



# **OPENGATE SMALL BUSINESS SOFTWARE**

## **VERSION 1.1**

### **Administrator's Guide**

Version 10.10.2009

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# 1 Welcome

OpenGate Small Business Software is an extensive package of feature from Customer Relationship Management (CRM) to Sales Order Management to Financial Management. The product also includes a significant amount of flexibility to configure the menus, user roles, and other features to your needs. This guide is intended to help you understand to the advanced setup and deployment optional available to you.

## 1.1 SETUP NAVIGATION

The Setup Menu is the main launch point to access all other administrative features. The Setup Menu is available from the "Configure" button on the main menu.



Figure 1: Setup Menu

Application Preferences are the high-level settings that affect how the product handles financial transactions, products, orders, etc.

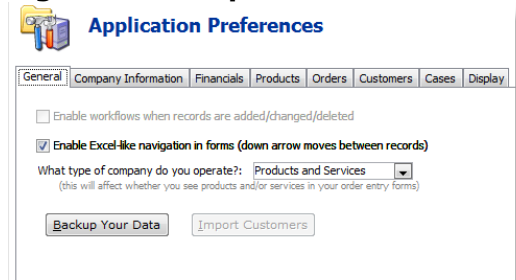


Figure 2: Application Preferences

Menu Configuration available in the Setup Menu, and provides access to the key menu, role, and user setup options.

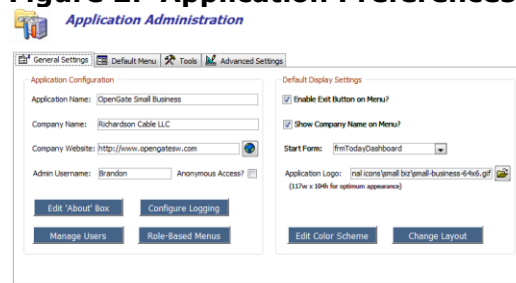
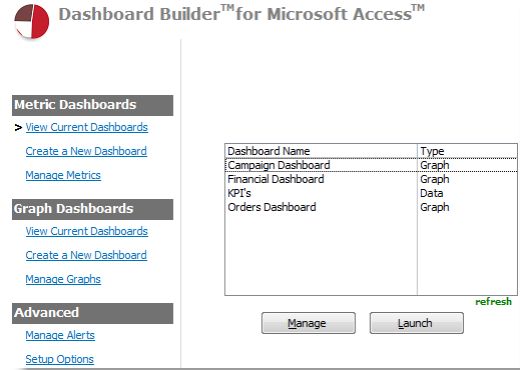


Figure 3: Application Administration

Dashboard Administration is where you can customize the dashboards, metrics, and graphs displayed in OpenGate Small Business.



**Figure 4: Dashboard Builder Setup**

## 2 Installation

### **2.1 INSTALLING ON A SINGLE USER'S MACHINE**

Follow the prompts in the Installation wizard. For Windows Vista and Windows 7 users, please allow the default installation directory "C:\OpenGate Small Business" to be used. This is because Windows Vista and Windows 7 make files in the C:\Program Files directory to be read-only. OpenGate Small Business must be installed such that it operates in a full read-write mode.

### **2.2 MULTI-USER INSTALLATION**

Install the program on each user's machine. Then follow these steps:

- 1) Open OpenGate Small Business on the machine that will serve as the default administrator.
- 2) Select "Move Your Data File" from the Setup Menu.
- 3) Select a central location (a PC that all other network PCs can access, or a file server).
- 4) Run the "End User" installation setup file on each user's PC.
- 5) Open OpenGate Small Business on each user's PC. You will be prompted to identify the location of the data file, which will be in the same folder you used for Step 3 above.

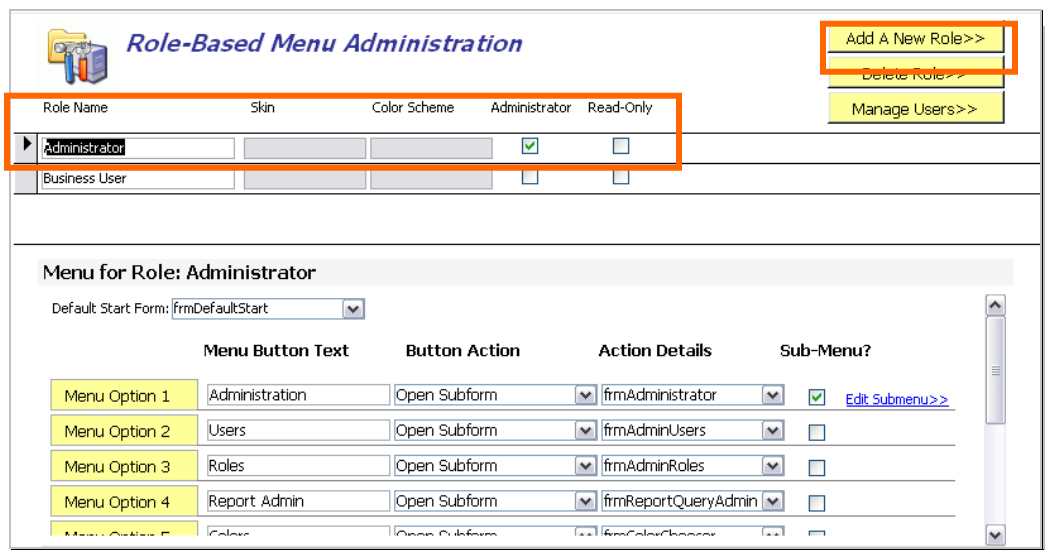
## 3 Managing Users and Roles

### 3.1 ROLES AND MENUS

OpenGate Small Business simplifies menus at a user-level by allowing you to assign one or more users to a role, which in turn defines a set of menu options for that role. For example, all users assigned to the role "Sales Rep" may be able to add new customers, whereas user associated with the role "Customer Service Rep" may only be able to view customers, but not modify the customer records.

#### 3.1.1 ADDING ROLES

To add a new role, or change an existing one, navigate to the Role-Based Menu Administration screen. To manage roles and role menus, select "Configure Menus" from the Setup Menu, then "Configure Menus." Then select the "Manage Roles" button.



Role Name	Skin	Color Scheme	Administrator	Read-Only
Administrator			<input checked="" type="checkbox"/>	<input type="checkbox"/>
Business User			<input type="checkbox"/>	<input type="checkbox"/>

Menu Button Text	Button Action	Action Details	Sub-Menu?
Menu Option 1	Administration	Open Subform   frmAdministrator	<input checked="" type="checkbox"/> <a href="#">Edit Submenu&gt;&gt;</a>
Menu Option 2	Users	Open Subform   frmAdminUsers	<input type="checkbox"/>
Menu Option 3	Roles	Open Subform   frmAdminRoles	<input type="checkbox"/>
Menu Option 4	Report Admin	Open Subform   frmReportQueryAdmin	<input type="checkbox"/>
Menu Option 5	Setup	Open Subform   frmSetupQuery	<input type="checkbox"/>

**Figure 5: Role-Based Menu Administration screen**

Select "Add a New Role>>" at the top right of the screen. In the dialog prompt, enter the name of the role. The new role will appear in the role list. Then simply configure the menu and submenu button options at the bottom of the screen for the new role.

Note that if the "Read-Only" check box is checked, users associated with this role will be able to open forms you define for their menu options, but all forms will open as read-only.

#### 3.1.2 TESTING ROLES

Simply select "Test Role>>" from the list of roles and select the role you want to switch to in the popup form. You can test the role's menus and actions, then close the popup form when you want to

return to your assigned role. This functionality is only available to administrators.

### **3.1.3 REMOVING ROLES**

To remove a role, select the "Delete Role>>" at the top right of the screen. If there are users associated with the role, you will not be able to delete the role until you remove the users, or reassign them to another role.

### **3.1.4 ADMINISTRATOR SECURITY**

When you first open OpenGate Small Business, the Windows username currently in use will be assigned as the default administrator. You can see the designated default administrator in the main Administration screen. The default administrator is allowed to access and update information in any of the administration screens. All others are not able to open these forms, unless they are associated with a role where the "Administrator" check box is checked.


## **3.2 USERS**

OpenGate Small Business supports two user login methods. You can rely on each user's Windows username to authenticate them and automatically log in authorized users, or you can employ the OpenGate Small Business login prompt. If each user will log in from their own machine, we recommend you employ the Windows username method. However, if you have a shared machine that is used by multiple individuals without logging in separately, the login prompt can provide user level menus despite the fact all users are logged in with the same Windows username.

Please refer to the section Configuring the Login Prompt for detailed information on how to set up the login prompt method.

### **3.2.1 ADDING USERS**

To add a new user, select "Configure Menus" from the Setup Menu, then "Configure Menus." Then select the "Manage Users" button.



The screenshot shows the 'User Administration' screen with a table of users. The table has columns for User Name, First Name, Last Name, Role, and Username Source. There are three rows, with the first two containing data and the third marked with an asterisk.

User Name	First Name	Last Name	Role	Username Source
spetterson	Steve	Petterson	Administrator	NT Login
gwashington	George	Washington	Business User	NT Login
*				NT Login

**Figure 6: User Administration Screen**

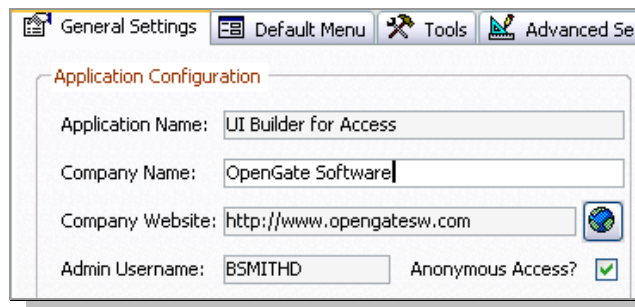
You must minimally specify each user's Windows username, and assign a role to the user from the drop-down box of available roles.

### 3.2.2 DELETING USERS

To delete a user, select the user's record, and then select "Delete [username]>>" from the bottom of the User Administration form.

### 3.2.3 ANONYMOUS USERS

If desired, you can allow anonymous users to access the system. That is, users that do not have a user record established in the users table. These individuals will have access to the default menus you set up in the Administration form "Default Menu" tab. To allow anonymous users, simply check the "Anonymous Access" box in the General Settings tab of the Administration form.



The screenshot shows the 'General Settings' tab of the Administration form. Under the 'Application Configuration' section, there are several fields: Application Name (UI Builder for Access), Company Name (OpenGate Software), Company Website (http://www.opengatesw.com), and Admin Username (BSMITHD). The 'Anonymous Access?' checkbox is checked.

**Figure 7: Anonymous User Access**

**Note**

OpenGate Small Business will still capture the Windows login username for any anonymous user's activities. They are anonymous only insofar as they do not have a formal user profile with an assigned role in your application.

### 3.2.4 RESTRICTING USERS

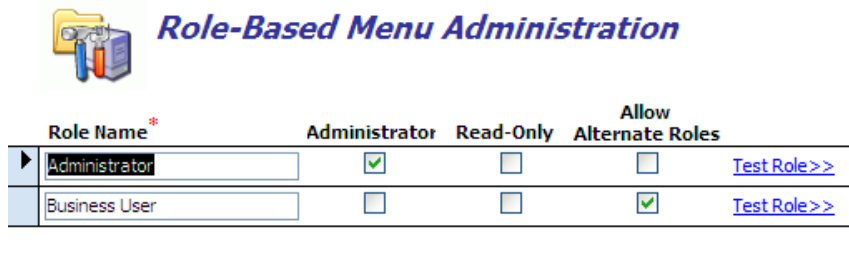
To prevent a user from accessing the system, leave their user record in the use table, but clear the role field for that user.

**Important!**

The "Anonymous Access" check box must be unchecked.

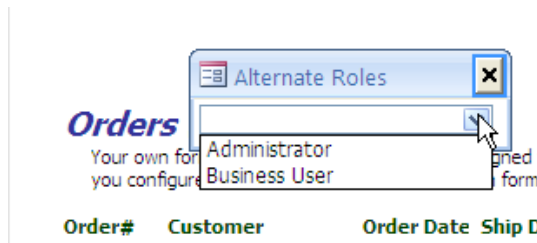
### 3.2.5 ALLOWING USERS TO SWITCH ROLES

You can optionally configure one or more users to be able to access multiple roles without logging in as a different user. For example, you may have a need for several complex menu schemes and have several staff that need access to both the "Sales" and "Operations" roles.



**Figure 8: Role-Based Menu Administration Form**

As shown above, you may define for each role whether to allow alternate roles to be presented to the user. If the **Allow Alternate Roles** box is checked, OpenGate Small Business will refer to the "Alternate Roles" tab settings to display the Alternate Role popup form shown below:

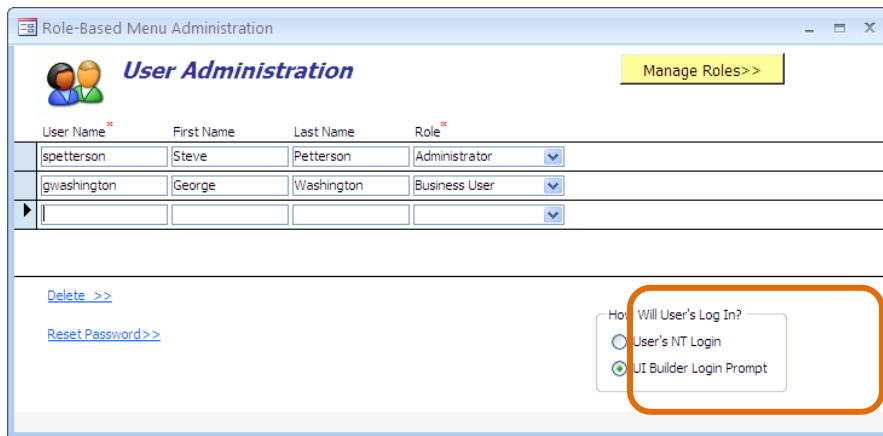


**Figure 9: Alternate Role Popup Form**

The Alternate Role popup form allows the user to quickly toggle between different roles you have set up for them.

## 4 User Login Methods

OpenGate Small Business Software supports two user login methods. You can rely on each user's NT (Windows) Login to authenticate them and automatically log in authorized users, or you can employ the product's own login prompt. If each user will log in from their own machine, we recommend you employ the NT Login method. However, if you have a shared machine that is used by multiple individuals without logging in separately, the OpenGate Small Business login prompt can provide user level menus despite the fact all users are logged in with the same Windows username.



**Figure 10: User Administration Screen**

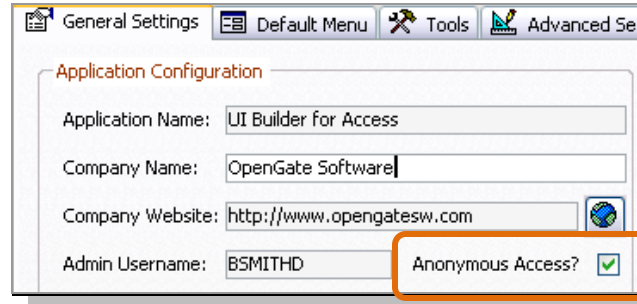
You can select which user login method to use in the User Administration screen.

### 4.1 USING THE NT (WINDOWS) LOGIN METHOD

When using the NT Login method, you will need to ensure each user's Windows username is defined in the User Name field of the User Administration form.

#### 4.1.1 ANONYMOUS USERS

If desired, you can allow anonymous users to access the system. That is, users that do not have a user record established in the users table. These individuals will have access to the default menus you set up in the Administration form "Default Menu" tab. To allow anonymous users, simply check the "Anonymous Access" box in the General Settings tab of the Administration form.

**Note**

OpenGate Small Business will still capture the Windows login username for any anonymous user's activities. They are anonymous only insofar as they do not have a formal user profile with an assigned role in your application.

### 4.1.2 RESTRICTING USERS

You may lock a user out of the application, while allowing anonymous users. For example, you may have a specific individual with a Windows Login that should not be allowed to access your database, but other users should be able to access the application even if they do not have a user record created in the user table. To prevent a user from accessing the system, leave their user record in the user table, but clear the role field for that user.

## 4.2 USING THE OPENGATE SMALL BUSINESS LOGIN PROMPT

When using the OpenGate Small Business login prompt method, users will be prompted to provide their username and password each time they log in to your OpenGate Small Business application.

### 4.2.1 USER'S FIRST LOGIN

Each new user is provided a temporary password, which is their username followed immediately by the number 999. For example, the username "gwashton" will have a temporary of "gwashton999." When the user first logs in with their temporary password, they will be prompted to change to a password of their choice.

### 4.2.2 RESETTING PASSWORDS

Select the "Reset Password>>" button for each user in the User Administration screen to establish a temporary password for the users.

## 5 Managing Lookup Values

Lookup values are the options you see when choosing from a set of options in one of the many dropdown boxes in the product. OpenGate Small Business primarily uses a central repository for all lookup values, which simplifies adding new values.

Lookup Manager filter

Lookup Type	Value	Advanced Values	Changes Existing Values?
Project-Status	Active		<input type="checkbox"/>
Project-Status	Cancelled		<input type="checkbox"/>
Project-Status	On Hold		<input type="checkbox"/>
Project-Status	Complete		<input type="checkbox"/>
Salutation	Mr.		<input type="checkbox"/>
Salutation	Ms.		<input type="checkbox"/>
Salutation	Mrs.		<input type="checkbox"/>
Salutation	Dr.		<input type="checkbox"/>
Salutation	Hon.		<input type="checkbox"/>
Name-Suffix	Sr.		<input type="checkbox"/>
Name-Suffix	Jr.		<input type="checkbox"/>
Name-Suffix	Esq.		<input type="checkbox"/>
Employee-Status	Active		<input type="checkbox"/>
Employee-Status	Terminated		<input type="checkbox"/>
Employee-Status	Retired		<input type="checkbox"/>
Employee-Status	Resigned		<input type="checkbox"/>
Employee-Status	Released		<input type="checkbox"/>
Product-Family	Converter Boxes		<input type="checkbox"/>

**Figure 11: Lookup Manager**

The field "Lookup Type" represents the type of lookup value to which the "Value" field corresponds.

### 5.1 ADVANCED VALUES

The "Advanced Values" field is reserved for either designating the sorting order for the list of values for a particular type, or for OpenGate Small Business to interpret during processing.

For any Lookup Types that have numbers in the Advanced Values field, the dropdown boxes where the lookup values are displayed will be sorted according to the numeric order. For example, Prospect Status is sorted in the dropdown list based on the numbers in the Advanced Values field, such that "Initial Contact" is displayed first, and "Lost" is displayed last.

For any Lookup Types with text in the Advanced Values, the information in the Advanced Values field is used by OpenGate Small Business to perform special processing. For example, the Advanced

Values field for the Lookup Type "Service-Type" must contain "Renewal" for OpenGate Small Business to include that service in the [Service Agreement Summary](#) dashboard section.

## **5.2 ADDING LOOKUP VALUES**

You can add new lookup values by scrolling to the bottom of the list of Lookup Values to an empty row, select the Lookup Type desired, and enter the value. This value will then appear as an option in the dropdown lists wherever the Lookup Type appears.

## **5.3 CHANGING LOOKUP VALUES**

If the "Changes Existing Values" field is checked, then this indicates changing the text in the "Value" field will automatically change any existing records in the database to reflect the new value. If the field is not checked, then any changes to an existing "Value" field will not carry through to existing values in the database.

## 6 Future Use Fields

Future Use fields are customer-defined fields available for nearly any screen in OpenGate Small Business. The Future Use fields hold a specific data type, and any user data entered into the fields will be stored with the displayed record.

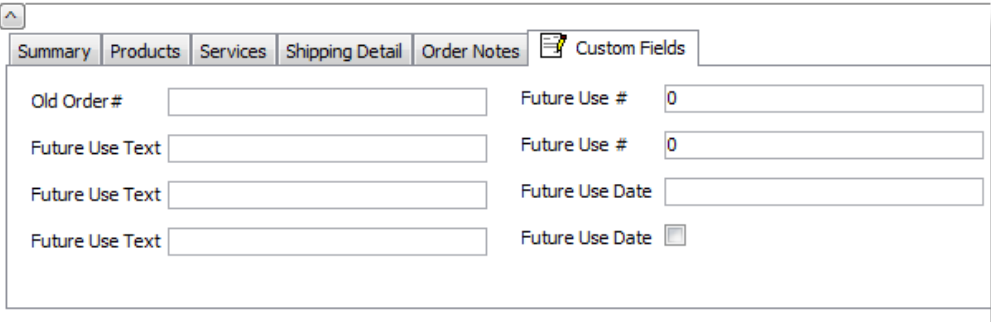
You can change the captions of the Future Use fields to represent the information you want the user to enter in the field. From the Setup Menu, select "Future Use Field Setup." For each table in the database, you will be able to change the caption of the field to display the text you want to see on the data entry forms that use that table.

The names of the tables follow the functional area. For example, "tblAccountTransaction" means a the main financials table where you enter income/expense transactions (for a given account).

Table Name	Field Name	Field Caption
tblAccount	Future-Use-1	Future Use Text
tblAccount	Future-Use-2	Future Use Text
tblAccount	Future-Use-3	Future Use Text
tblAccount	Future-Use-4	Future Use Text
tblAccount	Future-Use-5	Future Use #
tblAccount	Future-Use-6	Future Use #
tblAccount	Future-Use-7	Future Use Date
tblAccount	Future-Use-8	Future Yes/No
tblAccountTransaction	Future-Use-1	Future Use Text
tblAccountTransaction	Future-Use-2	Future Use Text
tblAccountTransaction	Future-Use-3	Future Use Text
tblAccountTransaction	Future-Use-4	Future Use Text
tblAccountTransaction	Future-Use-5	Future Use #
tblAccountTransaction	Future-Use-6	Future Use #
tblAccountTransaction	Future-Use-7	Future Use Date
tblAccountTransaction	Future-Use-8	Future Yes/No

**Figure 12: Future Use Captions**

In the example below, the Future Use-1 field for tblOrder (the order table) has been changed to display "Old Order#" instead of "Future Use Text."



Field Name	Field Caption	Data Type
Old Order #	Old Order #	Future Use #
Future Use Text	Future Use Text	Future Use #
Future Use Text	Future Use Text	Future Use Date
Future Use Text	Future Use Text	Future Use Date

**Figure 13: Future Use Caption Example**

## 7 Customizing Dashboards

The dashboards, including graphs and meters in OpenGate Small Business, are built using Dashboard Builder for Microsoft Access. To learn how to configure the dashboards to display different information, create new graphs or metrics, please refer to the Dashboard Builder User's Guide.

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