

# Adminware™ for IEP — Installation and Configuration

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## Introduction

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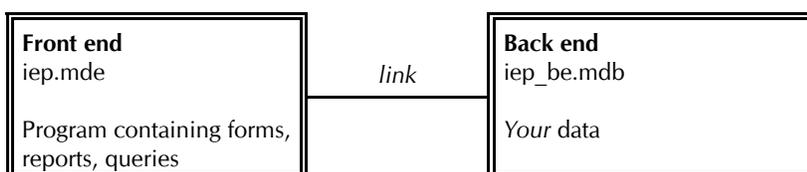
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This chapter discusses installing the *Adminware™ for International Education Program* on a stand-alone computer or on a network. It also looks at configuring the program by customizing various settings within the program.

Adminware™ for IEP program<sup>1</sup> consists of two parts:

- ▶ *front end*: the ‘program’ portion that contains the forms, reports, queries, program codes, etc. that makes the program work. The name of this file is **iep.mde**.
- ▶ *back end database*: the ‘data’ portion that contains the tables and the data that your office generates. This one file contains dozens of tables used to store your data. The tables within this database are *linked* to the front end. The name of this file is **iep\_be.mdb**.

The program has been split into these two files so that program updates can be distributed without affecting any of your data.



This part resides on *each* computer on the network, in a folder called c:\iep

On a stand-alone system, this file will reside in the same folder as the front end: c:\iep

On a network, this file will reside in a shared folder on the server, such as f:\iep

Some school divisions refer to their program as the International **Student** Program (ISP) while some call it the International **Education** (IEP) Program.

In these notes I may refer to it either way.

In any case, the actual Microsoft database file names are all called “iep”.

### Network environment:

In a network environment, it is strongly recommended that the front end file, and any images, icons, etc., be stored on each user’s individual computer. If this is not “possible”, these files can be stored on the shared network drive with everyone running the same set of files ... note that this will result in slower day-to-day operation of the database.

Users should have full access to all files (i.e. the entire folder) on the network shared folder. That is, full write, read, look, and any other rights that are available.

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<sup>1</sup> “program” is not quite accurate. This is really a customized Microsoft Access *database*. The forms, reports, queries, etc. is certainly developed as a “program”, but Access is the actual program that allows us to view this *database*. However, we typically refer to this customized database as a *program*.

## Installation



Stand-alone	Network
<p>It is recommended that <i>both</i> the front end (iep.mde) and the back end (iep_be.mdb) be installed in the same folder, called simply <i>iep</i>.</p> <ol style="list-style-type: none"><li>① Create a folder on your hard drive (likely <b>C:</b>) and call it <b>iep</b></li><li>② Copy the program files into this folder. The files will consist of:<ul style="list-style-type: none"><li>▶ iep.mde</li><li>▶ iep_be.mdb</li><li>▶ iep.ico</li><li>▶ &lt;image&gt;.bmp<sup>1</sup></li> <li>▶ any logo/images to be used in the program</li></ul></li><li>③ Create a shortcut on your desktop to run the program. Change the icon to be iep.ico.</li><li>④ Run and configure the program as noted on pages 4 and 6.</li></ol>	<p>The back end (iep_be.mdb) will be installed on a network server; the front end (iep.mde) will be installed on <i>each</i> workstation.</p> <ol style="list-style-type: none"><li>① create a folder on your network server (likely <b>F:</b>) and call it <b>iep</b></li><li>② Copy the program files into this folder. The files will consist of:<ul style="list-style-type: none"><li>▶ iep.mde</li><li>▶ iep_be.mdb</li><li>▶ iep.ico</li><li>▶ &lt;image&gt;.bmp<sup>1</sup></li> <li>▶ any logo/images to be used in the program</li></ul></li></ol> <p>On <i>each workstation</i>:</p> <ol style="list-style-type: none"><li>③ Create a folder on your hard drive (likely <b>C:</b>) and call it <b>iep</b></li><li>④ Copy the program file, icon, and any images from the network folder to the local folder. [Although you could point the program to find these files from the network, this will cause a slight delay in loading and running the program due to the required network access.] The files will consist of:<ul style="list-style-type: none"><li>▶ iep.mde</li><li>▶ iep.ico</li><li>▶ &lt;image&gt;.bmp<sup>1</sup></li> <li>▶ any logo/images to be used in the program</li></ul></li><li>⑤ Create a shortcut on your desktop to run the program. Change the icon to be iep.ico.</li><li>⑥ Run and configure the program as noted on pages 4 and 6.</li></ol>

<sup>1</sup> the <image>.bmp will be your division's logo that will appear on the Main Switchboard and on reports. There may be more one image file being used, some of which might be .JPG or .TIF file formats.

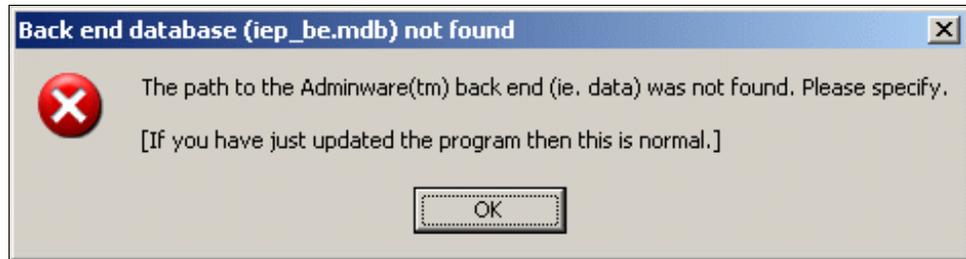
## Running, Linking

When you run the Adminware™ program (**iep.mde**), it attempts to first *link* to the data in the backend (**iep\_be.mdb**). By default, this location will be **c:\iep**.

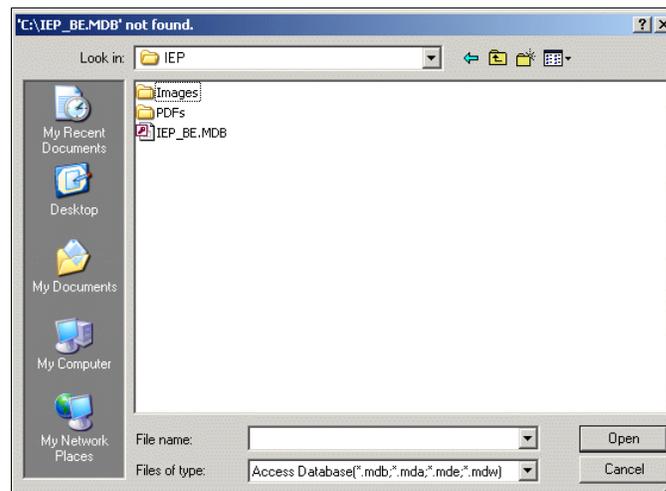
If you are in a stand-alone environment *and* you have installed the program and backend data in the **c:\iep** then *you can skip this section*.

If you have installed your *stand-alone* program in a folder **other** than **c:\iep** or you are running on a network, then the backend data (**iep\_be.mdb**) *will not* be found in the **c:\iep** folder. *Continue reading...*

The *first* time you run the program (or the first time after performing an update of the program from the Adminware website) and the backend data is *not found* (because it resides outside of the **c:\iep** folder), you will be prompted for its location. Once this location has been established and the table links have been automatically refreshed, you will not need to worry about this again ... until you do another update of the program.



Click **Ok** to continue. The following dialog box will appear (your list of files will likely be different).



You are being prompted for the **iep\_be.mdb** file.

- ▶ change the **Look in:** drop-down item to the correct folder
- ▶ select the **iep\_be.mdb** file
- ▶ Click Open to establish the new links

The Main Switchboard of the program should appear.

## Configuring Access

This section should be done only once on each computer. The screen shots are for Microsoft Access 2000, 2002, or 2003.

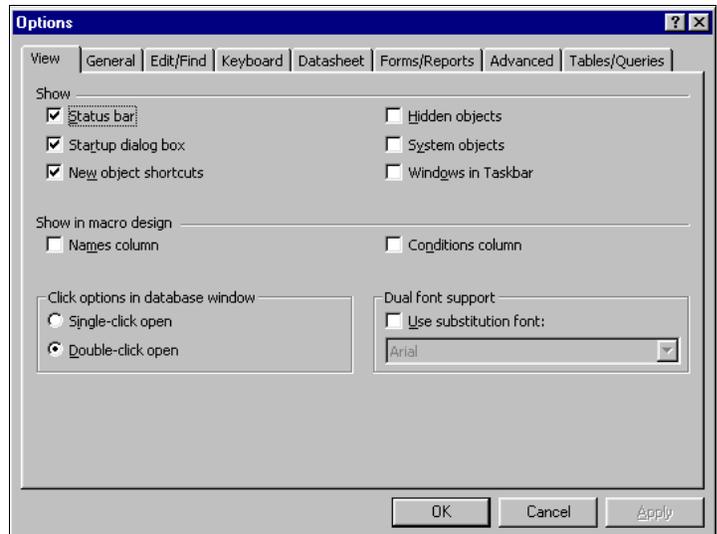
Access 2007 and 2010 have a different look and feel.

If you are using Microsoft Access 2000, 2002, or 2003...

Using the **Tools | Options** feature, we can configure certain features of Access.

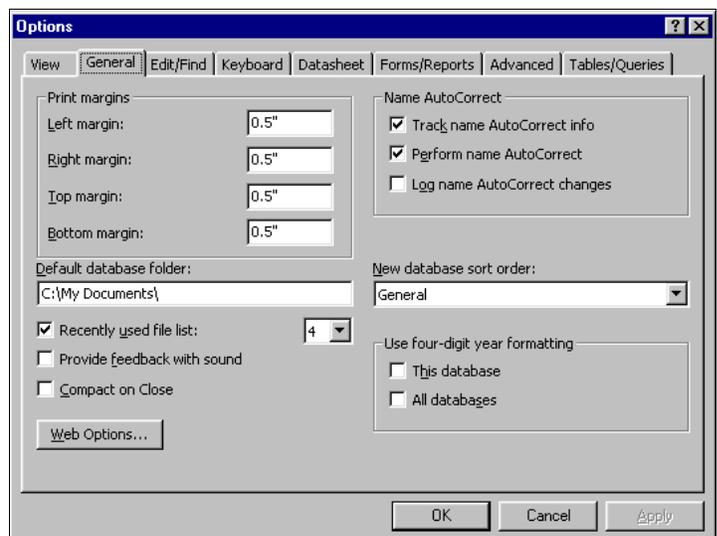
### View tab

- ▶ there is no need to have the **Windows in Taskbar** checked; instead use the **Window** pull-down menu to switch to different modules of the program.

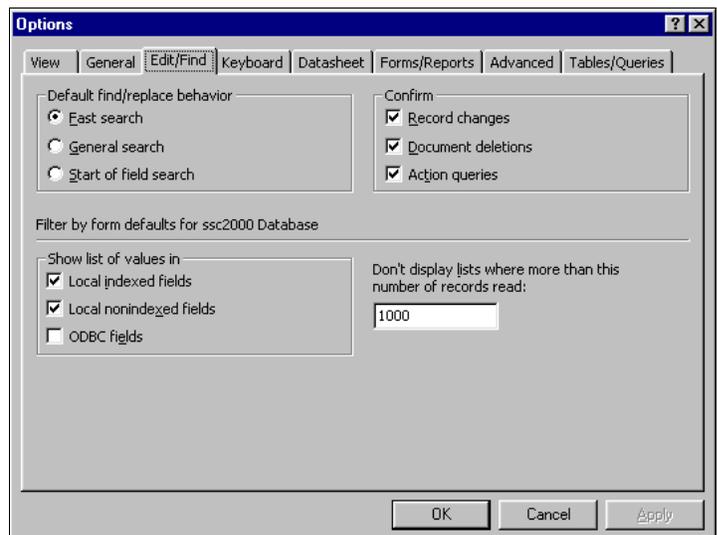


### General tab

- ▶ change the print margins to 0.5" for all four sides.

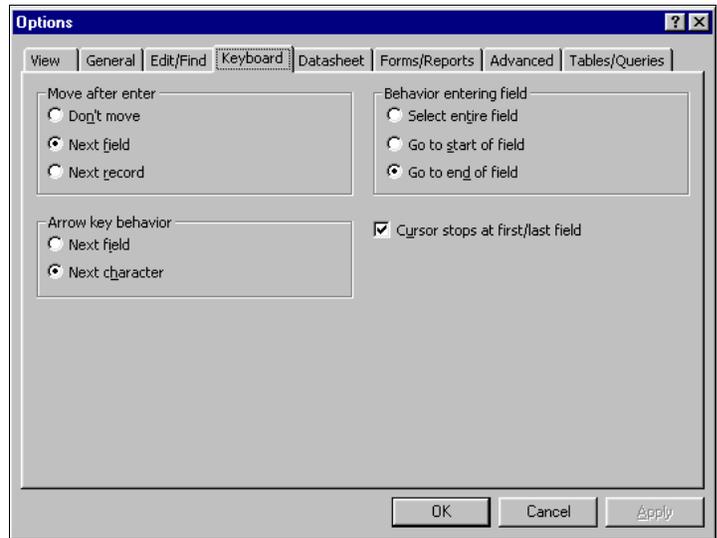


### Edit/Find tab



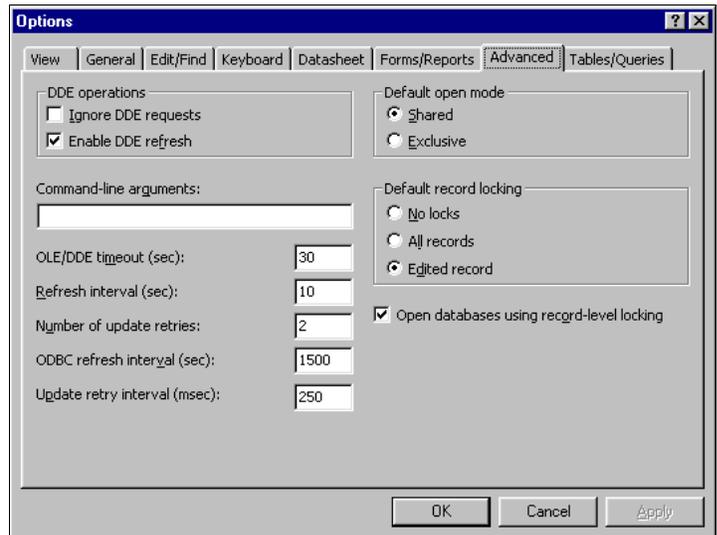
## Keyboard tab

- ▶ change the Behavior entering field selection to **Go to end of field**.



## Advanced tab

- ▶ the Default open mode must be **Shared**.
- ▶ the Default record locking must be **Edited record**.
- ▶ the **Open databases using record-level locking** must be checked.
- ▶ change the **Refresh interval (sec)**: to 10.



## Configuring Adminware™

This section should be done only once on each computer.

Configuring Adminware™ includes setting the following options:

- ▶ create user(s) and set security levels
- ▶ system-wide defaults

The *first* time you run the program, use a user id of **Demo** with a password of **Demo**. This will allow you access to the Users module where you can create and define users.

## Users

Users

Select the **Users** button from the Look-up Table module. This button is only visible if your security level for this feature is a level of 5. The pre-configured user of **Demo** has this security level.

If you delete user **Demo** or only have users whose security level for this feature is not a 5, you will not be able to gain access to this module!

The screenshot shows the 'ISP - [Users]' application window. The top half contains form fields for adding or editing a user. The bottom half contains a table listing existing users.

**User Configuration Form:**

- User Id: DEMO
- Year: 2011
- Email/Outlook: 2000
- User name: Demo
- Password: \*\*\*\*
- Printer available?: Laser
- Envelope printing?: Left
- Save button

**Security levels:**

- Student: 5
- Course: 5
- Flights: 5
- Health: 5
- Agent: 5
- Report: 5
- Fees: 5
- Homestay: 5
- Security/ Lookup: 5
- Financial rpt: 5
- School: 5

**User list table:**

UserId	UserName	Pswd	DefYear	Outlook	Ptr	Env	Std	Agent	Home	Fees	FinPnt	Flight	CrS	Health	Rpt	Sec
AV	Annelies van de Nadort	**	2011	2000	L	E	5	S	S	S	S	S	S	S	S	0
BH	Birgit Hartel	**	2011	2000	L	R	5	S	S	S	S	S	S	S	S	0
CB	Cheryl Buhler	**	2011	2000	L	E	5	S	S	S	S	S	S	S	S	0
▶ DEMO	Demo	****	2011	2000	L	L	5	S	S	S	S	S	S	S	S	5
JJ	Jackie Juckes	**	2011	2000	L	E	5	S	S	S	S	S	S	S	S	5
JW	Joel Weiss	**	2011	2000	L	E	5	S	S	S	S	S	S	S	S	0
KR	Kirsten Ramsay	**	2011	2000	L	E	5	S	S	S	S	S	S	S	S	5
ZZ	Robin Harris	****	2011	2000	B	E	5	S	S	S	S	S	S	S	S	5

Figure 10 Users

The top half of the screen is used to add new users and edit existing users.

The datasheet listing in the bottom portion of the form provides a quick list of which users exist for this program — the information in this part of the form cannot be modified.

## User Fields

Here are the fields used by each user.

User id	Up to 5 characters, unique to each user. It is this id that the user will require to enter into the program.	User Id DEMO
User name	What is the full name of this user.	User name Demo
Password	Up to 10 characters. Asterisks will appear as you enter the password. The user requires this password, along with their user id, to enter into the program.	Password ****
Year	This drop-down list identifies the default school year, as in <i>2004</i> –2005. It can be different from other users, depending on the needs of each user.	Year 2004
Email/Outlook	A drop-down list that identifies the version of Microsoft Outlook that this specific user has installed on <i>their</i> computer.	Email/Outlook 98
Printer available?	What is the default printer setting (in Microsoft Windows) for this user?	Printer available? Laser
Envelope printing?	If this user prints envelopes, how are they positioned in the printer?	Envelope printing? Envelope #10

## Security levels

Security levels							
Student	<input type="text" value="5"/>	Course	<input type="text" value="5"/>	Flights	<input type="text" value="5"/>	0 - no access	Any changes to 'Security' requires the user to sign in again in order to see the new values.
Health	<input type="text" value="5"/>	Agent	<input type="text" value="5"/>	Report	<input type="text" value="5"/>	1 - look only (no edits)	
Fees	<input type="text" value="5"/>	Homestay	<input type="text" value="5"/>	Security/	<input type="text" value="5"/>	2 - add (no edit/delete)	
Financial rpt	<input type="text" value="5"/>	School	<input type="text" value="5"/>	Lookup		3 - add and edit (no delete)	
						4 - add, edit, delete	
						5 - full access	

There are six levels of security that can be assigned to *each* module for *each* user:

Level	Ability
0	access is denied to the specific module
1	can only look at data; no editing is allowed
2	can look and add new data; cannot edit
3	can look, add new data, and edit existing information
4	all of the above, and delete
5	full access within the specific module

The security level for “**Security**” must be 5 in order to have access to the Users module.

## System-wide defaults

There are various system-wide defaults that need to be configured. Although most of these will be set only once, others will be changed periodically.

From the Main Switchboard, choose the **Look-up Tables** button. This is the part of the program where the various values displayed in drop-down lists are maintained (that is, *look-up tables*).

### Look-up Tables

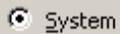
Figure 20 Look-up Table form

You can browse the various look-up tables by clicking on the appropriate radio button from the Table list on the left side of the form. All of these tables will have some amount of default values. In *many cases* you will *not* need to modify these.

### System defaults

With that said, the **System** defaults are what you will want to peruse, and perhaps configure, at this time. This option presents a *eight*-tabbed control:

### Defaults



*The System defaults can be changed at anytime.*

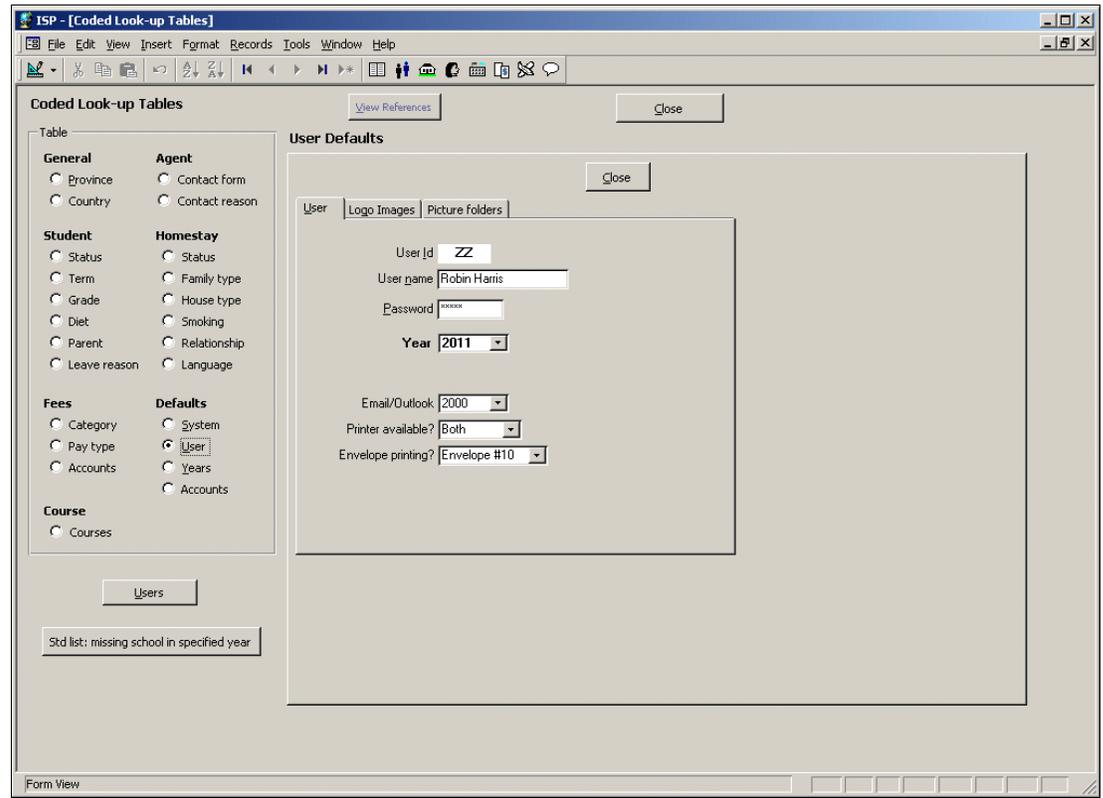
It is a good idea to become familiar with many of them at this early stage of using the program. In this way you will know where to go to change the “behavior” of your program as time goes on.

## User defaults

A user can change certain 'user' defaults at anytime via this part of the program ... but not their security levels (that is done only by someone with the highest security level in a different part of the program — see page 6).

A user's settings are first established by a system administrator via the Users module. This creates the user and their initial defaults (see page 6).

An individual user can modify several of their default setting via the **Look-up Tables** button from the Main Switchboard; then select the User 'radio button' on the Codes(1) tab.

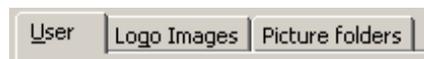


The screenshot shows a window titled "ISP - [Coded Look-up Tables]". The main area is divided into two panes. The left pane, titled "Coded Look-up Tables", contains a "Table" section with several categories of radio buttons: "General" (Province, Country), "Agent" (Contact form, Contact reason), "Student" (Status, Term, Grade, Diet, Parent, Leave reason), "Homestay" (Status, Family type, House type, Smoking, Relationship, Language), "Fees" (Category, Pay type, Accounts), "Defaults" (System, User, Years, Accounts), and "Course" (Courses). The "User" radio button under "Defaults" is selected. Below this pane is a "Users" button and a status message: "Std list: missing school in specified year". The right pane, titled "User Defaults", contains a three-tabbed control with "User", "Logo Images", and "Picture folders" tabs. The "User" tab is active, showing fields for "User Id" (ZZ), "User name" (Robin Harris), "Password" (masked), "Year" (2011), "Email/Outlook" (2000), "Printer available?" (Both), and "Envelope printing?" (Envelope #10). Both panes have "Close" buttons.

Figure 23 User defaults form

### User defaults

User defaults are configured via a *three*-tabbed control:



*The User defaults can be changed at anytime.*

It is a good idea to become familiar with many of them at this early stage of using the program. In this way you will know where to go to change the "behavior" of your program as time goes on.