

SmarTerm version 11  
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# Preface

This *System Administrator Guide* shows you how to configure SmarTerm for your users, including the creation of profile servers and profiles.

This guide, in combination with the detailed online help system, printed documentation, and online manuals, provides what you need to install and manage profiles.

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**Note:**

The online version of the manual may be more up to date than the printed version.

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## How to use this guide

Read the “Introduction” on page 7 for information on the concepts behind profile management. The *Installing SmarTerm with the Administrator Toolbox* chapter shows how to set up the Administrator Toolbox. The “Profile Management Workbook” on page 15 gives examples of working through the major tasks of profile management. The “Profile Management Reference” on page 39 contains a summary of major profile management procedures. Finally, the “Features Reference” on page 47 describes the SmarTerm features you can use when creating and modifying profiles.

## Technical support

For information on contacting Esker’s Technical Support department for SmarTerm, see the copyright page of this guide. Technical Support information is also available online in SmarTerm by selecting Help>Technical Support.



# Introduction

SmarTerm addresses the growing reliance on system administration and networks with profile management tools. SmarTerm is designed to help reduce the overall costs of software configuration and maintenance by:

- **Enabling standardization.** SmarTerm lets you, the system administrator, define how users work with SmarTerm through the use of *profiles* and *profile servers*.
- **Expediting software distribution.** With SmarTerm, you're able to automatically balance the load among several servers using the Automated Install wizard and Copy CD utilities.
- **Providing automated support for user problems.** Users can restore feature sets from profiles, which can include SmarTerm's automation features such as keyboard maps, macros, HotSpots, and Triggers. Administrators or help desks can restore SmarTerm configurations back to corporate or departmental standards after users have changed settings. (Open mode only.)

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**Note:**

User interface changes made by the system administrator will always be propagated to the users through profiles. However, no other profile feature is available to users or administrators when operating in lockdown mode. When operating in open mode, all profile features are available.

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## How does profile management work?

The SmarTerm Administrator Toolbox and other SmarTerm features let you create and customize SmarTerm profiles for users. The profiles determine the SmarTerm sessions and features that users can access.

The Administrator Toolbox is available under the SmarTerm Tools menu. This feature is only available if the Administrator Toolbox has been installed. Only users who have administrator rights may install the Administration Toolbox.

See the *Installation Guide* for complete instructions on installing SmarTerm.

With the Administrator Toolbox, you can:

- Create a profile server.
- Load an existing profile from a profile server.
- Create, modify, and delete profiles and on a profile server.
- Configure a profile by defining its SmarTerm user interface appearance. You can enable or disable SmarTerm menu items, editors, and dialog tabs.

The Restore and Undo Restore commands on the Tools menu are available to you and your users to restore a profile and undo a profile restore in open mode.

In addition to the Administrator Toolbox features, you can use the Properties>Global Options tabs to configure SmarTerm user profiles. These tabs include:

- Profiles, where you specify a profile server path and profile name
- Session Limits, where you can specify the total number of sessions the user can access at one time and limit a user to a single connection per host or IP address
- Other tabs that let you specify options for emulation, user help, shutdown, and startup

## About profiles and profile servers

A profile is a collection of SmarTerm feature and session characteristics that control how a user sees and works with SmarTerm. It is, in essence, a template that includes administrator-defined settings for sessions, automation tools (such as SmarTerm Buttons, keyboard maps, HotSpots, and SmartMouse), and the user interface. SmarTerm comes with a factory default profile that makes all tools and features available. Use the Administrator Toolbox to define your own profile and profiles for users.



A profile server is a folder, usually located on a network server, that stores SmarTerm profiles. Profile servers contain the profiles you create, as well as the factory default profile that comes with SmarTerm. You can create a profile server during or after installing the Administrator Toolbox.

It's also possible to create multiple profile servers at different locations. However, we recommend that you keep the profile server structure as simple as possible to reduce possible management and maintenance issues.

## What's included in a profile?

A profile contains folders that hold configurations for SmarTerm features, tools, and user interfaces (UI) available to the users of that profile. When you create or modify a profile, you define the configurations held in the profile folders, which include the following items:

- Button pictures—graphics for SmarTerm Buttons
- Color schemes—color settings for elements in a SmarTerm window
- Global options—specifications for profile server path and active profile; emulation options; user help; and session limits, shutdown, and startup
- HotSpots—clickable areas that initiate defined actions within a host session
- Keyboard maps—customized settings for keyboards for sending words, commands, or macros to a host
- LPD queues configuration—settings for an installed Windows printer that's made available to profile users
- Macros—keystroke or typed macro language scripts, either supplied by SmarTerm or defined by users, that automate functions for a host session
- Sessions—host sessions accessible to users of a profile
- SmarTerm Buttons—custom buttons that automate functions within a host session
- Triggers—application navigation aids that load SmarTerm tools for a specific host session or screen within a host session
- UI configuration—settings that determine how the SmarTerm user interface appears to profile users

## About profiles and sessions

SmarTerm profiles exist separately and at a higher level than sessions. A profile can include sessions as part of the profile makeup. This lets you provide session access to users who are assigned a certain profile. The sessions you create for a loaded profile will appear in the Sessions folder for that profile. On the other hand, you don't have to include a session as part of a profile.

## How to configure profiles

When you configure profiles, you also define the access that users will use when accessing SmarTerm features. You can configure a profile that has all the features of SmarTerm, or you can limit the profile so that users see only those features you want them to see. When you create and deploy a profile for a group of users, they will see the SmarTerm sessions, menu items, dialogs, and features that you have defined in the profile.

For some users, you might want to copy your own administrator profile or let them use the factory default profile, which has full access to all SmarTerm features. Other users might benefit from a more limited choice of SmarTerm features. Profiles let you control how SmarTerm works for any range of users. For details on defining features available in a profile, see *Modifying a profile* on page 22.

## An overview of what you need to do

Here's what you do to take full advantage of SmarTerm profile management features, and where you can find the information:

What you need to do:	Where to find the information:
Install SmarTerm on a multi-user server.	<i>Installing SmarTerm with the Administrator Toolbox</i>
Create a profile server.	Profile Management Workbook on page 15 and Profile Management Reference on page 39
Install the Administrator Toolbox.	Installing SmarTerm with the Administrator Toolbox on page 11
Create, modify, and manage profiles.	Profile Management Workbook on page 15, and Profile Management Reference on page 39

# Installing SmarTerm with the Administrator Toolbox

The SmarTerm Administrator Toolbox lets you create and customize SmarTerm profiles for users.

If you plan to use SmarTerm on a single-user basis and are not responsible for managing SmarTerm for users on a network, there's no need for you to install and use the Administrator Toolbox. See the ***Getting Started*** guide for instructions on installing a single-user version of SmarTerm.

## Installation requirements

The Administrator Toolbox can be installed as part of the single-user version of SmarTerm. This guide assumes that:

- You're installing the Administrator Toolbox features on a PC with administrator access only
- You're using the Copy CD utility and Automated Install Wizard to deploy single-user versions of SmarTerm to a network, where users can install SmarTerm to their own PCs

If your users will be accessing the server version of SmarTerm, you should be able to deploy profiles directly to a profile server. In the server-version environment, you should install a single-user version to your PC selecting the Administrator Tools features under custom installation, develop profiles, and then install a server version of SmarTerm to an accessible location for your users. Do the server install for users from another, separate PC.

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**Note:**

If you plan to use both the single-user and server versions of SmarTerm, do not install both versions on the same PC.

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## Before you install

Keep the following items in mind before installing the Administrator Toolbox.

### Shut down extra Windows programs

To make the installation process go as smoothly as possible, shut down any programs running in the background, such as:

- Applications
- Virus protection programs

### Shut down open instances of SmarTerm

If you have already installed and are running a single-user version of SmarTerm, exit the program before you install this version. If you have already installed a server version of SmarTerm, all users must exit the program before you install a new version.

## Running Setup

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**Note:** As you prepare for the Administrator Toolbox Setup, check the online Release Notes (Start>Programs>SmarTerm>) for information about installation.

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To install the Administrator Toolbox:

1. Insert the CD into the CD-ROM drive and select the product you would like to install. If the CD-ROM “autorun” feature is disabled or unavailable, run Launch.exe from the root directory of the CD. You can also run the program from a CD image located on a server.
2. Choose Install SmarTerm Single-User from the CD Browser window. Follow the prompts until you reach the Setup Type window where you must choose Custom. If you have already installed SmarTerm, you can choose to modify the existing install and proceed with the following steps.
3. In the Custom Setup window, select the Administrator Toolbox and choose This feature will be installed on local hard drive.

4. Follow the prompts. Setup offers you an opportunity to create a profile server. You may choose to create a profile server now, or at a later time from within SmarTerm.

When you launch SmarTerm, the Administrator Toolbox appears under the Tools menu.



# Profile Management Workbook

This chapter shows you how to use the SmarTerm Administrator Toolbox and other profile management tools.

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**Note:**

For streamlined instructions on working with profiles, without working through examples, see “Profile Management Reference” on page 39.

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The examples in this chapter take you through setting up profiles for three different departments in a company: Marketing, Accounting, and Sales. Let’s suppose that you want to set up an e-mail session in SmarTerm for each department, and you want to customize the session for each department. You can define the session, tools, and features for each department as part of a profile.

This chapter uses examples to show how to:

- Use the Administrator Toolbox toolbar
- Create profile servers
- Select a profile server and change the profile server path
- Create your own profile
- Load a profile
- Create user profiles
- Modify a profile with SmarTerm’s tools
- Restore profiles and profile features
- Undo a profile restore
- Merge profiles
- Delete a profile

## Using the Administrator Toolbox toolbar

You might prefer to use the Administrator Toolbox toolbar icons, instead of selecting menu items, as you go through this workbook chapter. To display the Administrator Toolbox toolbar:

1. With SmarTerm open, select View>Toolbars.
2. In the Customize dialog, check Admin Toolbox and click OK.

The Administrator Toolbox toolbar appears.



You can dock the toolbar in the SmarTerm window or leave it floating.

## Creating a profile server

Plan carefully where you want to store user profiles and how you will deploy them to your users. Also consider whether users should have profiles available to them other than the one you assign when you set up the Automatic Install Wizard.

Here are some guidelines for specifying the profile server path during the Administrator Toolbox Setup:

- If you want to let all users have access to all profiles that you create, specify a profile server path that everyone, including you, will be able to access. To protect these profiles from unauthorized changes, we recommend that you write-protect them in a way that's best for your network server type.
- Make sure that intended locations have ample disk space to hold profile folders, especially if you create many profiles or profile servers. The factory default profile is copied to each profile server you create. Online manuals alone take up about 12MB of disk space and are copied (as part of the factory profile) every time a new profile server is created.
- You can specify Universal Naming Convention (UNC) paths for profile server locations.
- If you create a profile server on a network location, you should limit user access to that location during installation.



### ► To create a new profile server:

1. Use Windows Explorer to create folders in a location that's accessible for users. Name the folder <network drive>:\Profiles\Acctserver for this example.
2. Open SmarTerm and select Tools>Administrator Toolbox>Save Profile to Server As.
3. In the Save Profile to Server dialog, specify a profile server path and a profile name. For this path example, type the network path you created in Windows Explorer: <network drive>:\Profiles\Acctserver. Type Accounting in the Profile name box.

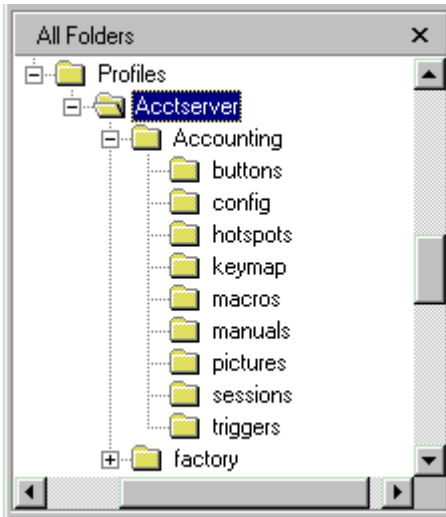
You can specify UNC paths for profile server locations. Doing so can be beneficial when users are mapped to a wide variety of drives.

4. Click OK to create the profile server and profile.
5. Because a profile server doesn't exist on the specified path, SmarTerm asks whether you want to create a new profile server at this location. Click Yes.

## Profile server folders

The SmarTerm factory profile is copied to any new profile server you create and appears there with the new profile folder. Open Windows Explorer and go to the location where you created the new profile server in the preceding

example. The following folders appear under the Acctserver profiles server folder:



The profile folder itself is named Accounting. The other folders hold values for features contained in the profile.

The factory profile is copied to the new profile server so restores from the factory default are possible.

---

**Note:**

If you intend to create multiple profile servers, be sure to check first that the intended location has ample disk space.

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## Selecting a profile server

If you create multiple profile servers, you can select a different profile server than the current one. For example, if a network-based profile server is active and you want to load your Admin profile from your PC's hard drive, you first select the profile server where the Admin profile resides. Use the Properties>Global Options>Profiles tab to select a profile server.

► **To select a profile server:**

1. Select Properties>Global Options>Profiles tab. The Profile server path box displays the current profile server path.
2. In the Profile server path box, type or browse for a path to another profile server. For this example, browse for and select the profile server you created for yourself as a system administrator.

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**Note:**

If you browse for a profile server, be sure to select the profile server folder (“profiles” in the example), not a profile folder (“Admin” or “Factory”) in the profile server folder.

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3. From the Profile name list, select the Admin profile and click OK.  
SmarTerm asks you to confirm restoring sessions and tools from the selected profile.
4. Click Yes.

The Restore Status message box appears while SmarTerm restores the settings from the specified Admin profile.

Even though the Admin profile name appears in the title bar, you must exit and restart SmarTerm to activate the profile.

## Creating profiles

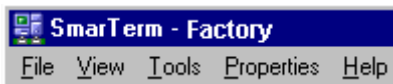
This section uses examples to show how to create your own profile, load a profile from the profile server, and create a user profile.

### Creating your own profile

First, you will want to create your own administrator profile with all the capabilities of the factory default profile that comes with SmarTerm. You can modify the profile by adding sessions and changing the appearance and availability of SmarTerm tools and features. We recommend, however, that any administrator profile should retain all of the capabilities that come with the factory profile.

### ► To create your own profile:

1. Open SmarTerm.
2. Make sure that the factory profile is active. The profile name appears in the title bar, separated by a hyphen from the product name.



If the factory profile isn't active, do the following in order:

- Select Tools>Administrator Toolbox>New Profile. A message warns that this action will delete SmarTerm sessions and tools and replace them with factory defaults. The previously active profile will remain intact on the profile server.
  - Click Yes. SmarTerm loads the factory profile and displays a status message. After the factory defaults are loaded, the changes will not take effect until you exit and restart SmarTerm.
  - Exit and restart SmarTerm for the changes to take effect.
3. Select Tools>Administrator Toolbox>Save Profile to Server.

The Save Profile to Server dialog appears:

4. In the Profile server path box, the profile server path should be the one you specified during Administrator Toolbox installation. If you didn't create a profile server during installation, you can do so now by following the instructions in Creating profiles on page 17.
5. In the Profile name box, type `Admin` for the new profile name in this example and click OK. The name can be as long as the Profile name box allows. (You can't overwrite or delete the factory profile.)

A new profile loads after you save it, and its name appears in the SmarTerm title bar. If a session is open, the session name appears enclosed within brackets.

This example saves the Admin profile with the same values as the default factory profile, which has all SmarTerm features available. You can use SmarTerm's tools and features to change the profile, which is a typical part of the profile process and is described in "Modifying a profile" on page 22.

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**Note:**

After you create and save a new profile, it remains active until you load a different profile or specify a different profile server.

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## Loading a profile

When you load a profile, its available sessions, features, and user interface replace those of the profile you had previously loaded. In the following example, the Admin profile that you created is active, and you'll load the factory profile.

### ► To load a profile:

1. Select Tools>Administrator Toolbox>Load Profile from Server.

The Load Profile from Server dialog displays the profiles that exist on the current profile server. (If you have multiple profile servers and want to change the current profile server path, select Properties>Global Options and click the Profiles tab. See Creating profiles on page 17 for more information.)

2. Select a profile name from the list and click OK. For this example, select the factory profile. SmarTerm notifies you that this action will replace all SmarTerm sessions and tools.
3. Click Yes to load the profile.

You must exit and restart SmarTerm for the profile to take effect.

## Creating a user profile

After creating the Admin profile, you can use it as a model for user profiles. The following example will create a user profile called Marketing:

1. Make sure that the active profile is the one on which you want to base a new user profile. (If it isn't, select Tools>Administrator Toolbox>Load Profile from Server.) In this example, you can use either the factory or Admin profile as a model for a new user profile.
2. Select Tools>Administrator Toolbox>Save Profile to Server As.

This saves an existing profile as a new profile. For this example, use the same profile server path as the Admin and factory profiles. If you have multiple profile servers, you can specify another profile server path: if that path doesn't exist, SmarTerm can create a new profile server. See [Creating profiles](#) on page 17.

3. In the Profile name field, type a name for the profile, and click OK. For this example, type `Marketing`.
4. Click OK to create the user profile.

The Marketing profile is active and its name appears in the title bar. Now you can modify it.

## Modifying a profile

This section leads you through a few examples of the ways you can use SmarTerm features to change and enhance the Marketing profile created in the preceding section. After you modify this profile, you can use it as a template for other profiles saved under different names. You can use all available SmarTerm features to customize a profile's appearance, tools, and available sessions.

---

### Note:

For a description of major SmarTerm features, see the "Features Reference" on page 47, or look up a specific tool in online help by selecting Help>SmarTerm Help and opening the Tools book in the Help Contents dialog. Sample files that come with SmarTerm contain examples of SmarTerm Buttons, HotSpots, macros, and other features. See the online Release Notes (Start>Programs>SmarTerm>) for more information.

---

## Changing the Marketing profile

So far, the Marketing profile contains the same features as your Admin profile. Profile users won't see the Administrator Toolbox under the Tools menu unless they have installed the Administrator Toolbox on their PCs, which is not recommended for anyone but an administrator.

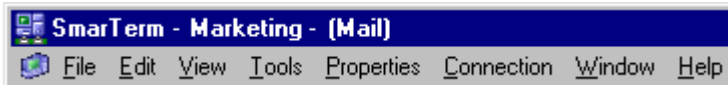
This section uses an example of opening an e-mail session, saving it as a session in the Marketing profile, and modifying the session and profile with

SmarTerm tools. You can use any available host session for your own work and modify profiles however you wish.

## Adding a session to a profile

In the following example, you will add a session to the Marketing profile created that you created earlier.

1. Make sure the Marketing profile is loaded. (If it isn't, select Tools> Administrator Tools>Load Profile from Server.)
2. Select File>New to create an e-mail session (or another type of session) on an available host. Keep in mind the emulation types and communication methods that different departments might support.
3. Select File>Save As to save the session. This example uses `mail` for the session name. After you save the Marketing profile, its users will be able to access this session, providing they have login rights to that host and access rights to that folder. The session name appears in brackets in the title bar, to the right of the profile name:



## Adding SmarTerm Buttons

You can add SmarTerm Buttons to the session to automate e-mail commands. You can create the button text/tooltip and the DIL (dynamic information line) description. A palette can have as many as 128 buttons.

In the following example, you'll add a SmarTerm Button to the Marketing profile's e-mail session:

1. Select Tools>SmarTerm Buttons.
2. In the SmarTerm Buttons dialog, select the Vms\_mail palette and click Open. The VMS palette appears. You can dock it by dragging it to the main toolbar.
3. Select File>Save to save the session with the SmarTerm Buttons.
4. Select Tools>Administrator Toolbox>Save Profile to Server to save the profile changes.

## Customizing a SmarTerm Button

The following example shows how to customize a SmarTerm Button and save it to the Marketing profile:

1. In the mail session of the Marketing profile, select Tools>SmarTerm Buttons.
2. In the SmarTerm Buttons dialog, select the Vms\_mail palette and click Create/Edit.
3. Customize the Send button: in the SmarTerm Buttons Editor dialog, click the Send button from the Buttons list. Click Background Color from the Button definition group, select a shade of yellow in the Color dialog, and click OK. In the SmarTerm Buttons Editor dialog, click Save.
4. Select File>Save Session, then select Tools>Administrator Toolbox>Save Profile to Server.

The Marketing profile now has a customized SmarTerm button. Later in this chapter, this example will help illustrate how to merge profiles.

## Changing the user interface (UI)

You can enable or disable menu items, editors, and dialog tabs for a profile. When you change the UI for a profile, the changes are stored in a UI file that exists in the profile's UI configuration folder. Users of that profile will see the UI the way you have defined it.

The following example lets you modify the Marketing profile's user interface (UI) by removing two menu items.

Let's say that you want to make the Macros item in the Tools menu unavailable to Marketing profile users. You'll also remove the Macro Language Reference item from the Help menu.

### ► To change the UI for the Marketing profile:

1. Make sure the Marketing profile is loaded. (If it isn't, select Tools>Administrator Tools>Load Profile from Server.)
2. Select Tools>Administrator Toolbox>Customize User Interface. In the Custom User Interface dialog, all commands and categories are selected by default for a new profile.



3. Disable the Macros command on the Tools menu. Under Categories, click Tools to display its Commands. Under Commands, click Macros to clear its check box. (A clear check box means that the feature will not appear on the UI for this profile.)
4. Disable the Macro Language Reference from the Help menu. Under Categories, click Help. Under Commands, click Macro Language Reference to clear its check box.
5. In the “Disabled commands are” group, select whether you want disabled commands to be grayed out or removed entirely from the UI. In this example, we don’t want the disabled items to appear at all on the Tools and Help menus, so select Removed.
6. Click OK after you have finished configuring the UI.
7. Select Tools>Administrator Toolbox>Save Profile to Server to save the changes to the Marketing profile.

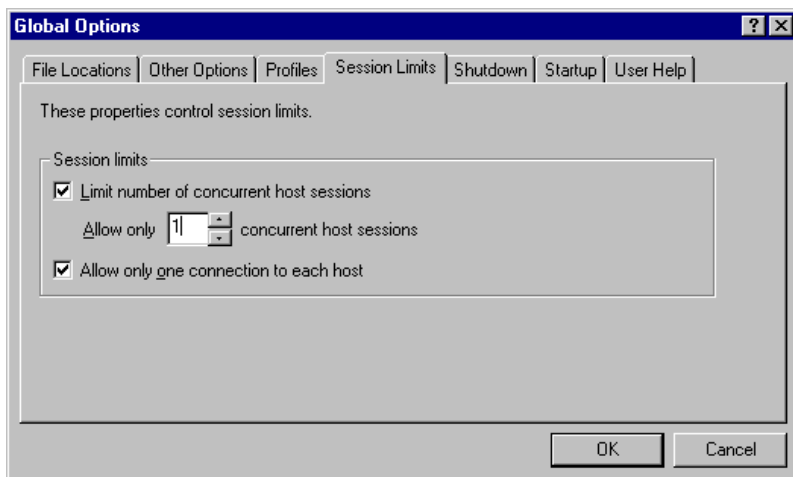
To see the UI changes, you must exit and restart SmarTerm, and the profile whose UI you changed must be loaded.

### Limiting sessions

You can limit how many sessions a user can open and how many connections a user has at one time to one host. In the following example, we’ll limit the Marketing profile users to only one session at a time and let them have only one connection to a host.

#### ► To limit sessions for the Marketing profile:

1. Make sure the Marketing profile is loaded. (If it isn’t, select Tools>Administrator Tools>Load Profile from Server.)
2. Select Properties>Global Options and click the Session Limits tab.



Settings for any global options tab apply to the profile you're changing, with the exception of File Locations, which you can't specify for a profile.

3. Check Limit number of concurrent host sessions and specify 1 in the Allow only box.
4. Check Allow only one connection to each host, and click OK.
5. Select Tools>Administrator Toolbox>Save Profile to Server.

## Creating the Accounting profile

While you have the Marketing profile loaded, you decide to create another profile based on it. This profile will be for the Accounting department.

### ► To create another profile:

1. Select Tools>Administrator Toolbox>Save Profile to Server As.
2. In the Save Profile to Server dialog, keep the same path as for Marketing. In the Profile name box, type *Accounting* and click OK.

The new profile is created and is active. You'll change it in the next section.

You can load a profile and modify it at any time. Just be sure to notify your users to update their profiles.

# Restoring profiles and profile features

You can restore all profile defaults, or only selected ones, through the Tools>Restore from Profile command. This section contains examples of how to do both types of profile restores.

An administrator (with the Administrator Toolbox installed) can restore any values from any profile available on the current profile server. (The profile server is specified in the Profiles tab under Properties>Global Options.)

When a user selects Tools>Restore, values are restored only from the active profile, which is shown under Properties>Global Options>Profiles.

## Restoring profiles

In the last example, you created an Accounting profile that used the values of the Marketing profile—which doesn't have menu access to Tools>Macros or Help>Macro Language Reference. You decide to restore menu access to these items from the factory profile to the Accounting profile:

1. Make sure the Accounting profile is loaded. (If it isn't, select Tools>Administrator Tools>Load Profile from Server.)
2. Select Tools>Restore from Profile. The Restore from Profile dialog appears. The name of the profile providing restore values is displayed in the dialog title bar.
3. From the Profile list, select the Factory profile. This is the profile from which you're restoring values. In this example, you're replacing the Accounting profile user interface settings with those of the factory profile.

---

**Note:**

Don't check Delete local profile files prior to restore. Selecting this check box would result in deleting all feature files from the Accounting profile. The most typical use of this option is to clear all values from a current profile and replace them with values from a profile that allows extremely limited choices to users.

---

4. This example is a partial restore, so you're selecting only certain features. Under Categories, click Clear All, then check User Interface Settings.

If you were restoring all values from the factory profile to a profile, you would select all Categories.

5. Click OK. SmarTerm asks you to confirm the restore.
6. Click Yes.

After profile values are restored, exit and restart SmarTerm for the changes to take effect.

## Adding features to a profile

You can use Tools>Restore from Profile not only to restore settings from the factory profile, but also to import features from other profiles. For example, imagine that another system administrator had a profile with a customized SmarTerm Buttons palette that you wanted for a user profile. Assuming you had access rights, you could select the other administrator's profile server by using Properties>Global Options>Profiles tab. Then you could load the profile and save it as a new profile to your own profile server. Finally, you could merge the profile's palette values into any other profile on the same server.

## Undoing a profile restore

What if you merged profiles or restored a profile, only to realize that you want to set the profile back to the way it was before you last restored it? Using the Tools>Undo Restore command sets a profile's SmarTerm configuration back to the state it was in before the latest restore.

---

### Note:

The Undo Restore command is available only after the Tools>Restore from Profile command has been used.

---

The profile restore in the preceding section restored menu item access from the factory profile to the Accounting profile. Let's say you decide, after all, to disable the Macro and Macro Language Reference menu items for the Accounting profile. Because access was granted in the last restore, you can use Undo Restore to undo that action.

### ► To undo the last profile restore for the Accounting profile:

1. Make sure that the Accounting profile is loaded. (If it isn't, select

Tools>Administrator Tools>Load Profile from Server.)

2. Select Tools>Undo Restore.

SmarTerm advises that you are about to undo your current settings and asks if you want to continue.

3. Click Yes to undo the profile restore.

In this example, settings are retrieved from an Undo folder that's created when you select Tools>Restore from Profile. The Undo folder stores profile settings immediately before a restore.

The undo restore will not take effect until you exit and restart SmarTerm.

## Restoring specific features

Administrators and end users can use the Restore button on feature dialogs to restore feature settings from the active profile. For example, you can restore an edited SmarTerm Button to its active profile appearance, directly from the SmarTerm Buttons dialog.

---

### **Note:**

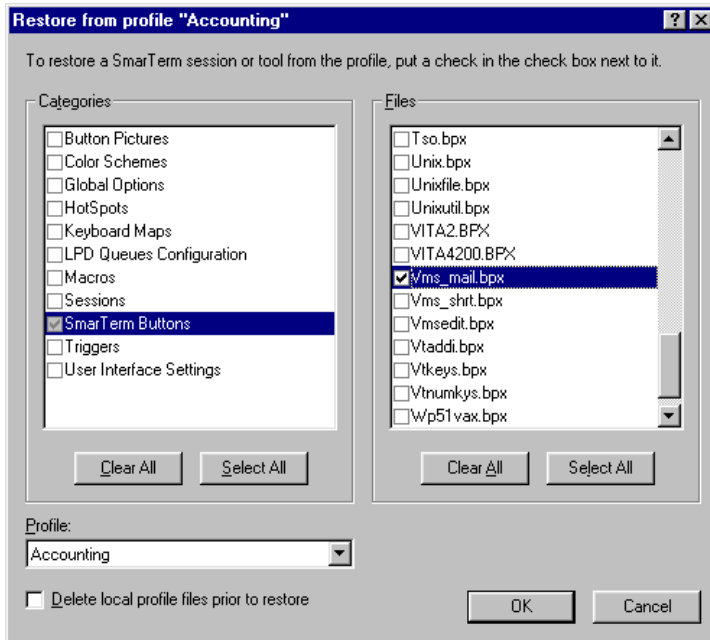
The Restore button only works if you have not saved your changes over the original file.

---

The following example will show how to restore SmarTerm Button palette values from the Accounting profile. Let's assume we've changed the color for the Send button from yellow to light blue in the mail session for the Accounting profile (see "Customizing a SmarTerm Button" on page 24), but haven't saved this change to the profile.

1. With the Accounting profile active and the mail session open, select Tools>SmarTerm Buttons.
2. In the SmarTerm Buttons dialog, click Restore.

In the Restore from profile dialog, the feature category—in this case, SmarTerm Buttons—is already selected. (Non-administrative users will not see the Profile list box and Delete local profile files prior to restore check box.)



3. Select the files that you want to restore from the profile. You can leave all SmarTerm Buttons selected or you can click Clear All under Files and check only the Vms\_mail file. Then click OK.
4. SmarTerm asks you to confirm the local profile restore. Click Yes to continue.  
The yellow Send button is restored from the Accounting profile.  
You must exit and restart SmarTerm for the changes to take effect.

## Merging profiles

You can use the Restore from Profile command to merge features from multiple profiles into a new or existing profile. The following example will create a new profile for the Sales department, merging feature settings from the Admin, Accounting, and Marketing profiles. First, we'll create the Sales profile.

1. Select Tools>Administrator Toolbox>Load Profile from Server, select the Admin profile, and click OK.
2. SmarTerm tells you that it will restore all tools and sessions from the selected profile. Click OK to continue.
3. Select Tools>Administrator Toolbox>Save Profile to Server As.
4. In the Save Profile to Server dialog, keep the same profile server path, but type a new profile name of Sales. Then click OK.

The new Sales profile is active. It has all of the settings of the Admin profile. For this example, we'll borrow the user interface settings from the Marketing profile and the SmarTerm Buttons settings from the Accounting profile and restore them to the Sales profile.

► **To restore Marketing and Accounting profile features to the Sales profile:**

1. Select Tools>Restore from Profile. The Restore from profile dialog appears.
2. From the Profile list, select the Marketing profile.

When you select feature files from a profile to restore to the active profile, the selected files overwrite any with the same name in the active profile. If the profile from which you're restoring has a unique file, such as a new SmarTerm Buttons palette, that feature is copied to the active profile.

---

**Note:**

When you merge profiles, don't check Delete local profile files prior to restore. This option will delete all local profile feature files.

---

3. Under Categories, click Clear All, then check User Interface Settings. Under Files, check stoffice.ui. This restores the Marketing user interface (UI) features to the Sales profile, disabling the Tools>Macros and Help>Macro Language Reference menu items.
4. Click OK. The UI settings from the Marketing profile overwrite the UI settings in the Sales profile.
5. Now select the Accounting profile from the Profile list.
6. Under Categories, click Clear All, then check SmarTerm Buttons. For Files, you can leave all files selected, or you can click Clear All and select only the

Vms\_mail palette. This will restore the blue color of the Send button to the Sales profile's SmarTerm Buttons Vms\_mail palette.

7. Click OK to restore the Accounting profile settings to the Sales profile.
8. Select Tools>Administrator Toolbox>Save Profile to Server to save the Sales profile.

## Deleting a profile

You can delete any profile except the factory default. For the following example, we'll delete the Accounting profile.

1. Select Tools>Administrator Toolbox>Delete Profile from Server.
2. In the Profile name box, type `Accounting` or select it from the list, and click OK.

The profile is deleted immediately.

---

### Note:

If the profile you want to delete isn't on the list, you must first change the profile path by selecting Properties>Global Options>Profiles tab.

---

If you happen to delete the loaded profile, the profile space in the title bar goes blank. You can load another profile at this point. If you don't, SmarTerm prompts you to do so the next time you select Tools>Restore from Profile.

3. Click OK. Then exit and restart SmarTerm.

## Reloading your administrator profile

After you work on user profiles and want to resume any work in SmarTerm for yourself, make sure your own administrator profile is active by selecting Tools>Administrator Toolbox>Load Profile from Server.



# Profile Management Reference

This chapter provides a task-oriented reference for profile management. To learn about profile management features in the context of examples, please see “Profile Management Workbook” on page 15. Then use this chapter as a quick reference when you create and manage user profiles.

## Creating a profile server

You can create a profile server when you:

- Save a new profile.
- Save an existing profile as a new profile.

### ► To create a profile server:

1. Create a new profile and save it by selecting Tools>Administrator Toolbox>Save Profile to Server. Or save an existing profile as a new profile by selecting Tools>Administrator Toolbox>Save Profile to Server As.

The Save Profile to Server dialog appears.

2. In the Save Profile to Server dialog, specify a new profile server path in the Profile server path box. You can type a pathname or click Browse to specify another path.
3. In the Profile name box, type a name for the new profile. You must type a profile name when you create a new profile server.
4. If a profile server doesn't exist on the specified path, SmarTerm asks whether you want to create a new profile server at this location. Click Yes to create the new profile server.

The profile loads after you create it, and its name appears in the SmarTerm title bar. If a session is open, the session name appears enclosed within brackets.

---

**Note:**

To specify the current profile server, use the Profiles tab under Properties>Global Options.

---

## Selecting a profile server

If you have multiple profile servers, use the Global Options Profiles tab to select a different profile server.

1. Select Properties>Global Options and click the Profiles tab.
2. In the Profile server path box, type or browse for a path to another profile server.
3. From the Profile name list, select the profile you want to use, and click OK.

## Loading a profile

1. Select Tools>Administrator Tools>Load Profile from Server.
2. In the Load Profile from Server dialog, type or select a profile name, and click OK.
3. SmarTerm warns you that the current tools and features will be replaced by those in the selected profile. Click Yes to continue.

You must exit and restart SmarTerm for the changes to take effect.

## Creating a new profile

You can create a profile for yourself, then use it as a model for creating other profiles for user groups.

1. Open SmarTerm. SmarTerm loads the current profile specified in the Global Options Profiles tab.

---

**Note:**

If you're not using the factory profile and want to create a new profile based on factory defaults, select Tools>Administrator Toolbox>New Profile.

---

2. Use SmarTerm's tools and features to change the settings to the way you want them. The factory profile has all SmarTerm features available.
3. Select Tools>Administrator Toolbox>Save Profile to Server As.

The profile is saved to the profile server shown in the Profile server path box. To save the profile to another profile server, type a new profile server path name or click Browse and select a path. If a profile server doesn't exist on that path, SmarTerm asks if you want to create a new profile server.

4. In the Profile name box, type a name for the profile, and click OK.

## Saving a profile

You can save a new profile based on the factory default profile, or save changes to the current profile.

1. Select Tools>Administrator Toolbox>Save Profile to Server.
2. In the Profile server path box, keep the current path, type a new path to create a new profile server, or browse for a profile server.

The Profile server path points to the folder where the profile is stored.

3. In the Profile name box, type a name for the new profile, and click OK.

## Saving an existing profile as a new profile

1. Load the existing profile.
2. Select Tools>Administrator Toolbox>Save Profile to Server As.
3. The profile is saved to the profile server shown in the Profile server path box. To save the profile to another profile server, type a new profile server path name or click Browse and select a path. If a profile server doesn't exist on that path, SmarTerm asks if you want to create a new profile server.
4. In the Profile name box, type a name for the new profile, and click OK.

## Deleting a profile

1. Select Tools>Administrator Toolbox>Delete Profile from Server.
2. In the Profile name box, type the name of the profile you want to delete, or select a profile name from the list, and click OK.

---

**Note:**

If the profile you want to delete isn't on the list, change the profile server path by selecting Properties>Global Options>Profiles tab.

---

## Modifying an existing profile

1. If the profile you want to change isn't on-screen, load the profile. Select Tools>Administrator Toolbox>Load Profile from Server, specify a profile name in the Load Profile from Server dialog, and click OK. Then exit and restart SmarTerm to activate the profile you loaded. The current profile name appears in the SmarTerm title bar.

If the profile you want to change doesn't appear in the Profile name list, select Properties>Global Options and click the Profiles tab. Change the path to the profile server that contains the profile you want to modify.

2. Change the profile's session properties, UI, or features.
3. Select Tools>Administrator Toolbox>Save Profile to Server to save your changes. (To save the changes as a new profile, select Tools>Administrator Toolbox>Save Profile to Server As.)

## Configuring the user interface for a profile

You can change the appearance of the SmarTerm user interface (UI) for a profile that you have created. You can enable or disable menu items, editors, and dialog tabs. Users of this profile will see the SmarTerm UI according to how you configure it for the profile.

### ► To configure the SmarTerm UI for the current profile:

1. Select Tools>Administrator Toolbox>Customize User Interface.
2. In the Customize User Interface dialog, clear (disable) or check (enable) the categories or commands, according to how you want sessions in this profile to

appear to users. Commands in the right-hand column appear for the selected category.

<b>To do this:</b>	<b>Click this:</b>
Disable all categories and commands	Clear All under Categories
Enable all categories and commands	Select All under Categories
Disable all commands within one category	Clear All under Commands
Enable all commands within one category	Select All under Commands
Disable individual commands within one category	Clear the check box next to the command
Enable individual commands within one category	Check the check box next to the command

3. In the Disabled commands are group, select whether you want disabled commands to appear as grayed out on the UI or to remove them entirely from the UI.
4. Click OK after you have finished configuring the UI.

To see the UI changes, you must exit and restart SmarTerm, and the profile whose UI you changed must be loaded.

## Restoring a profile

The Restore from Profile feature lets you restore features to the current profile. For example, a restore lets you change a profile and then restore it to the last saved version that resides on your profile server. You can also use the restore feature to import settings from another profile.

### ► To restore a profile:

1. Select Tools>Restore from Profile.
2. In the Restore from Profile dialog, select the features you want to restore to the current profile. For example, if you disabled a menu item for a profile and want to restore that menu item, click Clear All for Categories, and select User Interface.
3. Under Profile, select the profile from which you want to restore features.

---

**Note:**

The ability to see and use this feature is available only to Administrator Tool-box users.

---

4. To delete all SmarTerm feature settings except the ones you select to restore from a profile, check the Delete local files prior to restore check box.

---

**Note:**

The ability to see and use this feature is available only to Administrator Tool-box users.

---

When you select this check box and proceed with a restore, the current profile will contain only those features that you selected to restore from the profile specified in the Profile list.

5. Click OK after you have selected the settings you want to restore.

The restore will not take effect until you exit and restart SmarTerm.

## Undoing a profile restore

Undoing a profile restore sets the SmarTerm configuration back to the state it was in before the latest restore.

---

**Note:**

The Undo Restore command is available only after the Restore from Profile command has been used.

---

1. Select Tools>Undo Restore.

SmarTerm advises that you are about to undo your current settings and asks if you want to continue.

2. Click Yes to undo the last profile restore.

The undo restore will not take effect until you exit and restart SmarTerm.

## Merging profiles

Use the Restore from Profile command to merge features from multiple profiles into an existing profile.

1. Load an existing profile (Tools>Administrator Tools>Load Profile from Server) or save an existing profile as a new profile (Tools>Administrator Tools>Save Profile to Server As).
2. Select Tools>Restore from Profile.
3. From the Profile list, select the profile from which you want to restore sessions or tools to the current profile.

---

**Note:**

Don't check the Delete local profile files prior to restore check box when you merge profiles. This option will delete all features from the current profile.

---

4. Check any or all tools and sessions to restore from the Category and Files list. For example, to copy sessions from a selected profile to the current profile, put a check in the Sessions check box. To copy all sessions from one profile to another, click Select All. To copy only selected sessions, check individual sessions listed under Files. If any features are named the same in both profiles, the features from the profile you're restoring from overwrite those features in the current profile.
5. Click OK after you select tools and sessions to merge into the current profile.

You can continue to select other profiles and restore tools and sessions from them to the current profile.

## Setting session limits

Use the Global Options>Session Limits tab to:

- Limit the number of sessions to a host that can be opened at the same time
- Allow only one connection to a host

► **To set session limits:**

1. Select Properties>Global Options and click the Session Limits tab.

2. To limit the number of sessions to a host that can be opened at the same time, check Limit number of concurrent host sessions and specify a number in the Allow only box.
3. To limit this session to only one connection per host, check Allow only one connection to each host.
4. Click OK.



# Features Reference

This chapter describes SmarTerm's session type support and its features, which you use to create and modify sessions and profiles.

## Session types

- **IBM 3270 Display** emulates IBM 3278 and 3279 form-based terminals, along with enhanced terminal attributes. Use it to connect to hosts running the SNA protocol or Telnet.
- **IBM 3270 Printer** emulates the IBM 3287 printer.
- **IBM 5250 Display** emulates IBM 3477-FC, 3477-FG, 3180-2, 3179-2, 3196-A1, 5292-2, 5291-1, or 5251-11 terminals.
- **IBM 5250 Printer** emulates the IBM 3812 printer.
- **Digital VT** emulates Digital Equipment Corporation (Digital) VT series terminals from the basic VT52 text terminal through the sophisticated VT420 text terminal. Use it to connect with Digital VMS, All-in-1, and Unix hosts such as the Data General AViiON. SmarTerm also includes the ISO Latin-1, ISO Latin-2, and ISO Latin-9 (with Euro symbol support) character sets, and support for host control sequences.
- **Digital VT Graphics** emulates all of the above listed text terminals, plus the following graphics terminals: VT240 (monochrome graphics), VT241 (four-color graphics), VT340 (16-color ReGIS and sixel graphics), and Tektronix 4010/4014 graphics terminals.
- **ANSI** emulates ANSI terminal mode. Use it to connect to hosts that run a bulletin board service (BBS) that supports standard ANSI escape sequences. Additional support includes sequences that add color, lines, and cursor positioning to your screen emulation.
- **SCO ANSI** console emulation is a variant of ANSI-BBS and DEC VT emulation modes. Use it to connect to SCO XENIX and SCO UNIX hosts.

The emulation combines the features and sequences listed in the SCO screen (HW) manual, some VT510 ANSI mode features, and some Persoft extensions.

- **Data General Dasher** emulates Data General Dasher text and graphics terminal, from the high end D470C graphics terminal to the D200 text terminal. Use it to connect to MV hosts and hosts running CEO Workstation.
- **WYSE 50/60** emulates text terminals in WYSE 50 or WYSE 60 mode.

For more information about session types, see the online help system available through the Help menu.

## Features for all session types

SmarTerm has many features to make emulation and network connectivity easy, reliable, and customizable. This section provides descriptions of those features. For more information about SmarTerm features, see the online help system.

## Connection types

To make a connection type to a host, you can choose from the following connection types that SmarTerm supports:

- Telnet
- Direct serial
- LAT (purchased separately from Esker - NT 4.0 only)
- Modem
- PATHWORKS (Only supported with NT 4.0, but may work with Windows 2000)
- Microsoft SNA Server
- SSH
- SCP

Not all connection types are available for all session types. SCP, for instance, only works with hosts that support it. The following table shows the connection types that each session type supports.

Session Type	IBM 3270 Printer	IBM 5250 Display	IBM 5250 Printer	ANSI, SCO, VT, WYSE
Direct serial				X
Modem				X
PATHWORKS				X
LAT				X
Telnet	X	X	X	X
Microsoft SNA Server	X	X	X	
SSH				X

## File transfer types

You can use SmarTerm to send and receive files between your PC and a host or other computer. SmarTerm can transfer both text and binary files using the following transfer protocols:

- FTP
- IND\$FILE
- KERMIT
- XMODEM
- YMODEM
- ZMODEM

In addition you can use SmarTerm to:

- Paste text from a file on your PC to the host.
- Copy text from the host to a file on your PC.
- View files on the host or your PC before transferring them.

Not all file transfer types are available for all session types. The following table shows session types and the file transfer types they support.

Type	IBM 3270 Display	IBM 5250 Display	ANSI, SCO, VT, WYSE
FTP	X	X	X
Kermit			X
XMODEM			X
YMODEM			X
ZMODEM			X
IND\$FILE	X		
Copy to file	X	X	X
Paste from file			X

## MDI Workbook View

The MDI Workbook View presents multiple SmarTerm sessions as tabbed worksheets. This lets you move easily between open sessions by clicking on the tab. Use Window menu commands to arrange the sessions within the SmarTerm window.

Each open session has a window with a tab that shows the name of the session. A host icon on the tab blinks when a session has incoming data.

## Dialog View

Dialog View makes an IBM terminal screen look and act more like the GUI (graphical user interface) environment of Windows. With Dialog View enabled, the screen has a three-dimensional look. Dialog View makes moving around the screen more intuitive for Windows application users.

Dialog View is an optional feature. When you enable Dialog View, the HotSpots feature is enabled automatically as well.

## HotSpots

SmarTerm's HotSpots feature lets you create clickable areas on the screen to help use an existing host application. These clickable areas, called HotSpots, work the way buttons do in a Windows application.

All session types except ANSI support HotSpots.

When you click on a HotSpot with the mouse, the HotSpot can:

- Send a string to the host.
- Run a macro.
- Load another HotSpots file.
- Load SmarTerm Buttons.
- Unload SmarTerm Buttons.

## Triggers

Depending on what screen you're in in your host application, you might want different SmarTerm tools available to you. Certain SmarTerm Buttons, HotSpots, keyboard maps, and color schemes might apply to only certain host screens. Triggers allow you to load these tools automatically when you want them to appear.

A Trigger file contains a collection of Triggers. Each Trigger specifies a string that causes it to fire. When the Trigger fires (when the host screen appears), SmarTerm loads the tools you want, or unloads tools you no longer want loaded. To put it all in place, you load the Trigger file when you open a SmarTerm session.

Using Triggers, you can have greater control over how your users navigate host applications. Triggers can simplify application navigation for novice users by making the most of the SmarTerm tools available.

## Macro language recorder

SmarTerm provides a macro recorder to let you record your actions as a macro while using SmarTerm. Recorded macros can be run whenever you like and can be associated with a SmarTerm Button for easy access. The macro recorder is useful for recording simple login operations, routine file transfers, and other host operations.

SmarTerm's macro recorder doesn't record every single action within SmarTerm. Instead, as you perform tasks within SmarTerm, the macro recorder analyzes those tasks, and records those that have associated macro language commands. It also looks for incoming prompts and stores outgoing key-strokes.

For more information about the macro recorder, see the online help system and the printed or online version of the SmarTerm *Macro Guide*. This guide also contains detailed information about macro conventions and macro commands.

## SmarTerm Buttons

SmarTerm Buttons are custom buttons that allow you, with a single click, to perform familiar functions:

- Run macros.
- Stop a running macro.
- Send text to the host.
- Load a different set of buttons.

SmarTerm Buttons provide functions within a particular session. Access to a set of SmarTerm Buttons can be limited to you, or broadened to your work-group.

You control the button format. You can:

- Choose a picture from SmarTerm's list (for profiles), or use your own .BMP, .DLL, .EXE, or .ICO file (for customized sessions).
- Create the button text/tooltip and the DIL (dynamic information line) text.
- Determine how the picture and/or text appears in the button, including text, background colors, and font style, weight, and size.
- Dock the buttons anywhere or allow them to float on the session window.

## SmartMouse

SmartMouse enables mouse support to host applications by letting you define mouse actions—mouse events that trigger specific actions such as:

- Move the cursor around the screen.
- Invoke commands presented in a host application menu.
- Send the selected word to the host.
- Send the selected word and a carriage return.
- Execute macros.

For example, you can set up SmartMouse to allow you to left-click to move the cursor to a selected spot on the screen.

## Terminal keyboards and keyboard mapping

Terminal keyboards let you display how a key is mapped and click on a key to send information to the host. Keyboard mapping lets you customize your default keyboard to send a word, macro, or a command to the host by pressing your keyboard key. Default keyboard maps are loaded for each session type, and you can customize these maps and save them as new maps using the Keyboard Map Editor.

For example, depending on the host application, you may want a different keyboard map to be in effect. This is because one set of keystrokes might work best for most host operations, but a specific host application might require a completely different mapping. In this case, you can use the Keyboard Map Editor to customize a map for use with that host application, and use another map for your regular connection to that host.

## OLE and DDE

Object Linking and Embedding (OLE) and Dynamic Data Exchange (DDE) let applications share data. In other words, one Windows 95/98/2000/Me/XP or Windows NT application can automatically send and receive data from other Windows 95/98/2000/Me/XP or Windows NT applications supporting OLE or DDE.

SmarTerm's OLE support allows you to link applications and data from many sources at the same time. It is a full-featured OLE, allowing complete integration with OLE-compliant applications. For example, you can connect via SmarTerm to a host application and display a table of information, then link that table to a Microsoft Excel spreadsheet.

DDE Client and Server support allows SmarTerm to receive data and immediately send that data to another Windows 95 and Windows NT application, such as a spreadsheet or word processor, without having to update it manually. Sites can integrate SmarTerm into an Executive Information System using its DDE capabilities.





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