



MyOrgNet Administration

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Administrative Tasks

The primary administrative responsibilities, beside user training and assistance, are Controlling access, System configuration, and Database maintenance. This overview is a guide to what needs to be done, and what tools are available in the *MyOrgNet* system to help you do it.

Detailed documentation for each tool can be found by clicking the [Help](#) button for that tool. *[As of 6 July 2010 many are yet to be written, and most are out of date; we are working on them, but could use more help.]*

Access Control

Access in the *MyOrgNet* system is controlled by both allowed access to specific tools and by the visibility of data and visibility level of users. Users should be allowed to use and see everything they need to do their jobs, but not enough to inadvertently corrupt data outside of their area(s) of responsibility.

The ability to allow other users is itself controlled, and limited to allowing only those things available to the grantor. (i.e. You can allow anyone to use only those tools you are allowed to use, and only down to the visibility you are allowed to see for that tool.)

Tools Control

The [Allow](#) tool controls tool access for all users. Public, Friends, Members and Staff can each be allowed a general set of tools, and then individuals can be allowed specific additions or the same tools at a deeper level.

The deeper access levels often turn on additional abilities within the tools. The following table lists the access levels and a general statement of the added abilities. Levels are cumulative.

| Access Level | General Abilities |
|----------------|-----------------------------------------------------|
| Public | View public data |
| Members | View members data, create calendars |
| Private | Manage event |
| Accounting | Input financial data |
| Budget | Change budgets, program companions, accounting |
| Administrative | Correct program and financial data |
| Internal | Direct database access, view relational references. |

It is generally not safe to assume that a user with a shallower access level can see or do all of the same things that you can within a tool.

Visibility Controls

To be visible, all of the elements in the path must be visible: Program, Event, Session, Activity, Name and Name-associated-data. The lowest-level visibility in the path determines the visibility of the information.

In general, you can not set a visibility level lower than you are allowed to see within any tool. The **My Name** tool sets the visibility level to Private to allow Members (who normally have only Member-level access) to hide their information from the public and other members by setting it to Private.

Name Related Visibilities

The **Names** tool controls the visibility level of all name and name-related address data. Individual controls are provided for: Name, Address, Home Phone, Cell Phone, Work Phone and Email. A low Name-visibility may mask all other name-related information.

The **Auxiliary Data Types Definition** tool controls the visibility of each type of auxiliary name data. In addition, the **Names** and **My Name** tools can set a lower level if desired. Typically, sensitive information like tax-id-numbers are set to Accounting-level visibility when the Auxiliary Data Type is defined.

Program Related Visibilities

The **Program Definition**, **Event Definition** and **Activity Definition** tools control the visibility of all program-related data.

System Configuration

A great deal of the **MyOrgNet** system is configurable by the administrator. This is both its strength and its weakness. With flexibility comes confusion. A design goal is to make the system as tailored and simple as possible for the end user, but this puts a burden on the administrator to configure all of the hidden parts so they work correctly.

There are several distinct areas where configuration is possible: Tools, Names, Programs and Accounts.

Tools

The names and position on the menu (header or body) can be configured using the **Tools Definition** tool.

The same tool can be known by different names for different users, making their tools menu easier for them to understand.

Tools can be left on the menu or moved up to the header (e.g. Staff Menu line) for more visible or ready access.

Names

Auxiliary Name Data Types

The primary name and address information is stored in fixed fields, but additional (Auxiliary) information can be defined for occasional or special organizational uses. This information can be searched and displayed along with the regular name and address information.

The [Aux Data Type Definition](#) tool lets you create data storage to go with Names, Addresses, Programs and Accounts. Each type definition has a name, a storage format, a visibility, and may have default values.

Email Defaults

The email communication preferences for Newsletter, Ballots, Interests and News can be defaulted for general names and for members or staff updates.

The [Names](#) tool at the administrative level allows you to configure these defaults for the last names of Public, Friends, Members and Staff.

Activities

Activities are the heart of participation in the [MyOrgNet](#) system. They link the Names, Events and Accounting branches of the system, defining what the name is doing for the event, and how to account for any monies involved. So to correctly define Activities, you need to understand the organizational structure and basic accounting.

Activities are unique to each program. They may have the same name in different programs, but may be configured to behave quite differently.

The basic parts of an Activity definition and an overview of options are given in the following table.

| Part | Overview |
|------|----------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------|
| Type | What function the activity serves. Typically Venue, Staff, Committee, Performer, Volunteer, Posting, or Action. Some types have additional parameters for special uses like coordinators and membership. |

| | |
|-----------------|---------------------------------------------------------------------------------------------------------------------------------------------------|
| Name | What this activity is called in this program. |
| Visibility | What level of visibility does this activity have. |
| Name Scope | Where to search for the names for this activity. Usually all names or names from a limited pool. |
| Display Options | What other information like dates, numbers, status, and notes – simple or form should be asked for and displayed. |
| Accounting | If and what kind of automatic accounting is to be done: Income or Expense. Advanced or at the Event. Credit/Debit account. Taxable. How computed. |

Programs

Programs are the heart of interactivity in the *MyOrgNet* system. The relation between programs for reference and display, and the relation of programs to accounts are all configurable using the [Program Definition](#) tool, as are the Name, Visibility and Display settings for the program.

Programs have configurable Names and visibilities. The program's visibility restricts the visibility of all components of the program (Events, Committees, Headlines and Articles).

Reference Programs

Reference Programs are those on which this program depends for support functions. The following table lists the eleven reference program relations and what they provide.

| Program | Services Provided |
|------------|-----------------------------------------------------------------------------------------------------|
| Membership | Membership for registration and pricing. |
| Donations | Automatic donation opportunities. |
| Volunteers | General pool of volunteers (names received with membership or donations solicitations) |
| Interests | Matching interests to members & friends for targeted emails. |
| Accounting | Credit card services |
| Calendar | Shared calendar |
| News | |
| FIP | (Family-Involvement-Program) links adult volunteering to child participation in program activities. |
| Equipment | Pools and vendors of available equipment to support events. |
| Services | Lists and vendors to provide services to support events. |

| | |
|-------|------------------------------------------------------------------------------------------------------|
| Links | Display links to the outside wide world web as a member service and/or to draw visitors to the site. |
|-------|------------------------------------------------------------------------------------------------------|

Separate programs are not required for each referenced service, but are allowed depending on how the functions are organized.

Related Accounts

Related Accounts are those on which this program depends for automatic accounting. These include: the Cash account, the Deposit account, the Checking account, and an Administrative account for posting credit card charges.

In addition, this section of the [Program Definition](#) tool defines how payments may be made and what automatic text to send when a credit card payment is received.

Display Settings

The program display settings define an automatically generated web page for the program. The general layout of the page is:

Headlines
Program Header Text
Related Programs
Events
Committees
Projects
Articles
Volunteer Needs
Program Footer Text

All parts of the display are optional. Headlines can be ignored, for this program only, or for this program and its headline companions. The program header text generally describes the ongoing program in sales terms, while the program footer text provides details and caveats. Events, committees, projects and articles can be ignored, listed for this program, listed for this and companion programs in each area, or displayed for this program. An annual program would usually detail the current event; a program series would usually list its coming events; an umbrella program would usually list companion events.

Each program can have it's own web layout (colors, backgrounds, etc), and these are defined using the [Web Definition](#) tool. The web layout for the Organization-Program is the default (which provides a common look and feel for all programs in the organization) if non is specifically defined.

The display settings and companion programs for the Organization-Program, defines the home page and provides the public links to other programs for more

detail. For additional home page control, you can separately call the individual display functions rather than using the default program layout. See the `vdisplay.php` file for these functions.

Companion Programs

Companion programs are those whose activities are included with this program for display. They are generally used for umbrella programs. For example a *Dance* program might be defined as an umbrella program to display the combined activities for several independently managed dance programs like *Contra*, *English* and *Waltz*. The public, clicking on the *Dance* program link on the home page could see event, committees and contacts for all three of the actual dance programs. The Organization-Program is the root of such a display tree. It controls the home page display, and provides the links to all visible programs.

Companion programs and their visibility-level can be configured for each of the display areas: Related Programs, Headlines, Events, Committees, Projects and Articles. The need to define companion programs in each of these areas depends on the display settings in that area. You can only configure companions if the display in that area is set to list the companion programs.

Accounts

Accounts are defined for Assets, Liabilities, Income, Expenses and Equity using the [Account Definition](#) tool. For asset and equity accounts, the location of the account (Bank and account number) can be defined so users making deposits can easily confirm the account. All accounts can define the appropriate tax form and location. The initial reconciled balance and date can also be set.

Equipment

The [Equipment Definition](#) tool is being re-written (7 July 2010). It will define equipment both in-house and from vendors which can be scheduled for Events.

Inventory

The [Inventory Definition](#) tool is being re-written (7 July 2010). It will define items for in-house sale and vendors from which they can be purchased. It will also manage the warehouse inventory which is that allocated to the Inventory Program.

Web

The [Web Definition](#) tool lets you configure the “look and feel” of web presentations. (The content is controlled by the program definitions.)

To use this tool, it is necessary to understand some HTML and the basic layout of an HTML page.

Most format control is in the HTML HEAD statement. The BODY statement adds some control of general background and default text formats.

Page headers and footers provide the general layout control (headers, side bars, static links, and images).

The box settings for background, width, border color and highlight color define the boxes which surround forms and reports.

For additional home page control, you can separately call the individual display functions rather than using the default program layout. See the vdisplay.php file for these functions.

Database Maintenance

Any database system used by multiple users will become cluttered. Errors will be made and must be periodically cleaned up.

User Changes

Changes to name and address information made by users (as opposed to staff) are logged and should be periodically reviewed using the [Verify Changes](#) tool. You have the option to keep or reverse any user changes.

Financial

The [Financial Reports](#) tool at the administrative access level provides the ability to correct or delete erroneous entries in Transactions, Postions and Participations. The integrity of the accounting system is preserved since transaction and participation balances are internally maintained.

Deadwood

The [Deadwood](#) tool provides an easy way to remove empty participations from old Events, to close old events past accounting for, and to find and clean-up orphaned relations (eg. addresses without any names).



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