Dynacom Technologies

Dynacom Dashboards

Installation and configuration guide

TABLE OF CONTENT

# ACTIVATING AND SETTING UP THE DYNACOM DASHBOARDS APPLICATION

The Dynacom Dashboards application lets you monitor the real-time evolution of your business financial situation wherever you are. However, before you can enjoy the benefits of your new mobile application, you must configure your system to allow access to your company data to your different users.

1. ACCESSING THE DYNACOM MOBILITY SERVICE

1.1 PREREQUISITE: SUBSCRIPTION TO A PREFERENTIAL SERVICE SUPPORT PLAN

You will be required to have a valid Preferential Service subscription to benefit from the Dynacom Mobility Service.

If you are not currently on the Preferential Service support program, or if your subscription has expired, a warning will display inviting you to subscribe before going any further.
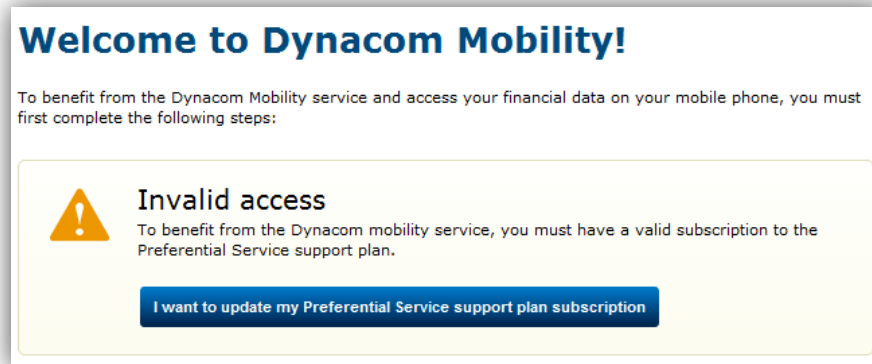
1.2 CREATING A PASSWORD

Access to your account must be protected by a password to ensure the security of your financial information.

Creating a new password can be done in 2 quick steps:

1. Enter your password.
2. Confirm your password.

Once you're done, click the **Create now** button. The next step will require installing the data transfer service.

1.3 CHANGING YOUR PASSWORD

You can modify your password at any time simply by entering and confirming a new password. Your new password will be effective the next time you login to your Dynacom Mobility account.

> If you change your Dynacom Mobility account password, make sure to update your connection settings in the Data Extraction Service to allow the service to access and update your data. For more information about configuring the Data Extraction Service, please refer to chapter 3.

2. INSTALLING THE DATA EXTRACTION SERVICE

The Data Extraction Service allows you to connect and extract data from your companies to make it accessible to your mobile users. Once configured, this service operates without intervention and updates your data at a frequency set during configuration.

2.1 DOWNLOADING THE DATA EXTRACTION SERVICE

After setting your password you can download the Dynacom Mobility Extractor Service setup file and install it on your workstation. To do so, simply click the **Download service** button. A download dialog will prompt you to save the setup file to your computer.

2.2 INSTALLING THE DATA EXTRACTION SERVICE ON YOUR COMPUTER

The Dynacom_Mobility_Extractor_Setup.exe file lets you download files required to install the Mobility Extractor Service and then to install the service on your workstation.

1.   Start the Dynacom Data Extraction Service wizard and select the installation language.
2.   Click the **Next >** button to continue.
3.   Follow the steps as shown in the installer to download all files required for installation.
4.   Once the download is complete, read the terms and conditions of use and check the **I accept the terms of the licence agreement** option.
5.   Click the **Next >** button to continue with the installation.
6.   Choose the application folder and click the **Next >** button.
7.   Follow the instructions on screen until the installation is complete.
8.   Click the Finish button to close the installation wizard and open the Dynacom Data Extraction Service.

> The installer might prompt you to reboot your system if some files in use need be updated. In this case, make sure you save your documents and proceed to reboot. The Dynacom Data Extraction Service installation procedure will resume after your computer restarts.

2.3 INSTALLING THE DATA EXTRACTION SERVICE ON A NEW COMPUTER

The Data Extraction Service can only be installed on one workstation at a time. To install it on a different workstation, you must first uninstall it from the workstation it is currently installed on by following these steps:

1. First of all, uninstall the **Dynacom Mobility Extractor** software from the workstation on which it is currently installed:

    a. Click on the **Start** button , then on **Control Panel > Programs > Programs and Features** (names may vary depending on your version of Windows).

    b. Select **Dynacom Mobility Extractor** in the list and click on **Uninstall**.

2. Then, in the Members section on the Dynacom website, go to the page **Mobility > Service** listed in the menus.

3. Under step 2 (Modify the Data Extraction Service), you can see the name of the computer on which the service is already installed.

4. To install the service on a different computer, remove it from its current computer by pressing the **Remove service** button.

5. You can now download the service if needed and install it by following the instructions above (section 2.2).

> If the Data Extraction Service is already installed on a workstation but no company data has been extracted yet, you cannot remove the service since it is not recognized by the system. In this case, you must either
>
> • Add a company from the workstation where the service is installed and proceed to a first extraction. You can then follow the steps described above.
>
>   or
>
> • If you are unable to add a company or extract data from the workstation where the service is currently installed, call Dynacom's technical support for further assistance.

3. SETTING UP THE DATA EXTRACTION SERVICE

3.1 SETTING UP YOUR CONNECTION

Under the **Connection** tab, enter your Dynacom serial number (also known as customer ID) and Dynacom mobility password as defined in step 1.2 of this guide.

If you are using a proxy to connect to the Internet, check the **Use a proxy** option and fill in the proxy information.

Press **Apply** and go to the **Databases** tab to continue setting up your mobile services.

3.2 ADDING DATABASES / COMPANIES

To add one or more databases, perform the following steps:

1. Press the **Add New +** button to add a company's database.
2. Enter the requested information and press **OK**.
3. The name of the company you just added, the database location and your login will be displayed in the table on the **Data Extraction Service configuration** screen.
4. You can set a company status to **Active** or **Inactive** by checking or unchecking the checkbox in the table.
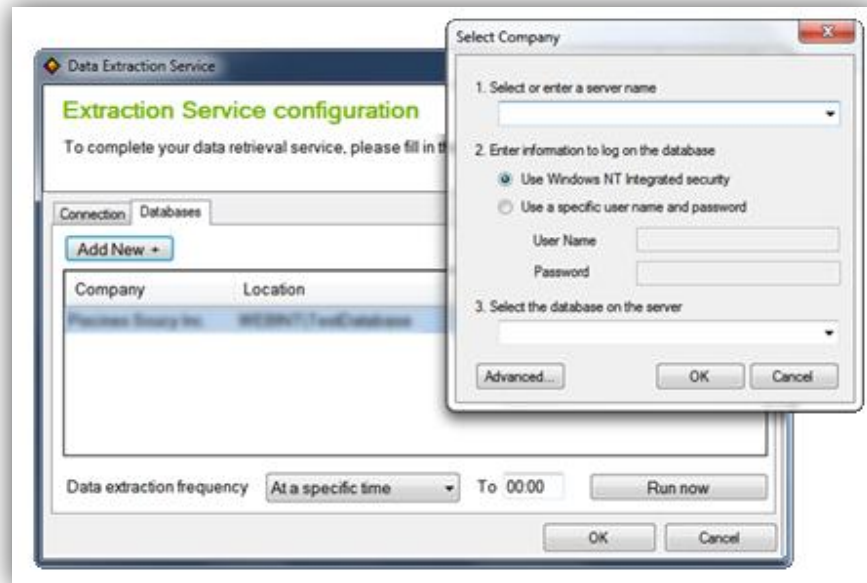
> If you decide to connect to the database using your Windows NT integrated security, you must configure the Data Extraction Service's Windows service to ensure that it connects using your current Windows NT user account.

3.3 SETTING UP THE DATA EXTRACTION FREQUENCY

The data extraction frequency defines when and how often your company's financial data will be updated on the server, allowing mobile application users to refresh their data to more accurate figures. The higher the frequency, the more accurate and up-to-date the data will be for your mobile users.

Choose a higher frequency if your data vary considerably during a single day, or a lower frequency (once a day being the minimum) if you want to view data more occasionally and don't need the most up-to-date figures at all times.

The extraction frequency can be set using the combo box under the table on the Databases screen.

- **At a specific time** allows you to determine at what time of each day the data will be refreshed.
- You can also select intervals of **one** (1), **two** (2), **four** (4) or **eight** (8) hours.

3.4 EXECUTING THE FIRST DATA EXTRACTION

Once you have added your company and adjusted your extraction frequency, you must make an initial extraction to make data available to your mobile users. **A first extraction is also necessary to proceed with the creation of your users.**

To perform your first data extraction, simply click on the **Run now** button located at the bottom of the **Databases** screen of the Data Extraction Service.
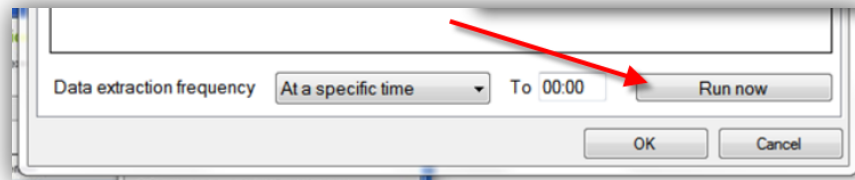
4. MANAGING YOUR DYNACOM MOBILITY ACCOUNT

This step allows you to create all users who will access your financial data and for each grant or restrict access to default profiles.

> **What is a user profile?**
> Dynacom offers a certain number of default user profiles (CEO, Sales, Purchases, Finance, etc.) where each profile grants specific access rights to your financial information. For example, the Sales user profile gives access to information completely different that the one offered by the Purchases user profile.

To create new users, click the **Add new users** button.

4.1 CREATING A NEW USER

You can create new users by following the previous steps or directly from the **Account Summary** page. Each new user has its own connection credentials you need to set as follows:

1. Enter the email address of the user, as well as his full name.
2. Set and confirm his password to access the Dynacom Dashboards application.
3. Assign the Inactive status if you want to refuse access rights to the user.
4. Click the **Add** button to continue to the next step.

Login information

|	
Email	☐ Inactive
First name	
Last name	
Password	
Confirm password	

* Required fields

Add   **Cancel**

> Please note that once a user is created, you cannot modify his email address. You will need to delete the current user and create a new one.

4.2 ASSIGNING ACCESS RIGHTS

After setting up the user's login information, proceed with assigning access rights to that user, as follows:

1. Select one or more profile to which you wish to grant access for the current user.
2. Click the **Update** button to finish editing the user profile.
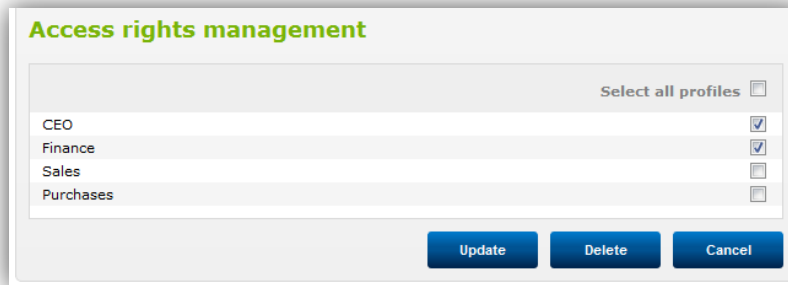
> Please note that the **Update** and **Delete** buttons apply to both the user's login information and access rights.

Repeat the same steps for any additional user you wish to create for your Dynacom Dashboards service.

4.3 EDITING A USER'S INFORMATION

You can modify a user's login information or access rights from the **Account Summary**, under the **Users** section of the page. This page lists and allows you to edit all the users you have created:

1. Click on a user's email address to edit that user.

2. Make changes to the user's information. You will notice that the email address cannot be changed since it is the user's unique identifier.
3. Click on **Update**.

5. CONCLUSION

After completing the steps in this guide, your users are now able to view your Dynacom Accounting company's financial data directly on their iOS mobile device equipped with the Dynacom Dashboards application.

Send us any comments, remarks or notes of appreciation at mobile@dynacom.com. Your opinion is important to us and your comments will help us pursue in our objective to always bring you the best experience possible.

Thank you for trusting Dynacom with your finance and business management activities.