A Network User's Guide.
Simple steps for Setting Up and Getting Started

Introduction

Networking MyBusiness Complete Manager creates a whole range of new benefits for your growing business and gives you control of your whole office.

It allows:

- Multiple user access to diaries, contacts and even financial information.
- A range of user access rights for different staff security requirements

MyBusiness has been designed to make networking for multiple users as easy as possible.

All you need is to have:

- 2 or more computers linked by a simple office or Local Area Network (LAN)
- A MyBusiness multi user network upgrade license for your MyBusiness Complete Manager software.

> **Note: You can have a single user system on a multi computer network!**
>
> If you work alone, but use more than one PC (perhaps you have two offices or a Business and Home Office) you can set up a "network" on a single user license.
>
> Only you would be able to use the system, but you could use it from multi locations.

System Requirements

To operate the MyBusiness Network program in a multi-user environment each computer that requires access to the program needs to be part of a 'peer-to-peer' (computer to computer) network. The user will need to have set up such a network prior to configuring the MyBusiness Network program for multi-users. This will typically be a LAN or WAN (wide area network) configured to use the TCP/IP network protocol.

The MyBusiness Network product will be installed on a single computer – nominated the 'MyBusiness Server'. Each 'Client' or computer that wishes to share the MyBusiness program must have unrestricted access to the folder (and sub-folders) on the MyBusiness Server. It is not required that each Client computer has access to each other.

The requirements for the MyBusiness Network program remain exactly the same as for the standard product. Each Client simply requires that Microsoft® Internet Explorer Version 5 or above is installed. A copy of this program can be found on the MyBusiness Complete Manager CD.

Getting networked in 6 simple steps

This guide covers the 6 steps you will need to take to get your software networked: -

1. Install the programme CD
2. Set up user (client) PCs,
3. Input the License Key
4. User Rights and Sharing Diaries
5. Adding, deleting and amending users
6. Begin using MyBusiness Network!

1. Installation

Note: You will only need to install the MyBusiness Network on the nominated MyBusiness Server computer. The MyBusiness Server does not need to be the office network server itself - it can be any computer on the office network that satisfies the System Requirements.

- **Installing the MyBusiness Server**

Follow the installation instructions provided with the MyBusiness product. Insert the MyBusiness Complete Manager CD into the CD Drive and allow the installation program to start up automatically. You will be prompted through a number of screens at the end of which there will be a 'MyBusiness' and a 'MyBusiness Demo' shortcut on the computer desktop. Additionally, there will be a MyBusiness menu folder created under the Start → Programs menu (for users of Apple Mac, please refer to the section below 'For Mac Users').
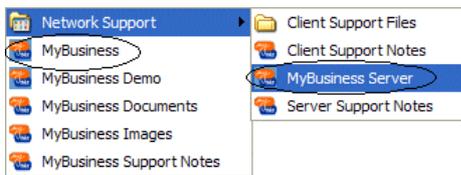
The program can be started in one of two ways. If it is required to use the program from the MyBusiness Server computer, the program is started in the normal way, by either selecting the MyBusiness desktop shortcut or the MyBusiness menu item shown to the far left.

If the program is not going to be used from this computer then the MyBusiness Server menu shortcut should be selected. This only starts program. The Database Server remain open while users access the the MyBusiness database Window is displayed. This must program.
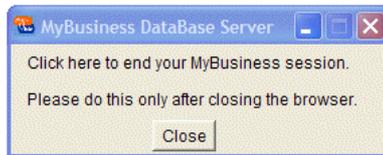
2. Installing additional Clients (PC's)

A Client will be able to access the program using the browser installed on their computer. To install a Client, it is necessary to copy two files from the server. These can be found under the Client Support Files folder that has been installed previously. Select Start→ Programs→ MyBusiness → Network Support → Client Support Files. This will display a Window containing the two required files.
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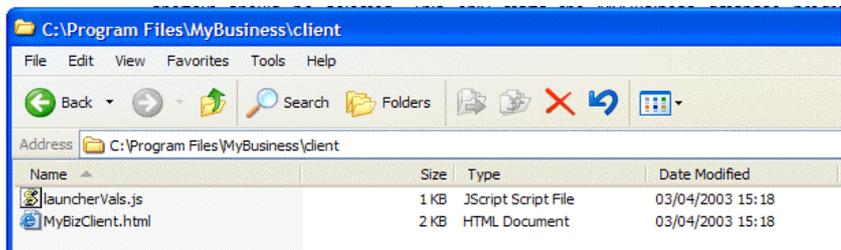
The two files (launcherVals.js and MyBizClient.html) can be either copied onto a floppy disk and then transferred onto the new Client computer desktop or perhaps copied to a common area of the network and copied to the new Client desktop. This process should be repeated for each new Client required to be part of the MyBusiness Network.

- **For Mac Users**

The MyBusiness program is designed to operate on both the PC and Mac systems. The fundamentals of installing, setting up and configuring the program remain identical, but the folder set up and navigation will follow MAC standards. In order for the MyBusiness Network program to operate, any MAC on the office network must adhere to the System Requirements stated above.

3. Licensing the product and setting your administrator password

Once the program has been installed and the Client computers have been set up, the next step is to start the MyBusiness Server by double clicking on the MyBusiness desktop icon. If this is the first time the program has been started it will be necessary to Licence the program.

After the program has loaded, select 'Continue'. A screen is displayed requesting a Licence number. Enter the 20-digit licence code provided. Select 'Continue' and the next screen will request a user name and password.

Note this is the username and password associated with the 'Administrator'. The Administrator will be the only person able to add, amend and delete additional Clients and will have full access to the entire program. The next screen identifies the Administrator to the system and sets up information about the Company.

After completing the information on this screen the set up of the program is complete. The program should then be configured for the individual Company (see The Six Steps to Setting Up MyBusiness Complete Manager for further information on ensuring the product is tailored for use).

4. User Rights and Sharing Diaries

Choosing how to configure the different users of the program will depend largely on their role in the organisation.
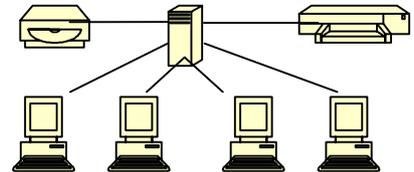
For instance, the Managing Director may only want to share diaries with a Personal Assistant, but require access to all other parts of the product. Similarly, the Sales Director may want to share the diary with the Sales team, but not require access to the bookkeeping data. This can be quite simply extended to a number of roles including Finance (Bookkeeping), Manufacturing (Jobs and Projects), Marketing (Mailings) and Administration (Diary). It is worthwhile reviewing the roles each member of the network first to simplify the set up process.

- **Example user access rights**

MyBusiness allows you to select a number of different levels access right for different staff. The software works on the basic principle of allowing options to View, Create, Amend, or Delete various key functions within MyBusiness. The diary works slightly differently and allows the diary owner to select whom he wants to share his diary with.

For instance you might want some staff to be able to share your diary but not others. You might want some staff to be able to view financial information like invoices, but not amend it, and not view the key financial reports.

A salesman might need to view contact details, raise contacts, and share other sales diaries for raising appointments – but not view directors' diaries. Crucially, prior to a sales visit, a salesman can view the contact history of the customer to see if there are any issues to resolve, view a task list of actions completed or to complete for that customer, and view a statement of invoices paid and outstanding. The salesman might not be required to view financial reports.

A finance clerk might be required to amend and raise invoices and financial information, but not view financial reports or share diaries. They might not be allowed access to contacts and projects. A secretary might have access to viewing and amending all diaries and projects, but not have access to any other part of the software. A Director might have access to all parts of the software.

- **Sharing Diaries**

One of the benefits of networking the MyBusiness product is that it is possible to share the diary with other users. Each user can decide whom they share the diary with. In order to make use of this facility, each user sets up if they want to share their diary and selects from a list of possible users those that will be able to

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view their diary. This feature can be accessed from the Diary and Tasks Page Preferences or from the Home Page, choose Preferences → Preferences → diary & Tasks Preferences.

Select the list of users to share the diary with. Once this has been done, the user can select the diary to view from the main Diary Page.

Only the diaries that users have elected to share will appear in the list – selecting one of these will display the users diary. Selecting 'All' will display all the users diaries simultaneously. By choosing to colour code the Users, each diary will be shown in a different colour.

4. How to Add Users

Before a User can be added to the system, the Administrator must first add them as a Contact categorised as an Employee (Got to Contacts, Add A Contact, select Employee as the Contact Type). Once this has been done, go to the User Administration Screen by selecting 'Admin' from the Home Page followed by 'User Administration'. The User Administration Main Page screen is displayed.

This screen displays who is currently using the system plus any employees that have been set up and available to be added as a user (it isn't necessary for all employees to be users). To add a user either choose 'Add User' from the left hand link or select one of the available employees. The User Administration Enter User Detail screen is displayed.
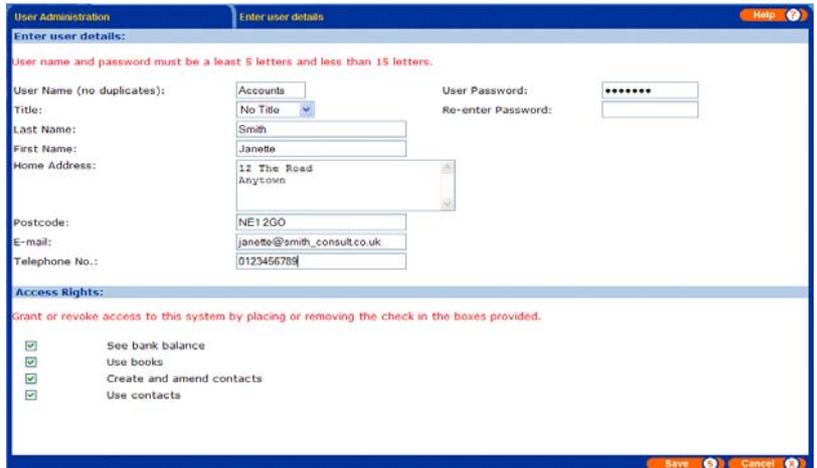
Choosing 'Save' will add this employee as a user. Note the options available to customise those parts of the program that access will be granted to. This is discussed below under **Amend User**.

• **How to Delete Users**

Deleting a user is simply a case of choosing 'Delete User' from the User Administration menu. Again, select the user to delete from the available list and choose **'Save'**. Only the user will be deleted – the Contact will remain within the database.

• **How to Amend Users**

Once a user has been added, the Administrator can customise the parts of the program that access is granted to. From the User Administration menu described above, choose 'Amend User'. The following screen is displayed:

Select the User to amend. The next screen will be identical to the Add User screen above. From here, select the accesses required for the user and choose **'Save'**.

Use this feature to customise what each user is allowed access to. For instance if the user should not have access to any Bookkeeping information, uncheck this item for this user. Any combination of the access rights displayed may be selected. In this way it is possible for example to only permit a user to view the diary.

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6. Starting the "Client"

Now that the users have been set up (additional users can be defined at any time – up to the limit permitted by the licence), Clients can 'log on' to the system by double clicking on the 'MyBizClient.html' icon previously copied to the Client computer desktop (c.f. Installing Additional clients). The following screen will be displayed:

MyBusiness

Please Wait. Connecting to MyBusiness Server on MBL-01 .

As soon as the connection has been established, the usual Welcome screen will be displayed. The user will then 'log in' using the appropriate username and password allocated by the Administrator. The user can continue to use the program with the access rights attributed to them. Once the user has finished using the program, the browser is closed.

- **Backing Up and Restoring Your Data**

It is always good practice to backup (save a copy) of your important business information. Each time the Server is closed down, a copy of the data is automatically saved in the MyBusiness/backup folder of the installed program. It is a good idea to take a regular backup of the data and store this away from the site of the program (off-site). This can be used in case of catastrophic failure of the system that requires a data restore. The backup / restore functions can be found under the 'Admin' menu from the Home Page.

A guide for Networking with more illustrations is available. Please contact MyBusiness Support on 0845 1 20 30 40 or email support@mybiz.co.uk to request a copy.