KEY2ACT

Alternate Windows and Reports Manager Guide

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AWARM Overview

Alternate Window and Report Manager (AWARM) allows you to open alternate and modified forms and reports, without requiring that you log in as a different user. You can control user access to alternate and modified alternate forms and reports either globally or individually. AWARM works with all Dexterity-based applications, including Microsoft Dynamics GP and the following Signature modules: Service Management, Job Cost, TimeTrack, and Equipment Management.

Installing AWARM

1. Launch the file **Alt Window & Report Mgr <version>.exe**.
2. On the Welcome screen, select *Next >*.
3. Accept the terms of the license agreement and select *Next >*.
4. Use the *Browse...* button to find the folder within the same installation location as Microsoft Dynamics GP and Signature. Select *Next >*.
5. When you are ready to begin the installation, select *Install*.
6. When the installation is complete, select *Finish*.
7. Launch Microsoft Dynamics GP.
8. Select *Yes* to the message asking if you wish to include new code. A message appears stating that the WSAWRM.CNK is being included. If a progress bar does not appear, verify that the WSAWRM.CNK file was saved in the same directory as the DYNAMICS.DIC file.
9. If you are the first user to log in after copying the WSAWRM.CNK file, log in as "sa." The SQL tables will be created on the server automatically. Otherwise, you can log in as any user.

Setting up AWARM

- Adding the Setup Window to the Shortcut Bar (page 1)
- Choosing Alternate Resource Security Options (page 2)
- Using the AWARM Setup Window (page 2)

Adding the Setup Window to the Shortcut Bar

1. Launch Microsoft Dynamics GP.
2. On the shortcut sidebar, located at the lower left-hand corner of the window, right-click and select *Add > Add Window*.
3. From the list of available windows on the Add Window Shortcut window, select *Alt Window & Report Manager > 3rd Party*.
4. Select *Alternate Window and Report Manager Setup*. You can rename the shortcut by editing the **Name** field.
5. Select *Add* to create a shortcut to the window on the sidebar.
6. Select *Done*.

Choosing Alternate Resource Security Options

The Alternate Window and Report Manager Setup window allows you to select a default method for all users to access alternate and modified alternate resources (forms and reports). You must set up security options before you can use the setup window.

1. From the shortcut bar, select *Alternate Window and Report Manager Setup*. You may be prompted to enter the system password. The Alternate Window and Report Manager Setup window opens.

   > ⚠ If you do not have the Setup option on the shortcut bar, see *Adding the setup window to the shortcut bar* above.

2. Select the *Options* button.
3. In the Options window, use the drop-down button to select a default method for handling modified resources. If a modified alternate form or report does not have its own individual handling method, the default method selected here will be used. The following handling methods are available:
   - **Always Use**
     Always use modified alternate resource if it exists.
   - **Never Use**
     Never use modified alternate resource.
   - **Define At Setup**
     All standard (alternate) and modified (modified alternate) resources for active products will display on the Alternate Window and Report Manager Setup window, where the system administrator selects which resources users can access.
4. All products in the system are listed on the window. Mark the **Active** checkbox for all products that you want to use the Alternate Window and Report Manager with. For example, *WennSoft Equipment Management* and/or *WennSoft Products*.
5. When you mark an **Active** checkbox, the product name becomes the default entry in the **Standard** and **Modified** columns. An asterisk is added to the name in the Modified column. The text in these columns is the text that displays in the Alternate Window and Report Manager Setup window and on the buttons in the message box when the user is asked which resource to use.

   > ⚠ Only the text displaying in each column will fit on the button, so we recommend you edit the text to fit.

6. Use the arrow buttons on the right side of the window to change the order of the products. The order the active products display in this window is the order the buttons will display when the user is asked which resource to use.
7. Select *OK* to close the window.

Using the AWARM Setup Window

Use the Alternate Window and Report Manager Setup window to determine which product's alternate and modified alternate resources will be opened or listed as choices when a user is questioned about which resource to open. Security settings are made for each company and user. Security settings made in the Alternate Window and Report Manager Setup window override security set up in Microsoft Dynamics GP.

1. Open the Alternate Window and Report Manager Setup window from the shortcut bar.

> ⚠ If you do not have the Setup option on the shortcut bar, see <u>Adding the setup window to the shortcut bar _(page 1)</u>.

2. Select one or more companies.
3. Select one or more users.
4. Mark the checkboxes for the alternate and modified alternate resources you want to grant the user access to. These resources are listed in a tree view organized as follows:
    - Level 1 - Resource category (Forms or Reports)
    - Level 2 - Series
    - Level 3 - The resource (form or report)
    - Level 4 - Products and modified alternate forms or reports

   When you mark a checkbox on one of the first three levels, all checkboxes below that will be marked.

> ⚠ Non-Service Management users should not have access to the Customer Maintenance, Customer Address Maintenance, and Customer Class Setup windows. If a user has access to Signature and non-Signature versions of these windows, we recommend closing all three windows before switching between Signature and non-Signature versions.
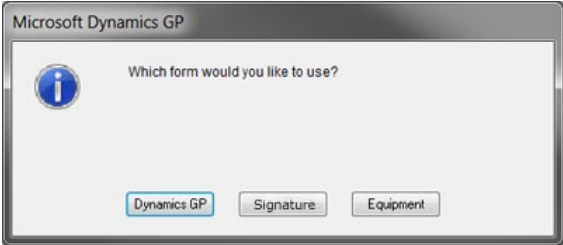
5. On the third level, you can assign each resource an individual handling method by double-clicking its icon. Each time you double-click an icon, it changes to another selection. The icons are as follows:

Icon	Handling Method	Description
✔	**Always Use**	Always use modified alternate resource if it exists.
✘	**Never Use**	Never use modified alternate resource.
?	**Ask On-The-Fly**	If a modified alternate resource exists, prompt the user to use the standard (alternate) or modified (modified alternate) version.
...	**Define At Setup**	All standard (alternate) and modified (modified alternate) resources for active products display in the Alternate Window and Report Manager Setup window. The system administrator selects which resources the users can access. **Note:** The Define At Setup handling method is not available for special resources.
(icons)	**None**	Use default method specified in Options window.

> ⚠ Some resources are considered special resources because they can only be opened from other resources. Security is automatically set for these special resources to be the same as the other resource. For these resources, the fourth level will display "Use same as:.."

6. Select *Print* to print the Alternate Window and Report Manager List.
7. Select *OK* to close the Alternate Window and Report Manager Setup window.

Using AWARM

Scenario	Message
If you have access to only one form or report, that form or report will open automatically when you open the resource.	Not applicable.
If you are using the ask-on-the-fly resource handling method, you may receive a message asking if you want to use the modified alternate version of the form or report.	
If you have access to more than one alternate or modified alternate form or report, you will be asked which one to use when you open the resource	
If you have access to more than three alternate or modified alternate form or report, a window will display the third button in the message window will be labeled *More...* When you select *More...*, the 3rd and subsequent options will be displayed in another message box.

After choosing *More...*, the following window displays with the additional resources. |

Scenario	Message
	Microsoft Dynamics GP Which form would you like to use? Fixed Assets SmartList Equipment

Contact Information

Support and Sales	
Support	**Phone**: 262-317-3800 **Email**: support@Key2Act.com[1] **Hours**: Normal support hours are 7:00 a.m. to 6:00 p.m. Central Time. After-hours and weekend support is available for an additional charge. Please contact Key2Act Support for additional information. Key2Act will be closed in observance of the following holidays: New Year's Day, Memorial Day, Independence Day, Labor Day, Thanksgiving Day, Day after Thanksgiving, and Christmas Day.
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