

# The BoardRoom

Version 7

## Documentation

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The BoardRoom version 7 is a full-featured instant messaging and chat system in FileMaker Pro.

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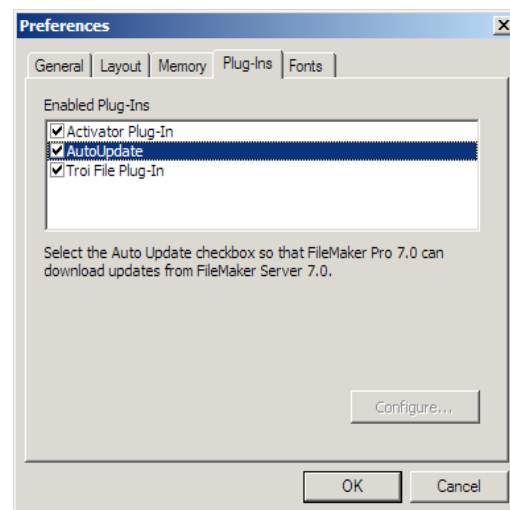
## Installing The BoardRoom

The BoardRoom is just a regular FileMaker 7 document, so no special installation is needed. The main file, BoardRoom 7.fp7, should be installed on your FileMaker Server. Users can access it exactly the same as they would any other shared FileMaker solution. See your FileMaker documentation if you have any questions on the normal use of shared FileMaker solutions.

Peer-to-peer file sharing, as opposed to using FileMaker Server, is possible but is not recommended or supported. Differently stated: if you choose to use peer-to-peer file sharing, you're on your own.

The BoardRoom does use a plug-in, Activator from Troi Automatisering (<http://www.troi.com>). Although a version of Activator is included with The BoardRoom archive, it is recommended that you visit Troi's web site to download the latest version.

The plug-in can either be manually installed at each station, or you can use FileMaker Server's AutoUpdate feature to automatically install it at any requesting workstation. See your FileMaker Server manual for more information on how to install the plug-in

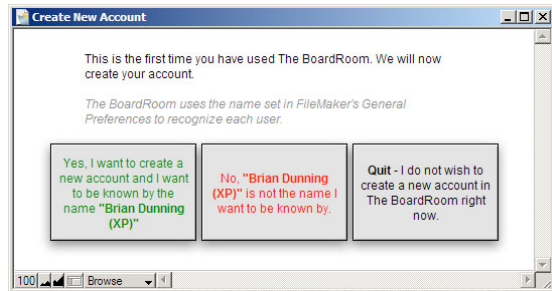


on the FileMaker Server machine. You will need to make sure that the AutoUpdate plug-in is enabled on each user's copy of FileMaker, as shown in the screen shot.

## Adding Users

The BoardRoom uses the username set in your FileMaker 7 preferences to recognize you. This lets it automatically identify all users, without requiring anyone to log in, which would be a pain.

When you first launch The BoardRoom, you will be presented with the Create New Account screen. If you click the green Yes button, The BoardRoom will add a user record using the name shown, and that's who you'll be from now on. If you click the red No button, The BoardRoom will bring up FileMaker's General preferences, and you can change the name to anything you like.



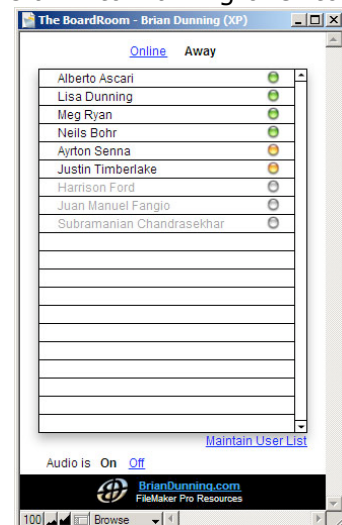
You can't assign nicknames to other users. Everyone shows up on everyone else's list exactly as their name appears in FileMaker's General preferences.

If a new user is trying to create a new account but instead is taken to an existing account, just close The BoardRoom, open FileMaker's General preferences and enter a unique name, and re-launch The BoardRoom. The new account should be created as above.

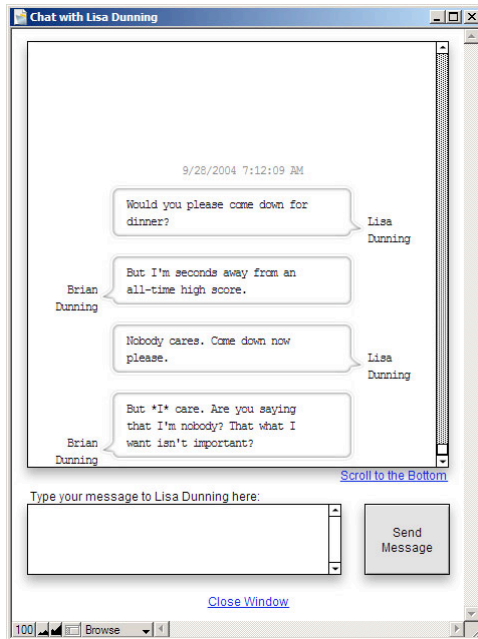
Since The BoardRoom uses FileMaker's built-in user name to identify users, it's easy for someone to change their username in their copy of FileMaker to something else and log in as a different user, and get their messages. This is akin to walking over to someone else's computer and launching an Instant Messaging client, or using their email program. This is not intended to be a super-secure way of sending confidential messages. The BoardRoom is intended to be fun and convenient, not secure.

## Starting a Chat

As soon as there are other users besides yourself, you'll see a list of their names on The BoardRoom's main screen. Click the name of any online user (offline users are grayed out) and it will open a dialog window. Type something in the text box provided, click the Send button, and you're chatting!



## Receiving a Chat



When someone sends you a chat message, it will pop to the foreground in your copy of FileMaker. You can reply to them simply by typing in the text box provided and clicking Send.

If you're working in another FileMaker file at the time, the chat window will still pop to the foreground but it shouldn't interrupt any work you were doing in the other file. If this annoys you, tell that person to stop bothering you.

Note that if you're working in another FileMaker file and it's running a script, or is in Pause mode, or is looping or something, or if you have a dialog box up, nothing will happen when someone sends you a message.

New messages will beep when you receive them. If you don't want it to beep, click the

"Audio" link at the bottom of the main screen. Either On or Off is bold to indicate which is the current state. Click to change it.

## Changing Your Status

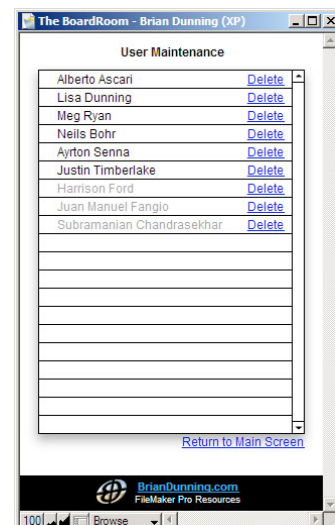
You can change your status from Online to Away, and back, by clicking the link at the top of the main screen. This changes your little icon from green (online) to yellow (away) on other users' machines. Note that this does not affect your ability to send or receive messages; it just gives the other users an indication of how likely you are to be paying attention.

## Deleting Users

Deleting users is a snap. From any copy of The BoardRoom, click the Maintain User List link on the main screen. This takes you to a maintenance screen where any offline user can be deleted.

Deleting a user does not affect their message history. If that user logs in again, their account will be recreated and their message history will be resurrected. Thus it is harmless to accidentally delete active users here. The function is mainly intended as a way to get rid of old, dead accounts.

Note that only offline accounts can be deleted. If the account you want to delete was somehow left in an online



state, then change your FileMaker username to that person's name, log in and out of The BoardRoom, and this will set the account offline. Change your username back to what it was, log in normally, and you can then delete the account.

## The BoardRoom Versions

The BoardRoom is available in four different versions:

**Free Demo** - This is fully functional, but it's time limited. FileMaker administrative functions are not available in this version.

**Unlimited Site License** - This is the standard version of The BoardRoom. There are no limits on users, messages, or anything. FileMaker administrative privileges are not available in this version.

**Developer Version** - This version is fully unlocked and you can modify it or do whatever you want with it, for your own internal use. You need to separately purchase your own license for the Troi Activator plug-in ([www.troi.com](http://www.troi.com)).

**API** - This is the same as the Developer Version, but the software license permits redistribution and resale of the code in whole or in part, as part of a larger application.

Version	Is it time limited?	Do I get full access to the files?	Do I have to buy my own Troi Activator license?	Can I resell it or include it in my own solutions?	What does it cost?
Free Demo	Yes	No	No	No	Free
<b>Unlimited Site License</b> This is what most users will have.	No	No	No	No	\$99
Developer Version	No	Yes	Yes	No	\$299
API	No	Yes	Yes	Yes	\$999

## Using Auto-Update with Troi Activator

The BoardRoom 7's startup scripts include code to perform the Auto Update feature to automatically install or update the latest version of Troi Activator on all users' workstations. **Note: for the convenience of users, The BoardRoom does not return any error if the Auto-Update fails. If you update your version of Activator on your FileMaker Server, you should manually check to make sure it gets propagated out to your users. If it doesn't, for some reason, just update them manually. Or not. ;)**

If you use this feature, please see FileMaker Server's documentation for information on how to configure your FileMaker Server and your client computers to do this.

When you create the folder of plug-ins on your FileMaker Server, make sure that the Windows and Mac versions of Troi Activator are called:

activatr.fmx  
Activator Plug-in.fmplugin.tar

The enclosing folder should be called:

Troi Activator

These are the filenames that the Auto Update script in The BoardRoom uses.

## Entering your own Activator Key

If you are using the Developer Version or the API of The BoardRoom, you need to enter your own license key for the Troi Activator.

Without a key for Activator, the plug-in will function for a limited time in Demo mode. You should enter your key during this demo period. Please see [www.troi.com](http://www.troi.com) for more information about the demo period.

If you are sharing The BoardRoom among both Mac and Windows machines, you will need an Activator key for each platform.

To enter your Activator key(s), switch to the layout called Admin. This is a hidden layout, so you will need to go into Layout mode before you'll see it in the layouts menu. There are fields on that layout in which you can enter your Mac and Windows keys for Activator.

If you are using the Free Demo or Unlimited Site License versions of The BoardRoom, a license key for Activator is already built into the program.

## Getting Support

If you require support for anything not covered in this guide, the first place to check is the web page at <http://www.briandunning.com/boardroom/>. If that doesn't help, email me at [brian@briandunning.com](mailto:brian@briandunning.com). Good luck, and Happy Chatting!

