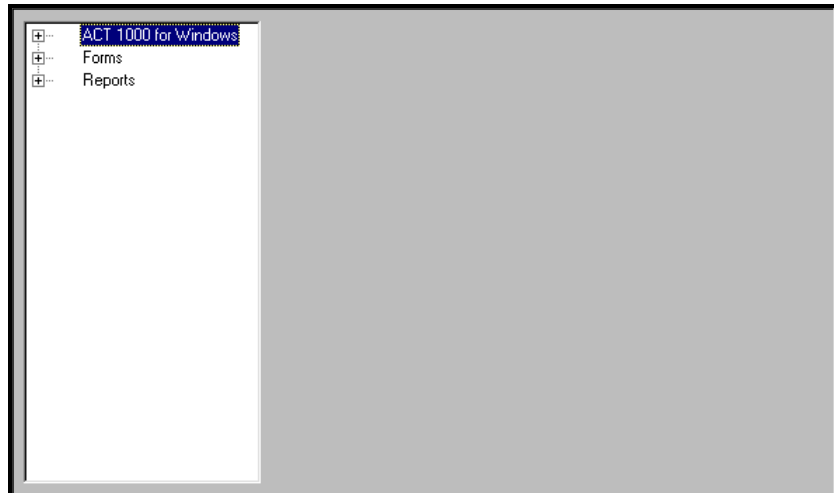


System Configuration

Welcome to System Configuration

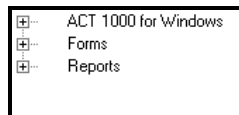
This section is a brief overview of how to configure your web-based applications. For specific information on configuring the web-application that you are using, consult its respective online help file.

Configuration



Configuration, whether it is in Work Order or Facility Scheduling, is set up in the same manner, and it is run over the Internet.

System Configuration



System Configuration is a very powerful tool in terms of customizing programs. There are three parts that make up System Configuration:

- Forms -which allows you to customize forms and sub-forms through various options, field property customization, and security access.
- Reports -which allows you to customize reports through options and security access.
- Programs -which allows general customization of the application. This includes options and database paths.

These three parts are identified on the left screen of System Configuration. By double-clicking the square to the left of the labels, they expand. Double-click the expanded choices and the final customization features appear. The final customization features can be accessed by simply clicking the label. Although the actual forms, reports, and programs vary, these three parts are similar.

System Configuration Features

After choosing the form, report, or program to customize, the features of System Configuration become available. These common features are available in most ACT applications.

There are several features of System Configuration. Not every form and report contains all System Configuration features, but in most cases, at least one will be available. The features are:

- Options
- Properties
- Security

System Configuration Options

Options is found in all three parts of System Configuration: Forms, Reports, and ACT 1000 System. These customization tools are defaulted to "Yes" and should be turned off to deactivate the feature. To turn a feature on or off, click the check box to the right of the option's description.

Listed below are the options and their locations in the ACT 1000 System:

General Option

- Telephone Input Mask (how to enter telephone numbers). It is defaulted to the following form: (999) 000-0000.

The Work Order Form

- Print Location Hazards on work orders
- Print PM Additional Information on work orders

- Print PM Material List on work orders
- Print PM Task List on work orders
- Choose one of the printed work order formats from a drop-down box

(Examples of these choices are available in the ACT 1000 System manual.)

Create Inventory Pick List Form

- Automatically show report after Pick List is created. (After the Create Pick List button is clicked the Pick List Report will automatically appear if this option is set to Yes, which is the default.)

Issue Pick List Inventory Form

- Automatically show Delivery Slip Report after inventory is issued? (After the Create Pick List button is clicked the Pick List Report will automatically appear if this option is set to Yes, which is the default.)

Reports:

General Option

- Report Headers. These options allow you to create customized report headings. You can choose to use the defaulted headings, create your own, or leave the headings blank.

Detailed Work Order Report

- Print Location Hazards on report
- Print PM Additional Information on report
- Print PM Material List on report
- Print PM Task List on report

Options

- Load SiteNet Paths on startup. This option allows SiteNet paths to be loaded, or imported, when the ACT 1000 System is started up. This option is defaulted to yes. In cases where SiteNet paths are stored locally and changes are not made to the path structure, this option should be set at no.
- Update account balance for each transaction? This option should be turned off if you are not tracking accounts. If this option is turned off, the ACT 1000 System will run faster.

Note: By turning off the accounting features in the ACT 1000 System, the account balances will NOT be correct in Global.

System Configuration Properties

Properties allows you to customize fields. The Properties screen allows you to scroll through a form's fields to:

- Determine if it is system-required.
- Assign a field to be optional or required. (System-required fields may not be made optional). Required fields will appear Bold.
- Create a default for a field.
- Skip over fields when tabbing through a form. (Note: If you choose not to stop at a field, it can be accessed using your mouse).

System Configuration Security

Security is available for forms, sub-forms, and reports. This feature lets you determine who has access to what. "Who" is determined in SiteNet. SiteNet users are given a level, 1-4, for each of the modules. Then the levels (1-4) are assigned tasks for each of the forms, sub-forms, or reports.

How to set up Security

Security information is found in two places: Under Security in SiteNet and System Configuration. In the Forms, Sub-forms, and Reports in System Configuration you will find Security tabs. In most cases, security information can only be accessed by Administrators. Security is accomplished through three basic things, each of which is explained in a separate section:

- Tasks
- Security Levels
- SiteNet Users

Tasks

Tasks are listed on the right side of the Security screen in System Configuration. When Security is chosen for a form, sub-form, or report, the Tasks will appear. These tasks are set up and will vary. The possible tasks are:

- **Delete Records** -the most powerful task. Also allows you to edit, add, and view records.
- **Edit Records** -not only allows you to view and add records, but also make changes to previous records. (**Note: Some fields cannot be edited regardless of security level).
- **Add Records** -a "basic" data entry task. Allows you to add and view records.
- **View Records** -the least powerful task. Only allows you to see the form sub-form, or report -without making any changes or adding information.

Security Levels

The Tasks that are found in forms, sub-forms, and reports are each assigned a Security Level. There are four security levels for each module. For example, the Work Order module has WorkOrderLevel1, 2, 3, and 4. All forms, sub-forms, and reports in the Work Order module use these levels. Just as Tasks are hierarchical, so are Security Levels.

Level 1 is the highest level and Level 4 is the lowest level. If a task is assigned to a level, all the levels above it can also perform the task. For example, if you assign WorkOrderLevel3 to Add Records, Level2 and 3 can also Add Records, but Level4 cannot. The only way that Level4 could add records would be to assign it to a higher Task, such as Edit or Delete. Because these tasks also allow Adding and Viewing, it would override the earlier choice. This, however, is uncommon.

Security is defaulted as follows, using Work Order as an example. In most cases, these will be changed to accommodate varying needs.

- **WorkOrderLevel1** -Delete Records (and Edit, Add, View)
- **WorkOrderLevel2** -Edit Records (and Add, View)
- **WorkOrderLevel3** -Add Records (and View)
- **WorkOrderLevel4** -View Records

SiteNet Users

The third step in establishing security is to assign SiteNet users to the Security Levels for each of the programs and modules. After the Tasks for forms, sub-forms, and reports have been assigned Security Levels, you can assign users.

For example, if the Task to Add Records on the Work Order Form is given a WorkOrderLevel3, any users assigned to this level or higher (2 or 1) can add work orders.

To create or assign a SiteNet user to a Security Level

1. Open up **SiteNet**.
2. Choose **Users** under the Security Menu.
3. Choose **New** to add a new user or select a current user from the choices under Name.
4. Select the security level. Click **Add**.
5. Add any other security levels that the employee may need. Click **Close**.

A Security Example

To help you better understand security, we'll walk through the Work Order Form:

1. Decide how many groups of users will be using the program or module. The first thing to do is to decide how many "types" or groups of users will be dealing with Work Orders. This helps you to decide what levels to assign to what Tasks. Organization X decides there are three basic groups of users:
 - **Administration** (Level 1) -This group includes administrators and directors. This group will have access to Configuration.
 - **Secretaries** (Level 2) -This group will enter/complete work orders. They also need the power to edit existing data.
 - **Shop Employees** (Level3) -This group includes maintenance workers who will receive the work order and occasionally print them out or enter data into the computer at the shop.

****Note: You are not limited by grouping users. Individual modifications can easily be made for individual modules.**
2. Go to Security for the Work Order Form.
 - a. Go into the ACT 1000 System Configuration. Click System Configuration.
 - b. Click the label to the left of Forms.

- c. Go to the bottom of the list and locate Work Orders.
Click Security.
- 3. Assign Security to the tasks for the Work Order Form and all its sub-forms. Begin with the Work Order Form. (**Notice that this does not include the sub-forms). Choose the lowest level allowed to perform the task.
 - a. Edit Records: Work OrderLevel3
 - b. Add Records: Work OrderLevel3

WHY? Level 3 is chosen for all three tasks because all three groups: Administrators, Secretaries, and Shop employees need to be able to access and use this form.

- 4. Assign Security to Labor Transaction Tasks.
 - a. Delete Records: WorkOrderLevel2
 - b. Edit Records: WorkOrderLevel3
 - c. Add Records: WorkOrderLevel3
 - d. View Form: WorkOrderLevel3

WHY? Level 3, 2, and 1 can view, add, and edit labor transactions. This means that they can enter or alter employee "time" for a work order. Only Secretaries and Administrators (Level 2 and 1) can delete labor records.

- 5. Assign Security to Purchase Transaction Tasks.
 - a. Delete Records: WorkOrderLevel2
 - b. Edit Records: WorkOrderLevel3
 - c. Add Records: WorkOrderLevel3
 - d. View Form: WorkOrderLevel3

WHY? Level 3, 2, and 1 can view, add, and edit purchase transactions. This means that Shop Employees can do everything with items purchased outside of inventory except delete records.

- 6. Assign Security to Vehicle Travel Tasks.
 - a. Delete Records: WorkOrderLevel2
 - b. Edit Records: WorkOrderLevel3
 - c. Add Records: WorkOrderLevel3
 - d. View Form: WorkOrderLevel3

WHY? Level 3, 2, and 1 can view, add, and edit vehicle travel transactions. This means that Shop Employees can

do everything with vehicle information except delete records.

7. Assign Security to Totals Tasks.

a. View Form: WorkOrderLevel3

WHY? Organization X wants everyone to be able to view the moneys spent for a work order.

8. Assign Security to Labor Rates in Global.

After information in the ACT 1000 System is set up, Global security must be set up. Although you will want to set up more each module, including each form and sub-form, we will just go through the Labor Rates Sub-form.

a. In System Configuration in Global, go to the Employees Form. Set security up so that Levels 1 and 2 can do anything, but Level 3 can only view the form - making no additions or changes. (Delete, Edit, and Add: EmployeeLevel2, View: EmployeeLevel3).

b. Go into Subforms, Labor Rates.

c. Go into Security and set it up as follows:

- Delete Records: EmployeeLevel1
- Edit Records: EmployeeLevel2
- Add Records: EmployeeLevel2
- View Form: EmployeeLevel2

WHY? Only administrators can delete labor rates. The secretaries, which handle personnel can edit, add, or view labor rates for all employees, including themselves. Level 3 Shop Employees cannot view Labor Rates at all. **Keep in mind that Labor Rate is the only field in the system where security is field-based, not form-based. In this case, Level 3 cannot only see the Labor Rates Sub-form, but Labor Rates in work orders or totals.

9. Set up SiteNet users with the appropriate Security Levels. The two modules that we dealt with in this example are Work Order and Employees. For these modules, assign the following Security Levels:

- Administrators (Level 1) -WorkOrderLevel1 and EmployeesLevel1
- Secretaries (Level 2) -WorkOrderLevel2 and EmployeeLevel2

- Shop Employees (Level3) -WorkOrderLevel3 and EmployeeLevel3.

**Use the System Security Report found in the *ACT 1000 System Configuration* module as a reference when assigning Security Levels to SiteNet Users.