



CODESPEAR

SmartMsg Administrator Maintenance Guide

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SmartMsg Secure Notification Software

Additional SmartMsg documentation is available through the Codespear website.
<http://www.codespear.com/helpcentral.asp>

Codespear is committed to providing documentation that provides full understanding of SmartMsg software. We encourage comments on any of the above documentation. This may include pointing out features that require further explanation, ambiguity in any language, inconsistencies in information or misinformation.

Send e-mails regarding any of the above-mentioned problems or any other grievances regarding any documentation to:

SmartMsgdocumentation@Codespear.com

Codespear appreciates all comments regarding any issues in order to ensure the accuracy, consistency and simplicity of all of our documentation.

Please note: This e-mail address is for comments only. If you have technical questions please contact Technical Support by visiting our website.



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Overview

Maintaining SmartMsg will be an ongoing process for the SmartMsg Administrator. Fortunately, Codespear offers some recommendations within this document to help Administrators stay on top of maintenance duties and the SmartMsg software itself offers some ways to automatically monitor the system.

SmartMsg Maintenance tasks include:

- Monitoring server logs
- Maintaining sufficient disk space to run SmartMsg
- User/Group Maintenance
- Creating system backups
- Backing up server folders on a separate drive
- Archiving Alerts and Chat Logs
- Updating SmartMsg with Auto Updates
- Monitoring license usage/Maintaining sufficient licenses
- Issue Reporting



Maintenance Setup Recommendations

There are two modules within the SmartMsg system that help automatically monitor administrative functions.

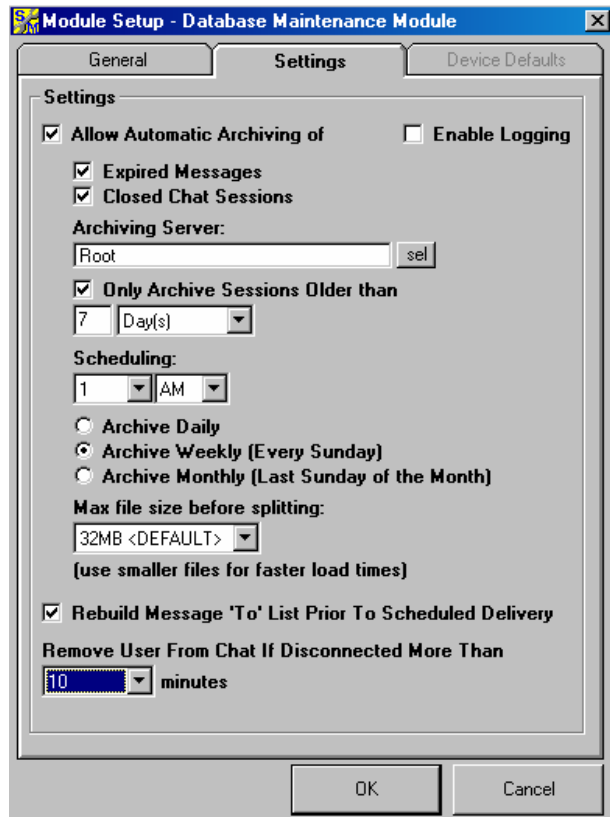
1. The Database Maintenance Module can be configured to automatically archive alert and chat logs. Setting up this module will help to fulfill the following maintenance task:
 - Archiving Alerts and Chat Logs
2. The System Alert Module can be configured to automatically alert an Administrator if errors are generated, license keys are nearing their expiration date, and more. Setting up this module will help to fulfill the following maintenance tasks:
 - Monitoring server logs
 - Monitoring license usage/Maintaining sufficient licenses

Codespear recommends setting up both of these modules as it will cut down on the maintenance monitoring required in SmartMsg.

Database Maintenance Module Settings

1. Open the **Database Maintenance Module** settings.

- a.) Check the box for **Allow Automatic Archiving of**. This is the checkbox that will turn on the Auto Archiving option. (Therefore, to turn the option off, deselect this checkbox.)
- b.) Check the boxes for **Expired Messages** and **Closed Chat Sessions**
- c.) Check the box for **Enable Logging**, if desired. This will enable a log of Database Maintenance Module events to be created. The logging feature is usually used in troubleshooting situations.
- d.) Check the boxes for **Expired Messages** and **Closed Chat Sessions**
- e.) Choose an **Archiving Server**.
- f.) Check the box for **Only Archive Sessions Older than** and enter a number of Days, Weeks or Months.
- g.) Configure the **Scheduling** of the Archiving – Daily, Weekly, or Monthly.
- h.) Choose the **Max file size before splitting**.



- g.) Check the box for **Rebuild Message 'To' List Prior To Scheduled Delivery**. This ensures that the To list is rebuild prior to every scheduled alert delivery to accommodate for changes in group membership.
- h.) Choose a setting for **Remove User From Chat If Disconnected More Than x minutes**.



System Alerts Module Settings

1. Open the **System Alerts Module** settings.
 - a.) Pick a **Template** for the alert that will be sent.
 - b.) Enter an **Alert From Name**.
 - c.) Enter an **Alert Subject**.
 - d.) Choose users to **Send Alerts To**.
 - e.) Choose conditions to **Send Alert If**. If you want to turn System Alerts off, you will need to deselect the boxes under **Send Alert If**.

Module Setup - System Alerts Module

General Settings Device Defaults

Settings

Enable Device Logging

Template: Alarm Sounding

Alert From Name: SmartMSG System Alert

Alert Subject: New Alert Message

Send Alerts To: Admin [Select]

Send Alert If:

An Error is Generated on a Server *

An Error is Generated on a Server Module *

Server goes offline for at least 3 minutes and when server comes back online

If License Key Expires in Less Than 30 Day(s)

A Status Changes to OFFLINE for the Following:

Root [Select]
Backup Root [Select]

Send Test Message Every: 60 Minute(s)

Any of these devices fail upon receipt of test message: Phone [Select]

* All servers must have this module installed for this feature

OK Cancel



Recommended Maintenance Schedule

Fill out the following matrix to schedule system maintenance tasks. These are the default recommendations. Individual needs may vary based upon usage.

Note: If you have not configured the Database Maintenance Module and the System Alerts Module, please perform the tasks at the bottom of the list. (The tasks that begin with the phrase "If NOT") If these modules have been configured,, there is no need to perform the tasks at the bottom of the list.

Task	Frequency	Responsible
1. Check for ample disk space. See the document called System Requirements for a SmartMsg Server for more information.	Monthly	
2. User/Group maintenance (add, edit, delete users/groups) OR Periodic refreshes of users/groups with Active Directory Import tool or the Data Import Export Utility if using them to maintain user and group database. See the SmartMsg Active Directory Guide or the SmartMsg Data Import-Export Tool Guide for more information.	As needed	
3. Perform system backups within the Data Import-Export Tool. Codespear recommends using the password protection option for Backups. See the SmartMsg Data Import-Export Tool Guide for more information.	Weekly/ Monthly or as needed	
4. Copy the entire server folder and store on separate drive. The Server folder can be found under Program Files> Codespear> SmartMsg.	Monthly	
5. Check for new SmartMsg updates through the Admin Tool against updates.codespear.com. See the SmartMsg Administrator Tool Guide for instructions.	Monthly	
6. Report any issues found with our software at http://www.codespear.com/IssueReporting_4684.aspx	As needed	
7. If NOT configuring the System Alerts Module to monitor errors generated on the server, review server logs for obvious problems.	Daily/ Weekly	
8. If NOT configuring the System Alerts Module to monitor license key expirations, check the license key counts to make sure you are not about to run out of available keys. See the SmartMsg Administrator Tool Guide for more information.	Monthly	
9. IF NOT configuring the Database Maintenance Module to complete auto archiving, manually archive message logs through the Admin Tool Message Log Viewer. See the SmartMsg Administrator Tool Guide for instructions.	Monthly or as needed as Expired Message Percentage reaches limit	
10. IF NOT configuring the Database Maintenance Module to complete auto archiving, manually archive Chat Logs through the Data Import Export Tool. See the SmartMsg Data Import-Export Tool Guide .	Monthly or as needed	