

Advanced Features for the Manager and EBMS Admin

Engage 2019
EBMS User Conference

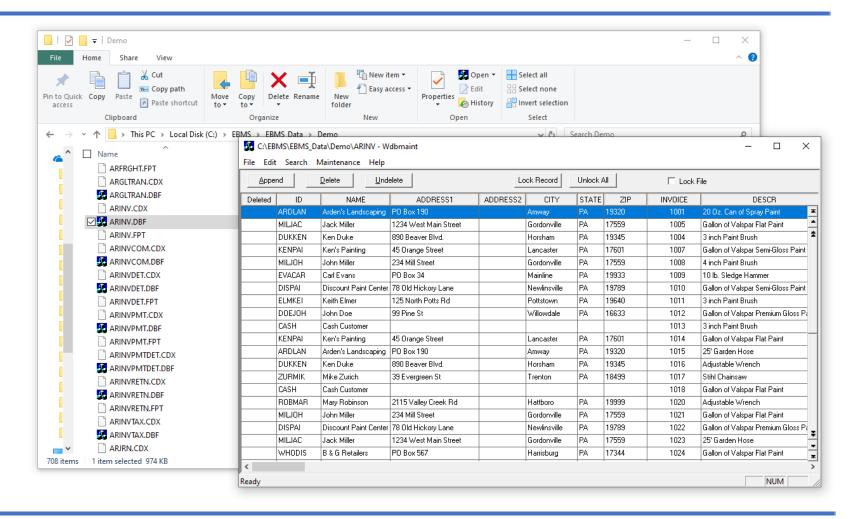
Nathaniel Gingrich

COO, EBMS Program Manager, and EBMS Client



What is EBMS?

- Data!
- Data!
- Data!
- A Big Calculator





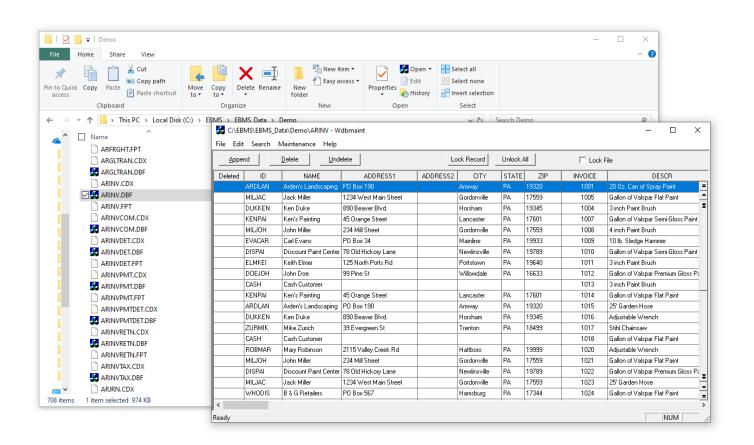
The EBMS Data Server

Caring for your most valuable EBMS asset—DATA



Securing EBMS data

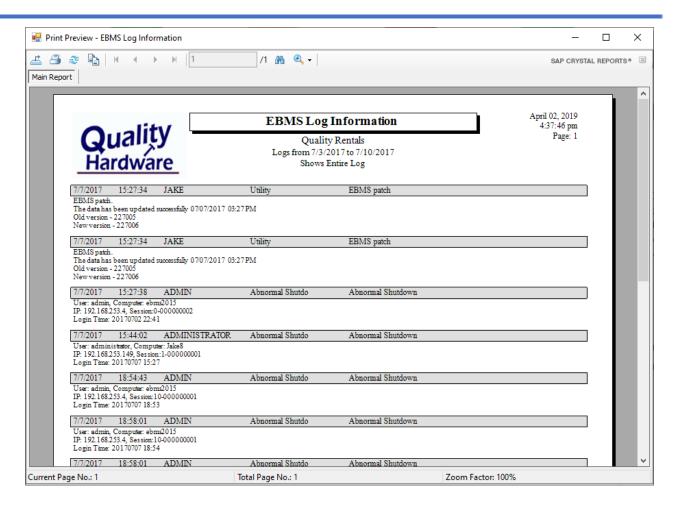
- EBMS Client/Server (software)
- EBMS Data Server (computer)
 - Do not share the folder the EBMS Data lives in.
- Named EBMS user logins
- Backups
 - In-house
 - Cloud





Monitoring EBMS Logs

- EBMS Log Information Report
 - Who did what?
 - Who is experiencing bad network connections?

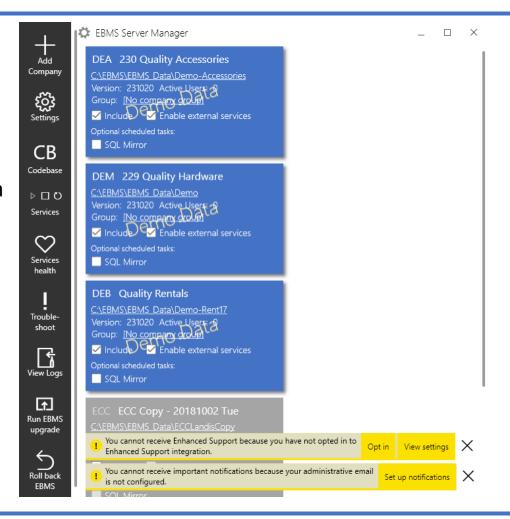




EBMS Server Manager

- The "Go-to" Admin tool (EBMS 8.1+)
 - Installed on the EBMS Data Server
 - Manages all the connections to the data
 - Checks for and downloads EBMS updates/upgrades
 - Notifies the EBMS Admin of incidents
 - Sends log info to Eagle Business
 Software for proactive fixes, etc.

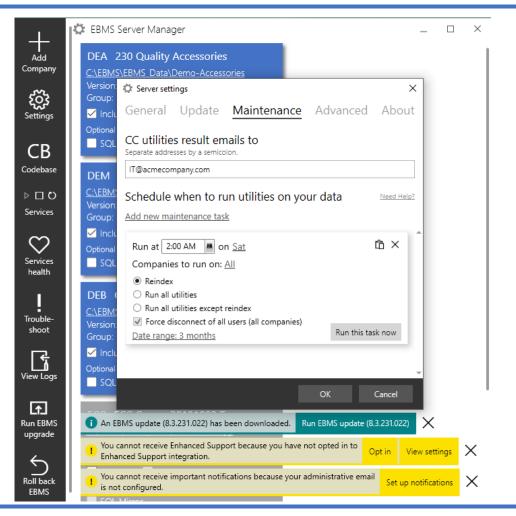
"Troubleshoot" is a great friend!





Keeping EBMS Data Happy

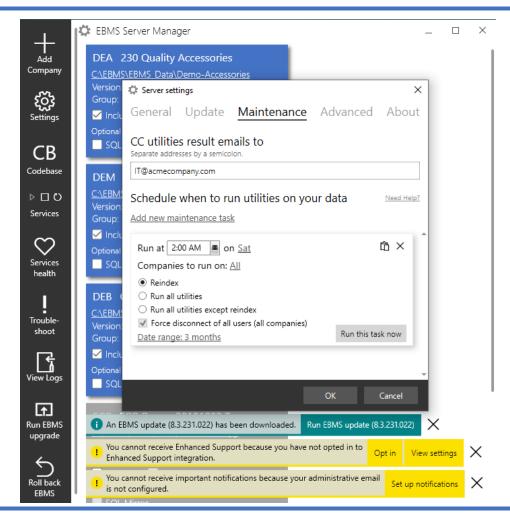
- Scheduled Maintenance Utilities
 - Checking for data integrity
 - Automatically fixing many data issues
 - Re-indexing improves performance
 - Reports emailed to the EBMS Admin(s) and cc'd to anyone else specified





Providing a great place for EBMS to Live

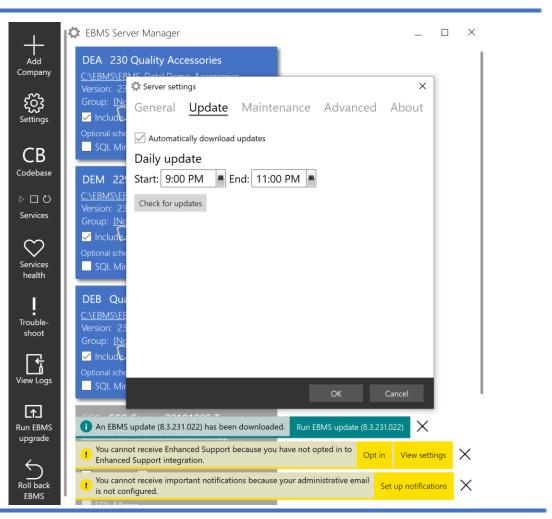
- EBMS Data Server with a big "pipe"
 - High CPU clock speed
 - Motherboard with high Bus Speeds
 - Fast hard drives
- EBMS is not multi-threaded
- Reduce what other programs on the server are competing with EBMS
- Use a Remote Monitoring and Management solution (RMM) to monitor disk health etc.
- Backup in-house and to the cloud
- EBMS is network sensitive
 - No tight corners on cable
 - Watch for stray voltage!



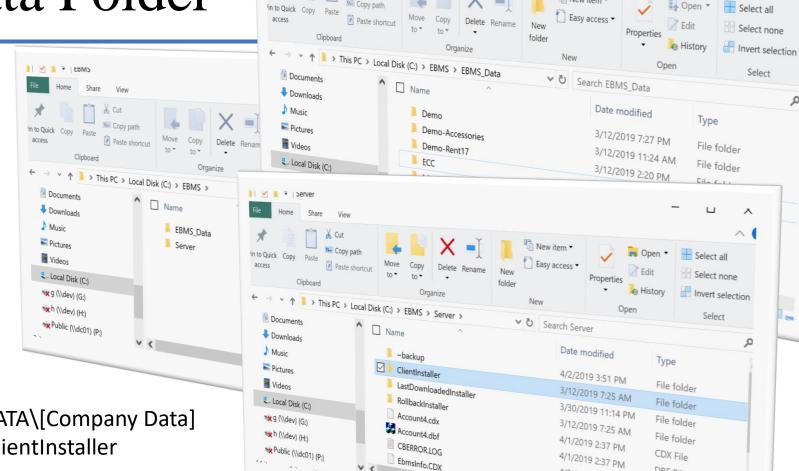


Updating EBMS

- EBMS will check the EagleBusinessSoftware.com server daily for updates or upgrades
 - "Patch Updates" are non-exclusive updates with bug fixes. They can be done with everyone still using EBMS.
 - "Version Upgrades" require everyone to be out of EBMS as data changes occur during the upgrade.
- Once the EBMS Data Server is updated users will be prompted to update their workstations when they login to EBMS.



EBMS Data Folder



■ EBMS_Data

- C:\EBMS\EBMS_DATA\[Company Data]
- C:\EBMS\Server\ClientInstaller

 \Box

Select

New item *

4/2/2019 4:36 PM

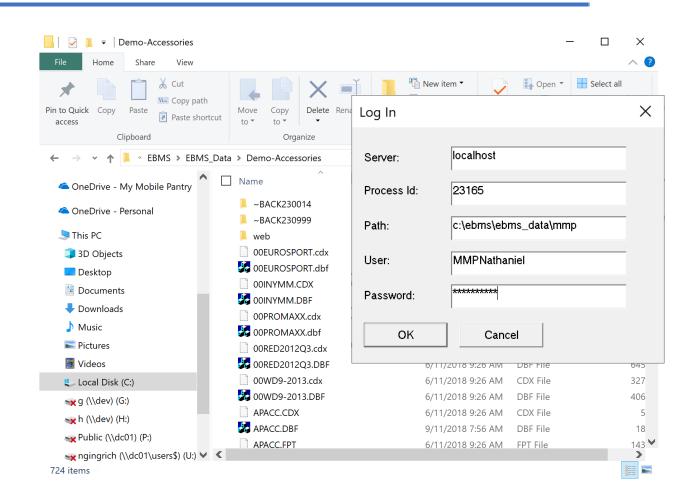
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DBF File Text Document X

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EBMS_Data

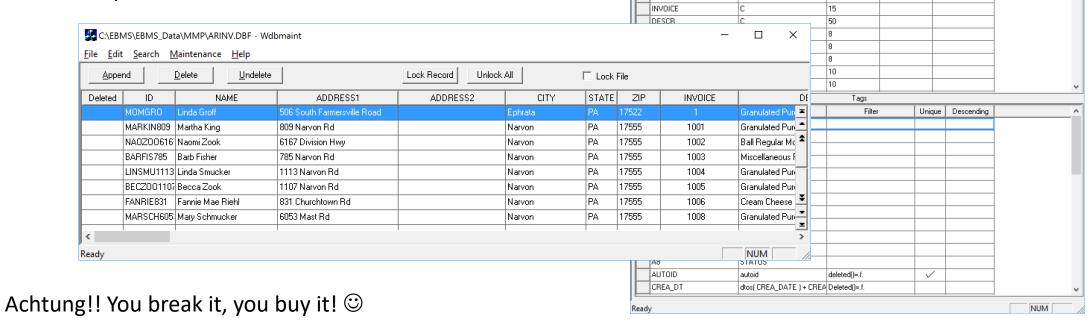
- EBMS_Data is the most important folder to backup.
- ~BACKnnnnnn files may be manually deleted after a time to reduce backup size
- Files prefixed with "00" are Vendor Catalogs
- C:\Program Files(x86)\common\eshware\wdbmaint.exe to read the database directly (DO NOT EDIT!).
 No user security with wdbmaint.



Wdbmaint.exe

• C:\Program Files(x86)\common\eshware\wdbmaint.exe

• A utility that allows for table review and modification



C:\EBMS\EBMS Data\MMP\ARINV.DBF - Wdbmaint

Type

Fields

Decimals

Nulls Allowed

Length

10

50

30

File Edit Search Maintenance Help

Field Name

NAME

STATE

ADDRESS1

ADDRESS2 CITY

Accessing that valuable data!

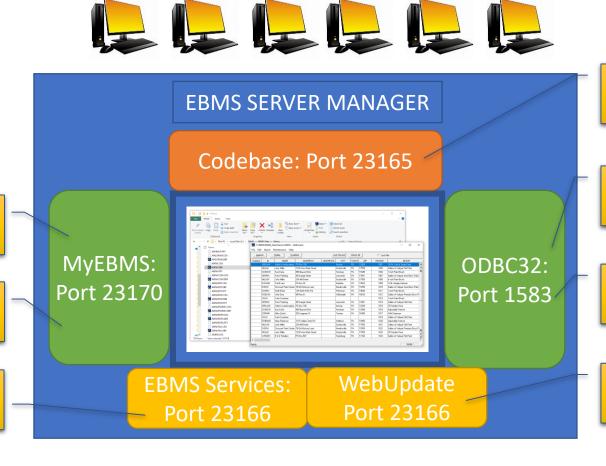
 Many services providing access to the EBMS data

WARNING: Writing to the EBMS Data without using a program or API bypasses validation and will result in corrupted data!

REST API Read/Write

MyEBMS Apps

TimeTrack, MyTime



EBMS ERP
Read/Write Data

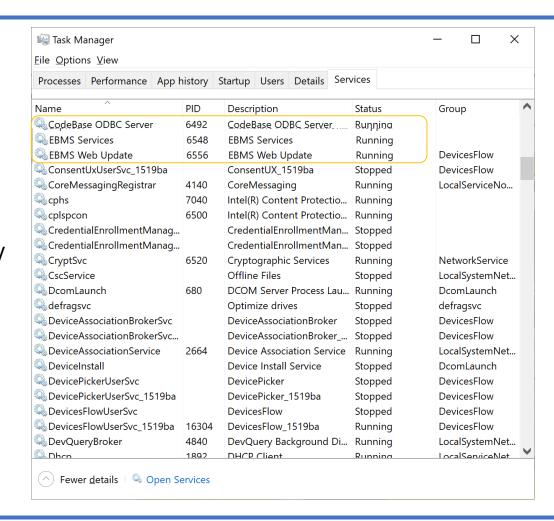
EBMS ERP SAP Printing

Shipping UPS, USPS, etc.

Ecommerce XpressPOS

Services

- Three primary services
 - CodeBase ODBC Server
 - EBMS Services
 - EBMS Web Update
 - eCommerce/Xpress POS Sync only
- When printing two other services appear
 - CB4ODBC
 - S4server



Users & Security

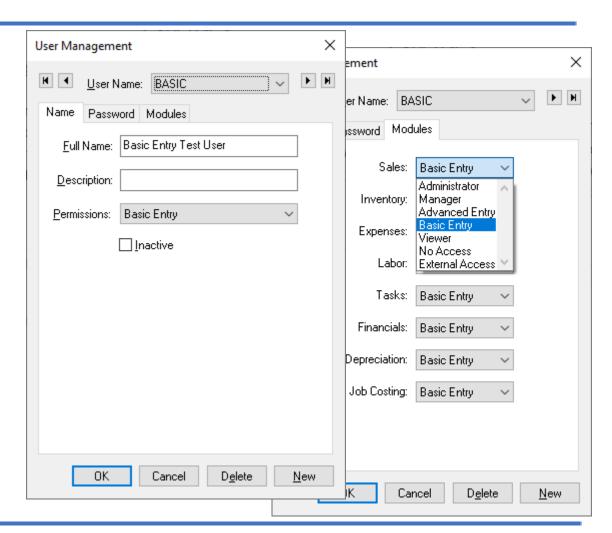
Managing Access



Creating Test Users

- For testing purposes setup a user login for each permissions level
 - Remember to create passwords for them!
 - Or mark them Inactive when not testing
- Use these accounts to experience what your workers do.

CRAZINESS: TOO MANY OF OUR CLIENTS DO NOT HAVE PASSWORDS ON THEIR "ADMINISTRATOR" ACCOUNT!



Tweaking the Default Security Settings

Manage access to Dialogs (the Parent)

The three **User Level** options are:

No Access

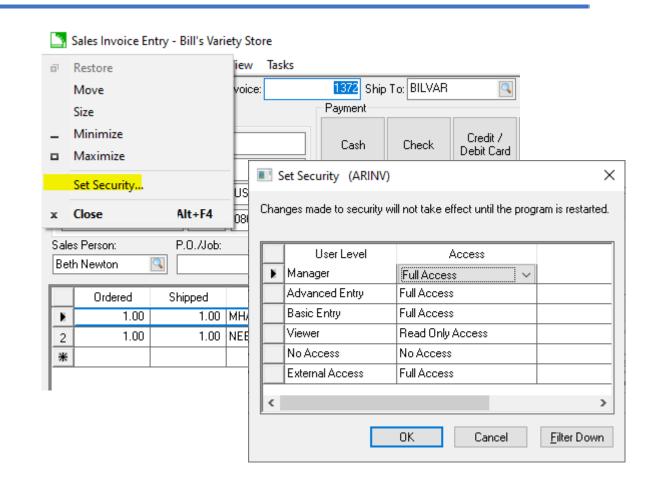
Prohibits the user from opening the selected window.

Read only

• Allows the user to open the window but restricts them from changing any information.

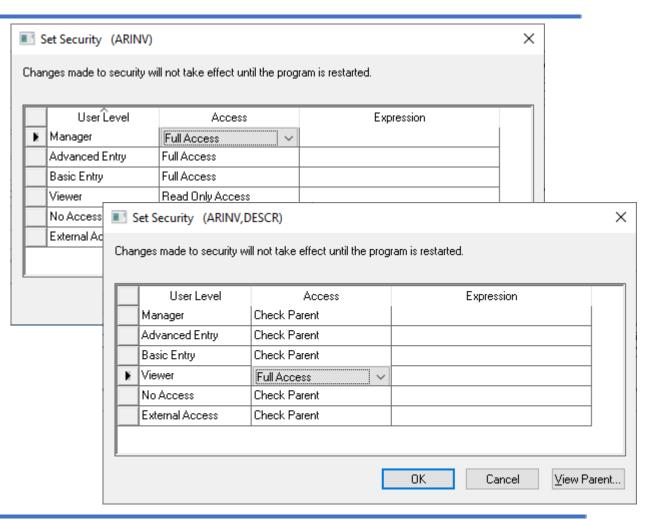
Full Access

 Gives user full access to information within the window. Note that the user may be restricted from some data entry fields or tabs based on other security settings or program restrictions.



Tweaking the Default Security Settings

- Managing those "Children"
 - Right-click on a Field
 - Ctrl + Shift and click on a menu or button
- A more restrictive setting on the parent will over-ride the less restrictive setting the child wants to have. E.g. Parent set to "Read-Only" and a child property set to "Full Access" will result in a "Read Only" permissions level.
- More restrictive child settings will over-ride less restrictive parent settings.

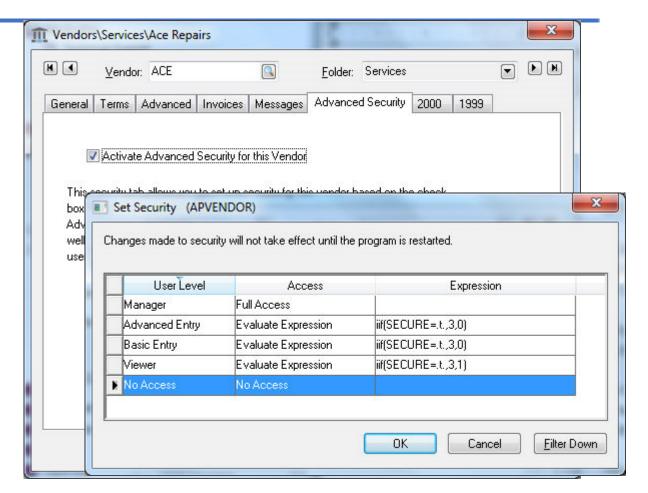


Advanced Security (IFTTT)

The **Expression** setting in this example for the *Advanced Entry* **User Level** contains a script expression as explained below:

If (iif) SECURE field on the vendor tab is true (.t.) then No Access (3) otherwise Full Access (0).

Notice that the **Expression** setting for the *Viewer* **User Level** is slightly different. if (**iff**) **Secure**setting on the vendor tab is true (.t.) then **No Access (3)** otherwise **Read Only Access (1)**.



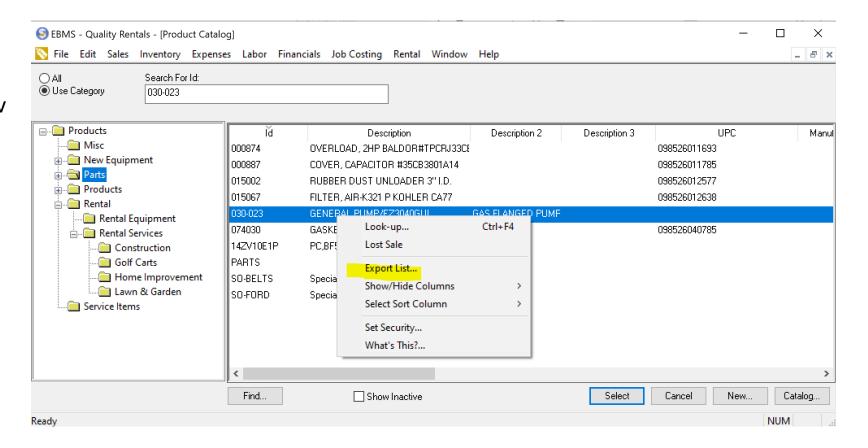
Data IN, Data OOUT

It's the Canadian Accent



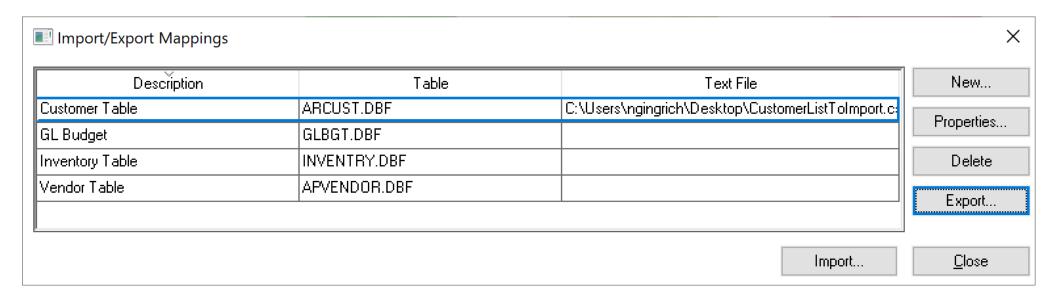
Data OUT: Export List

 Any list in EBMS can be exported to a .csv file.



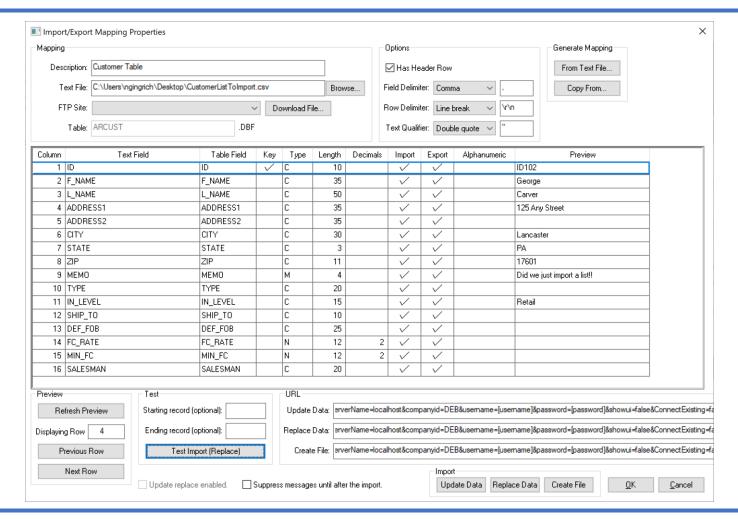
Data OUT: to a text file

- File > Utilities > Text Import/Export Mappings
- Export Customer, Vendor, and Inventory info to a file



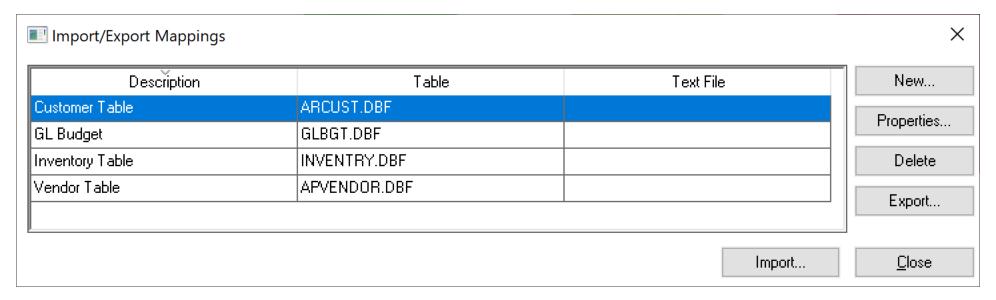
Data OUT: text file mapping

 Powerful mapping ability to export data to a text file.



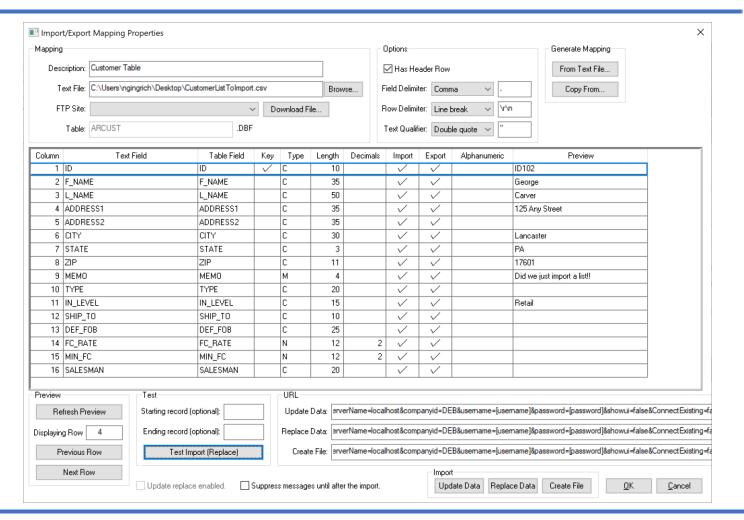
Data IN: from a text file

- File > Utilities > Import/Export Mappings
- Update Customer, Vendor, and Inventory info
- Create Vendor Catalogs and automate their update



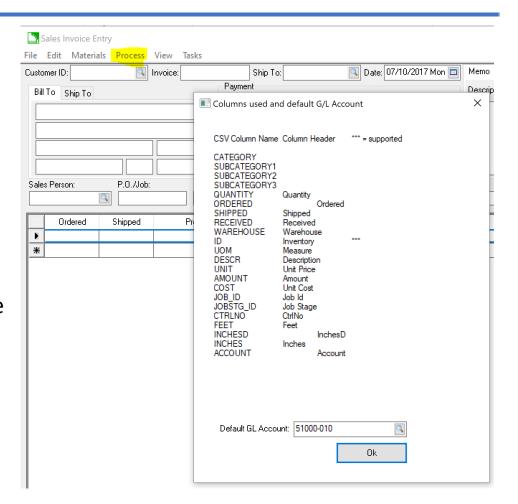
Data IN: Text file mapping

 Powerful mapping ability to update data from a text file.



Data IN: Document Import

- Journals, Proposals, Sales Orders, Purchase Orders
- Match the EBMS field names as the file header names
- Comma-delimited .csv or Tab-delimited .txt files
- Scenarios
 - 3rd Party Payroll imports
 - Orders from customers
 - Product exports from estimating/take-off software
 - Much more...



Data IN: REST API with JSON

- Create (POST) and Update (PATCH) customers, inventory, sales orders, purchase orders, etc. using a URL
- Use IFTTT, Zapier, or Microsoft Flow
- Create integrations with other software products

Creating a Customer in EBMS

```
POST URL:
https://[myebms.eaglebusinesssoftware].com/MyEbms/[ECC]/OData/ARCUST
Header:
Basic Authentication, Username: [EBMS User], Password: [EBMS Password]
         Content-Type:application/json
Body (JSON):
"TREE_ID": "[numerical category identifier the customer will be created in]
"CUST_ID": "[Customer ID]",
"F NAME": "[35 char, First name]",
"L NAME": "[35 char, Last name or company name]"
"Address1": "[35 char]",
"Address2": "[35 char]",
"Zip": "[5 digit zip, will set the city and state]"
"Contact_1": "[phone number]"
"Contact 2": "[fax number]",
"Contact 3": "[email]",
"Memo": "[Multi-line memo \r\nWrite a book in here]"
```

Data OUT: REST API with Odata Queries

- Read (GET) customers, inventory, sales orders, purchase orders, etc. using a URL
- Use IFTTT, Zapier, or Microsoft Flow to trigger other events based on the info.
- Create integrations with other software products
- Use Postman to try different queries.

Pulling customer info from EBMS

The following GET will pull a list of all customers with a last name of "Smoker" and return the data as selected. This is an OData query based on the OData standard specified at www.odata.org.

GET URL:

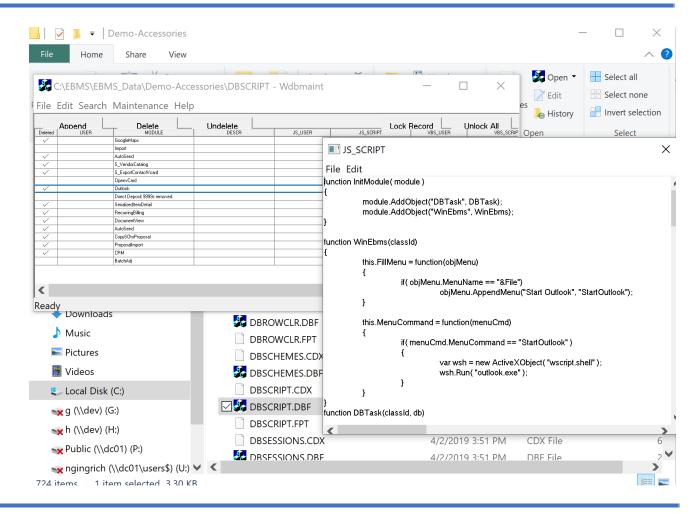
https://myebms.eaglebusinesssoftware.com/MyEbms/ECC/OData/ARCUST?\$filter=L_NAME eq 'Smoker'&\$select=F_NAME,L_NAME,ADDRESS1,CITY,STATE,ZIP

Header:

Basic Authentication, Username: [EBMS User], Password: [EBMS Password

Data IN/OUT: COM API

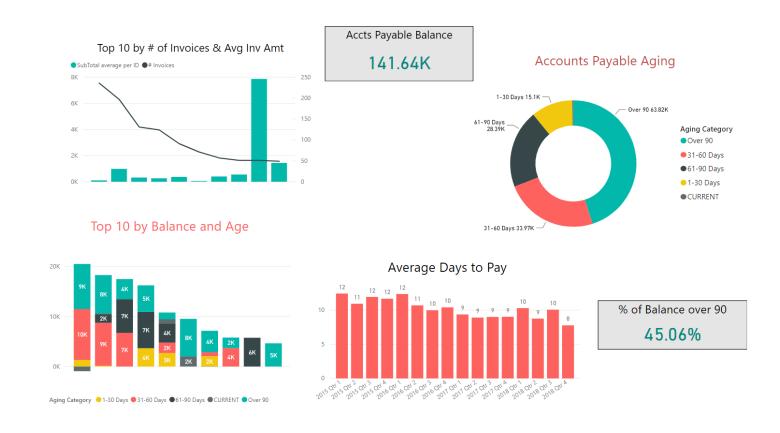
- Most powerful API through which all customization of EBMS is done.
- Uncompiled Javascript code stored in the DBSCRIPT table of the EBMS data.
- Add tables, tabs, fields, and business logic.
- Extends EBMS to fit your business.





Data OUT: SQL Mirror

- A real-time mirrored copy of the EBMS data to an MSSQL server.
- EBMS Reporting (future)
- Business Intelligence
- Integrations with other software products.
- Microsoft Power BI and Flow
- Azure SQL Studio will allow you to query and read the data



Data, Data!

There's a lot going on in an ERP* system!
Knowing what is happening beneath the wraps will empower you to ensure smooth operations for all the workers relying on it everyday.

*Enterprise Resource Planning

You're now an expert EBMS Admin!

Thank you

Go and