.
18. Select **Cancel** to return to the main menu.

RAI Considerations

Unlike a DBS external modem, the RAI does not need to be configured. However, the **DBS Manager modem** must be configured appropriately to connect to a DBS with the RAI installed.

When configuring a DBS Manager modem to connect to an RAI, follow the steps in “DBS Manager Modem Considerations” on page -13. When **Configurations - Advanced Setup** is chosen, the following parameters must be set in the initialization string for the DBS Manager modem as described in your modem manual:

- All data compression must be **disabled**
- All error control must be **disabled**.

Note: If using DBS Manager to connect to phone systems using DBS external modems and RAIs, you must choose the correct modem setup for the type of connection (either for DBS external modem or RAI), and then select **Configure Modem** before connecting.

DBS or DBS 824 External Modem Considerations

If using a external modem attached to the DBS or DBS 824, the modem must be configured at the DBS Manager PC and then attached to the DBS or DBS 824 using the appropriate customized cable before the first remote communication can be made.

Configuring the DBS or DBS 824 External Modem using DBS Manager

1. Attach the modem to be configured as the external modem to a DBS Manager PC com port using a standard modem cable.
2. Start DBS Manager and login.
3. Select **File** then **Communications**.
4. Select the PC COM port connected to the DBS external modem.
5. Select **Operator Assisted External Modem** or **Unassisted External Modem**.
6. Select **Ext Modem**.
7. Select the modem manufacturer from the modem manufacture list.
8. Select the modem model.
9. Select **Advanced Setup**.
10. Check the **Initialization** string. If necessary, make changes. (It should not be necessary to make changes unless you have trouble connecting.)
11. Select **OK**.
12. Select **Configure Modem**. When DBS Manager displays “**The DBS Ext modem was successfully configured, now connect it to the DBS SMDR port....**,” click OK. The screen will return to the **Communication Setup**.
13. Select **Cancel** to return to the main menu.
14. Attach the modem to the DBS SMDR port or the DBS 824 Maintenance port.

Note: VERY IMPORTANT! For the DBS, disable SMDR printing for every installed port (FF3 # (Ext No.)# 14# 0#) when attaching an external modem.

Customizing the External Modem Cable

A customized cable must be used with an external modem. The cable required to connect to the DBS is shown in Figure 5. The cable required to connect to the DBS 824 is shown in Figure 6.

Figure 5. *DBS External Modem Customized Cable*

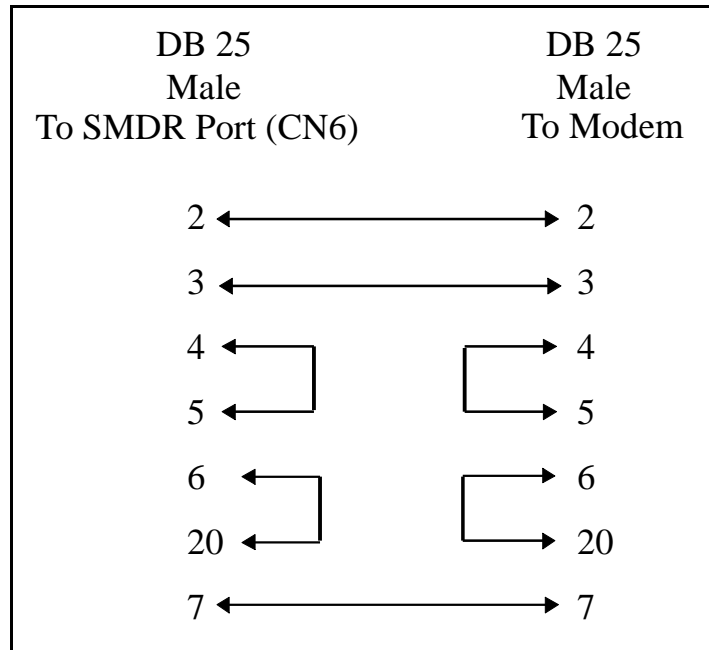
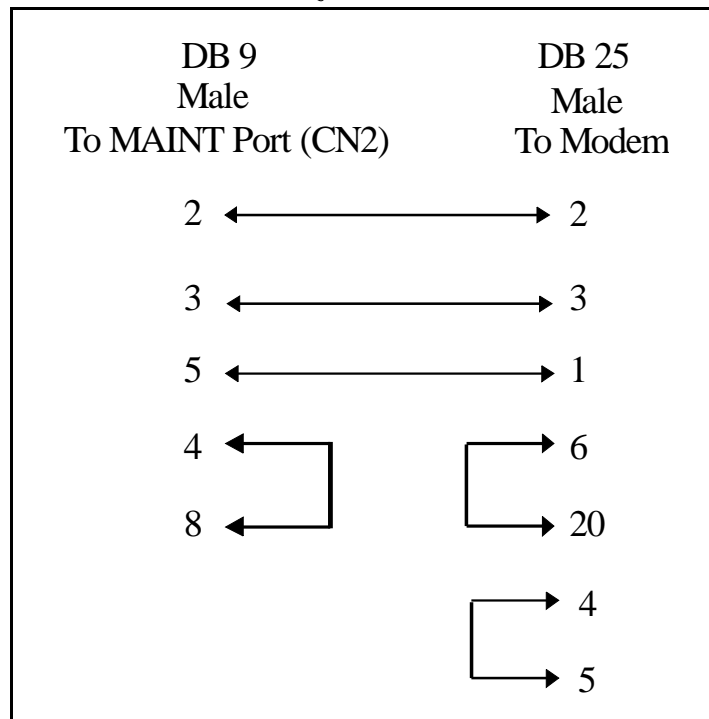


Figure 6. *DBS 824 External Modem Customized Cable*



Operation

Operator-Assisted External Modem Connection

1. Confirm under **Communications** that **Operator Assisted Modem Connection** is selected.
2. Check all other communication parameters to make sure they are configured properly.
3. Return to the main menu.
4. Plug a phone into phone connector on the DBS manager modem.
5. Select **Connect to DBS**.
6. Enter the DBS remote password. (This must match the DBS setting in FF1 4#.)
7. Go off-hook on the phone and dial the DBS operator.
8. **With the DBS**, when the call is answered at the remote end, ask the operator to place the call on hold and dial the extension of the external modem.

With the DBS 824, when the call is answered at the remote end, ask the operator to place the call on hold, dial #91, dial the extension of the modem and hang up.

9. **When you are placed on hold**, select **Connect** and hang up phone. The far end modem answers and talks to the DBS manager modem.

Unassisted External Modem Connection (DBS Only)

Before an Unassisted External Modem Connection can be performed, the DBS must be configured to allow unassisted transfer of an incoming call. This can be accomplished in a number of ways including DISA access, Auto Attendant, Voice Mail or VAU.

1. Confirm under **Communications** that **Unassisted External Modem connection** is selected.
2. Check all other communication parameters to make sure they are configured properly.
3. Return to the main menu.
4. Select **Connect to DBS**.
5. Enter the DBS Remote Phone number followed by commas (for pauses) and the dial string required to transfer the call to the external modem. For instance, **5554000,1111,104** would dial a DBS DISA line (5554000), pause 1 second (,) enter the DISA inbound ID code (1111), pause 1 second (,) and call the modem (104).

6. Enter the DBS Remote Password. (This must match the DBS setting.)
7. Select **Connect**. DBS Manager dials the phone number. The far end modem answers and talks to the DBS Manager modem.

Unassisted RAI Connection (DBS Only)

Before an Unassisted RAI Connection can be performed, the DBS must be configured to allow unassisted transfer of an incoming call. This can be accomplished in a number of ways including DISA access, Auto Attendant, Voice Mail or VAU.

1. Confirm under **Communications** that **Unassisted RAI** is selected.
2. Ensure DBS Manager modem is configured for RAI connection.
3. Check all other communication parameters to make sure they are configured properly.
4. Return to the main menu.
5. Select **Connect to DBS**.
6. Enter the **DBS Remote Password** (if different than the default). (This must match the DBS setting.)
7. Enter the **DBS phone number** followed by the dial string required to transfer the call to the RAI. For instance, **5554000,1111** would dial a DBS DISA line (5554000), pause 1 second (,) and dial the DISA inbound ID code (1111).
8. Select **Connect**. The far end RAI modem answers and talks to the DBS manager modem.

Operator Assisted RAI Connection (DBS Only)

1. Confirm under **Communications** that **Operator Assisted RAI Connection** is selected.
2. Check all other communication parameters to make sure they are configured properly.
3. Return to the main menu.
4. Plug a phone into the DBS manager modem.
5. Select **Connect to DBS**.
6. Enter the DBS remote password. (This must match the DBS setting.)
7. Go off-hook on the phone and dial the operator.
8. **When the call is answered at the remote end, ask the operator to place the call on hold and dial #69999.**

9. **When you are placed on hold**, select **Connect**. The far end modem answers and talks to the DBS manager modem.

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DBS Manager Quick Tour

The Main Window

When you start **DBS Manager**, you will see the main window shown below. The main window consists of four sections: the menu bar, the button bar, the **DBS Administration** section, and the information bar. The main window also shows what type of hardware key is connected to your PC (Dealer Key, End User Key, or No Hardware Key.)

An example of the **DBS Manager** main window is shown below.

Note: Most items in the **DBS Administration** section of the main window will be dimmed and therefore unavailable until either a DBS database has been opened or a connection established to a DBS.

Figure 7. The DBS Manager Main Window



The Menu Bar

DBS Manager provides four menus in the menu bar of the Main screen: **File**, **Database**, **DBS Administration**, **Reports**, and **Help**.

The File Menu

The following menu items are available from the **File** menu.

Menu Item	Description
New	Creates a new customer database.
Open	Opens an existing customer database.
Copy	Copies an existing customer database.
Close	Closes an open customer database.
Connect to DBS	Connects to a DBS.
Disconnect DBS	Disconnects from a DBS.
Communications	Sets communication parameters.
External DBS Modem	Configures the modem on the DBS system.
User Accounts	Sets passwords and other access parameters for users of DBS Manager.
Print	(Not supported at this time.)
COM Status	Monitors the connection session between DBS Manager and a DBS phone system.
New Function Reset	Initializes SRAM after upgrading CPC-B software to a new release (such as from 5.0 to 6.0).
Exit	Exits DBS Manager.

The Database Menu

The database menu contains items pertaining to database management. The following items are contained in the **Database Menu**.

Menu Item	Description
Download Raw Data from DBS	Transfers programming parameters from a DBS to a <i>.raw</i> data file in DBS Manager.
Convert Raw Data to Database	Converts a <i>.raw</i> data file to a <i>.mdb</i> database file that can be opened in DBS Manager.
Upload Raw Data to DBS	Transfers programming parameters from a <i>.raw</i> data file in DBS Manager to the appropriate DBS.
Convert Database to Raw Data	Converts an existing <i>.mdb</i> database to a <i>.raw</i> data file for uploading to a DBS.
Upgrade Database	Upgrades a <i>.mdb</i> database to a newer CPC version.

Menu Item	Description
Repair Database	Attempts to repair a <i>.mdb</i> database file in DBS Manager that may have been corrupted by an incorrect log-off procedure, power interruption, etc. This option is unavailable if a database is open.
Compact Database	Rebuilds a <i>.mdb</i> database file to reduce the file size. Note: Compact Database should be run after a database has been repaired.

The DBS Administration Menu

Items contained under the **DBS Administration Menu** are the same as those displayed in the DBS Administration section of the main window. These items are available only when a database file is open or when connected to a DBS.

The following items are contained in the **DBS Administration Menu**:

Item	Description
Customer/Site Setup	Contains customer name, address, DBS modem #, CPC type, etc., for a DBS.
System Parameters	Defines various DBS system-wide parameters, such as serial ports, paging relay, timing, absence messages, system speed dial, classes of service, verified account codes, and call waiting/OHVA.
DID/DNIS	Defines DID/DNIS name and ringing assignments.
T1	Defines T1 trunk parameters, timing parameters, master/slave designations, alarm timer and relay parameters, etc.
Trunks	Defines many CO trunk parameters for the DBS, such as trunk port #, port usage, trunk operational status, trunk type, inbound ring pattern, etc.
Extensions	Defines parameters for DBS extensions, including station port#, extension #, Class of Service, call waiting, auto redial, paging groups, call forward, Personal Speed Dial #s, Flexible Function keys, etc.
Groups	Defines parameters for Hunt Groups, Group Ringing Assignments, and Coverage Groups
Toll Restrictions	Defines Toll Restriction parameters for the DBS such as TRS types, maximum dialed digits allowed, operator access, N11 restrictions, etc.
Least Cost Routing	Defines LCR trunk groups, time priority parameters, routing, and other LCR parameters.

The Reports Menu

Not available at this time.

The Help Menu

This menu provides access to DBS Manager's online help files. Help is described in detail in Chapter 5.

The Button Bar

The button bar on the main screen contains small icons which represent certain DBS Manager functions. To perform a function, click on its corresponding button.



Exit

Exits DBS Manager. You will be asked to confirm before exiting.



New File

Creates a new file using system defaults. The **Create New Customer File Using Defaults** screen will appear.



Open File

Opens an existing database file. The **Open Existing Customer File** screen will appear, allowing you to select a file from any drive/directory. Each file represents an existing customer database.



Print

Not supported at this time.



Communications Setup

Sets the parameters of the communication link between the computer and the DBS phone system. The **Communications Setup** screen will appear, with prompts for specifying the COM port, baud rate, modem, etc.



ID Entry

Maintains user names and passwords for DBS Manager. The **Maintain User Accounts** screen will appear, which allows you to create, change, or delete User Accounts.



Connect

Connects your PC to a DBS. The **Connect to DBS** screen will appear, allowing you the opportunity to change the connection type, remote phone number and/or DBS password. A customer database does not have to be loaded before connecting to a DBS.



Disconnect

Disconnects your PC from a DBS.



Reports

Not available at this time.



Help

Provides access to DBS Manager online help files.

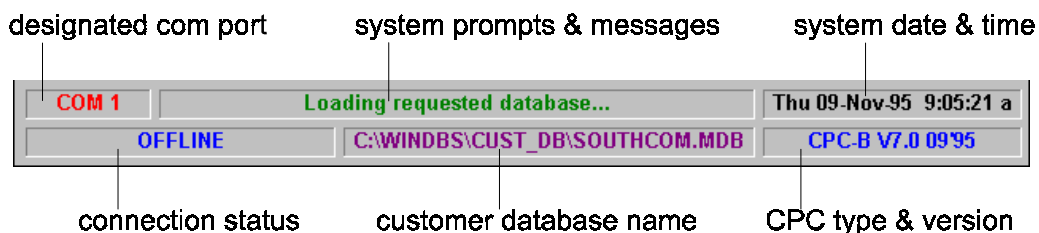
The DBS Administration Section

This section of the DBS Manager main window contains the same items as those found in the **DBS Administration Menu**. These items are available only when a DBS database is open or when connected to a DBS. You can open a DBS Administration item by either selecting it from the drop-down menu or by clicking on its corresponding button on the screen.

Items in this section are described under **DBS Administration Menu** on page 23.

The Information Bar

The information bar located at the bottom of the **DBS Manager** main window provides status information and other data about **DBS Manager**. This section is described below.



Item	Description
designated com port	The communications port on your PC. The com port is designated in the File menu, under Communications . Note: This item will display in black if you are set
system prompts & messages	Contains various prompts & messages to help you with DBS Manager . For instance, may read "Please select an option..." when DBS Manager needs you to indicate an option choice.
system date & time	Indicates your PC's date & time.

Item	Description
connection status	Indicates whether or not your PC is currently connected to a DBS via modem.
customer database name	Indicates the name of the currently open DBS database. If no database is open, this section will read "No customer database selected..."
CPC type & version	Indicates the CPC type & software version for the currently open DBS database. If no database is open, this section will read "CPC version not set..."

DBS Manager Basic Operations

This section contains information on performing basic **DBS Manager** operations. You can obtain additional help at any point within **DBS Manager** by pressing **F1** or by clicking on the **Help** button.

Note: Items in this section are not necessarily in the same order in which they appear on the various **DBS Manager** menus, or in the same order in which they are used.

Starting DBS Manager

To start **DBS Manager** in Windows 3.1, double-click on its icon on the Windows Program Manager screen. To start **DBS Manager** in Windows 95, click **Start > Programs**, then choose **Panasonic DBS > DBS Manager**.

You will be asked to enter your **DBS Manager** user ID and password. Available menu items and options depend on how your user account is configured.

Exiting DBS Manager

To exit **DBS Manager**, select **File**, then **Exit**, or click on the **Exit** button  on the **DBS Manager** button bar.

Modifying user accounts

User Accounts are used to maintain user ID and password information for **DBS Manager**. Only individuals with a valid user ID and password can start **DBS Manager**.

To add or modify a **DBS Manager** user account, choose **File > User Accounts**, or click on the **ID Entry** button.




The **Maintain User Accounts** window will open. You will need to re-enter your **DBSManager** log-in ID before you can make any modifications to user accounts.

To add a user, click the **Add User** button and enter the new user ID and password. You will be asked to enter the password twice to confirm it. Click **OK** to add the user. After the new user is added, you will need to indicate which areas of **DBS Manager** the user is allowed access to. In the **User Access** section of the **Maintain User Accounts** window, click on each area the user will be allowed to access (be sure the correct user is highlighted in the **Select User** window). A check mark in the box indicates that the user has access to that area. Be sure to save the new user information before closing the **Maintain User Accounts** window.

To delete a user, select the user ID from the **Select User** window (click the down arrow button to open the window and click on the desired user ID). Click the **Delete** button. You will be asked to confirm the deletion.

To change a user password, select the user ID from the **Select User** window (click the down arrow button to open the window and click on the desired user ID). Click the **Change Password** button and enter the new password information. Be sure to click **OK** to save the new data.

Setting communications parameters

To change your communications parameters, choose **File > Communications**, or click on the **Communications Setup** button  on the **DBS Manager** button bar.

Enter the appropriate settings for the communications session in the **Communications Setup** window and click **Save**.

Notes:


- 1) The DBS Manager parity setting must match that of the DBS before a communications session can be established. (The DBS's default parity setting is Even. DBS Manager's default parity setting is None.)
- 2) **DBS Manager** allows you to set communications parameters for two different modems. Be sure you have the right connection type and modem selected before attempting to initiate a connection.
- 3) Any changes made to communications parameters while a database is open will be saved with that database.

Connecting to a DBS

Note: You must have a **DBS Manager** hardware key installed on your PC in order to connect to a DBS. The dealer version hardware key allows remote connections. The end-user version is limited to local (on-site) connections only (i.e., no external modem communications with a DBS are allowed). The version type is displayed just above the phone graphic on the **DBS Manager** Main window.

Before connecting to a DBS, be sure to check **File**, then **Communications** to verify that the correct communication parameters are set for the communications session. Information on setting communications parameters can be found in the preceding section.

After verifying the communication parameters, use any of the following methods to initiate a connection to a DBS.

- Choose **Connect to DBS** from the **DBS Manager File** menu.
- Click on the **Connect to DBS** button on the **DBS Administration** section of the main window.
- Click on the **Connect** button  on the **DBS Manager** menu bar.

The **Connect to DBS** window will open, showing the **Connection Type** as currently set under **File - Communications**.

You will need to enter the DBS' remote programming password for the following connection types:

- Unassisted RAI
- Unassisted External Modem
- Operator Assisted External Modem
- Direct (i.e., without a modem)

You will also need to enter the remote phone number for the DBS for the following connection types:

- Unassisted RAI
- Unassisted External Modem

If a database is open, the remote programming password and phone number as specified in the database will be displayed (see **Note 1** below).

If the connection type is **Operator Assisted RAI**, you will need a modem phone attached to your PC. You will not need to enter a phone number or password into **DBS Manager**, but you will need to dial the DBS Attendant from your modem phone and ask him/her to dial #6 and the Remote Programming Password for the DBS.

Once the connection parameters are correct, click **Connect** to initiate the connection process. The connection status portion of the information bar on the **DBS Manager** main window will change to reflect "*On-line*" and various communication messages will flash across the system message portion of the information bar.

Notes:

- 1) The remote phone number for a DBS is specified in the database under Customer/Site Setup. The remote password for a DBS is specified in the Remote Programming Security Code field under System Parameters - General Parameters - Security Codes.
- 2) If a database is open in **DBS Manager** when a connection is established, **DBS Manager** will compare the software version of the **DBS Manager** database with the software version of the DBS. If a mismatch is found, an error message will be displayed. You must then disconnect from the DBS and open the correct database in **DBS Manager** before re-establishing the connection.
- 3) Any changes made to programming parameters while connected to a DBS will be transmitted immediately to that DBS. If you do not wish the DBS to be updated immediately, enter the changes into the database for that DBS **without connecting** to it. You can then establish the connection and upload the changes later at a more convenient time.
- 4) Changes made to an open database while connected to the DBS will update both the database and the DBS.

Disconnecting from a DBS

To disconnect from a DBS, choose **File > Disconnect**, or click on the **Disconnect** button on the **DBS Manager** main window. If a **DBS Manager** database was open, it will close automatically during a Disconnect.


Modifying system parameters

To modify system parameters, click on the appropriate button in the **DBS Administration** section of the main window, or select the desired item from the **DBS Administration** menu. A new window will open containing additional buttons for the selected option. Click on the button for the area containing the parameters to be modified. After modifying the appropriate parameter(s), click **Save** to save your changes.

Note: Some screens require that you enter a trunk or extension port # or a hunt group # in the first dialog box, then click the **Display** button to display the settings for that port or group #.

Working with Databases

Creating a new database

To create a new database for a DBS, choose **File > New**, or click on the **New File** button  on the **DBS Manager** button bar.


The **Create New Customer Database Using Defaults** window will open. Select the appropriate CPC type and software version for the new database, then select the directory the database will reside in and specify a name for the database. Database names must be 8 characters or less and have *.mdb* for an extension. Typically the database name reflects the identity of the customer.

DBS Manager will automatically open the new *.mdb* database after it has finished creating it.

Notes:

- 1) Each new database is based on a default database for the specified CPC type and software version. These default databases are shipped in a raw format to save disk space and must be converted to a *.mdb* format before a new database can be opened. This conversion process may take some time (approximately 15-30 minutes, depending on the speed and power of your system). The conversion only occurs, however, the first time a new database is created for a particular CPC type and version - additional new databases based on that CPC type and version will not need to go through the conversion process.
- 2) It is not necessary that a database exist in **DBS Manager** in order to make changes to a DBS' programming. If desired, you can connect to the DBS using **DBS Manager** and modify its programming without maintaining a copy of its database in the **DBS Manager** application. See "**Databases and Connecting to a DBS - Special Considerations**" on page 33 for additional information on databases.

Opening an existing database

To open an existing database, choose **File > Open**, or click on the **Open File** button  on the **DBS Manager** menu bar.

The **Open Existing Customer File** window will open. Select the appropriate database and click **OK**.

Note: You cannot open a database while connected to a DBS. Open the desired database first, then connect to the DBS.

See "**Databases and Connecting to a DBS - Special Considerations**" on page 33 for additional information on databases.

Modifying customer/site information in a database

To modify general site information for a database, open the database and click on the **Customer/Site Setup** button in the **DBS Administration** section of the main window, or select **Customer/Site Setup** from the **DBS Administration** menu. The **Customer Site Information** window will open, allowing you to modify the customer's name, address, and remote phone #.

Modifying a remote phone number in a database

To modify the remote phone number in a DBS database, open the database, then click **Customer/Site Setup**. Enter the new phone number in the appropriate field and click **Save**.

Note: The remote phone number in a DBS database must match that of the modem attached to the DBS in order for a successful connection to occur.

Modifying a remote programming password in a database

To modify the remote programming password for a DBS database, open the database, then click **System Parameters**. Select **General Parameters**, then **Security Codes**. Enter the new password in the **Remote Programming Security Code** field and click **Save**.

Copying a database

To copy all parameters in one database to another database, choose **File > Copy** from the main window. The **Copy Existing Customer File** window will open. In the *Copy From* section, select the appropriate source file (the file to be copied). In the *To* section, type in the name of the destination database (the database to be copied to). Be sure to indicate the appropriate directory where the new database will reside. Click **Save** when finished.

Note: You can copy a database to either another existing database or a new database. If an unknown database name is entered in the *To* section, a new database with that name will be automatically created.

Closing a database

To close an open database, choose **File > Close** from the main window.

Note: You cannot close an open database while connected to a DBS. Disconnect from the DBS first, then close the database.

Deleting a database

DBS Manager does not provide a function for deleting a database. If you find it necessary to delete an existing database, use Windows File Manager (if using Windows 3.1) or "My Computer" (if using Windows 95).

Uploading a database to a DBS

To upload a database from **DBS Manager** to a DBS, you must first convert the *.mdb* database file to a *.raw* file. In **DBS Manager**, choose **Database > Convert Database to Raw Data**. Select the appropriate database and click **OK**. The conversion process will take approximately 10-30 minutes, depending on the speed and power of your PC.

After converting the database, connect to the DBS and choose **Database > Upload Raw Data to DBS**. The **Upload Database** window will open. Select the *.raw* file to be uploaded and click **OK** to begin the upload. It may take several minutes for the upload to finish, depending on the size of the database being uploaded and the speed of your modem - an upload at 9600 bps, for instance, usually takes 10-12 minutes. Various messages will flash across the system message portion of the **DBS Manager** main window information bar during the upload.

Downloading data from a DBS to DBS Manager

To download programming data from a DBS to **DBS Manager**, you must first connect to the DBS. Once a connection is established, select **Database > Download Raw Data**. The **Download Data** window will open.

Type in the name of the *.raw* file the data should be downloaded to. If the *.raw* file already exists, you will be asked to confirm that the file should be overwritten by the new data. If the *.raw* file does not exist, it will be created during the download process.

It may take several minutes for the download to complete, depending on the size of the database being downloaded and the speed of your modem - a download at 9600 bps, for instance, usually takes 10-12 minutes. Various messages will flash across the system message portion of the **DBS Manager** main window information bar during the download.

After the download is complete, you must convert the *.raw* file to a *.mdb* file before the database can be opened. To convert the file, select **Database > Convert Raw Data to Database**. Select the *.raw* file to be converted and click **OK**. The conversion process will take approximately 10-30 minutes. After the conversion is finished, you can open the database in **DBS Manager**.

Note: If you are downloading a database just for backup purposes, it may not be necessary to convert the *.raw* database to a *.mdb* format.

Upgrading a database to a higher CPC version

To upgrade an existing database to a higher CPC version, select **Database > Upgrade Database**. The **Upgrade Database CPC Version** window will open. Select the database to be upgraded from the list in the first window, then select the appropriate conversion from the second window. In the third window, enter a new name for the database (**DBS Manager** keeps the old database under the original name as a backup). Be sure to use a *.mdb* extension for the new database.

Notes:

- 1) **DBS Manager** does not support converting an existing database to an earlier software version.
- 2) When upgrading to a new CPC version, new features added subsequent to your current CPC version must be individually programmed into the DBS, either via **DBS Manager** or FF key programming.
- 3) When upgrading CPC-B software to a new release, you must initialize the SRAM (Static Random Access Memory) immediately after changing out the EPROMS on the CPC-B card. This clears out unused registers and adds new programs, but retains all current DBS program settings. To accomplish this using **DBS Manager**, choose **File > New Function Reset**.
 - A RAMCLR is not needed at this point.
 - **New Function Reset** is needed only when a major CPC-B upgrade is done (such as from CPC-B 6.0 to 7.0). It is not needed for minor upgrades from one "point" release to another (such as from 6.0 to 6.1), nor is it needed for any other CPC other than CPC-B.
- 4) If upgrading to CPC-III/B 7.0 or later from a version prior to 7.0, you must perform a RAMCLR after the 7.x software is installed.
- 5) Any feature settings activated by a station set user (such as Background Music, Call Forwarding, Do Not Disturb, Headset Mode, Extension Lock, Reminder Alarm, Absence Messages, Call Forward ID, etc.) are lost when an upgraded CPC is installed in the system.

Databases and Connecting to a DBS - Special Considerations

It is possible that parameters in a DBS database may not always match those of the DBS. This can occur in any of the following ways:

- Parameters in the DBS were modified by on-site FF key programming.
- Parameters in the DBS were modified by a connection through **DBS Manager** without a database being open.
- Parameters were modified in a **DBS Manager** database without being connected to a DBS, but those changes were never uploaded to the DBS.

To ensure that a database always matches its DBS, you should therefore be sure to open the database before connecting to the DBS. It is also a good idea to download a DBS' programming parameters back to

your PC if you have reason to suspect that a DBS may have been modified independently of the **DBS Manager** database.

Remember that you can connect to a DBS either with or without a database being open. If a database is **open**, any changes made to programming parameters while connected will be updated immediately to **both** the DBS and the open database. If a database is **not open**, changes made while connected will update **only the DBS** and will not be reflected in the database unless those same changes are made in the database at a later time, or you download the entire DBS programming to the database.

Furthermore, when you connect to a DBS while a database is open, **only** those parameters changed while connected will be updated back to the database. If there are other parameters in the database that do not match those in the DBS, these parameters **will not be updated** in the database unless you reenter them in **DBS Manager** while connected, change the parameters in the database at a later time, or download the entire DBS programming to the database.

Using Help

DBS Manager contains extensive on-line help files. You can access Help at any time via any of the following means:

- by pressing **F1**
- by clicking the Help button on the screen
- by clicking on the **Help** button located on the **Menu** bar.

The Help system is structured the same way as **DBS Manager**. For each **DBS Manager** screen of parameters and/or buttons, there is a corresponding Help screen that lists the parameters/buttons in green, underlined text. These are called "jumps". Click on a jump - anywhere in the green underlined text - to display either a Help window for the selected parameter or another list of jumps.

Each **Help** window reflects the name of the **Help** topic, which area of **DBS Manager** it pertains to (e.g., Trunks, Extensions, Groups, etc.), and the corresponding FF key programming for that topic.

Locating a Help Topic

DBS Manager follows standard Windows Help file conventions. You can either navigate to the desired topic by selecting the appropriate item from the **Help Contents** screen, or you may use **Help**'s powerful search function to help you locate a specific topic. Procedures for using **Search** are as follows:

1. While in **Help**, click on the **Search** button and enter the first few letters of the desired topic in the first window. Notice that as you type, the second window scrolls up or down to display an alphabetical list of topics.
2. Select the desired topic from the list in the second window and click **Display**. If a secondary list appears, select the appropriate topic and click **Display** again. The **Help** file for the selected topic will then be displayed.

About Bookmarks

DBS Manager's Help files allow you to quickly jump to commonly referenced **Help** topics by creating Bookmarks for them. This allows you to go directly to a desired topic without having to search for it. For instance, suppose you find that you often need to view **Help** on **System Speed Dials**. Instead of navigating through several screen levels to reach the **System Speed Dial Help** screen, you can create a bookmark that will take you straight to the appropriate section of **DBS Manager Help** with a click of your mouse.

Creating Bookmarks

Bookmarks are created as follows:

1. Go to the **DBS Manager Help** topic that you want to mark with a Bookmark.
2. From the **Menu** bar, click on **Bookmark**, then **Define**. You can either accept the default Bookmark name shown in the window or enter a different name.
3. After entering a name for the Bookmark, click **OK** to save the Bookmark or **Cancel** to exit without saving the Bookmark. If saved, the new Bookmark will be listed on the Bookmark menu.

Using Bookmarks

To jump directly to a Help topic that already has a Bookmark, click on **Bookmark**, then click on the desired Bookmark from the list.

Deleting Bookmarks

To delete a Bookmark, click on **Bookmark**, then **Define**. Select the desired Bookmark from the displayed list and click **Delete**.

Copying and Annotating Help Topics

You can "edit" or expand on **Help** topics by attaching annotations to them. Annotations are notes which you create to help you perform **DBS Manager** operations. Annotated items are indicated by a small paper clip icon next to them. To view an annotation, click on the paper clip.

Creating an Annotation

1. Click **Edit** from the **Menu** bar (be sure the **Help** topic you want to annotate is displayed).
2. Choose **Annotate** and enter your notes in the annotation window.
3. Click **Save** to save your annotation or **Cancel** to exit without saving your annotation.

Copying an Annotation

1. To copy an annotation, open the annotation window by clicking on the paper clip icon next to an annotated item.
2. Select the desired text in the annotation window, then click **Copy**.
3. Close out that annotation window and navigate to the **Help** topic where you want the annotated text copied to.
4. Choose **Edit**, then **Annotate**, then click **Paste** to insert the copied information into the annotation window. You can then edit the copied information if desired. Be sure to click **Save** before exiting the Annotation window.

Copying an entire Help topic into an Annotation

1. To copy an entire **Help** topic into an annotation, choose **Edit**, then **Copy** from the Help Menu bar (be sure the Help topic you want to copy is displayed).
2. Navigate to where you want the information copied to and choose **Edit**, then **Annotate**.
3. Click **Paste** to insert the copied information into the annotation window. You can then edit the copied information if desired. Be sure to click **Save** before exiting the Annotation window.

Deleting an Annotation

To delete an annotation, click on the paper clip icon next to the annotated item, then click **Delete**. The paper clip will disappear as the annotation is removed.

Printing Help Topics

You can print **Help** topics either by selecting **File**, then **Print Topic**, or by clicking on the **Print** button on the **Help** button bar. Some **Help** items also display a printer icon in the **Help** window. You can print these topics by clicking on this icon.

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