

# Martial Arts Licence Master

*Martial Arts Manager Software*



System Startup

Version 6.02.03

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Martial Arts Manager Software

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All individuals, organisations and associated data used in the examples are purely fictitious and any resemblance to existing persons or organisations is purely coincidental.

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# System Requirements

MA Licence Master is written in the powerful, easy-to-use database software from FileMaker Pro ([www.filemaker.co.uk](http://www.filemaker.co.uk)). FileMaker Pro can operate on both Windows and Mac platforms, as well as iOS devices such as an iPad (requires FileMaker Go 13). It does not at this time work on other tablet devices, for example Android. You must have your monitor's screen resolution set to 1024 x 768 or higher. A detailed outline of minimum and recommended system requirements can be found in Appendix A on page 16 at the end of this user guide (or by referring to <http://www.filemaker.co.uk/products/filemaker-pro/pro-13-specifications.html>). To run the database on an iOS device requires a copy of the FileMaker Go 13 App offered free via the Apple App Store.

All the components you need to run this application have been compiled in to a runtime version that requires no additional software to work on your PC (Windows) or Mac (Mac OS). This is the standard format in which the software is supplied.

**Note:** Not compatible with Windows XP or Vista.

# Getting Started

## Installing MA Licence Master

Before attempting to install MA Licence Master, you should check its compatible with your operating system (Appendix A page 16), then follow the instructions below.

### Mac OS

The zip file downloaded from our website, contains a folder called MA Licence Master, which contains all the elements needed to run the database. Copy the MA Licence Master folder into your Applications folder, then:

1. Open the MA Licence Master folder.
2. Drag the MA Licence Master executable icon (Application file) to your Dock.
3. Click the MA Licence Master button on your Dock to open the database.
4. Refer to Logging In below.

### Windows PC

The zip file downloaded from our website, contains a single setup.exe file.

1. Copy the setup file to your computer (i.e. your desktop).
2. Double click the Setup.exe file to install MA Licence Master to your computer. The database installs to a MA Licence Master folder within your Documents folder.
3. The installation process will install a button to your desktop and programmes menu under startup. Select either button to open the database.
4. Refer to Logging In below.

### Logging In

On opening the database, you will be asked for a user name (account) and password. To access the database for the first time you need to use the following settings:

Account Name = Master

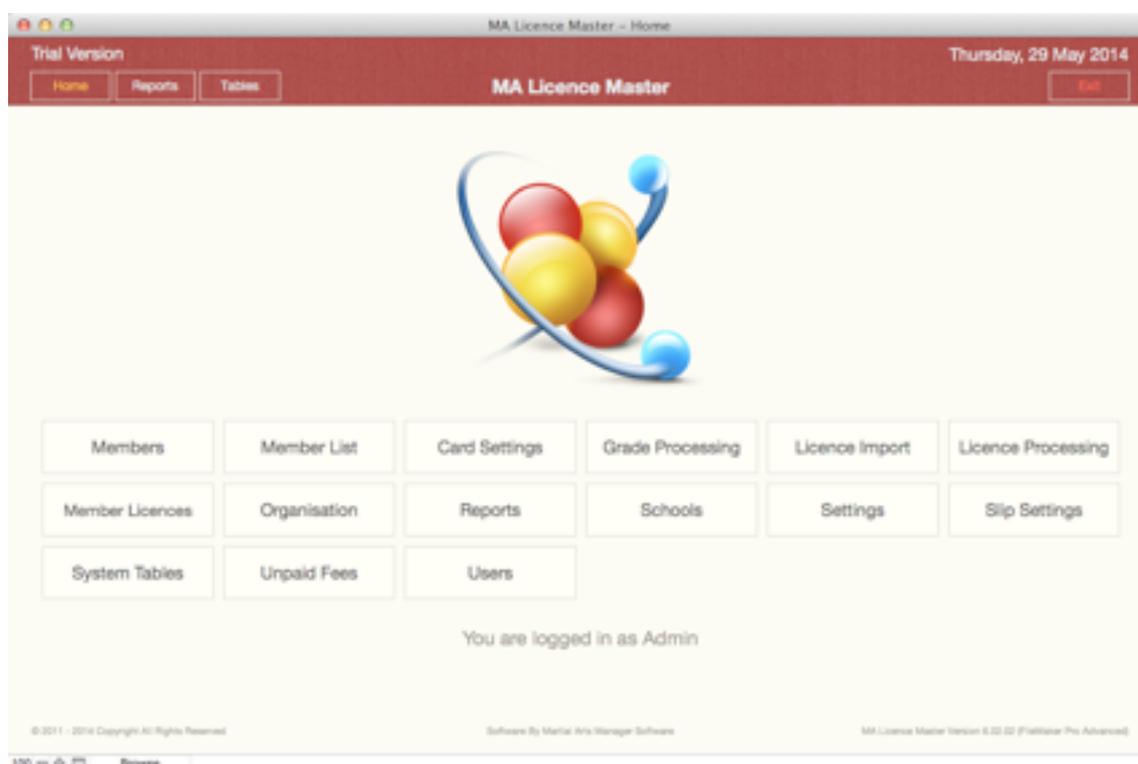
Password = master (i.e. the same as account but in lower case).

Having gained access to the database, you should consider deactivating the default Master account and creating a new account in your own name and with your own password. For instructions on how to do this, please refer to page 12 below.

**Note:** Not deactivating the Master account and creating your own, allows anyone who knows the default account settings to access your data.

# MA Licence Master

The application on opening directs you to the main Home menu screen, the central point for navigating your way around the many different modules that exist within the MA Licence Master application.



You are advised to familiarise yourself with how MA Licence Master works using the test data currently stored in the database. Once familiar you can choose to remove all test data by clicking the **Reset** button located top right in the Settings screen on the Secondary Navigation Bar.

Next you should visit both the Settings screen (page 7), and the Organisation screen (page 10) to configure the database to meet your own requirements.

To configure the rest of the database, we suggest you consider the following elements in order:

- Martial Arts (System Tables menu) - create a new entry for each style you teach.
- Grades (System Tables menu) - create a new entry for each grade and style combination you need to record individual student grades.
- Schools (Home screen)

Having set the above, you have done the bare minimum necessary to start using the database and adding members to the Member Details module.

As you become more familiar with how the database works you should refer to the User Guide for how to use specific components and take time to understand how they work. For

example to start recording member licences, you should familiarise yourself with Fee Levels and Slip Settings.

## Settings

The system has a number of standard settings that can be customised to dictate how the database works. In addition there are a number of values that need setting in order to identify the database as yours, relating to your organisation. These elements should be updated and or amended before you begin using the database in earnest. In certain cases information provided is extracted on documents printed from within the application.

**Note:** Not all setting options are available when the database is used on an iOS device.

To modify this information, from the Home screen first select **Settings**.

The Settings screen is split into 2 parts, the top section covers system functionality, whilst the bottom part is split between certain default settings and system registration fields.

The screenshot shows the 'Settings' screen of the MA Licence Master application. The title bar reads 'MA Licence Master - Settings'. Below the title bar is a navigation menu with buttons for 'Home', 'Cards', 'Members', 'Organisation', 'Settings' (highlighted), 'Slips', and 'Tables'. There are also 'Backup', 'Reset', and 'Restore' buttons. The main content area is divided into two sections. The top section contains various system settings: 'Adult Age' (16), 'Backup Interval' (20, with a note 'system exits (12 to go)'), 'Enforce Proper Test' (checked), 'Ext ID Capitals' (checked), 'Ext ID Trim' (checked), 'Export Format' (radio buttons for 'CSV' and 'Excel', with 'Excel' selected), 'Fiscal Day/Month/Year' (6, 4, 2015), 'Import Next Valid Unit Date' (checkbox), 'Maximise Screen Size' (checkbox), 'Prompt for Printer Setup' (checkbox), 'Region' (Default), 'Unit' (£), and 'Tax Rate'. The bottom section contains default settings and registration fields: 'Default Category', 'Default Country' (Bedfordshire), 'Default Fee Level', 'Default Martial Art' (Taekwon-Do), 'Default School' (Academy), 'Client ID', 'Organisation' (Academy Martial Arts), 'Registered To', 'Key Code', and 'Disable Guest Login' (checkbox). A status bar at the bottom indicates 'Last updated 26/05/2014 23:10:13'.

The top section contains the following fields:

- Adult Age - the database records a gender for each member record. The value entered here is used to determine when a member gender changes from that of a child's (Boy or Girl) to that of an adult (Male or Female).
- Backup Interval - used to determine how often the database should perform a system backup. Backups are performed on closing the database a number of times as indicated. Backup files are saved to the Data folder within the database directory. Each new backup file is annotated with the current date. Over time you should monitor this folder and remove unwanted backups to save storage capacity on your computer.

- Enforce Proper Text - a check box, used to ensure that values entered into the First and Last Name fields are converted to proper text. This ensures each part of the name begins with a capital letter.
- Ext ID Capitals - a check box, when checked the system will automatically convert any values entered into the Ext ID field in Member Details to capitals.
- Ext ID Trim - a check box, when checked the system will automatically remove any spaces or carriage returns from text entered into the Ext ID field in Member Details.
- Export Format - allows you to indicate the file format used by the database when exporting predetermined data sets.
- Fiscal Day/Month/Year - used to tell the database when your financial year begins. Enter the day and month, the system will calculate the current year. The system uses this information to summarise and report on certain financial activity.
- Import Next Valid Until Date - when checked allows you to set the next valid until date within the import file, rather than the system calculating it. Only applies where you are using the import function to generate new licence records.
- Maximise Screen Size - a check box, when checked the system will maximise each screen within the database to fill your computer monitor. Fields are adjusted to fill out each screen.

**Note:** Windows only allows for one screen to be maximised and visible at the same time. Therefore when used on a Windows PC instead of maximising the window, the data screen will expand to fill the available area.

- Prompt for Printer Setup - a check box, when checked the system will display the Printer Setup screen prior to previewing each system document or report. Can be useful if you are experiencing problems printing or your computer is linked to more than one printer.
- Region - tells the system the regional format you want to use. Options include:
  - Default - designed specifically with the UK in mind.
  - Australasia
  - USA
- Unit - the currency unit you want the database to use. A general text field, just enter the currency symbol required.
- Tax Rate - selected from the drop down list, tells the system what rate if any to apply to licence fees.

The bottom section contains a number of default field settings. When populated, the system will apply the indicated value as a default within the indicated data field in Member Details. These include:

- Default Category - applied when creating a new student record.
- Default County - applied when creating a new student record.
- Default Country - applied when creating a new student record.

- Default Martial Art - applied when creating student grading records.
- Default Fee Level - applied when creating a new licence.
- Default School

**Note:** For default fields, you select the value required from the drop down list provided. It therefore means that before you can set these values, you must have populated the relevant area of the database first, e.g. before you can set a default school, you must have listed all your schools in the Schools module.

**Note:** It isn't necessary to amend any of the fields outlined above, however you may wish to experiment to get the most out of your copy of the database.

Registration Fields are listed to the right of the default fields outlined above, and are used to unlock the database following registration with Martial Arts Manager Software. These include:

- Client ID
- Organisation - set in the Organisation module.
- Registered To
- Key Code

All the above fields should be populated as per instructions from Martial Arts Manager Software following registration.

On entering a name into the Registered To field the text to the right of the Key Code field will change to "Error" to denote it is waiting for a valid code to be added. On entering a valid Key Code the text will change to "Registered" and the "Trial Version" text will disappear from the screen header.

Care should be taken when entering values to ensure no hidden character returns are added. This sometimes happens when you copy and paste values into a field. Where the system determines character returns have been entered, the "Error" text will turn red. To correct the situation and remove the unwanted character returns, just click the "Error" label itself until the text changes to "Registered".

**Caution!** Failure to register this product within the trial period (30 days) will cause the database to lock. If this happens you will not be able to gain access to this version of the database or any data within it. The database will have to be returned to us at Martial Arts Manager Software to be unlocked.

Additional Fields:

- Disable Guest Login - the database comes with a guest login enabled. This login allows read only access to certain parts of the database. If you don't want to activate this level of access, you can turn it off by checking this field (recommended).

## Functions

There are a number of system functions that can be run from the Settings screen. These include:

- Backup - create a backup copy of your database file to your desktop.
- Reset - reset the database. This removes all test data from the database.
- Restore - replaces existing data with data from the backup copy of the database (MALicenceBackup.st6) found on your desktop.

**Caution!** Both reset and restore functions remove existing data from the database. This can not be reversed, so care should be taken before using them.

## Organisation

You use the Organisation screen to set your Organisation Name (the name you want displayed on all documentation printed from the database, as well as any logo you want to appear, and where applicable the header (address details), and footer (contact details) text.

The screenshot shows the 'MA Licence Master - Organisation Details' window. It features a navigation bar with 'Home', 'Members', 'Settings', and 'Tables' buttons. Below this, there are sections for 'Documents Logo' (showing a tree icon) and 'System Logo' (showing a landscape icon). The 'Organisation Name' field contains 'Academy Martial Arts'. The 'Header' field contains '40 The Moorings, Halesowen, B16 8AE'. The 'Footer' field contains 'T: 0121 643 5858' and 'W: academyschool.com'. On the right, the 'Email Option' is set to 'SMTP' (checked), with fields for 'Email Address' (info@academy.com), 'Reply to Email Address' (info@academy.com), 'Outgoing SMTP Server' (auth.smtp.auth.co.uk), 'Email Signature' (John Smith), 'Email Account/User Name' (smith@academy.com), and 'Password' (password). A note at the bottom right states: 'Email options allows you to bypass your systems default email client.'

You can use the System Logo to change the logo that appears on the Home screen to a logo of your choice. Thereby enabling you to personalise the database to your own organisation. However, the screen is also where you configure database email settings and a number of system document templates.

**Note:** Email settings should be set to “Client” unless your computers default email client conflicts with MA Master 2 and won’t work.

Check the Use Image field to display your organisations logo on certain documents. Removing the check tells the system where applicable that you are using our own preprinted stationary.

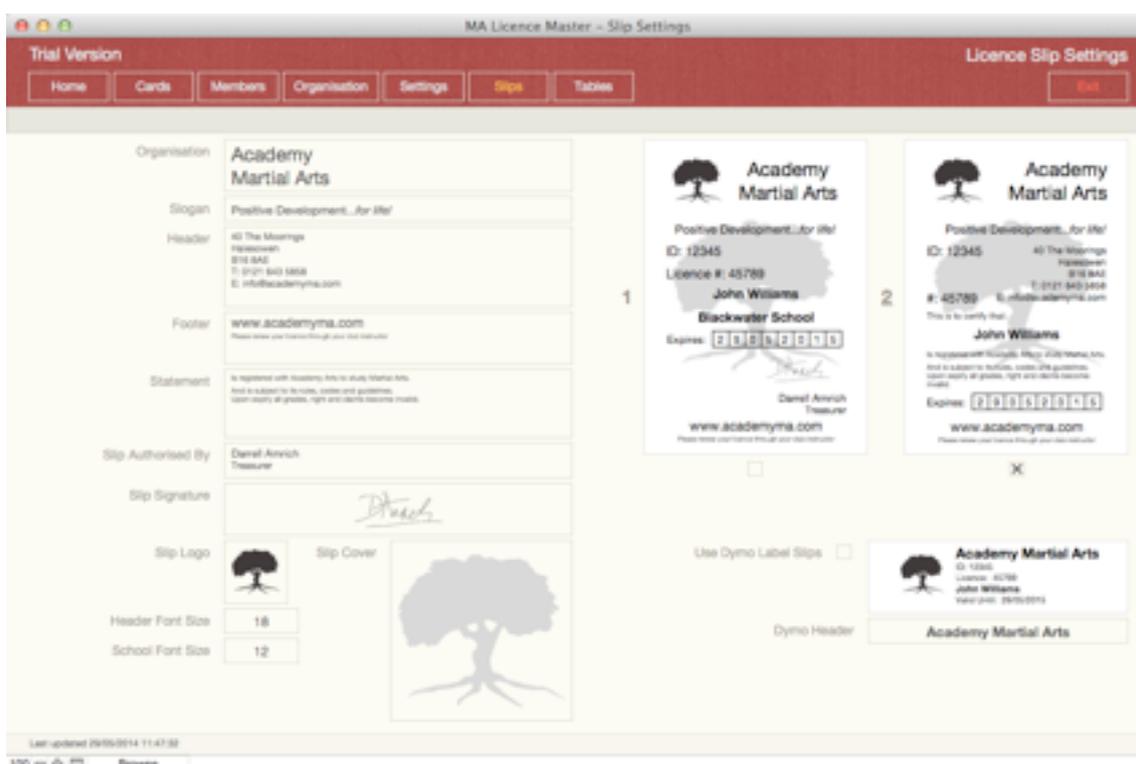
Buttons to the top right on the Secondary Navigation bar give access to a number of system templates. These include:

- Application Form - a basic template.
- Certificate - allows you to produce grading certificates.
- Renewal Letter
- Welcome Letter

Clicking any button will display a popup data entry window allowing you to modify the template contents.

## Licence Slips

The MA Licence Master database allows you to print licence slips for each licence created against any individual member recorded in the database. There are two formats available to choose from. You determine which format you want to use, as well as the information displayed on them in Slip Settings from the Home screen.



The Licence Slip Settings screen is split into two parts. On the left you will see the data entry fields for determining what information is replicated on each licence slip, as well as any logos. The right part of the screen displays a visual example of each slip format.

Modify the data in the fields on the left to meet your organisations needs. Pay close attention to how your information appears on the two examples given.

Check the check field beneath either slip image to determine which format you want to use.

The system also allows you to produce slips using Dymo labels (small size) for those who have them.

**Note:** To add an image, locate the image file on your computer and drag it into the relevant image field. Thereby replacing the existing image.

**Note:** Use the Format option on the Menu Bar at the top of the screen to apply formatting to text.

**Note:** Licence slips have been designed to print 8 to an A4 sheet. The layout of labels has also been configured to fit standard labels using either Ryman universal labels P8 or any Avery labels using the Avery template L7165.

# Security

Access to the database is through the creation of user accounts (Users from the Home screen). Initially when you open the database for the first time there are only two user accounts:

- Master
- Guest - read only with certain permissions and restrictions.

To access the database for the first time use the following settings:

Account Name = Master

Password = master (i.e. same as account but in lower case).

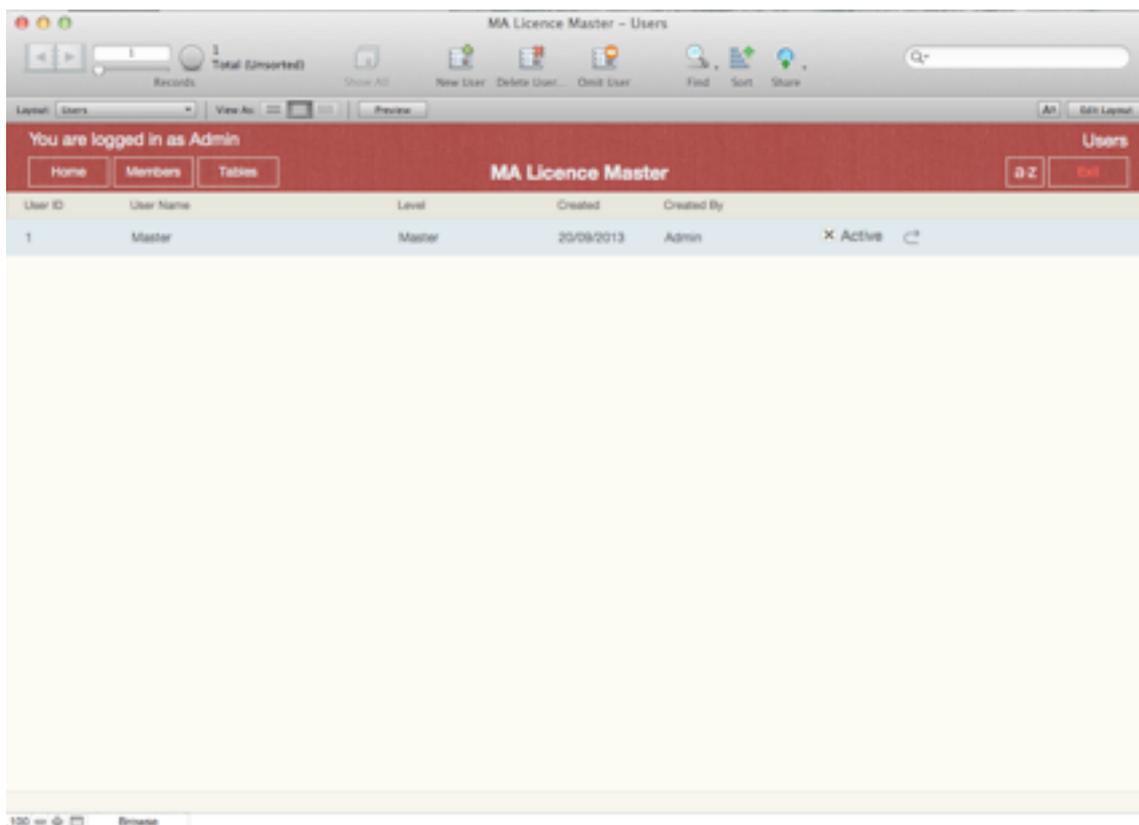
However prior to entering your own data into the database you should create a user account in your own name with your own password, and disable the generic Master account.

**Caution!** Failure to disable the Master account leaves your database and data open to access by anyone who is aware that this is a generic account for this database.

**Caution!** Don't attempt to deactivate the Master account whilst logged in as that account. The system will warn you and prevent this from happening.

To deactivate the Master account and create your own, follow the steps below:

1. Select **Users** from the Home screen.



2. Create a new record.

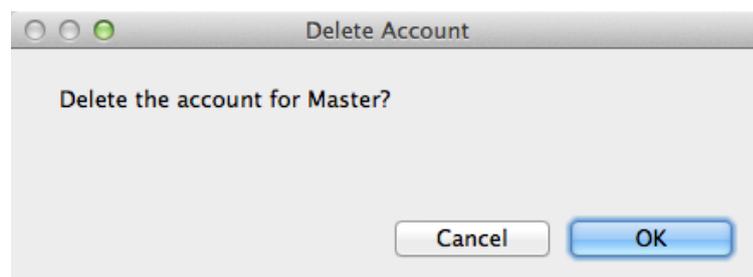
3. Enter the user name you want (this can be a single name, nickname or full name). This will be the name you have to enter when opening the database in the Account field.
4. Select Master from the drop down list in the Level field. This is to ensure you have the same and fullest access rights to the database.
5. Check the Active field - this will create a new account for you using the details just entered.



6. The system asks you to confirm you want to create a new account for the named user. Click **OK**.
7. The system acknowledges the creation of a new account, and confirms the password set. Click **OK**.



8. Make a note of your new account name and password.
9. Close the database and reopen it to test your new account works. If it doesn't log in again using the Master account and repeat the above steps. Assuming it does work, you can now deactivate the Master account.
10. Return to the Users screen, then for the existing Master account, to deactivate it, uncheck the Active field.
11. The system will ask you to confirm you want to perform this action. Click **OK**.



Though you can delete the Master entry from the Users table, we strongly advise against this. All future upgrades to MA Licence Master will come with the single Master account enabled. You will therefore need to reactivate the Master account in your copy of the database before starting the upgrade process. Without an active Master account you won't be able to upgrade your database, and may lose your existing data.

**Caution!** Do not delete the Master account from the Users table. However, do deactivate it.

**Note:** When creating a new account, the system always uses the first name (or if only one name used the single name) to form the password, but always in lower case, e.g. John Smith would generate a password of john.

## Changing Your Password

When logging into the database, you are given the opportunity to change your password. On the Open MA Licence Master login screen, click the **Change Password...** button located bottom left.



The system will show the Change Password screen.

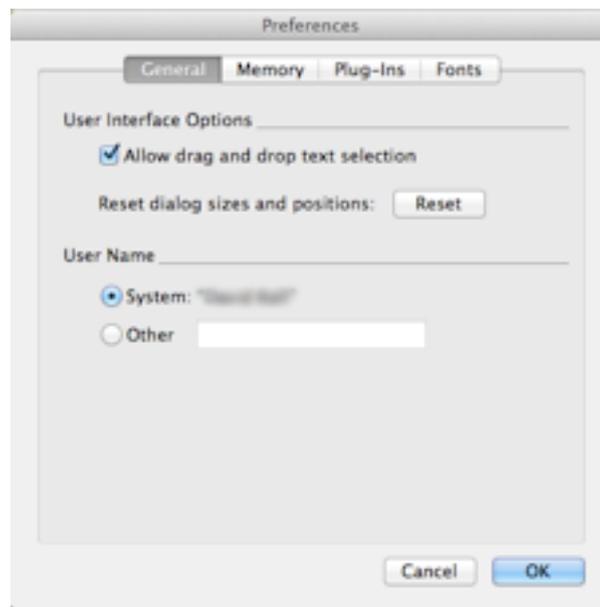


Enter your old password (as outlined above), then your new password then your new password again to confirm it. To confirm the change, click **OK**.

The database will open normally. However the next time you access the database remember to use your new password.

## Change The Default User Name

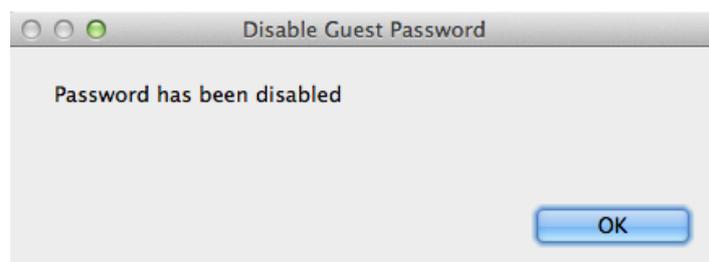
If when opening the database the system doesn't default the account name to yours or the one you want, you can set this from within the database. To do this, from the Home screen select Help on the Menu Bar at the top of the screen then choose **Preferences**. This opens the Preferences window. To change the default user name, just type the new name in the Other field at the bottom of the screen. Make sure you type it correctly, or the system won't recognise it. Click **OK** to confirm the change.



**Note:** The Preferences screen in Windows is slightly different. To change the default user name in windows, you will need to amend the User Name field located on the General tab.

## Disable Guest Login

You can disable the guest login from the Settings screen. Check the Disable Guest Login field located bottom right. The system will confirm the account has been disabled. Click **OK**.



# Appendix A

FileMaker Pro 13 and FileMaker Pro 13 Advanced databases only work with other FileMaker 12 and FileMaker 13 software. MA Licence Master has been developed using FileMaker Pro 13 Advanced and can only be used as a runtime system (format provided by Martial Arts Manager Software), or when used with a full and licensed copy of FileMaker Pro 13 or FileMaker Pro 13 Advanced.

Operating System:

Windows 8.1, and Windows 8.1 Pro\*

Windows 8, and Windows 8 Pro\*

Windows 7 Ultimate, Professional, Home Premium\*

OS X Mavericks v10.9

OS Mountain Lion v10.8

OS Lion v10.7

\* Version stated is the minimum requirement. This software may also work with later versions certified by FileMaker Inc. Operating systems not listed above have not been tested and are not supported.

Hardware Requirements	Minimum Requirements	Recommended Requirements
Window	CPU: Intel Pentium 4 / AMD Athlon 64 or newer RAM: 1 GB	CPU: Intel Pentium 4 / AMD Athlon 64 or newer RAM: 2 GB
Mac	CPU: 64-bit Intel-based Mac RAM: 2 GB	CPU: 64-bit Intel-based Mac RAM: 4 GB

**Note:** Not compatible with Windows XP or Vista.