

Martial Arts Master 2

Martial Arts Manager Software



System Startup

Version 2.02.02

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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 Master 2 is written in the powerful, easy-to-use database software from FileMaker Pro (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 20 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 Master 2

Before attempting to install MA Master 2, you should check its compatible with your operating system (Appendix A page 20), then follow the instructions below.

Mac OS

The zip file downloaded from our website, contains a folder called MA Master 2, which contains all the elements needed to run the database. Copy the MA Master 2 folder into your Applications folder, then:

1. Open the MA Master 2 folder.
2. Drag the MA Master 2 executable icon (Application file) to your Dock.
3. Click the MA Master 2 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 Master 2 to your computer. The database installs to a MA Master 2 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

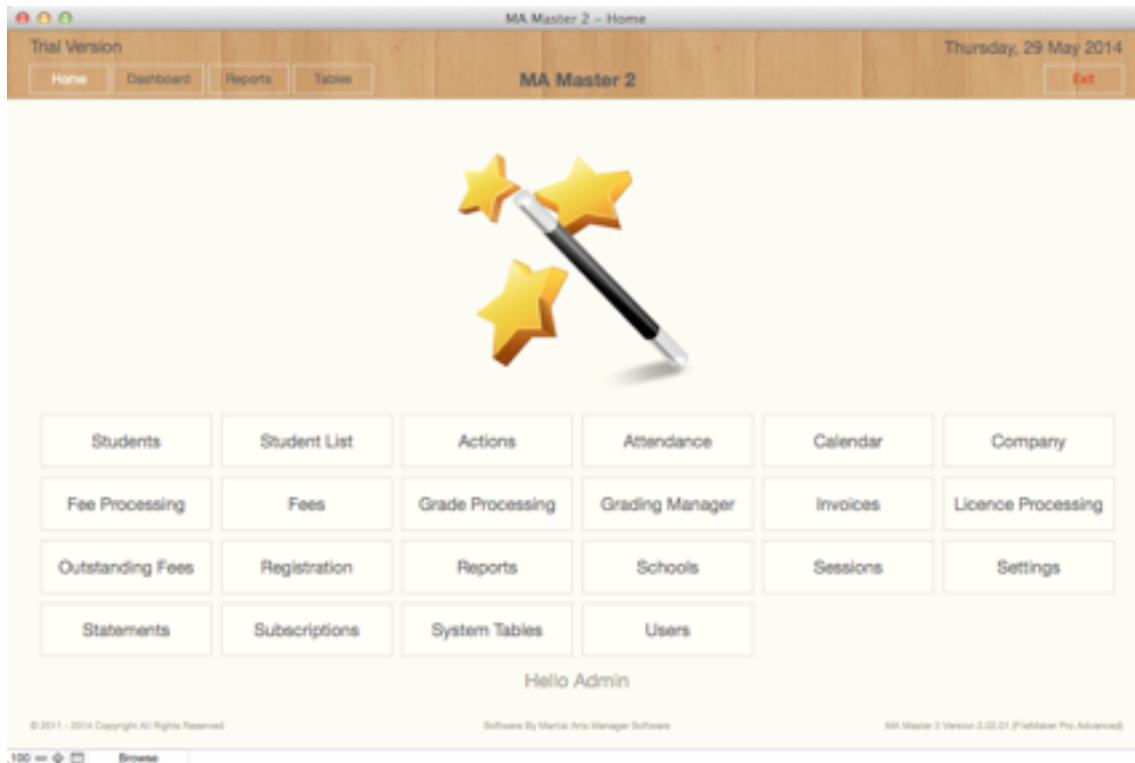
Password = master (i.e. the same as account but in lower case).

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 16 below.

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

MA Master 2

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 Master 2 application.



You are advised to familiarise yourself with how MA Master 2 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 Company screen (page 12) 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) - you need to create at least one school.
- Classes (System Tables menu) - create a record for each class you teach (minimum of one).
- School Classes - return to the Schools screen and attach all relevant classes to each school.

Having set the above, you have done the bare minimum necessary to start using the database and adding students to the Student 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 student fees, you should familiarise yourself with Subscription Levels, Subscriptions, Schedules and Fees.

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. Unlike in MA Master in MA Master 2, this functionality has been split between Settings and a new option called Company (page 12).

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 top section contains the following fields:

- Adult Age - the database records a gender for each student record. The value entered here is used to determine when a student's gender changes from that of a child's (Boy or Girl) to that of an adult (Male or Female).

- Apply Vouchers - allows you to award vouchers to a student record each time an attendance record is created in the database.
- Vouchers - allows you to determine the number of vouchers to be awarded as outlined above.
- Auto Add Registered Class - a check box, when checked the database will automatically enrol a student who is registered as attending a class to that class.
- 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.
- Barcode Font - the name of the font the database should use when printing membership cards. Must be entered exactly as listed in your Fonts folder. See the user guide MA Master Barcode Font (downloaded from our website).

Note: If you want to download a barcode font, we recommend the free font supplied royalty free by Matt Welch. This can be downloaded from a number of websites. For example <http://www.barcode-label-hk.com/tool/free-code-39-barcode-font-download-english.htm> or <http://www.squaregear.net/fonts/>

- Display Barcode On Registers - a check box, that when checked tells the system to print a barcode to the right of each students name listed on printed class registers.
- 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 Student 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 Student 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.
- iOS Barcode Scan Format - allows you to specify how the kiosk registration format works when used on an iOS device.
- Licence Slip Authorised By - the name you want to appear at the base of Licence Slips produced from the database. If you don't use slips, you can leave this field blank.

- Licence Slip Signature - an image of the signature you want to appear on Licence Slips. Just drag an image into the field or right click and select from the displayed context menu list. If you don't use slips, you can leave this field blank.
- 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 accessing popup or document screens will cause the main screen to adjust. This can cause the screen to flicker.

- 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
 - Canada
 - New Zealand
 - USA
- Student Details Default - allows you to set which screen in Student Details becomes the primary details screen when navigating to it. Select either:
 - Details - Student Details data entry screen.
 - Profile - student statistics and summary information.

Note: There may be a slight delay in the Profile screen loading, as it performs a number of calculations when summarising data.

- Subscription Monthly Grace - a check box, when checked the system will wait a month from a subscription payment becoming due to being classed as outstanding.
- Unit - the currency unit you want the database to use. A general text field, just enter the currency symbol required.

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 Student Details. These include:

- Default Category - applied when creating a new student record.
- Default Class - applied when creating student class records.
- Default County - applied when creating a new student record.
- Default Martial Art - applied when creating student grading records.
- Default Payment Plan - applied when creating a new subscription (Subscription Details).
- Default School - applied when creating student class record.

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
- Company Name - set in the Company 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".

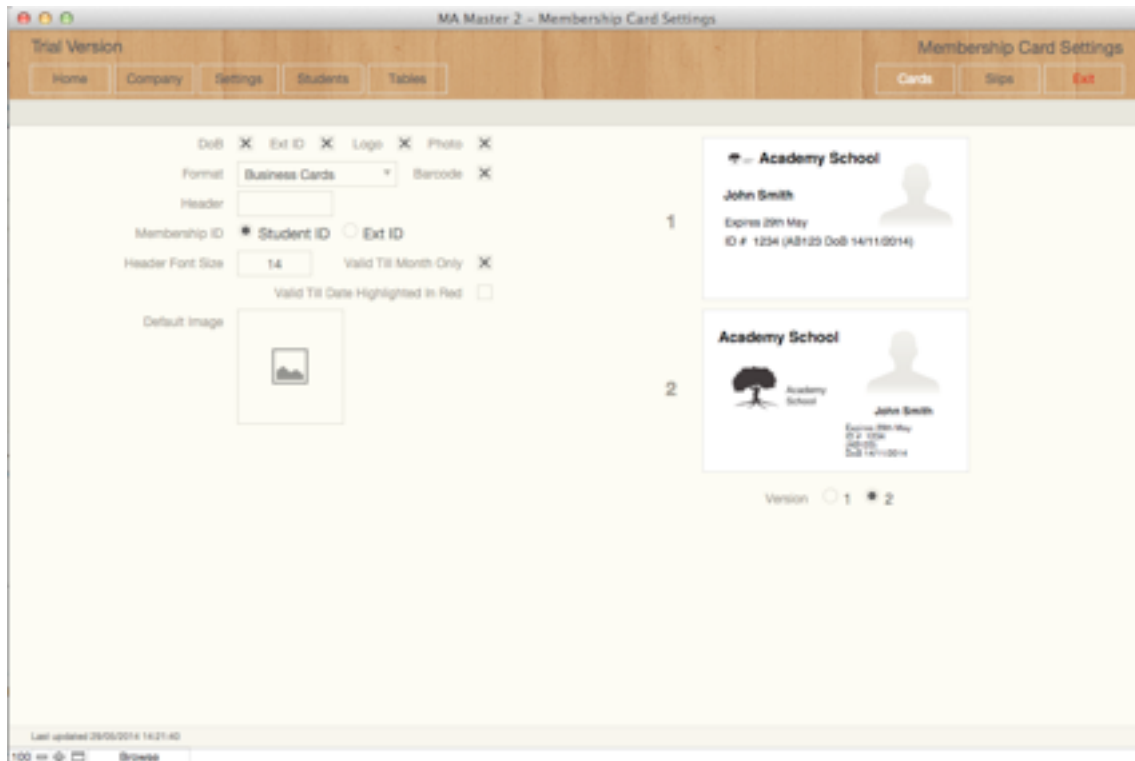
Caution! Failure to register this product within the trial period (30 days) will cause the database to lock. If this happens you will not be able to gain access to this version of the database or any data within it. The database will have to be returned to us at Martial Arts Manager Software to be unlocked.

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).
- Database ID - added for future development and system integration.

Membership Card Settings

To access and preview membership card settings, select the **Card** button located on the navigation bar located at the top of the screen to navigate to the Card Settings screen.



Here you can determine from a limited set of values what elements are displayed on system generated membership cards. You are also able to choose from the two versions shown. The field options include:

- DoB - check if you want each students date of birth to be displayed.
- Ext ID - check if you want each students External ID to be displayed (this should only be checked where Membership ID is set to Student ID and you also want the Ext ID to show as well).
- Logo - check to display the logo set in Company (page 12 below).
- Photo - check to display each students photo (requires a photo for each student record).
- Format - select the type of cards to be printed, i.e. the stationary being used. Options include:
 - Card Printer
 - Business Cards
 - Name Cards
- Barcode - check to display a barcode on each card. Requires a barcode font (see page 8 above).
- Membership ID - select between Student ID or Ext ID.
- Header Font Size - allows you to amend the size of your Company Name (see page 12 below).
- Valid Until Month Only - when checked, instead of showing the full date, only the day and month are used, e.g. 01/04/2014 will show as 1st April.

- Version - select between version 1 or 2 for your preferred layout.
- Header - allows you to add text above the student photo. Designed to allow you to distinguish between certain card users, e.g. Staff, Instructor, Coach etc. For students, should be left blank.

Note: Changes are reflected in the example cards displayed.

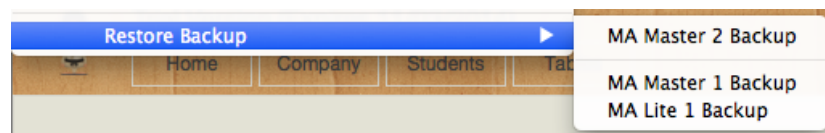
Functions

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 (MAM2Backup.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.

In addition to the functions outlined above, the Settings screen also allows you to import data from previous versions of both MA Master and MA Lite (see page 14 below). These options are accessed from the Menu Bar at the top of the screen under Help. Then select Restore Backup followed by the either of the following options:



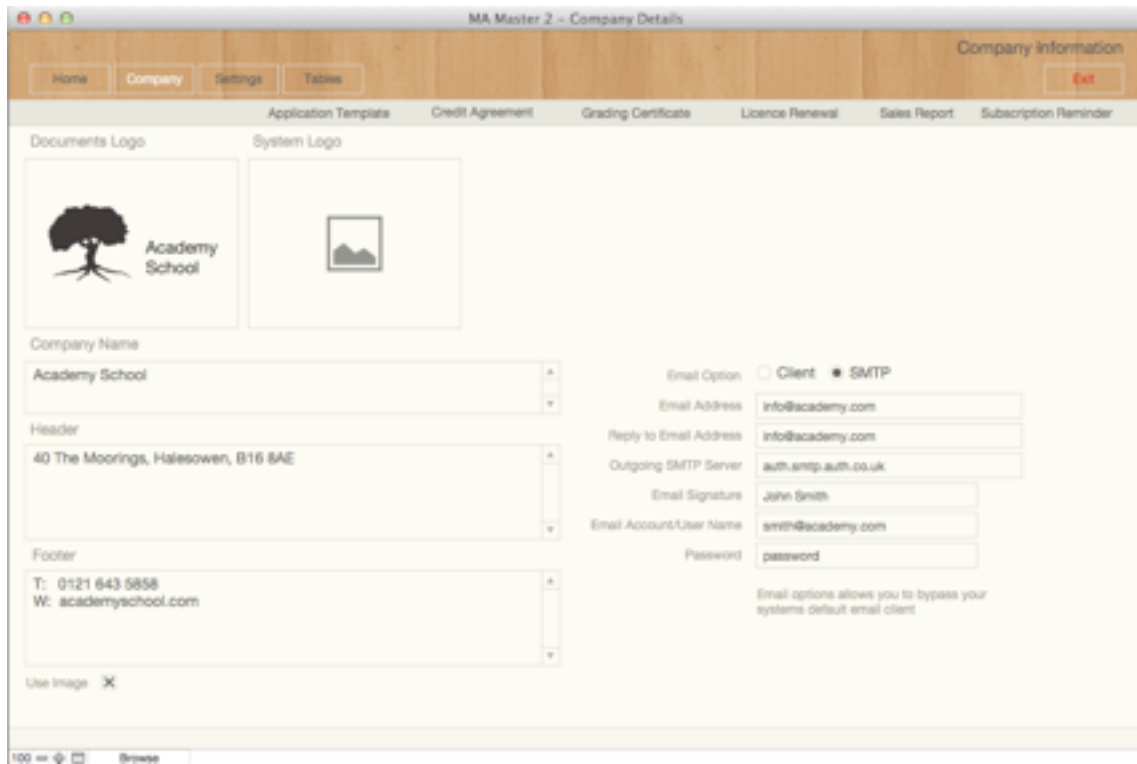
- MA Master 2 Backup - used to transfer data from your existing copy of MA Master 2 as and when we issue new database updates. Same as selecting the Restore button outlined above.
- MA Master 1 Backup - to import data from your MA Master backup file.
- MA Lite 1 Backup - to import data from the MA Lite backup file.

Company

You use the Company screen to set your Company 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.

However, the screen is also where you configure database email settings and a number of preset standard document templates. In previous version of MA Master, templates were incorporated into Communication Templates. In MA Master 2 we've separated these, as we felt it over complicated the document template function itself.

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 companies logo on certain documents. Removing the check tells the system where applicable that you are using our own preprinted stationary. In addition you can use the System Logo field to replace the logo displayed on the startup and Home screens with your own logo. Thereby enabling you to personalise the database to better represent your own organisation.

Access to each template is via the relevant button located just beneath the Navigation Bar at the top of the screen. Here you have access to the following options:

- Application Template
- Credit Agreement
- Grading Certificate
- Licence Renewal
- Subscription Reminder

Select an option and a popup data entry window will appear allowing you to edit certain content.

In addition it is possible to run and preview a Sales report from the Company screen, just click the **Sales Report** button located with the template buttons outlined above.

Transfer Data From MA Master & MA Lite

If you've used either MA Master or MA Lite, it is possible should you wish, to transfer some of your existing data across to the new MA Master 2 database. However, it should be noted that MA Master 2 is not an upgrade to MA Master. It is a completely new database, designed from the bottom up. So whilst there is much familiar about it to its predecessor, it is also significantly different. Therefore, it simply isn't possible to transfer all data across, and it will be necessary for you to reenter some data yourself.

Some changes include:

- MA Master 2 treats a number of functions from MA Master differently. For example there are no longer separate tables for recording Health Issues, Groups, Courses etc. These have now all been merged into a set of tables called Attributes and Attribute Values.
- User defined fields are no longer supported.
- Membership Cards, credit agreements, application forms etc are no longer maintained within student communications or communication templates. For this reason the transfer process won't bring across any system templates. You will need to reconfigure your templates in MA Master 2.
- Tasks have gone, replaced by Actions, but again due to changes in how this works tasks are not transferred over.
- In MA Master you could record fees in one of two ways, in advance (invoiced) or in arrears. MA Master 2 completely changes this format. Here fees are based on student subscription plans, where you need to set a plan for each student, and then as payments are made they are offset against the plan. When a plan is completed, it is necessary for you to create a new plan and so on.

Note: The import process from MA Master will bring across and generate pay per class and monthly subscriptions. All associated payments are allocated to the newly generated subscription plan. The transfer process won't create subscription schedules. You will need to do this manually.

- We've added a new sessions module linked to the calendar module that allows us to quantify none attendance. The import process will reconfigure existing events and attendance records into the new format. However, whilst transferred attendance records are associated with each session, the process doesn't provide enough information to determine none attendance for these historic entries..
- We've changed the way the system determines when a student is eligible to take their next grading. So you will need to review your Martial Art and Grade settings. Review the

relevant section in the User Guide. But this means the valid until dates relating to grades isn't brought over.

Naturally many of these changes won't affect users of MA Lite, which being simpler didn't have the elements outlined above in the first place.

Having transferred your data across from your old system, you are still able to access your old database and keep it for reference. But be aware you will need to spend time reconfiguring MA Master 2. Specifically you will need to redo:

- Communication Templates (Coms Templates from the System Tables menu)
- System Templates (Company details screen from the Home menu screen), i.e. application forms, credit agreements etc.
- Membership Cards (Settings screen from the Home menu screen).
- Subscription Levels (System Tables menu screen)
- Subscriptions - please refer to the User Guide.
- Martial Arts & Grades (System Tables menu screen) - populate the format to be used in determining when students can take their next grading. Please refer to the relevant sections in the User Guide.

Transfer Data

The transfer process uses a backup file of your current version of MA Master or MA Lite. It is therefore necessary that you perform a backup before attempting to transfer data.

To transfer data from your backup file:

1. Navigate to the Settings screen from the Home menu.
2. Perform a system reset by clicking the **Reset** button located on the Secondary Navigation Bar at the top right of the screen. This will remove all test data from the database.
3. Select **Help** on the Menu Bar at the top of the screen, then choose **Restore Backup**, then choose either MA Master 1 Backup or MA Lite 1 Backup (see page 12 above). The system will then import as much of your data as it can.
4. Review your data, familiarising yourself with how MA Master 2 may have reconfigured it.
5. Determine what hasn't been brought across and consider how you can use MA Master to record it manually.

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).

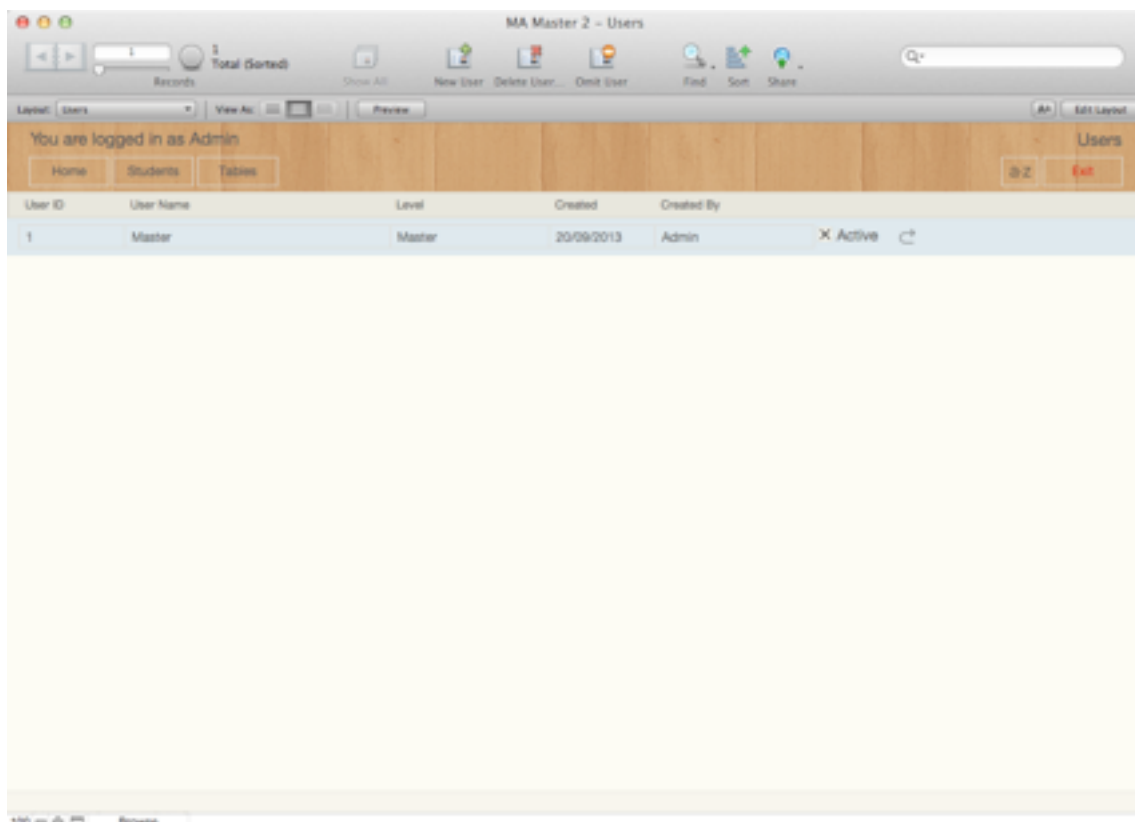
However prior to entering your own data into the database you should create a user account in your own name with your own password, and disable the generic Master account.

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.

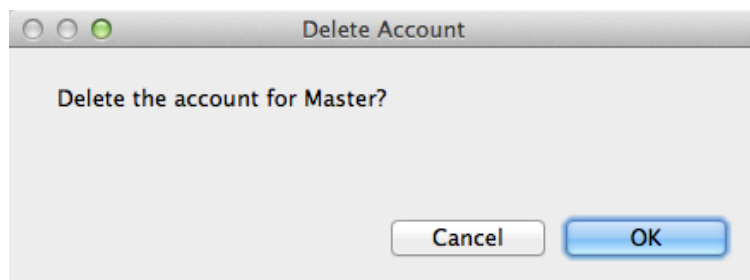
3. Enter the user name you want (this can be a single name, nickname or full name). This will be the name you have to enter when opening the database in the Account field.
4. Select Master from the drop down list in the Level field. This is to ensure you have the same and fullest access rights to the 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 sternly advise against this. All future upgrades to MA Master 2 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 sets 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 Master 2 login screen, click the **Change Password...** button located bottom left.



The screenshot shows a dialog box titled "Open 'MA Master 2'". It features a play button icon on the left. The text "Open 'MA Master 2' using:" is followed by two radio button options: "Guest Account" (unselected) and "Account Name and Password" (selected). Below these are two text input fields: "Account Name:" containing "John Smith" and "Password:". A checkbox labeled "Remember this password in my keychain" is also present and unchecked. At the bottom, there are three buttons: "Change Password..." (highlighted), "Cancel", and "OK".

The system will show the Change Password screen.



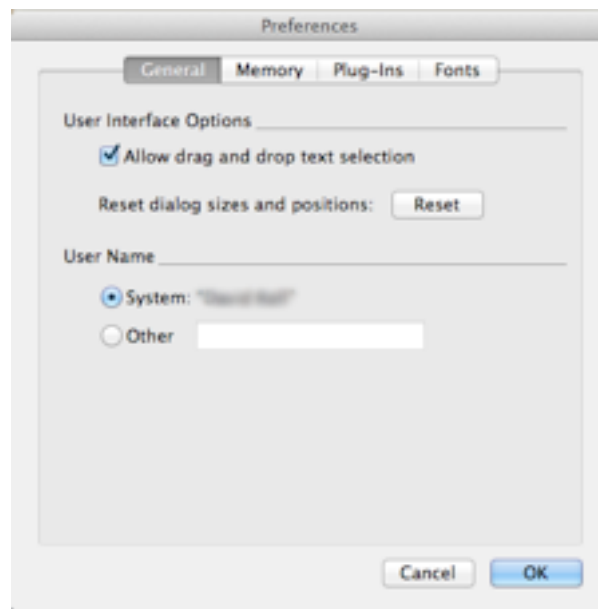
The screenshot shows a dialog box titled "Change Password". It contains the instruction: "Use these fields to change the password for your FileMaker account. Please enter your old password once and your new password twice." Below this, the "Account Name:" is pre-filled with "John Smith". There are three text input fields: "Old Password:", "New Password:", and "Confirm New Password:". At the bottom right, there are "Cancel" and "OK" buttons.

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

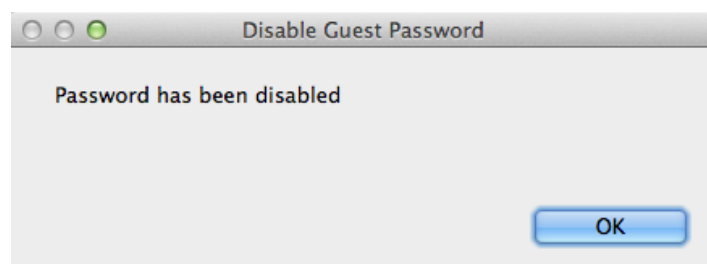
If when opening the database the system doesn't default the account name to yours or the one you want, you can set this from within the database. To do this, from the Home screen select Help on the Menu Bar at the top of the screen then choose **Preferences**. This opens the Preferences window. To change 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 Master 2 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.