**What is coecontact?**

It’s a kind CRM application written in Microsoft Office 2010. It can also been used successfully with Office 2013.

**How to Install coecontact on a PC or Fileserver**

We describe four methods of installing coecontact.

|  |  |  |
| --- | --- | --- |
| Method | For | Against |
| A | Simplest possible installation | Single user only |
| B | Reliable multi-user | Some extra work to install software updates required |
| C | Simpler multi-user | Less reliable, especially if there are more than a few users. |
| D | Microsoft Remote Desktop Services (RDS). Log-on from anywhere | Cost of Microsoft RDS licences (CALs) |

Log-on for the first time

* Choose the user ‘Db Adminsistrator’ whose password is ‘password’

Method A: Single User

1. On the PC (say on the C:\ drive) create the following folder with two sub-folders as shown:  
   C\_Local  
    C\_App  
    C\_Doc
2. Copy the files, listed under the ‘Files’ heading below, into C\_App
3. Delete C\_Soft.accdb unless you need it now for software development.
4. Open C\_Soft.accde
   1. There might be a pause and you may see a message ‘coecontact (not responding)’. That is caused by C\_Soft re-linking to the tables in C\_data.accdb etc. to the links in C\_Soft
5. When the log-on screen appears, log-on as ‘Db Administrator’ or other user with DB Admin privileges.
   1. Create a password if necessary.
   2. Click ‘Main switchboard’
   3. Click the tab ‘Db Admin’
   4. Click ‘Data table link Management …’
   5. See that the links shown refer to the folder containing C\_Soft.
6. Click the option button for ‘Disable Auto Re-attach’. This step will make opening C\_Soft faster in future.
   1. Exit
   2. Quit.
7. Back in Windows Explorer, right click C\_Soft.accde and ‘Send to desktop (create shortcut)’
   1. Rename the new shortcut to something suitable.
   2. Right click the shortcut, click ‘Properties’, ‘Change icon …’ and choose a suitable icon.
   3. Double click or open the new shortcut to open C\_Soft. That completes the process.

Method B: Reliable Multi-User

1. On the fileserver, create the following folder with two sub-folders, as shown:  
    C\_Shared  
    C\_App  
    C\_Doc
   1. You may choose other names for the folders, but if you change the path to or name of C\_Doc you must change the parameter value in ‘Standing Data Maintenance’, ‘Document Management’.
   2. Copy all the files supplied into C\_Shared\C\_App see the section under the heading ‘Files’ below.
   3. Delete C\_Soft.accdb and C\_Soft.accde
   4. C\_Doc will hold .docx .msg .pdf .xlsx and other files external to coecontact that can be opened from within the application.
2. Choose a PC (the master PC) that is to be used for installation and future updates of coecontact.
   1. On the master PC, map the folder ‘C\_Shared’ on the fileserver as ‘K’ or any other letter that is convenient. Note that every PC, from which coecontact is to run, will have to have the same mapping, so check that ‘K’ is not already in use.
   2. Now install coecontact on the master PC, following the steps (1) to (7) above.
3. On the master PC, open coecontact, get into ‘Data table link Management …’ as before.
   1. Ensure that ‘Disable Auto Re-attach’ is set.
   2. In the text box under the label ‘Or enter an entire path … ‘, key in K:\C\_App
   3. Click ‘Re-link tables’. There may be a considerable pause before the list of tables on the left side of the screen is refreshed to show links to the file server.
   4. All being well, Exit
4. Click ‘Standing Data Maintenance’, then ‘Document Management’.
   1. In the text box below ‘Shared document folder …’, enter ‘K:\C\_Doc’ or whatever you’ve chosen for document folder on the fileserver.
   2. Ensure that the correct formats are set for Word and Excel.
   3. To the left of the ‘Exit’ button there is a small button [?], click it to read Help Note 1050.
   4. Exit, Quit.
5. Installing on PCs other than the master PC.
   1. On each PC, map ‘C\_Shared’ as K, or whatever you chose before.
   2. Create two folder as show here  
      C\_Local  
       C\_App
   3. Copy C\_Soft.accde from the master PC into C\_App
   4. Copy the desktop shortcut.
   5. The user need only know to open C\_Soft using the shortcut.
6. Testing the Installation
   1. Open coecontact as a user with DB Admin privileges.
   2. Create new users as required, in User Maintenance.
   3. On any PC, log-on and on the ‘General’ tab page click ‘Contacts and their Events’.
   4. Choose any contact and click the ‘Events’ tab
   5. Choose the record type ‘Word’, on the same row, click the button under Event ID. Choose any Word format, say ‘Normal’. When coecontact creates a document, key in any text to identify it. Exit Word.
   6. On any other PC, find the same contact and the same event, click the Event ID to see the test document.
   7. In the C\_Doc folder on the file server you should see the document with the Event ID as its name. For example if the Event ID = 9 then the document name is 9.docx

That completes the installation.  
  
  
Method C: Simpler Multi-User

1. The application is installed only on a file server; PCs merely have a link to open the C\_Soft.accde file that resides on the file server.
   1. Advantage: a software update involves replacing the single copy of C\_Soft.accde
   2. Disadvantages:
      1. The application is slower to start because Microsoft Office will load C\_Soft.accde from the fileserver, but run it on the user’s PC. Loading it from the PC’s local drive (as in Method B) would be faster and reduce traffic on the network.
      2. If more than a few users log-on, C\_Soft.accde may be corrupted; inexplicable VBA errors messages may appear and the C\_Soft.accde file size appears to increase.
2. On the fileserver, create the following folder with two sub-folders, as shown:  
    C\_Shared  
    C\_App  
    C\_Doc
   1. You may choose other names for the folders, but if you change the path to or name of C\_Doc you must change the parameter value in ‘Standing Data Maintenance’, ‘Document Management’.
   2. Delete C\_Soft.accdb unless it’s needed for software development.
3. Open C\_Soft.accde
   1. There will probably be a pause and you may see a message ‘coecontact (not responding)’. That is caused by C\_Soft re-linking to the tables in C\_data.accdb and in other files.
   2. When the log-on screen appears, log-on as ‘Db Administrator’ or other user with DB Admin privileges.
   3. Create a password if necessary.
4. Click ‘Main Switchboard’
   1. Click the tab ‘DB Admin’
   2. Click ‘Data table Link management …’
   3. Click to option ‘Disable Auto Re-attach’. That will prevent re-linking every time the file is opened.
5. Open C\_Soft.accde once more to check it’s working correctly.
   1. The log-on screen should appear more quickly.
   2. Click the tab ‘DB Admin’
   3. Click ‘Data table Link management …’
   4. ‘Disable Auto Re-attach’ should still be in effect.
   5. The list of linked tables should show a path to the current folder.
6. On each PC
   1. Map a drive so that C\_Shared on the fileserver appears as, say, K:\
   2. Create a shortcut to open K:\C\_App\ C\_Soft.accde
   3. Create desktop shortcuts on each PC, to open C\_Soft.accde

A user need only open the shortcut to open coecontact.

Microsoft Remote Desktop Services (RDS)

1. Proceed as for Method C above until step (18).
2. RDS works by running everything on the fileserver; the user’s PC is merely a terminal.
   1. This overcomes the disadvantage of Method C; in which everything must be loaded onto the user’s PC at run time.
   2. RDS allows users to log on from anywhere.
   3. Installing RDS is outside the scope of this note.

**Files**

|  |  |  |
| --- | --- | --- |
| file name | function | Security |
| C\_Data.accdb | Holds most of the data tables. Compact & Repair daily or at least weekly. | Microsoft encryption |
| C\_Licensee.accdb | Holds the licensee’s name & address, maximum number of users, licence expiry date and encryptions keys | encryption keys |
| C\_PostBox\_1.accdb | Contains a single table Postbox\_1 to which a user may output data selected from within coecontact by category etc. The data may be used for Word Merge or other purposes instead of the internal coecontact mailing and emailing facilities. The user must be given permission to export data in this way. The data may be used to create a snapshot of part of the database. | none |
| … |  |  |
| C\_PostBox\_9.accdb | Contains a single table Postbox\_9 otherwise as for C\_PostBox\_1.accdb | none |
| C\_Soft.accdb | The unprotected source code. This file should only be used for development. Users should not see this file nor be able to open it via a shortcut. | none |
| C\_Soft.accde | Compiled file to be opened by an end user. The file includes several layers of security. | bespoke security |
| C\_Soft.bmp | A splash image of coecontact | none |
| Install\_ coecontact.docx | This file. Users can see over 100 help notes within the application. |  |