

Dealing With Data  
**Order Management System**  
for MS Access

**Database Administrator's Guide**

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# Deployment

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## Downloading and Installing the Trial Version

The trial version is time limited for 30 days (after which you will no longer be able to access the system). The trial version is intended to be installed on a single PC using [Deployment Options 1 or 2](#). Here are the instructions for downloading and installing the trial version of *DWD Order Management System for MS Access*:

- a) Click the Download Now link on the [Free 30 Day Trial Webpage](#).
- b) Click SAVE to save the installer file
- c) Locate the installer file you downloaded in stage a. The file name is **OrderManagement.msi**
- d) Open the installer file and follow the instructions on the installation wizard. (NB – please choose the TYPICAL setup type when prompted).
- e) Your *DWD Order Management System for MS Access* can now be access via a desk-top icon, or by clicking the Windows START BUTTON, followed by ALL PROGRAMS.

### *After the Trial*

If would like to purchase the full version of the software, please go to the [Order Management System webpage](#) and click BUY NOW.

## Deployment Options

When you come to deploy the DWD Order Management Database, there are three options.

1. Install as a stand-alone database on a desktop computer. This is fine as long as the system is just going to be used by one person at a time (like in the trial version).
2. Install as a single file on a local area network to be used by simultaneous users. This option is not recommended due to performance issues and the increased chance of database corruption. If you do choose this option, please make sure you make daily backups, and keep the number of concurrent users to a minimum (eg no more than five).
3. Install the Client/Server version of the software whereby the Order Management System is divided into a *Front End* (Client) and *Back End* (Server). The Back End Server is stored on the network, whilst the Front End Clients' are stored on the users' desktop computers'.

If the database needs to be accessed simultaneously by a number of users, the third option is recommended.

## Deploying the Stand -Alone Version

- 1.1. Download and save the *Stand-Alone Version Installation Package*. Do this via the STAND ALONE VERSION link sent to you in the above mentioned email.
- 1.2. Locate the installer file you downloaded in stage 1.1. The file name is **OrderManagement.msi**
- 1.3. Open the installer file and follow the instructions on the installation wizard. (NB – please choose the TYPICAL setup type when prompted).

Your *DWD Order Management System for MS Access* can now be access via a desk-top icon, or by clicking the Windows START BUTTON, followed by ALL PROGRAMS. The file is called **OrderManagement.accdb**, and is located in a folder called ... **Documents\order\_management\_system**. If you want to access the database NAVIGATION PANE, please press the SHIFT key when you open the Order Management System. It is not advisable to disable this SHIFT KEY facility for the stand-alone version (doing so will make it impossible for you, DWD, or any third party Access Developer, to access the database design features in the future).

## Deploying the Client/Server Version

The process for deploying the Client Server Version of the software can be broken down into three separate stages.

1. The first stage involves downloading and installing both the front and back end installer packages. To do this you will need two download links, a username, and a password. These are sent to you by email after purchasing the software.
2. Once you have installed the front and back end files, you should make a copy of both, and retain the originals. You may then save the Back End copy to a location on the network. This should be somewhere all the Front End files have access to it.
3. Prepare the Front End Client so it can access the Back End Server. You may then make a number of copies of the front end client and install them on each users' computer.
4. Secure the Font End Client. This involves taking a couple of measures which ensure front end users are not able to alter or modify the front end database design. (NB - The back end database is already encrypted and protected with a password).

### Stage One – Download and Installation

- 1.4. Download and save the Back End Installation Package. Do this via the BACK END SERVER link sent to you in the above mentioned email.
- 1.5. Download and save the Front End Installation Package via the FRONT END CLIENT link.
- 1.6. Locate the installer files you downloaded on your computer. The file names are **OrderManagement\_be.msi** and **OrderManagement\_fe.msi** for the back and front end's respectively.
- 1.7. Open each installer file in turn, and follow the instructions on the installation wizard. (NB - please choose the TYPICAL setup type when prompted).
- 1.8. This will install the two *Front* and *Back End* Order Management System files (**OrderManagement\_fe.accdb** and **OrderManagement\_be.accdb**) in a folder called ... **Documents\order\_mangement\_system**.

### Stage Two – Make a Copy of the Front and Back End files

- 2.1 Once you have installed the front and back end files, you should make a copy of both, and retain the originals. You may then save the Back End copy to a location on the network. This should be somewhere all the Front End files have access to it. Please note that the back end database is password protected (see email for database password).

### Stage Three – Link the Front End Database to the Back End Tables

- 3.1 Open the Front End file whilst holding down the SHIFT key on your keyboard. This opens the front end database at the Navigation Pane.
- 3.2 Click the ACCESS icon (located in the IMPORT group of the EXTERNAL DATA ribbon). This opens the GET EXTERNAL DATA dialog form.
- 3.3 Click the option button that says “LINK TO DATASOURCE BY CREATING A LINKED TABLE”.
- 3.4 Next click the BROWSE button and navigate to the location of your Back End Order Management System file (ie the copy prepared in stage 2.1 above).
- 3.5 Select the Back End file name and click OK.
- 3.6 You will then be prompted for the Back End password (see email). When this has been accepted a new form opens listing all the Back End tables.
- 3.7 Click SELECT ALL and then OK. This will then link your front end database to the back end tables.

### Stage Four - Securing the Front End Client

Two measures need to be taken here in order to prevent users from altering the front end database design. These involve disabling the SHIFT key bypass, and then converting the front end file to accde file format.

- 4.1 Open the front end database whilst holding down the shift key (this bypasses the VBA code which runs at start up thereby bypassing this level of security).
- 4.2 Click the VISUAL BASIC icon (located in the MACRO group of the DATABASE TOOLS ribbon). This opens the VBA Editor.
- 4.3 Select IMMEDIATE WINDOW from the VIEW menu. This opens the Immediate Window, within which you can enter Visual Basic commands for immediate effect.
- 4.4 Enter the following command to disable the Shift bypass: **ap\_DisableShift**
- 4.5 Close the VBA Editor.
- 4.6 Click the MAKE ACCDE icon from the DATABASE TOOLS group of the DATABASE TOOLS ribbon.
- 4.7 Click SAVE and click QUIT SYSTEM when the new database opens at the login screen.

This new accde file can now be used as the secure front end database for the *DWD Order Management System for MS Access*. You may copy and distribute this file to all front end users within your organisation.

### General Information on the SHIFT Bypass Facility

When you first download and install the Order Management System, it is necessary to hold down the SHIFT key (as the database opens) in order to access the Navigation Pane, VBA Code and any of the MS Access Design features. This bypasses the VBA code which hides the Navigation Pane when the database opens. Moreover, the Order Management System is also set up so that users cannot use the Right Mouse Click to access the short cut menu (and then form design view) or change the ACCESS OPTIONS via the MS OFFICE button. Holding down the shift key allows you, the database administrator, to access these features.

When you come to distribute the Order Management System to users (in a multi-user environment), it is important to disable the SHIFT Bypass feature. This can be done following the instructions mentioned in the previous section.



# Database Administration (DBA)

## Multi-User System

The DWD Order Management System is designed to operate in a multi-user environment. In so order to facilitate this, separate password protected user accounts are supported. These are created and managed via the Database Administration (DBA) Dashboard. To access this Dashboard you must have DBA permissions. When the DWD Order Management System is first purchased there is an existing DBA account from which you can begin your database administration. Here are the account details to login.

**User Name** = User1

**Password** = password

The password should be changed before your Order Management System goes live.

## The DBA Dashboard

The DBA Dashboard is opened by clicking the DBA DASHBOARD command button from the MAIN SWITCHBOARD. Alternatively, you may open the DBA Dashboard via the DATABASE ADMINISTRATION icon on the DATABASE ADMINISTRATION ribbon. Please note that this button or icon will only appear when you are logged into the system with a DBA user account and permissions.

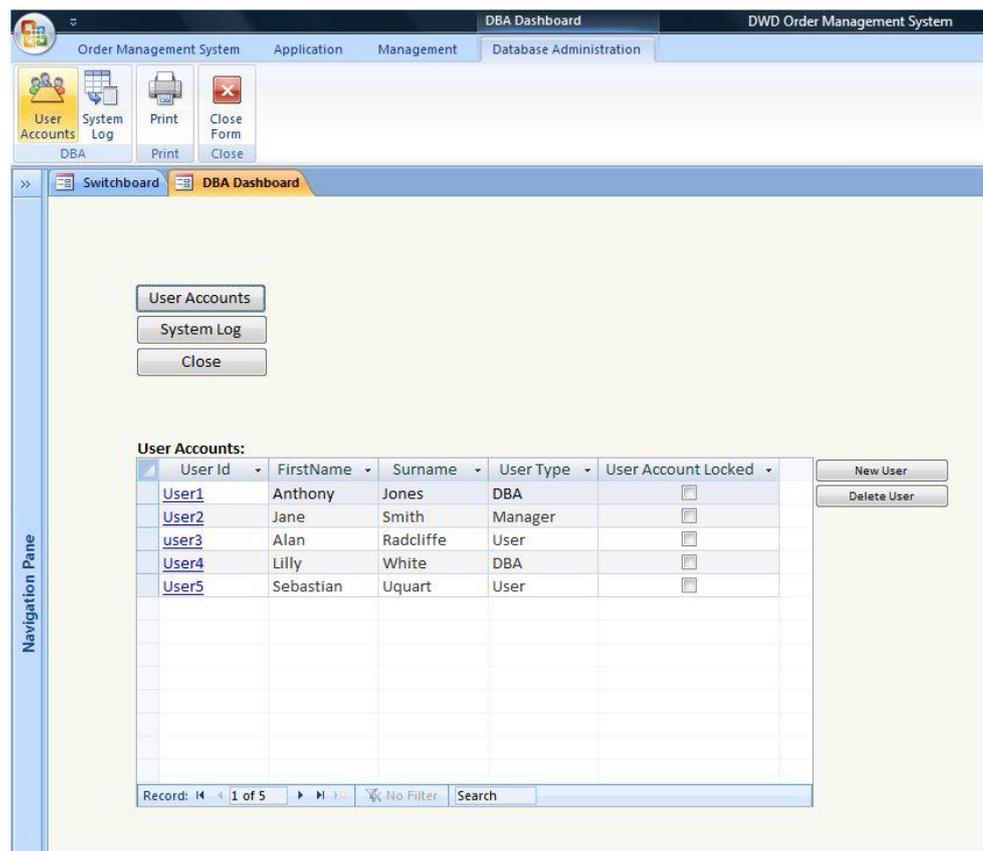
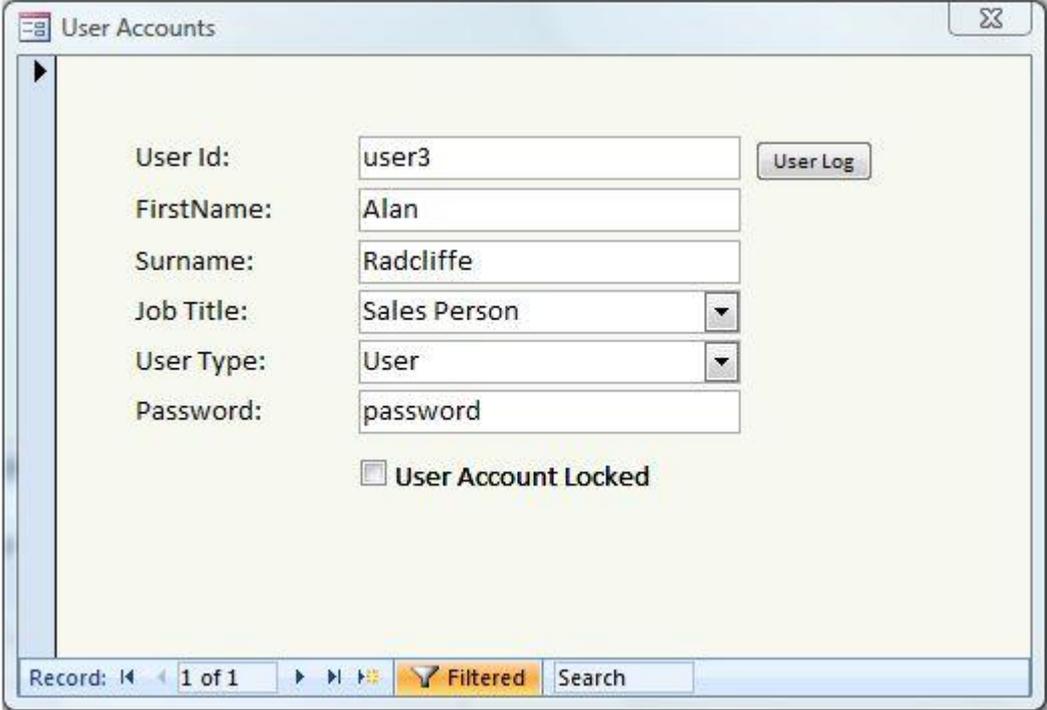


Figure 1: The DBA Dashboard. Note the USER ACCOUNTS subform in the middle.

## User Accounts

User Accounts are created and maintained via the USER ACCOUNTS form. The easiest way to navigate to an existing user is via the USER ACCOUNTS subform on the DBA DASHBOARD (see figure 1 above). Simply click on the USER NAME link to open the required user account record. To create a new user account, simply click the NEW USER command button to the right of the Subform. To delete a user account simply highlight the record in the subform, and then click the DELETE button which is located under the NEW USER button on the right. NB As an alternative to deleting you may wish to tick the USER ACCOUNT LOCKED check box on the relevant record of user accounts form. This is a preferable solution as deleting a user account will also delete any System Log record belonging to that account.

User Accounts may also be accessed via the USER ACCOUNTS command button on the DBA DASHBOARD, or the USER ACCOUNTS icon on the DBA ribbon. The form then opens at the first record in the user accounts table. The NAVIGATION BUTTONS may be used to move through each of the user records.



The screenshot shows a web-based form titled "User Accounts". The form contains the following fields and controls:

- User Id: user3
- FirstName: Alan
- Surname: Radcliffe
- Job Title: Sales Person (dropdown menu)
- User Type: User (dropdown menu)
- Password: password
- User Account Locked
- User Log button

At the bottom of the form, there is a navigation bar with the following elements:

- Record: 1 of 1
- Navigation icons (back, forward, search, etc.)
- Filtered (dropdown menu)
- Search (input field)

Figure 2: The USER ACCOUNT form.

## Users Types and Permissions

When you create a new user account, there is a field to select a USER TYPE from a drop down list. There are three types to choose from, each of which has its own set of permissions: these are DBA, MANAGER, and USER. The DBA user type allows access to the whole of the Order Management System including the DBA Dashboard and Management Reports. The MANAGER user type allow access to all system apart from any DBA related features, but *does* allow access to the MANAGEMENT reports. The USER account type allows access to all features apart from those which are DBA or Management related.

## System Log

System events such as user login's, customer record creations, and order confirmations etc are logged in the system log. This can be accessed via the SYSTEM LOG button of the DBA DASHBOARD.



EventLogId	EventDate	UserId	EventId	EventName	OrderId	CustomerId
2182	28/02/2012 09:32:24	user1	7	Issued Invoice	234	120
2181	28/02/2012 09:31:58	user1	6	Dispatched Order	256	299
2180	28/02/2012 09:31:53	user1	7	Issued Invoice	256	299
2179	28/02/2012 09:31:51	user1	5	Confirmed Order	256	299
2178	28/02/2012 09:31:47	user1	4	Issued Quote	256	299
2177	28/02/2012 09:31:31	user1	3	Created New Order Record	256	299
2176	28/02/2012 09:30:30	user1	7	Issued Invoice	255	299
2175	28/02/2012 09:30:28	user1	6	Dispatched Order	255	299
2174	28/02/2012 09:30:26	user1	5	Confirmed Order	255	299
2173	28/02/2012 09:30:13	user1	3	Created New Order Record	255	299
2172	28/02/2012 09:23:26	user1	7	Issued Invoice	254	299
2171	28/02/2012 09:23:18	user1	6	Dispatched Order	254	299
2170	28/02/2012 09:22:52	user1	5	Confirmed Order	254	299
2169	28/02/2012 09:22:18	user1	3	Created New Order Record	254	299

Figure 3: The SYSTEM LOG.