

KSB EasySelect

User Administration for Offline Support

Author: Christopher P. Hamkins

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Object

This concept is designed to explain the most important elements needed to support offline users.

Scope

The following are included:



- Basic procedure for installation
- Creating User ID
- Setting proper privileges
- Creation of license files
- How to load the license file in the offline version
- Changing the default values for currency exchange rates
- Procedures for offline data backup and restore

Basic procedure for installation

This version has been issued for Windows 2000, Windows XP, Windows Vista and Windows 7. Note: Windows NT displays colours differently to XP, but otherwise there are no known problems with this operating system.

Minimum System Requirements

Operating system: Windows XP / Vista / 7

CPU: Pentium 4 with 2 GHz or comparable

RAM: 512 MB

Drive: DVD-ROM

Hard Drive: 8 GB

Administrator privileges are required for installation. If you do not have administrator privileges the installation will be aborted.

If the Autorun-function is enabled on your computer, installation will start automatically when you insert the DVD. If this is not the case, please start setup.exe from DVD. EasySelect makes a difference between local and server installation. Server installation requires subsequent client installation on each individual client. For this purpose, please run the file setup.exe (located in the server directory) on each client. Local installation does not require any additional steps. After the installation has been completed, you can launch the application using the icon on your desktop. The option "Program Updates" in the installation routine is not active yet.

"Server installation" means that all the main program data are present on a single server at the site using a local network. The users each run a "client" on their own computer which connects to the version on the server. This allows the sales documents to be saved in a central location and be modified by everyone at the office.

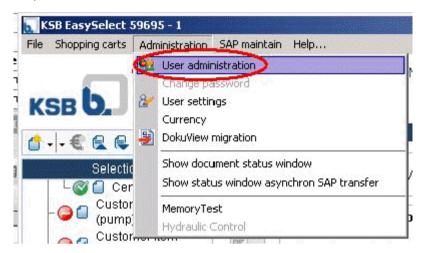
"Local installation" means that the complete installation is done on one machine. The user has a complete functioning system on his own machine, but no one else can see or edit his sales documents.

There is a PDF file with more detailed installation instructions provided on the DVD.

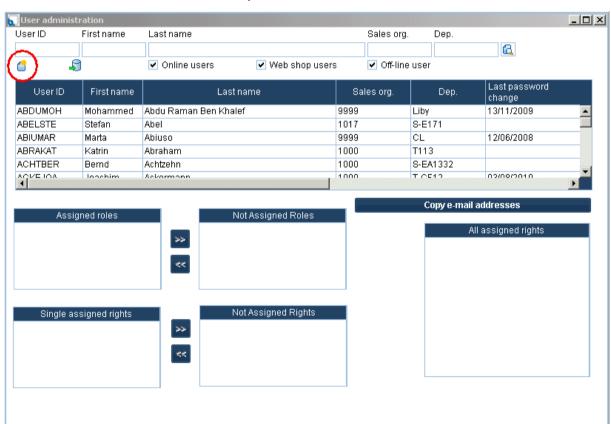


Creating User ID

To create user ID's, start the user administration in the online version of KSB EasySelect®:



The user administration window will open. There, click on the icon for "create new user":





Fill out the information on the form:

Enter user data	_ X
UserID	123456789
First name	Big
Last name	Dealer
Department	Acme Pumps
Sales organisatior	KSB PUMPS India (: ▼
E-mail address	big.dealer@acme.com.in
☐ Group ☑ (Off-line user	OK Cancel

For the User ID, use the IT-key for KSB employees, and the customer number for external customers like dealers. The user ID must be globally unique for KSB worldwide.

Do not add KSB employees except in specific response to approved IT orders, as there is an internal billing for use of KSB EasySelect[®].

The first and last name and department can use your own conventions, but the department cannot be more than 12 characters.

For the sales organization, use "KSB PUMPS India (5088)" for Indian dealers and internal KSB users in India.

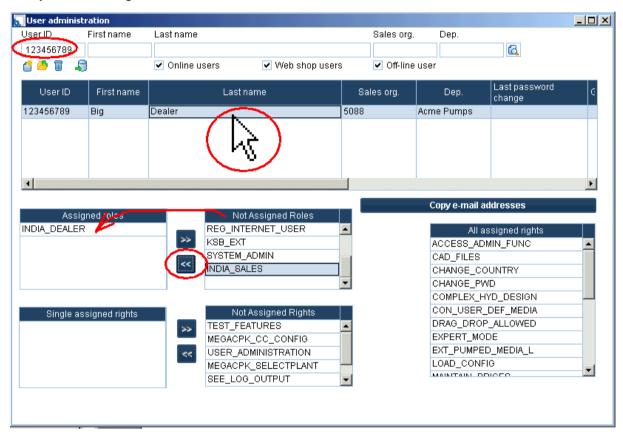
Set the tick for "offline user" if you plan to provide a license file.

Finally, click on OK. This will create the user in the database.



Setting proper privileges

A new user will have absolutely no privileges, so he will not be able to actually do anything in the program. To assign the privileges, call up the user in the table. You can enter the user ID or the name in the boxes at the top to filter the display. Then click on the user in the table to select him or her. Finally, mark the correct role in the list of "Not Assigned Roles" and on the << symbol to assign it.



Normally, each user should be assigned only one role according to his function. However, it is possible to assign more than one, for example if a user is active both offline and as registered internet users.

For KSB India, the following roles are relevant:

INDIA SALES Normal KSB sales offices in India

INDIA_DEALER
 For Indian dealers

INDIA PA
 For Indian P&A offices

• REG_INTERNET_USER For users who also use the web shop, give this role in addition to the normal one.

For a list of what privileges are currently assigned to reach role, see the Appendix. You can check in the list of "All assigned rights" to see what rights the user has in total.

In some cases, it may be necessary to assign specific individual rights, for example MEGACPK_SELECTPLANT to allow the user to change the plant of production for the MegaCPK from Sinnar to Pegnitz. This is done in the list on the bottom.

Changes made are saved immediately. Simply close the dialog with the "X" at top right.



Creation of license files

Reset the password

First, select the user in the list and click on "reset password" in the context menu.



Make a note of the password that was generated (e.g. by copying with Ctrl-C).



If you are sending the license file via e-mail you can then paste the password into the e-mail.



Create the file

Then select "create license file" from the context menu:



A "file save" dialog will open; navigate to a convenient folder and save the file.

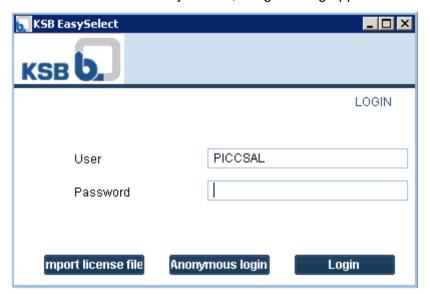
You can attach the file to the e-mail and then send it.

How to load the license file in the offline version

First of all, the license file must be available in the local file system. If it was received via e-mail, it needs to be saved as a local file.

Further, the password communicated with the license file must be known.

Then start the offline version of KSB EasySelect®; a login dialog appears:



In this dialog, you have the following options:

- Click on "Anonymous login" to start with restricted program features and without price display.
- Enter your user-ID and password and click on Login (for returning users)



Import a license file (for first time login).

If you click on "Import license file", a "file open" dialog appears. Navigate to the folder with the license file, then select it.

After opening the license file, you can login with the provided password. On the first login, you are asked to change your password to one of your own choice.

On subsequent logins, you don't need to import the license file again, you can log in with the password you created.

Changing the Currency Exchange Rates

Contexts for the exchange rate

KSB EasySelect® maintains the currency exchange rates in two separate contexts:

- The master data
- The individual sales document

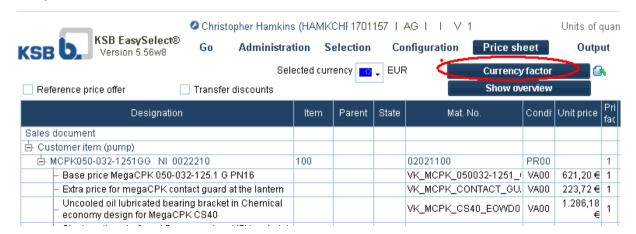
Master data

The master data is maintained online by the support department in Germany only whenever they receive notice of changes in the exchange rates. The master data in the offline version corresponds to that of the online system at the time of generation of the DVD. It cannot be changed by the user.

Individual sales document

Each sales document maintains its own currency and its own copy of the currency exchange rates. This allows the user to modify the exchange rates for individual quotations.

The exchange rates are accessed from the price sheet page by clicking on the button "currency factor"





This opens a dialog with the exchange rates:

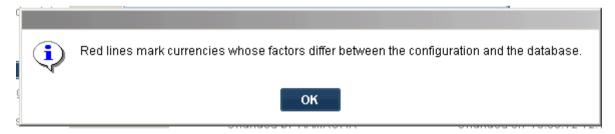


User-defined currencies can be created with the "new currency" icon in the upper left. You can always enter a new exchange rate for them (highlighted in blue).

Users with the privilege "CHANGE_EXCHANGE_RATES" can also modify the other exchange rates. The modifications are saved in the sales document.

Note: the exchange rate entered is not transmitted to SAP. SAP will recalculate the quotation with its own internal exchange rates after transmission..

When you save the document, and open it again, you will be warned about currencies not matching the exchange rate from the database:





The line not matching will be highlighted in red:



Click on "OK" to keep the value you entered, or on "DB-Factor -> Factor" to overwrite it with the value from the database.

Procedures for offline data backup and restore

Backup

All of the "live data" (sales documents, configurations, user-defined media, user-defined pipe elements...) are saved in the databases

- KSB_LOCAL_ADMIN.MDB
- KSB_LOCAL_USER.MDB
- KSB_LOCAL_USERMEDIUM.MDB
- KSB_LOCAL_DYN.MDB

Where these are located depends on the operating system and on the user choices during the installation. For Windows XP they are located by default at

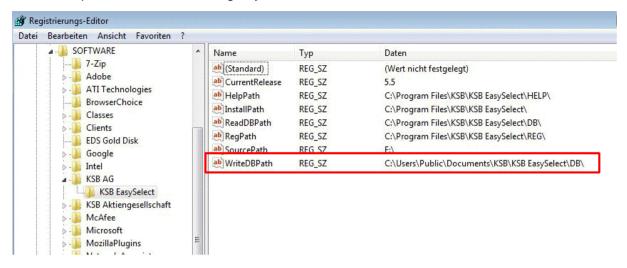
C:\Documents and Settings\All Users\Documents\KSB\KSB EasySelect\DB

and in Windows 7 in

C:\Users\Public\Documents\KSB\KSB EasySelect\DB



The exact path is stored in the registry as follows:



It is sufficient to back up these files to have a complete backup of the live data of KSB EasySelect[®].

The KSB_LOCAL_UPDATE.mdb file does not need to be backed up.

On a server installation these files are located on the server; only those need to be backed up.

Restore

To restore the KSB EasySelect[®] data after a system crash or reinstallation of the operating system, first install a clean new version of KSB EasySelect[®] offline version directly from the DVD.

After the installation, restore the four files named above from your backup.



Appendix: Chart of Rights and Roles

SRIGHT	Description	ANON OFF- LINE	IN- DIA DEA- LER	INDIA PA	INDIA- _SALE S	REG INTER- NET USER
ACCESS_ADMIN_FUNC	Allows the user to see the administration page to open and save sales documents and versions.	х	x	х	х	
AMADS_CONF	Allows configuration of the "Ama-DS" solids separation system.					
AMAREXKRT_BUSINESS_3+	Allows BT3 configuration for Amarex KRT					
AMA- REXKRT_BUSINESS_3DOC	Allows 'documented' BT3 configuration for Amarex KRT					
AMAREXKRT_CC_CONFIG	Allows access to features reserved for the P&A for the product Amarex KRT					
AMAREXKRT_CONF	Allows selection and configuration of the product Amarex KRT	х				x
AMAREXN_BUSINESS_3+	Allows BT3 configuration for Amarex N					
AMAREXN_BUSINESS_3DOC	Allows 'documented' BT3 configuration for Amarex N					
AMAREXN_CC_CONFIG	Allows access to features reserved for the P&A for the product Amarex N					
AMAREXN_CONF	Allows selection and configuration of the product Amarex N	х				х
AMRI_BUSINESS_3+	Allows BT3 configuration for Amri products					
AMRI_BUSINESS_3DOC	Allows 'documented' BT3 configuration for Amri products					
AMRI_CC_CONFIG	Allows access to features reserved for the P&A for the Amri products					
AMRI_CONF	Allows selection and configuration of the Amri products	х				х
AUTOM_BUSINESS_3+	Allows BT3 configuration for Automation products					
AUTOM_BUSINESS_3DOC	Allows 'documented' BT3 configuration for Automation products					
AUTOM_CC_CONFIG	Allows access to features reserved for the P&A for the product Automation products					
AUTOM_CONF	Allows selection and configuration of the product Automation products	х				х
BOA_BUSINESS_3+	Allows BT3 for Boa family valves					
BOA_BUSINESS_3DOC	Allows documented BT3 for Boa family valves.					
BOA_CC_CONFIG	Allows special P&A functions for Boa family valves					



BOA_CONF	Allows configuration of Boa family valves	x				х
BUILDSERV_BUSINESS_3+	Allows BT3 configuration for building services products					
BUILD- SERV_BUSINESS_3DOC	Allows 'documented' BT3 configuration for building services products					
BUILDSERV_CC_CONFIG	Allows access to features reserved for the P&A for the product building services products					
BUILDSERV_CONF	Allows selection and configuration of the product building services products	х				х
CAD_FILES	Allows selection of the CAD files on the output page	х	х	х	х	х
CHANGE_COUNTRY	Allows the user to change the "customer country" for the sales document.		x	х	х	
CHANGE_EXCHANGE_RATES	Allows the user to change exchange rates for currencies that in the database in addition to those that he defined himself.					
CHANGE_PWD	Allows the user to change his password.		х	х	х	х
COMPACTA_BUSINESS_3+	Allows BT3 configuration for COM-PACTA					
COMPAC- TA_BUSINESS_3DOC	Allows 'documented' BT3 configuration for COMPACTA					
COMPACTA_CC_CONFIG	Allows access to features reserved for the P&A for the product COMPACTA					
COMPACTA_CONF	Allows selection and configuration of the product COMPACTA	х				х
COMPLEX_HYD_DESIGN	Allows configuration of advanced features for the hydraulic design.		x	х	х	
CON_USER_DEF_MEDIA	Allows the user to create his own fluid data and save them in the database.	x	x	х	х	х
CPK_BUSINESS_3+	Allows BT3 configuration for CPK					
CPK_BUSINESS_3DOC	Allows 'documented' BT3 configuration for CPK					
CPK_CC_CONFIG	Allows access to features reserved for the P&A for the product CPK					
CPK_CONF	Allows selection and configuration of the product CPK	х				х
DATA_MAINTENANCE	Allows the user to maintain data in the development system.					
DEA_BUSINESS_3+	Allows BT3 configuration for DEA					
DEA_BUSINESS_3DOC	Allows 'documented' BT3 configuration for DEA					
DEA_CC_CONFIG	Allows access to features reserved for the P&A for the product DEA					
DEA_CONF	Allows selection and configuration of the product DEA	х				х
DRAG_DROP_ALLOWED	Allows "drag and drop" in the component tree to sort items.	х	х	х	х	



		1			1
Allows the user to edit the data sheet for BT3 configurations.			х	x	
Allows BT3 configuration for ETA					
Allows 'documented' BT3 configuration for ETA					
Allows access to features reserved for the P&A for the product ETA					
Allows selection and configuration of the product ETA	х				х
Allows the user to activate the expert mode.	х	х	х	x	х
User can see a larger list of fluid media ("extended pumped media list")		х	х	х	
User can edit the SAP characteristics before transmission of an item to SAP. ("Side entry"). Similar to manual configuration in SAP.					
Allows the user to open sales documents which were saved in the database.	х	х	х	х	х
Allows the user to enter prices manually.		х	х	х	
Allows the user to see the margin calculator.					
Allows the user to use the item to define a "material variant", i.e. an ident-number product whose configuration will become the same as the currently configured item.					
Allows BT3 for MegaCPK			х	x	
Allows documented BT3 for MegaCPK.			х	х	
Allows special P&A functions for MegaCPK			х		
Allows configuration of MegaCPK	x	х	х	x	х
Allows selection of plant of production for the MegaCPK.					
Allows BT3 configuration for MIX- ERS_BIOGAS					
Allows 'documented' BT3 configuration for MIXERS_BIOGAS					
Allows access to features reserved for the P&A for the product MIX- ERS_BIOGAS					
Allows selection and configuration of the product MIXERS_BIOGAS					
Allows BT3 configuration for MIXERS					
Allows 'documented' BT3 configuration for MIXERS					
Allows access to features reserved for the P&A for the product MIXERS					
	Allows BT3 configuration for ETA Allows 'documented' BT3 configuration for ETA Allows access to features reserved for the P&A for the product ETA Allows selection and configuration of the product ETA Allows the user to activate the expert mode. User can see a larger list of fluid media ("extended pumped media list") User can edit the SAP characteristics before transmission of an item to SAP. ("Side entry"). Similar to manual configuration in SAP. Allows the user to open sales documents which were saved in the database. Allows the user to enter prices manually. Allows the user to see the margin calculator. Allows the user to see the margin calculator. Allows the user to use the item to define a "material variant", i.e. an ident-number product whose configuration will become the same as the currently configured item. Allows BT3 for MegaCPK Allows documented BT3 for MegaCPK. Allows special P&A functions for MegaCPK Allows selection of plant of production for the MegaCPK. 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MIXERS_CONF	Allows selection and configuration of the product MIXERS					
MOD_C_OTH_SALES_ORG	Allows the user to load, modify and save sales documents created by users in other sales organizations.					
MOD_C_OTH_USER	Allows the user to load, modify and save sales documents created by other users.		x	х	х	
MOTOR_SOLO_CONF	Allows selection and configuration of the product MOTOR_SOLO	х				х
MOVITEC_BUSINESS_3+	Allows BT3 configuration for MOVITEC					
MOVITEC_BUSINESS_3DOC	Allows 'documented' BT3 configuration for MOVITEC					
MOVITEC_CC_CONFIG	Allows access to features reserved for the P&A for the product MOVITEC					
MOVITEC_CONF	Allows selection and configuration of the product MOVITEC	х				х
MULTITEC_BUSINESS_3+	Allows BT3 configuration for MULTITEC					
MULTITEC_BUSINESS_3DOC	Allows 'documented' BT3 configuration for MULTITEC					
MULTITEC_CC_CONFIG	Allows access to features reserved for the P&A for the product MULTITEC					
MULTITEC_CONF	Allows selection and configuration of the product MULTITEC	х				х
N_STAND_DOC	Allows the user to select non-standard (BT3) documentation.			х	х	
N_STAND_DRIVE	Allows the user to select non-standard drive group components like coupling, baseplate.			х	х	
N_STAND_FLANGE	Allows the user to select non-standard flange connections.			х	х	
N_STAND_MOTOR	Allows the user to select non-standard (BT3) special motors.			х	х	
N_STAND_P_COATING	Allows the user to select non-standard (BT3) coatings.			х	х	
N_STAND_PACKAGING	Allows the user to select non-standard (BT3) packaging.			х	х	
N_STAND_SHAFT_SEAL	Allows the user to select non-standard (BT3) shaft seals.			х	х	
NO_SESSION_TIMEOUT	Allows the user to work in the webshop without getting any timeout.	х	x	х	х	х
OMEGA_BUSINESS_3+	Allows BT3 configuration for OMEGA					
OMEGA_BUSINESS_3DOC	Allows 'documented' BT3 configuration for OMEGA					
OMEGA_CC_CONFIG	Allows access to features reserved for the P&A for the product OMEGA					
OMEGA_CONF	Allows selection and configuration of the product OMEGA	х				х
PIPE_CALCULATOR	Allows the user to use the pipe calculator feature.	х	х	х	х	х
RDLO_BUSINESS_3+	Allows BT3 configuration for RDLO					



RDLO_BUSINESS_3DOC	Allows 'documented' BT3 configuration for RDLO					
RDLO_CC_CONFIG	Allows access to features reserved for the P&A for the product RDLO					
RDLO_CONF	Allows selection and configuration of the product RDLO					
REFERENCE_PRICE_OFFER	Allows the user to make reference price offers in which YEMC and YEXP are deactivated.					
RESERVE_PARTS_SEL	Allows the user to make reserve parts selections.			х	х	
RPH_BUSINESS_3+	Allows BT3 configuration for RPH					
RPH_BUSINESS_3DOC	Allows 'documented' BT3 configuration for RPH					
RPH_CC_CONFIG	Allows access to features reserved for the P&A for the product RPH					
RPH_CONF	Allows selection and configuration of the product RPH	х				х
SAP_MAINTAIN	Allows access to the SAP sales document mapping functions needed for programming the SAP interface.					
SAVE_CHANGE_CONFIG	Allows the user to change and and save sales documents.	х	х	х	х	х
SAVE_LOAD_USER_PREF	Allows the user to save his user preferences.	x	х	x	х	х
SEE_ALL_PRICES	Allows the user to see prices for all products, even those which are not shown in the customer version.		x	х	х	х
SEE_C_OTH_SALES_ORG	Allows the user to open sales documents which were saved in the database by users from other sales organizations.					
SEE_C_OTH_USER	Allows the user to open sales documents which were saved by other users.	х	x	х	х	
SEE_COMP_PRICES	Allows the user to see detailed price in- formation breakdown on component ba- sis (individual variant conditions and YEMC)			х	х	
SEE_CUST_SPEC_P_OPT	Allows the user to see and select customer-specific product options like "BASF execution"			х	х	
SEE_DEBUG_OUTPUT	Allows the user to see special debugging information to aid program development.			х		
SEE_INT_DATA_SHEET	Allows the user to see the internal data sheet.			х	х	
SEE_INT_PRICE_SHEET	Allows the user to see the internal price sheet.			х	х	
SEE_LOG_OUTPUT	Allows the user to see log files containing debugging information to aid program development.					
SEE_OTH_USER_MEDIA	Allows user to see user-defined media created by other users.		х	х	х	



SEE_PRICES	Prices are shown only for users with this privilege		х	x	х	х
SEE_SAP_CLASSES	Allows the user to display the SAP classes to see the configurable attributes for the FK			х		
SEWA_BUSINESS_3+	Allows BT3 configuration for SEWA					
SEWA_BUSINESS_3DOC	Allows 'documented' BT3 configuration for SEWA					
SEWA_CC_CONFIG	Allows access to features reserved for the P&A for the product SEWA					
SEWA_CONF	Allows selection and configuration of the product SEWA	х				х
SPRINKLER_3	Allows sprinkler pump configuration					
SPRINKLER_MX	Allows sprinkler pump configuration					
SPRINKLER_MXNGXN	Allows sprinkler pump configuration					
SPRINKLER_RX	Allows sprinkler pump configuration					
SPRINKLER_SX	Allows sprinkler pump configuration					
SPRINKLER_UPA	Allows sprinkler pump configuration					
SURPRESS_BUSINESS_3+	Allows BT3 configuration for SUR- PRESS					
SURPRESS_BUSINESS_3DO C	Allows 'documented' BT3 configuration for SURPRESS					
SURPRESS_CC_CONFIG	Allows access to features reserved for the P&A for the product SURPRESS					
SURPRESS_CONF	Allows selection and configuration of the product SURPRESS	х				х
TEST_FEATURES	Activates special buttons and commands used for testing only.					
TRANSFER_KIPSS	Allows user to make output files for KIPSS interface		х	х	х	
TRANSFER_SAP	Allows the user to transmit configurations to SAP.			х	х	
TRIACHEM_BUSINESS_3+	Allows BT3 configuration for TRIA- CHEM					
TRIACHEM_BUSINESS_3DOC	Allows 'documented' BT3 configuration for TRIACHEM					
TRIACHEM_CC_CONFIG	Allows access to features reserved for the P&A for the product TRIACHEM					
TRIACHEM_CONF	Allows selection and configuration of the product TRIACHEM	х				х
UPA_BUSINESS_3+	Allows BT3 configuration for UPA					
UPA_BUSINESS_3DOC	Allows 'documented' BT3 configuration for UPA					
UPA_CC_CONFIG	Allows access to features reserved for the P&A for the product UPA					
UPA_CONF	Allows selection and configuration of the product UPA	х				х
USER_ADMINISTRATION	Allows the user to add new users in the database and maintain the user privi-					



leges.			