



# My Clients & Profits! X<sup>®</sup>



## Administrator's Guide



# Clients & Profits Help Desk: (800) 521-2166

This Administrator's Guide documents the My Clients & Profits! X web server

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## How to use this administrator's guide

This administrator's guide explains how to run My Clients & Profits! X, an add-on web server that lets creatives, account executives, and out-of-office staff members access the shop's Clients & Profits X database. This guide provides complete, step-by-step instructions for installing, setting up, and running the My Clients & Profits! X software. (A separate User Guide explains how web users log onto and use the My Clients & Profits! X)

You'll find many helpful screen shots throughout the administrator's guide that illustrate My Clients & Profits! X's management features and web capabilities. For more information, visit the My C&P! X web site:

[www.cnp-x.com/my](http://www.cnp-x.com/my)

There you'll find up-to-date technical information about how the My Clients & Profits! X web server works, as well as tips, shortcuts, and troubleshooting ideas.

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# Introducing My Clients & Profits! X

My Clients & Profits! X is an add-on web server for your Clients & Profits 5.x database that allows creatives, account executives, and out-of-office staff members to track jobs, traffic, time, expenses, and more from anywhere using any kind of internet-enabled computer.

The My C&P! X web server serves web pages using real-time data from your Clients & Profits database. Users can add proposals, open jobs, edit traffic and schedules, review company and personal calendars, update status reports, enter hours on time cards, and track costs using only a web browser—and more.

My Clients & Profits! X acts as a gateway between the shop's Clients & Profits database and any number of users either inside or outside the office. A user opens their web browser then logs onto the My C&P! X server by entering a specified web address (such as "http://my.clientsandprofits.com"), their user ID, and their password. My C&P! X verifies the user's ID and password, then displays a personalized "creative dashboard," or home page. This home page contains links to the various client, job, and costing functions available to them, as well as links to company and industry news, a company calendar, and an optional online company handbook.

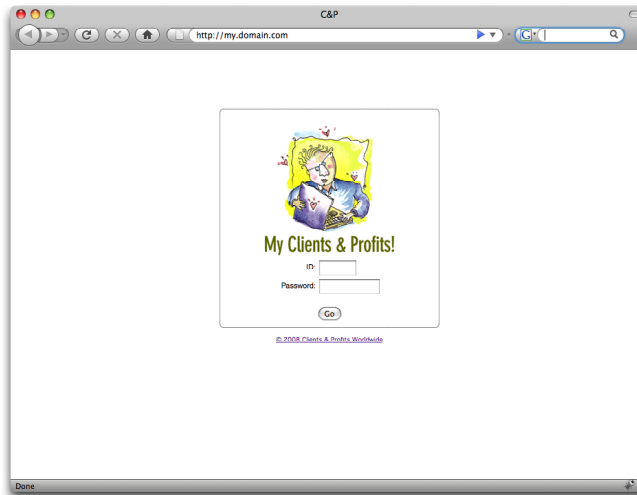
My Clients & Profits! X maintains its own list of web users, so only authorized people can use it. Hundreds of users can be supported, depending on your server hardware. Once connected to the My Clients & Profits! X web server, staff members and freelancers can perform many creative, production, and account service (but not, for security reasons, accounting) activities.

My Clients & Profits! X also lets authorized clients and vendors access their information in your database. Clients can see their account information, job tickets, client job status report, and invoices. Vendors can see their own purchase orders. Each individual who works at a client or vendor must have his or her own My C&P! X web ID and password, which prevents them from seeing the work of other clients and vendors. This keeps important data private.

My Clients & Profits! X is available 24/7 (except during nightly backups). It runs unattended on a stand-alone computer that is connected to your Clients & Profits file server. There is no preset limit on the number of concurrent My

C&P! X users, so many web users can add jobs, time, and expenses simultaneously.

The My Clients & Profits! X web server keeps track of every request, or hit, in a log. This makes it easy for a web server administrator to track the server's usage, including who's using it at which times. The web server administrator can remotely monitor and manage the My Clients & Profits! X web server from home, a hotel room, an airport—anywhere there's an internet connection. My Clients & Profits! X even sends instant e-mail error notifications to the webmaster.



All of the My Clients & Profits! X web pages are customizable.

A page's design can be tailored to match your company's visual identity and style. This can make your My C&P! X system look and feel just like your web site for anyone who uses it.

**No password, no access** The My C&P! home page requires a valid, active user ID and password before allowing someone to access the shop's database.

## The My Clients & Profits! X home page

Each My C&P! X web user has their own personalized home page, whether they are a staff member, freelancer, client, or vendor.

The company calendar page is linked to the Calendar window in Clients & Profits, listing company events, meetings, and important dates.

The job hot sheet list shows every job on which the staff member is assigned (either as the AE or as one of the traffic assignments from the traffic system).

The In / Out Board shows the status of all staff members. You can change your status by clicking on the User Name link.

Welcome to My Clients & Profits! X

http://my.clientsandprofits/validate

**My Clients & Profits! X** YOUR LOGO HERE

My Production Accounting Lookup Setup Snapshots Help

You are logged into Clients & Profits as DEMO. If you're not Clients & Profits Demo User, [logout here.](#)

April 2009

Monday, April 6th 2009

**TIME CARD**

Job	Task	Hours	Description
ABI-107	CCD	1.50	prepare for Tuesday's concept presentation
ABI-173	CON	2.75	brainstorming
		4.25	

**DEADLINES**

Who	Due Date/Time	Job	Task	Est. Hrs	Done:
GG	04/11/09 11:00 AM	ABI-107	COL Color Marking	2.00	--
GG	04/11/09 3:00 PM	SAI-101	ARTD Art Direction	0.00	--
GG	04/21/09 12:00 AM	ABI-117	COMP Comps/Layout	4.00	--
GG	04/22/09 9:00 AM	ABI-173	CON Creative Concepting	0.00	--

**IN/OUT BOARD**

ID	Name	Status	Note	Last Login
AK	<a href="#">Allan Koonitz</a>	●	doctor's appointment @ 9a ...	04/06/09 11:45 AM

Clicking on a web page's help link opens the My C&P! X online user guide.

Everyone can track their daily hours using their time card. It keeps a daily record of the jobs and tasks on which you work.

The deadlines section shows all of the staff member's unfinished tasks, both due today and overdue, from the Work To Do window.

A special "welcome" message greets each My C&P! X user on their home page. This greeting is edited in the user's Access & Privileges window by the web server administrator.

The In / Out Board shows the status of all staff members. You can change your status by clicking on the User Name link.

# Quick Start

The My Clients & Profits! X web server installs like the regular Clients & Profits X software, so the process is probably familiar: Download the My Clients & Profits! X installer onto a PC or Mac, start the Installer application, then follow the prompts. The My Clients & Profits! X web server can be started once its preferences and web users have been set up.

The My Clients & Profits! X web server requires a dedicated Mac Pro, Macbook, iMac, or eMac running Mac OS X v10.2 (or later) or a PC running Windows 2000/XP, a full-time high-speed connection to the internet, and a full-time LAN connection to your Clients & Profits file server. This computer must have a fixed IP address that can be accessed outside of the office. Also, this computer should be dedicated to running My C&P! X, so shouldn't be used for other web, mail, or file servers for best performance.

■ For up-to-date system recommendations for My Clients & Profits! X, please see [www.cnp-x.com/sales/server\\_recs.html](http://www.cnp-x.com/sales/server_recs.html)

My Clients & Profits! X should only be installed on the server that will run it. The My Clients & Profits! X is fully self-contained. There is nothing to install on the user workstations or on the Clients & Profits X file server itself.

My Clients & Profits! X is browser-independent, meaning anyone using any kind of web browser can access the Clients & Profits X database from any kind of computer.

■ My Clients & Profits! X only works with Clients & Profits Classic X, Clients & Profits Pro X, and Job Tracker X or later databases. If you are using an earlier version of Clients & Profits, please call (800) 272-4488 for upgrade information.

The Clients & Profits X web site features detailed technical information, including up-to-date hardware recommendations:

[www.cnp-x.com/sales/server\\_recs.html](http://www.cnp-x.com/sales/server_recs.html)

**For technical help, please call (800) 521-2166**

## To install the My C&P! X web server

Before installing My Clients & Profits! X, be sure that the computer does not contain any prior versions of My Clients & Profits. Different versions of C&P can conflict with the My Clients & Profits! X web server and cause system problems.

**1** Download the My Clients & Profits! X installer from [www.cnp-x.com](http://www.cnp-x.com)

**2** On a Mac, double-click on the Installer. On a Windows-based PC the installer application starts up automatically.

The Installer will prompt you to choose a destination for the new My Clients & Profits! X folder. On a Mac, the Applications folder is selected automatically. In Windows, the Programs folder is selected automatically. Any volume can be chosen.

**3** Follow the prompts to finish the installation.

A My Clients & Profits! folder will be copied to your hard disk. Inside it you'll find the My Clients & Profits! X application, an HTML folder that contains the My C&P! web pages, and other program files.

**4** Restart the computer.

## Activating the My C&P! X web server

My Clients & Profits! X needs to be activated before it can be used. Activation automatically serializes your application, which contains multi-user access to your database. Unless activated, My C&P! X will run in a 60-day trial mode.

**1** On a Mac, double-click on the My C&P! X application. In Windows, choose Start > Programs > My Clients & Profits!

**2** Find and open your Clients & Profits X database from the file server, or connect to your SQL database.

**3** Enter your Clients & Profits X user ID and password when prompted.

You must be a Clients & Profits X manager-level user to initially set up the My Clients & Profits! X web server. Once My C&P! X is running, access to it is controlled by a separate web user list (see "To Add My C&P! X web users" on page 7). You'll then see the My C&P! X Web Server Status window. Before the web server can be started, the server's preferences (including a webmaster's name and e-mail address) and users must be entered.

**4** Choose My Clients & Profits! > Activate then click the Activate button.

## To set my My C&P! X preferences

Before starting the My Clients & Profits! X web server, be sure to set the server's basic preferences:

1 Choose My Clients & Profits! > Web Server Preferences.

2 Enter or select any of the settings that seem appropriate to your web server (see page 17 for a description of each preference).

■ Most web servers use port 80 by default. However, Mac OS X reserves for port 80 for itself, a different port number must be used.

■ Be sure to enter the My C&P! X webmaster's name, their e-mail address, and address of your mail server first. This enables the server's automatic e-mail notifications, which keep the web administrator constantly informed of server problems.

3 Click Save.

■ For details about setting My C&P! X preferences, see page 16-17.

## To add My C&P! X web users

1 Choose Setup > Users, Access & Passwords.

2 Click the Auto-Create Web Users button.

The Auto-Create Web Users window opens, listing all of your current Clients & Profits users.

3 Click OK.

Web user accounts are automatically created for everyone who currently uses Clients & Profits now, using the same password for the web server. Later, web access privileges and passwords can be changed for each user. Once web user accounts are created, the My Clients & Profits! web server can be started.

■ For details about setting up web user accounts for My C&P! X, see page 18.

## To start the My C&P! X web server

1 Choose My Clients & Profits! > Start Web Server, or click the Start button.

Once started, My Clients & Profits! X begins listening for requests from web users. Every request, or hit, from a web user makes a log entry into the Web Server Status window, so it's easy to monitor who's using the web server.

## To access the My C&P! X web server from a web browser

1 Open a web browser such as Safari, FireFox, or Internet Explorer.

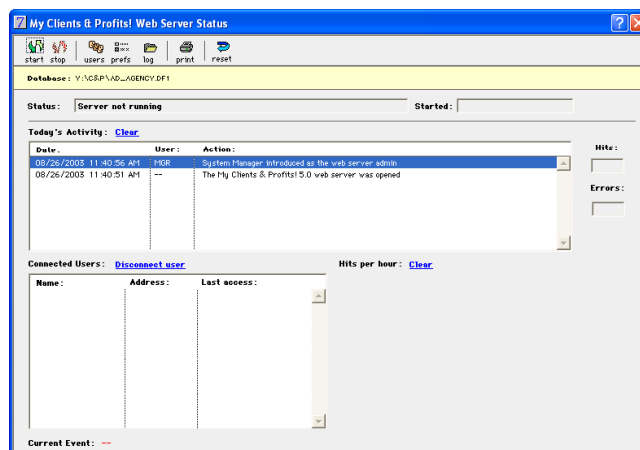
2 Enter the My C&P! X web server's IP address or name, then press Enter.

The My C&P! X web server can be identified by its IP address or by a URL depending on how your domain name is configured with your ISP or internal DNS server. An IP address would be entered like "http://192.168.100.10" while a URL could be entered as "http://my.agency.com". The URL can be any name of your choosing.

3 Enter your web ID and password, then click Go.

If you're successfully connected you'll see the My Clients & Profits! X home page—your "creative dashboard" that displays your time card, deadlines, job hot sheet, and the shop's in/out board.

To use the various parts of My Clients & Profits! X, use the drop-down menus on the home page.



Starting the web server Buttons to start and stop the My Clients & Profits! X web server are found in the window's toolbar.

# How My Clients & Profits! X Works

The My Clients & Profits! X web server acts as a gateway between your shop's Clients & Profits X database and any number of Safari, FireFox, or Internet Explorer—whether in the office (your “intranet”), working at home, in a client's conference room, or in a hotel room somewhere on the road. No browser plug-ins or special software is needed.

My Clients & Profits! X installs and runs just like the regular Clients & Profits software. My C&P! X features an industry-standard HTTP server for publishing custom web pages that include real-time data from the Clients & Profits database. Users access My Clients & Profits! X by entering the web server's address, or URL. The URL can be the computer's actual IP address (e.g., 192.168.100.55) or a custom domain name (e.g., “my.clientsandprofits.com”). In fact, the web address of My C&P! X can be any variation of the shop's domain name. The web server is started by opening the My C&P! X application, opening your shop's C&P X database from the file server, then clicking the Start button. Once the My C&P! X web server has been started, it begins listening for incoming HTTP requests from web users.

■ Due to limitations in its TCP server engine, SSL is not supported.

Any web browser can access the My C&P! X web server as long as the user has the right access privileges. Only authorized users can access the My Clients & Profits! X web server, which share access privileges with the user list in Clients & Profits.

## How the web administrator manages My Clients & Profits! X

Only existing C&P system managers can configure the My Clients & Profits! X web server, including adding web users. Anyone can be added as a web user, including clients, vendors, freelancers, and contractors—all with specific access privileges to what they can and can't see and do. Any web user can be a web server administrator and make changes to the My C&P! X server's preferences, monitor the server's status, and print web server reports. One web administrator (typically the Clients & Profits system manager) can be designated as the webmaster. The webmaster is the key contact for anything My C&P! X-related. The webmaster's name and e-mail address appears on error pages (so that users can contact him or her about problems) and gets notified automatically via e-mail about web errors.

## How staffers, freelancers, clients, and vendors will use My Clients & Profits! X

From a user's point-of-view, using My Clients & Profits! X is even simpler. A user opens their web browser then logs onto the My C&P! X web server using a special URL (e.g., <http://my.clientsandprofits.com>). An introduce yourself page prompts them to enter their user ID and password. My Clients & Profits! X instantly verifies the ID and password, then displays a personalized “creative dashboard” home page.

Staff members and freelancers have full access (within the limits of their access privileges, that is) to clients, jobs, time cards, expenses, and purchase orders. Clients see their own account information, jobs, and Client Job Status Report. Vendors see only their own purchase, insertion, and broadcast orders. Web administrators have the same access as staff members, but have links to monitor and manage the My Clients & Profits! X web server remotely.

My Clients & Profits! X will let any number of web-based users access the shop's database concurrently. To the database, the My Clients & Profits! X web server looks like any other user on the network.

■ My C&P! X takes up one of the database's user slots (for example, a 10-user version of Clients & Profits that also uses My C&P! X will have 9 slots available for non web-based users).

## Padlocks, error checking

Unlike regular Clients & Profits X users, web users don't have a full-time connection to the shop's database. This means they won't get padlocks that indicate record-locking, and losing the network connection can't damage the database. Instead, each request is a separate transaction that's received by the My C&P! X web server, processed, then returned to the web page in the form of a web page. Because there is no full-time connection to the Clients & Profits database, there is no interactive error-checking when a user tabs from field to field. Error checking only occurs when the transaction is saved; if an error occurs (such as an invalid job number), the My C&P! X displays an error page to the user explaining what was done wrong.

## Performance factors

The performance of the My Clients & Profits! X web server depends on three factors:

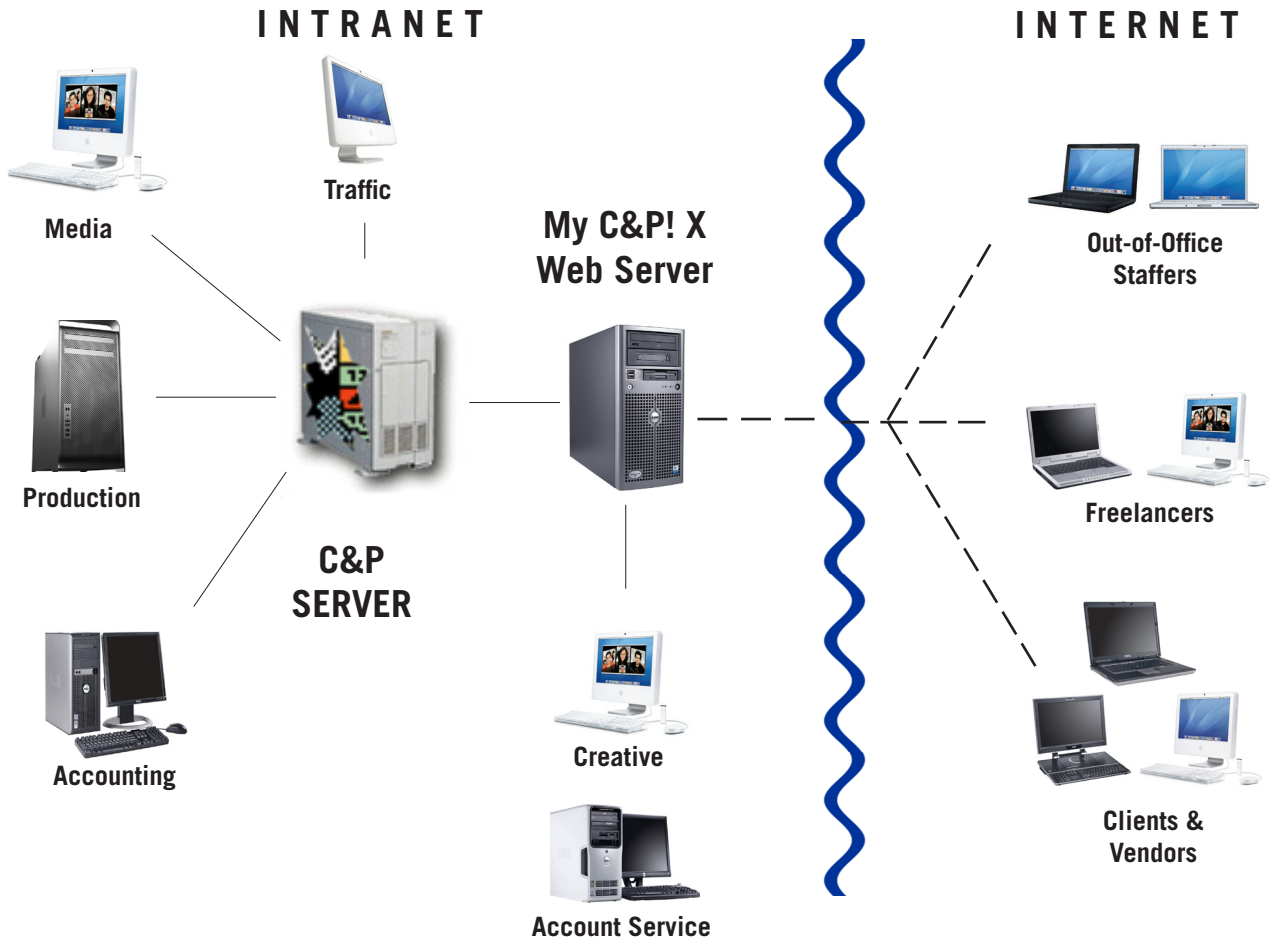
- (1) the speed of the internet connection,
- (2) the speed of the server running the My C&P! X web server, and
- (3) the amount of traffic on the LAN and the Clients & Profits file server.

Stress in any of these areas will be noticeable to web users when they request a web page or wait for data to be submitted (although data-entry will be unaffected). Transactions from My Clients & Profits! X have no greater or lesser priority over regular Clients & Profits X users—everything is handled first-come, first-serve.



## The My Clients & Profits! X Flow Chart

The My Clients & Profits! X web server acts as a gateway between your shop's Clients & Profits X database and any number of web-based users—whether in the office, working at home, at a client location or on the road.



**HOW IT WORKS:** A user opens their web browser then logs onto the server using the special web address, a personalized ID, and password. My Clients & Profits! X verifies the user's access privileges then displays a personalized "creative dashboard" home page. This page features links to the various client, job, and costing functions using drop-down menus.

# My Clients & Profits! X Features

## General

- My Clients & Profits! X is a stand-alone application that runs on a dedicated Mac OS X or Windows based PC; no additional software is needed.
- My Clients & Profits! X can be accessed inside or outside the office using any high-speed internet connection.
- My Clients & Profits! X is compatible FireFox and Internet Explorer, but is optimized for Safari.
- My C&P! X serves real-time data-driven web pages directly from the C&P X database.
- No browser plug-ins are required.
- Access to My C&P! X is available only to authorized users with their own web accounts.
- Each web user has his or her own My C&P! X-specific access privileges that piggyback on the user's regular Clients & Profits access privileges.
- Web accounts can be created for individual clients contacts, giving them access to only their own jobs, traffic, and invoices.
- Web accounts can be created for freelancers, allowing them to enter time and see work schedules.
- Vendors can be given web accounts to access their purchase orders.
- My C&P! X web pages can be redesigned to fit the shop's corporate identity and visual style by any other web design and site management application.
- Additional data fields can be added using special OMFLD database tags.
- A web-based version of the Clients & Profits X In/Out Board lets staff members track when they arrive and leave the office.
- Staffers can use My C&P! X to mark themselves unavailable for the day, morning or afternoon.
- My C&P! X web pages have help links to an enhanced online user guide.

## Personalized home page

- Each web has his or her own custom "creative dashboard" home page that displays their time card, deadlines, job hot sheet, and the agency in/out board.
- Users access clients, jobs, costs, etc. using drop-down menus that work just like those found in Clients & Profits X.
- Web administrators can include a custom log-in message that appears at the bottom of the user's home page.
- Clicking on a date in the home page calendar jumps to that day, displaying the user's time card and deadlines for that date.
- The home page can be customized with text and links to employment benefits, policies, standards, and holidays from the company handbook.
- Lookup pages show complete lists of clients, jobs, staff members, vendors, status codes, the task table, groups, purchase/insertion/broadcast orders, job type/spec sheets, and client projects.
- Real-time access to company and personal calendars.
- Web users can add calendar entries to the personal and company calendar.

## Clients

- The client web page features name, address, contact, and account informa-

tion.

- The client page includes links to client contacts, billing info, budgets, the client diary, projects, stats, jobs, and invoices.
- New client diary entries can be added from My C&P! X.
- The Client Jobs page lists a client's open and closed jobs, including estimate, hours, billed, and unbilled totals.
- The Client Invoices page lists client's billing history, including unpaid invoices.
- New client projects can be added from My Clients & Profits!
- The Lookup Clients page lists all clients; clicking on a client number opens the Clients web page directly.
- A client's contacts can be viewed and edited.

## Proposals

- Proposals can be viewed, added, edited, approved, killed and printed.
- **Approving a proposal converts it into a new job automatically.**

## Job Tickets

- The job ticket web page looks just like the Job Ticket window in Clients & Profits X, displaying the job's number, name, contacts, and tasks.
- Users can find jobs by number or use the "Lookup Jobs" page.
- The job ticket web page features links to the job's specifications, work order, creative brief, estimate, schedule, job snapshot, diary, and change orders.
- Web users can open new jobs using job type/spec sheets.
- Tasks from the Task Table can be added to existing job tickets.
- Web users can edit and print a job's printing specs, work order, and creative brief.
- The start and due dates for a job's scheduling tasks can be updated.
- New jobs can be opened for any client, based on the user's access privileges. If a new job is given a job type/spec sheet, My Clients & Profits! X will copy the template's tasks to the new job automatically.
- Estimates can be viewed, edited, and approved or unapproved for any job.
- Printer-friendly estimate previews can be printed for any job.
- Change orders can be viewed, added, and deleted.
- A job's production status, billing status, status notes, next steps, traffic assignments, and milestones can be updated from the Traffic web page.
- Web users can view the task's billings, POs, and job costs.
- The Job Snapshot web page shows authorized users a job's estimate remaining, hours worked to date, billings, and profit so far.
- **Selected job production and accounting reports, such as the Job Summary, can be printed.**
- **Job tasks can be removed from job tickets.**

## Production and Traffic

- The Daily Job Status report can be viewed by production status or billing, just like the regular report printed from Clients & Profits X.
- Users with the appropriate access privileges can update a job's status codes and status notes any time.

- The web-based Weekly Traffic report looks like the report printed from Clients & Profits X.
- Creatives and production staff can review the week's deadlines from job schedules in their Weekly Task Planner web page any time.
- The web-based Work To Do page lets creative and production staff keep track of unfinished job tasks for any range of start dates or due dates.
- The Daily Job Status and Weekly Traffic reports can now show jobs by billing status.
- Both clients and staff members can use the web-based Client Job Status report to track a client's open jobs.
- The Job Timeline can be viewed for one job at a time.
- Opened jobs can be tracked using the Production Planner.
- Purchase orders can add, edit, updated, and printed.
- Users with the right access privileges can approve or unapprove POs.

### Job Costing

- Production, creative, and account service staffers can add, edit, and print purchase orders.
- Production managers can approve new purchase orders online.\*
- Staff members can enter their hours worked on a daily Time Card web page.
- Lookup lists on time cards, POs, and expense reports open up automatically if no job or task is entered onto the time entry.
- Budget alerts can be triggered when adding POs, time, and expenses.
- Time cards have a stopwatch timer to automatically track hours worked.
- Time from previous days can be reviewed and changed as needed, based on the user's access privileges.
- Staff time sheets can be approved on-line by department managers.
- Production and creative staff working on location can enter time each day, keep productivity and job cost reports up-to-the-minute accurate and timely.
- Staff members can enter daily expense reports for travel, parking, in-house supplies, and more without manual expense forms.
- Internal charges for items such as CD duplication, output, slides, can be added, edited, and removed.
- Vendor invoices can be approved for payment.\*

### Billing

- Client invoices can be approved for printing.\*
- Job estimates can be pre-billed.

### Snapshots

- Production snapshot reports can be printed by production status and a selected client: Job Hot Sheet, Traffic Hot Sheet, Rush Jobs.
- Work in progress snapshots can be printed for a range of production or billing status codes and a selected client: Billing Hot Sheet, Job Billing Worksheets, Unbilled Costs by Job.

### Administration and security

- No browser plug-ins or special software is needed.
- A Web Server Status window constantly monitors the web server's current activity and its connected users (by IP address), producing a hits-per-hour graph. This window makes it easy for webmasters to check the server's performance at a glance.
- My Clients & Profits! X will automatically close then reopen the database at selected times to accommodate the nightly backups.
- The web server port 80 can be administrator-defined in Preferences.
- Cookies are used to automatically log in users throughout the day.
- The My Clients & Profits! X can be set to automatically start listening for hits every time the application is opened.
- My Clients & Profits! X supports multiple webmasters.
- Webmasters can monitor and manage the My C&P! X server remotely from home or on the road from any internet connection, including public browsers.
- A My C&P! X webmaster can be notified automatically via e-mail on failed attempted log-ins and invalid passwords.
- The server's activity log can be printed remotely from a web browser.
- Temporary "guest" access is not allowed to prevent access to My C&P! X from anonymous web users.
- Web accounts can be automatically created for current Clients & Profits users, eliminating rekeying.
- Users cannot create their own web accounts, and cannot choose their own passwords (which are required); both are performed by the webmaster.
- Users cannot create their own web accounts, and cannot choose their own
- All web user accounts require a password.
- Users cannot create their own web accounts, and cannot choose their own passwords
- Web accounts can be temporarily suspended for security reasons.
- A web account is automatically suspended after 3 bad login attempts.
- A detailed activity log keeps track of every kind of hit to the My C&P! X web server, including each hit's date, time, user ID, IP address, and event/action.
- The web log can be automatically archived to a text file every Monday.
- Server reports can be printed to analyze the performance and utilization of My Clients & Profits! X based on log entries.
- Your company's logo can appear at the top of each web page by simply placing a 179x62 graphic on your web site then entering its URL into the server's preferences.
- Clicking on the company logo jumps to a new web page defined by the web administrator in the server's preferences, such as a company intranet page.

\* Not available in Clients & Profits Classic X

# Setting My C&P! X Preferences

Key functions of the My Clients & Profits! X web server are controlled by the system's preferences, which are user-defined. My C&P! X web server administrators can change these settings and options to improve the server's accountability and security. One or more My C&P! X users who are defined as web administrators can change the server's preferences as needed, anytime.

■ The server's preferences can't be changed from My C&P! X while the web server is running. If the server is running, you'll need to stop it temporarily while you make your changes. However, most preferences can be changed remotely using a web browser without stopping the server if the allow remote administration setting is enabled.

## Remotely managing the My C&P! X web server

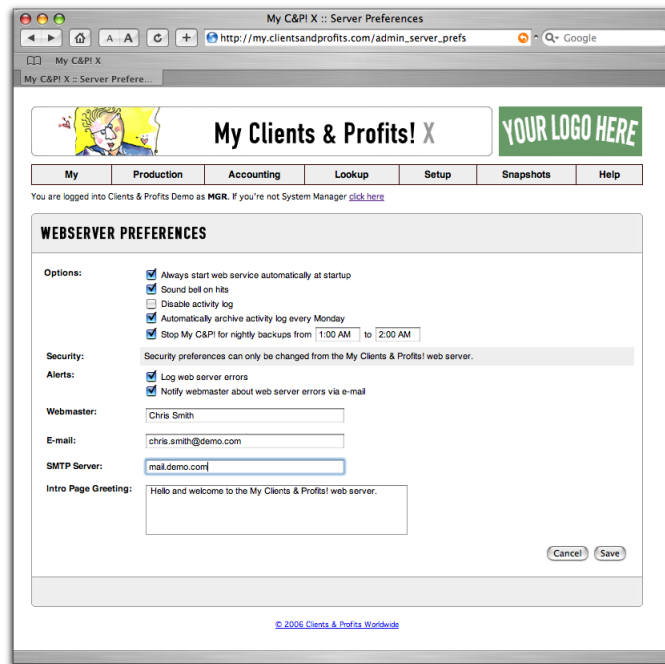
The server's preferences can be changed from the My Clients & Profits! X application or remotely from any web browser. To remotely change preferences, the allow remote administration option must be checked. This setting allows webmasters to check and update the server's preferences from home, a trade show, a client's site—anywhere there's an internet connection.

■ There is an inherent security risk to allowing the My C&P! X server's preferences to be changed remotely. While the server's preferences can only be changed by a web administrator (whose user ID and password are assumed to be private), there's no guarantee that someone couldn't steal the administrator's account information and access the server's settings. For this reason the server can't be started or stopped remotely; instead, starting and stopping My Clients & Profits! X can only be done from the application itself.

For better security, remote administration via the internet can be limited to one specific, preset IP address. The restrict remote administration option prevents any computer except the one with the preset IP address from monitoring and managing the My C&P! X server remotely. This setting ensures that only the designated web administrator's computer can remotely manage My Clients & Profits! X. However, this setting only works for a computer with

a fixed IP address, such as a home computer connected using a DSL or cable modem. Laptops and computers using a dial-up modem connection have dynamic IP addresses that change with each new connection, so they won't have the same address every time. They can't be used for remote administration if the restrict remote administration setting is enabled.

■ For security reasons, the web server can't be started or stopped remotely.



**Changing My C&P! preferences anywhere** If the allow remote administration is enabled, web administrators can change the My Clients & Profits! X web server preferences from any browser.

To change the My Clients & Profits! X web server preferences

1 Choose My Clients & Profits! > Preferences link from the Web Server Status window.

The Preferences window opens, displaying the My Clients & Profits! X web server's current settings and options.

2 Make any changes, then click Save.

Any changes you make take affect instantly once the web server is started.

**To change the My C&P! X web server preferences from a web browser**

1 Open your web browser and connect to My Clients & Profits! X

2 Enter your user ID and password,

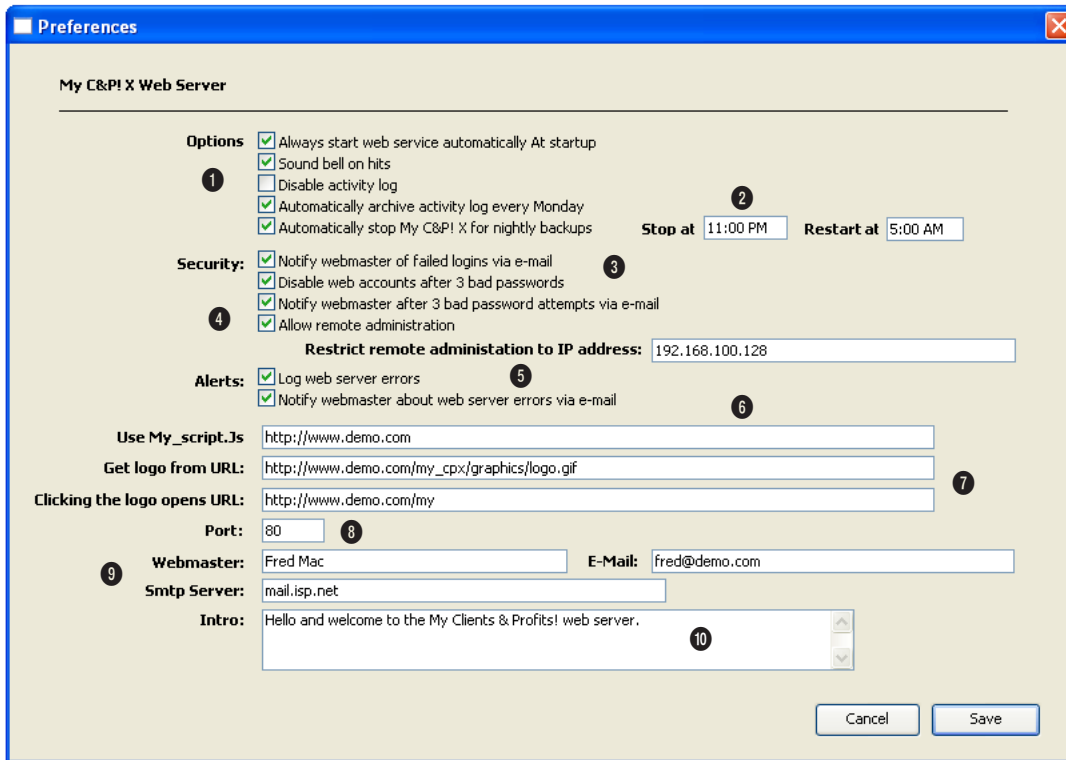
then click Go.

3 Click the Preferences link in the Web Admin section of your home page.

The web server preferences home page opens, displaying the server's current settings and options.

4 Make any changes, then click Save.

## The My C&P! X Preferences window



1 The **always start** option tells My C&P! X to check for hits as soon as it's started. (If unchecked, My C&P! X won't serve pages until the web administrator clicks the "start" button.) The **sound bell on hits** option makes My C&P! X beep after every hit. The **disable activity log** option stops My C&P! X from tracking how people use the server, which improves performance by reducing the system's overhead caused by logging. The **automatically archive activity log every Monday** purges the web log weekly (see page 25).

2 Use the **automatically stop** option accommodate the nightly backup. My C&P! X will stop, close the database, then reopen the database and restart the web server at user-defined times.

3 The **notify webmasters of failed logins** option e-mails the webmaster every time someone tries to access My C&P! X with an unknown user ID or password. The **disable web accounts** option will suspend any user who enters an invalid password three times.

The **bad password** option sends an e-mail notification when a valid user ID tries to enter an unknown or incorrect password.

4 The **allow remote administration** option lets web administrators monitor the server's status, add web user accounts, and check the server's log from any web browser. If the allow remote administration option is checked, a web administrator can be restricted to accessing the server from a specific computer at a fixed **IP address**. To allow a web admin to access My C&P! X anywhere, leave it blank.

5 The **web log server errors** tracks TCP/IP errors on the activity log. The **notify webmaster about server errors** option automatically e-mails the webmaster about server error. These two settings are only needed to troubleshoot server problems.

6 My C&P! X uses a javascript based file to store scripts for displaying data on web pages. The `my_script.js` file

is normally accessed from the C&P! X web site, but can be served from your own site. For more information, see page 33.

7 The **port number** on which My C&P! X listens for hits can be changed from 80, which is the default for web servers, to any port number.

8 Enter the name and e-mail address of the My C&P! X **webmaster** here. Web users can send questions, problems, and comments to this webmaster easily from links included on selected web pages. While there can be many My C&P! X web administrators, there is only one designated webmaster. The **SMTP server** is either the name or IP address of your mail server. If you don't want to get automatic e-mail, leave it blank.

9 This standard **greeting** appears on the introduce page whenever someone tries to access My Clients & Profits! X

10 The **table font/size** setting is HTML code that formats cells on CGI-generated tables, such as a list of job tasks.

# Setting up My C&P! X Users

Only authorized My Clients & Profits! X web users can access the shop's database. Any staff member, freelancer, client, or vendor can be set up as a My C&P! X user—all they need is a valid web account, ID, and password.

All current Clients & Profits users can also be web users, allowing them to work with clients, jobs, time, and more from either their Clients & Profits application or the My C&P! X web server. Select clients can have their own My C&P! X web account, letting them see their own jobs, costs, and job status (but not for other clients, of course). Vendors can be allowed to see their purchase orders. Also, freelancers can access their jobs, tasks, and deadlines. All accounts can be given expiration dates to keep users from accessing My C&P! X after a certain date. There is no guest access to My C&P! X.

Web users cannot create their own accounts online; instead, accounts can only be created by a My C&P! X web administrator. Web accounts can be added from the My C&P! server application or remotely from a web browser if the remote administration preference is enabled (see pages 16-17).

## To view a list of My C&P! users

- 1 Choose Setup > Users, Access & Passwords or click the users button from the Server Status window.

The Users window opens, displaying the web accounts for existing My C&P! X users. Since web accounts are not created automatically when My C&P! X is first installed, the list will be empty.

## To automatically create web accounts for current C&P users

- 1 Choose Edit > Auto-create Web Users or click the auto-create button.

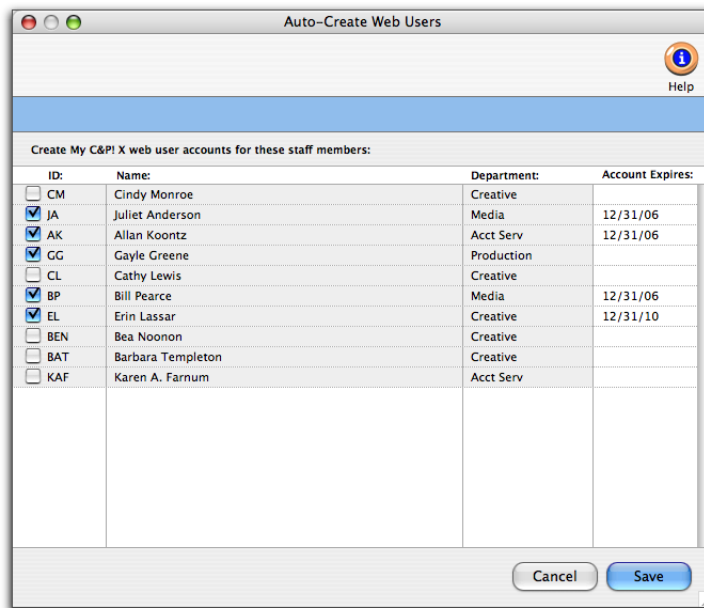
The Auto-create Web Users window lists the shop's current Clients & Profits staff members who aren't already My C&P! X users. Some or all staffers can

be given access by clicking on individual user names.

- 2 Click on the checkbox to create a My C&P! X web account for any user, then click Save.

A new My C&P! X web account will be created automatically for each Clients & Profits selected user. The user's Clients & Profits information is copied

to My C&P! X automatically, so there's no rekeying of their ID, name, and access privileges—except for their web password.



Create web accounts automatically The Auto-create window is a shortcut for creating My C&P! web accounts for one or more existing Clients & Profits users. The window lists all current C&P users who don't have access to My Clients & Profits! X Clicking the checkbox automatically creates a web account for the selected users.

(see page 20).

- 3 Click Save.

## To edit a web user's access privileges

- 1 From the Users window, double-click on a web user.

- 2 Make your changes then click Save.

## To delete a web user's account

- 1 From the Users window, click once on a web user.

- 2 Choose Edit > Delete Web User or click the delete button.

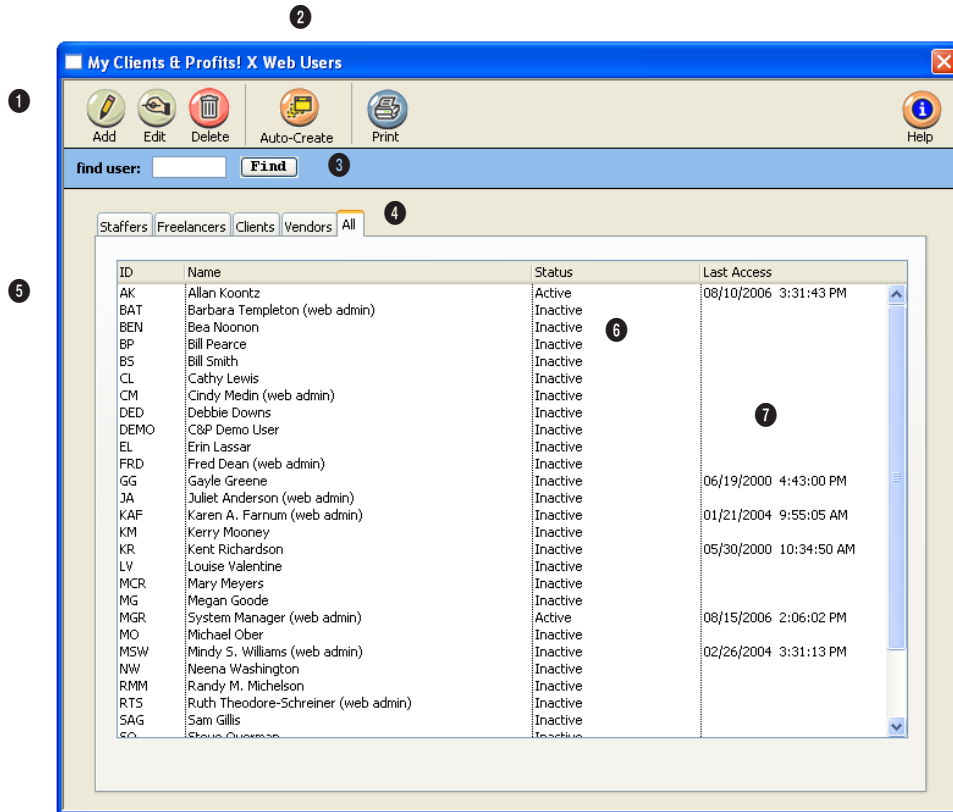
Passwords are required to access the web server. For better security, users can't choose their own passwords; they can only be changed by the web administrator. All new user accounts are given the temporary password of temp. New My C&P! X users will enter their initials and the password "temp" until a web administrator assigns a permanent web password to each new user. To automatically create a random password, click the Create Password button.

## To add a new web user

- 1 Choose Edit > Add New Web User or click the add button.

- 2 Enter the web user's account information and access privileges

## The My Clients & Profits! X Users window



1 Web user accounts can be added, edited, deleted, and printed by clicking these toolbar buttons. Clicking a button is identical to choosing an Edit menu command.

2 The **auto-create** button is a shortcut that creates My C&P! X web user accounts for one or more existing Clients & Profits users. Clicking this button opens the Auto-Create window, which lists everyone who already uses Clients & Profits. If selected, the account information for each user will be copied to a new My C&P! X web user account automatically, including access privileges. Each new user account is given the temporary web password of "temp".

3 To jump to a web user's access privileges window, enter the user's initials then click the **Find** button.

4 My Clients & Profits! X allows

different kinds of users to access the shop's C&P database, including staff members, freelancers, clients, and vendors. Each web user is identified as a staffer, freelancer, client, or vendor. Since each individual web user has his or her own account, the My C&P! X user list can become very long. The **show** menu filters the user list to display only one kind of user at a time, making it easier to track who can use My Clients & Profits! X Choose "all" to display all web users.

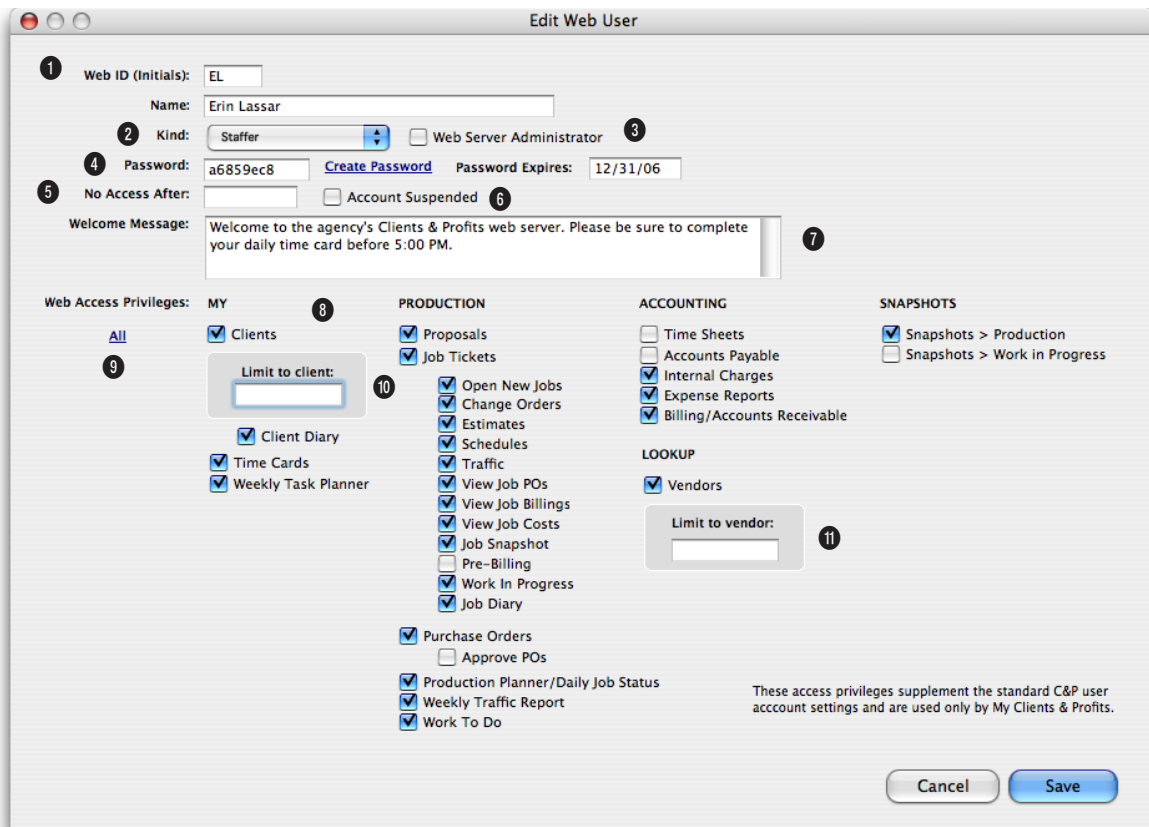
5 The **user ID** and **name** identify each My C&P! X web user. Each web user needs a unique ID, such as initials, before he or she can access My Clients & Profits! X Existing Clients & Profits users are identified by the same initials they use in the C&P database.

6 Click the **access privileges** button to edit a web user's access privileges.

These privileges determine just what someone can see and do with My Clients & Profits! X

7 The user list displays all or some of the My Clients & Profits! X web users. It can contain names of staff members, freelancers, clients, or vendors. Double-click on a user to edit his or her access privileges.

## My C&P! X Access Privileges



1 Each web user must have a unique ID. The ID will be used for the user to log onto My Clients & Profits! X if the web user is also a Clients & Profits user, then the web ID is identical to their C&P ID (which is usually their initials). The ID field is limited to 10 characters, so a long value like an e-mail address can't be used as an ID.

2 Each My C&P! X user is identified by **kind**—staffer, freelancer, client, or vendor. This setting determines which pages are available to users. Clients have their own custom home page, and are limited to seeing only their

jobs. Vendors can only see their POs. Freelancers have limited access to jobs and traffic.

3 Any account with the **web server administrator** option enabled can start, stop, monitor, and manage the My C&P! X web server. The web server administrator also typically Clients & Profits system managers. There can be multiple web administrators.

4 The web user's **password** is assigned by the web administrator. For better security, users can't choose their own passwords — or change them later. A

user password is required. Click the **Create Password** link to automatically assign a random password. The password will be automatically encrypted when the user's access privileges are saved. The user's password can be set to **expire**, preventing access to the My Clients & Profits! X server after a specified date (which is a useful option for temporary staff).

5 The **no web access after** option prevents a web user from accessing My C&P! X after a selected date. Use this for temporary employees or contractors who should only use My C&P! X for a



## My C&P! Access Privileges

limited time.

**6** The web administrator can use the **account suspended** option to temporarily prevent a web user from using My C&P! A user's web account is automatically suspended after 3 bad login attempts if the disable web accounts after failed logins setting in Preferences is checked (see page 17).

**7** The **welcome message** is an optional greeting that appears on each user's home page.

**8** The **allow web access to settings** determine which pages a web user can see and use. These settings only allow a user to see a page; what they can or can't do with it is based on their access privileges in Clients & Profits (e.g., adding job tasks, a PO limit, seeing costs, etc.).

Selecting the **clients** option allows a web user to see the client's account information as well as client contacts, billing information. The **job tickets** access privileges determine which production, estimating, and traffic functions are available to a My Clients & Profits! X web user. If a My C&P! user is a staff member, then his or her access privileges to jobs is copied here. Web users who are clients have no automatic access to jobs; instead, the web administrator needs to specifically decide which functions the user can

see by checking on the various options.

**9** Click the **All** button to make all of the options available to the web user.

**10** Web users can be restricted to seeing one particular client and its jobs or vendor and its POs using the **restricted to** option. When a client or vendor number (or code) is entered here, the web user won't be able to see any other client's and vendor's data. This option is required for web users who are clients or vendors. It can be a useful option for web users who belong to exclusive account teams. Client and vendor numbers are available for quick reference using the Lookup menu.

**11** Each user can have a completely **custom home page** (see page 37). When a custom home page is specified in a user's web account, My C&P! X displays it instead of the standard home page whenever that user logs in. The custom home page needs to be created first, then selected by clicking on the **Get Page** button.

# Running the My C&P! Web Server

Once the My Clients & Profits! X server software is installed, web service can be started immediately. (There is no client-side software to install and nothing to set in the web browser. Anyone using a web browser can access My Clients & Profits! X immediately.)

There are two steps to starting the My Clients & Profits! X web server: (1) launch the My C&P! application then (2) start the web server.

The My C&P! server application won't start listening for requests, or hits, from web users until web service has been started. This gives the web administrator a chance to update the user list, review the activity log, and update preferences before web users start accessing the server.

■ Opening the My Clients & Profits! X application doesn't automatically start the web server unless the always start web service at startup option is enabled in Preferences. When this option is enabled, My C&P! will start listening for hits as soon as the server application opens (for more information on setting preferences, see page 16).

■ The My Clients & Profits! X web server can be set to automatically close the database at a specified time each evening to accommodate the nightly backup. The web server will stop listening for hits, but doesn't actually shut down. Instead, My C&P! waits until a specified time then reopens the database and restarts the server. Clicking the automatically stop My C&P! for nightly backups preference sets the close and reopen time to 11 pm and 5 am. The close time can't be set before 5:00 pm or after 12:00am. The reopen time can't be set after 12:00 am or before 10:00 am.

## To start the web service

- 1 Choose My Clients & Profits > Start Web Server or click the start button.

Starting the web service resets the Web Server Status window: the Today's Activity list, the Connected User list, and the Hits Per Hour graph. As soon as web users start logging onto My Clients & Profits! X you'll see the hits reflected on this window.

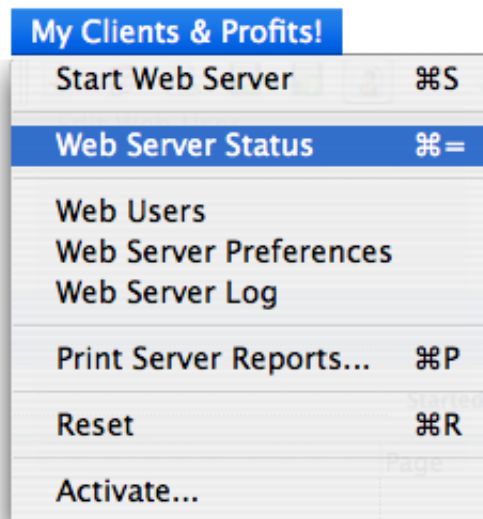
The Web Server Status window usually remains open while My Clients & Profits! X is running, making it easy for web administrators to monitor the server's usage and performance at a glance.

## To stop the web service

- 1 Choose My Clients & Profits > Stop Web Server or click the stop button.

Stopping the web service stops My Clients & Profits! X from listening for hits from web users.

■ If a web user tries to access My Clients & Profits! X when it isn't running, they'll get a "a connection failure has occurred" error from their web browser. It may take up to one minute for the browser to realize the server's not running and show the error message.



Making changes to the My Clients & Profits! X web server

The My Clients & Profits! X web server doesn't have to be stopped to make changes to users, preferences, or the activity log. All of these functions can be accessed without interrupting web service.

## To monitor the web server's status

If the My C&P! X Web Server Status window isn't opened, choose My Clients & Profits! > Web Server Status. The Server Status window displays the server's recent activity and connected users.

■ The My C&P! X web server can also be monitored remotely from a web browser if the allow remote administration preference is enabled. This setting allows a web administrator to view the server status, activity log, user list, and preferences web

pages from any internet connection.

## To reset the My Clients & Profits! X web server

Resetting the My C&P! X server clears the Today's Activities list, Connected Users list, and Hits-Per-Hour graph. It does not stop the web server or affect whatever work a connected user is doing. Starting the web server automatically resets the server's stats. My C&P! X only needs to be manually reset each morning so that the Server Status stats are cleared for the new day's work—and only if My C&P! X wasn't stopped the night before.

## Looking up clients, vendors, staff members, etc.

For easy reference, lookup lists for clients, jobs, vendors, staff members, and more can be opened by the web administrator from the My Clients & Profits! X application using the Lookup menu.

## To quit My Clients & Profits! X

- 1 Choose File > Quit.

## The My C&P! Web Server Status window

**Database:** W:/Clients&Profits/Demo.df1

**Status:** Listening for hits on 192.168.100.200:5959 **Started:** 04/17/09 3:00 AM

Date	User	Action	Page
04/17/2009 3:35:36 PM	AK	Opened job lookup list	lookup_jobs.htm
04/17/2009 3:34:49 PM	GG	Opened home page for 08/17/09	home.htm
04/17/2009 3:34:11 PM	NW	Viewed change orders for DED-026	change_orders.htm
04/17/2009 3:33:59 PM	MO	Opened home page for 08/17/09	home.htm
04/17/2009 3:33:44 PM	CG	Edited time entry 19273 for SDI-304	edit_time.htm
04/17/2009 3:32:55 PM	FRD	Edited job ABC-483	edit_job.htm
04/17/2009 3:32:23 PM	GG	Opened time card for 08/17/09	time_card.htm
04/17/2009 3:31:55 PM	GG	Opened time card for 8/16/09	time_card.htm
04/17/2009 3:31:48 PM	CL	Viewed client ABC	clients.htm
04/17/2009 3:31:45 PM	AK	Added job diary entry for SED-133	add_diary_entry.htm
04/17/2009 3:31:43 PM	GG	Oopened home paae for 08/17/09	home.htm

**Connected Users:**

Name	Address	Last Access
Allan Koontz	192.168.100.105	04/17/2009 4:31:43 PM
Cathy Lewis	350.129.250.8	04/17/2009 12:31:43 PM
Kerry Mooney	192.168.100.33	04/17/2009 10:18:24 AM
Fred Dean (web admin)	230.126.102.37	04/17/2009 10:14:40 AM
Bill Smith	192.168.100.190	04/17/2009 9:51:55 AM
Erin Lassar	192.168.100.187	04/17/2009 9:01:10 AM
Michael Ober	192.168.100.44	04/17/2009 8:12:42 AM
Bea Noonan	192.168.100.50	04/17/2009 7:51:33 AM
Gayle Green	192.168.100.120	04/17/2009 7:31:43 AM
Neena Washington	192.168.100.101	04/17/2009 7:23:13 AM
Marv Mvers	192.168.100.14	04/17/2009 7:22:32 AM

**Current Event:** Listing jobs for for job lookup list for AK...

1 The start and stop buttons control the My Clients & Profits! X web server. Clicking the Start button tells My C&P! to begin listening for requests, or hits. Clicking the Stop button stops the server, but leaves the My C&P! application running.

2 Clicking the users button opens the My C&P! users window, where web user accounts can be added, edited, and deleted.

3 Click the prefs button to change the My Clients & Profits! X web server's preferences.

4 Clicking the log button opens the My Clients & Profits! X activity log.

5 Click the print button to print web server performance and utilization reports.

6 Clicking the reset button clears the data on the Web Server Status window, including the day's activities, currently connected users, and hits-per-hour graph. Use the Reset function to start a new set of daily statistics.

7 The database name shows the name and location (i.e., file server) of the Clients & Profits database which is being served by My Clients & Profits! X

8 The web server's current status tells you what the My Clients & Profits! X system is doing right now. The typical status is "Running" while it waits for requests from web users.

9 The today's activity list displays the day's most recent hits to the web server. Hits, or requests from users, are listed chronologically, newest ones first. Each hit shows its date and time, the web user who made the request,

and what action occurred. This list can get very long. Clicking the Clear button erases the list without actually deleting the log entries.

10 The connected users list shows the names of recent web users. The list displays the most-recent My C&P! X users first. Users are identified by IP address. A specific user can be disconnected from My C&P! by clicking the disconnect user button, which allows a different user to connect to web server with the same IP address.

11 The hits per hour graph visually shows how busy the web server has been today. The graph charts hits per hour from 6 AM to 8 PM (hits after those hours aren't graphed). The graph's scale will change based on the volume of hits to the web server.

12 The current event panel shows the process currently being performed by the web server.

# The My C&P! X Activity Log

The activity log keeps track of every request, or hit, to the My Clients & Profits! X web server. Each hit creates a web log entry, which contains the date and time of the hit, the user's ID, and what actually happened (i.e., the event).

The activity log can store thousands of hits. Log entries are created instantly after every hit to the web server. The activity log can be searched to find entries for a particular day, which can then be printed. The web log can be automatically archived every Monday based on a setting in Preferences to keep the log size manageable.

Webmasters can view the log any time from the My Clients & Profits! X server application to monitor the server's work load. The log can also be monitored from a web browser if the allow remote administration option is enabled in Preferences (see pages 12-13).

## To view the My C&P! X activity log

1 Choose My Clients & Profits! > Web Server Log or click the log button from the Server Status window.

The Activity Log window opens, listing all of the web server's log entries in chronological order. The entries on the log can be sorted by date, user, and event description by clicking on a column heading. The sort direction (i.e., ascending or descending) can be changed by clicking on the up and down buttons.

## To find a selected day's log entries

1 Enter a date into the find date: field then choose File > Find Log Entries or click the find button.

The log entries for the selected date will be highlighted in the Activity Log window. To print a list of these log entries, click the print button.

## To print the activity log

The Activity Log Report is a hard-copy version of the activity log window. The printed report shows all log entries or some entries, depending on which ones are selected. Log entries will be sorted on the printed report in the same way they are sorted on the window.

To print the entire activity log, choose Edit > Deselect Log Entries. To print a selection of log entries, use your mouse to highlight the entries you wish to print.

1 Choose File > Print Activity Log or click the print button.

## To clear the activity log

Selected entries can be removed from the activity log. While the activity log can hold over 100,000 entries, the number of entries that are displayed in the Activity Log window is based on your computer's available memory. Log entries should be regularly deleted when they are no longer relevant or likely to be used.

To clear a selection of log

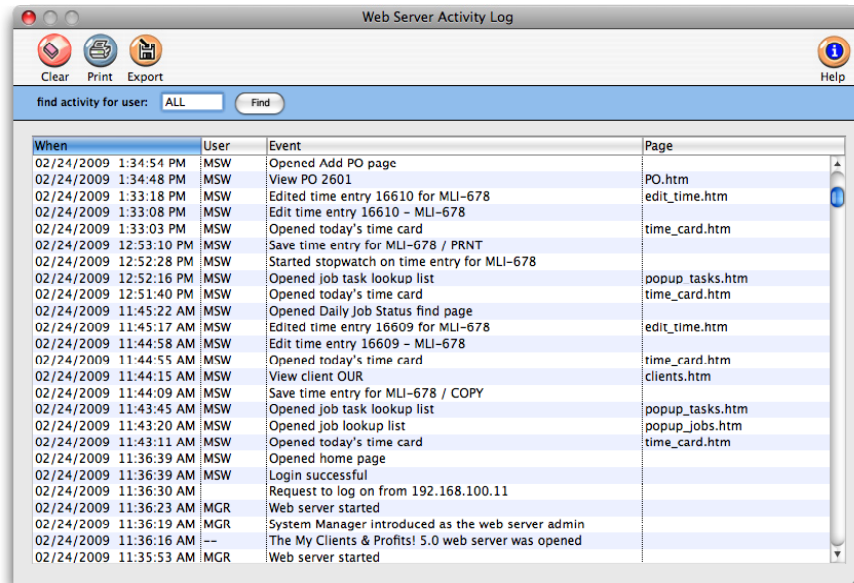
entries, use your mouse to highlight a set of entries. To clear the entire list, choose Edit > Deselect Log Entries.

1 Choose Edit > Clear Log Entries or click the clear button.

## To export log entries

Selected entries can be exported from the activity log into a tab-delimited text file. This text file can then be opened by Microsoft Excel, FileMaker Pro, Access, and any other spreadsheet or database for analysis. Exporting is an ideal method for storing old sets of log entries when they are no longer needed in the activity log.

■ Exporting doesn't clear log entries. If you don't want to keep exported entries in the activity log, click the Clear button to delete the selected log entries.



The screenshot shows the 'Web Server Activity Log' window. At the top, there are buttons for 'Clear', 'Print', 'Export', and 'Help'. Below these is a search bar with 'find activity for user: ALL' and a 'Find' button. The main area is a table with four columns: 'When', 'User', 'Event', and 'Page'. The table contains 20 rows of log entries, including events like 'Opened Add PO page', 'View PO 2601', 'Edited time entry 16610 for MLI-678', 'Opened today's time card', 'Save time entry for MLI-678 / PRNT', 'Started stopwatch on time entry for MLI-678', 'Opened job task lookup list', 'Opened today's time card', 'Opened Daily Job Status find page', 'Edited time entry 16609 for MLI-678', 'Edit time entry 16609 - MLI-678', 'View client OUR', 'Save time entry for MLI-678 / COPY', 'Login successful', 'Request to log on from 192.168.100.11', 'Web server started', 'System Manager introduced as the web server admin', and 'The My Clients & Profits! 5.0 web server was opened'.

When	User	Event	Page
02/24/2009 1:34:54 PM	MSW	Opened Add PO page	
02/24/2009 1:34:48 PM	MSW	View PO 2601	PO.htm
02/24/2009 1:33:18 PM	MSW	Edited time entry 16610 for MLI-678	edit_time.htm
02/24/2009 1:33:08 PM	MSW	Edit time entry 16610 - MLI-678	
02/24/2009 1:33:03 PM	MSW	Opened today's time card	time_card.htm
02/24/2009 12:53:10 PM	MSW	Save time entry for MLI-678 / PRNT	
02/24/2009 12:52:28 PM	MSW	Started stopwatch on time entry for MLI-678	
02/24/2009 12:52:16 PM	MSW	Opened job task lookup list	popup_tasks.htm
02/24/2009 12:51:40 PM	MSW	Opened today's time card	time_card.htm
02/24/2009 11:45:22 AM	MSW	Opened Daily Job Status find page	
02/24/2009 11:45:17 AM	MSW	Edited time entry 16609 for MLI-678	edit_time.htm
02/24/2009 11:44:58 AM	MSW	Edit time entry 16609 - MLI-678	
02/24/2009 11:44:55 AM	MSW	Opened today's time card	time_card.htm
02/24/2009 11:44:15 AM	MSW	View client OUR	clients.htm
02/24/2009 11:44:09 AM	MSW	Save time entry for MLI-678 / COPY	
02/24/2009 11:43:45 AM	MSW	Opened job task lookup list	popup_tasks.htm
02/24/2009 11:43:20 AM	MSW	Opened job lookup list	popup_jobs.htm
02/24/2009 11:43:11 AM	MSW	Opened today's time card	time_card.htm
02/24/2009 11:36:39 AM	MSW	Opened home page	
02/24/2009 11:36:39 AM	MSW	Login successful	
02/24/2009 11:36:30 AM	MSW	Request to log on from 192.168.100.11	
02/24/2009 11:36:23 AM	MGR	Web server started	
02/24/2009 11:36:19 AM	MGR	System Manager introduced as the web server admin	
02/24/2009 11:36:16 AM	--	The My Clients & Profits! 5.0 web server was opened	
02/24/2009 11:35:53 AM	MGR	Web server started	

Sorting the activity log Log entries for every hit to the My Clients & Profits! X server is recorded in the Activity Log. Log entries can be sorted by date, user, or by what happened by clicking when, user, or event column headings.

To export a selection of log entries, use your mouse to highlight a set of entries. To export the entire list, choose Edit > Export Log Entries.

1 Choose Edit > Export Log Entries or click the export button.

### To remotely monitor the activity log

The My Clients & Profits! X web server activity log can be monitored remotely from any internet connection using a web browser. This ability lets My C&P! X web administrators monitor the server's usage and performance when they're outside the office—from home, an airport, a trade show, or a client's office.

The allow remote administration option in the My C&P! X web server's preferences must be checked before the log can be accessed from a browser. The view activity log function appears as a link on the web administrator's home page.

■ Only web administrators can remotely monitor and manage the My Clients & Profits! X server from a web browser.

### To automatically archive the web log every Monday

The automatically archive activity log every Monday option tells My Clients & Profits! X to export the week's web log every Monday morning, then start a brand-new log for the week. This setting keeps your web log's size manageable (a busy shop with lots of web users could have a 10,000+ entry web log within months). The exported logs are automatically dated and stored in the same folder as your My C&P! X web server.

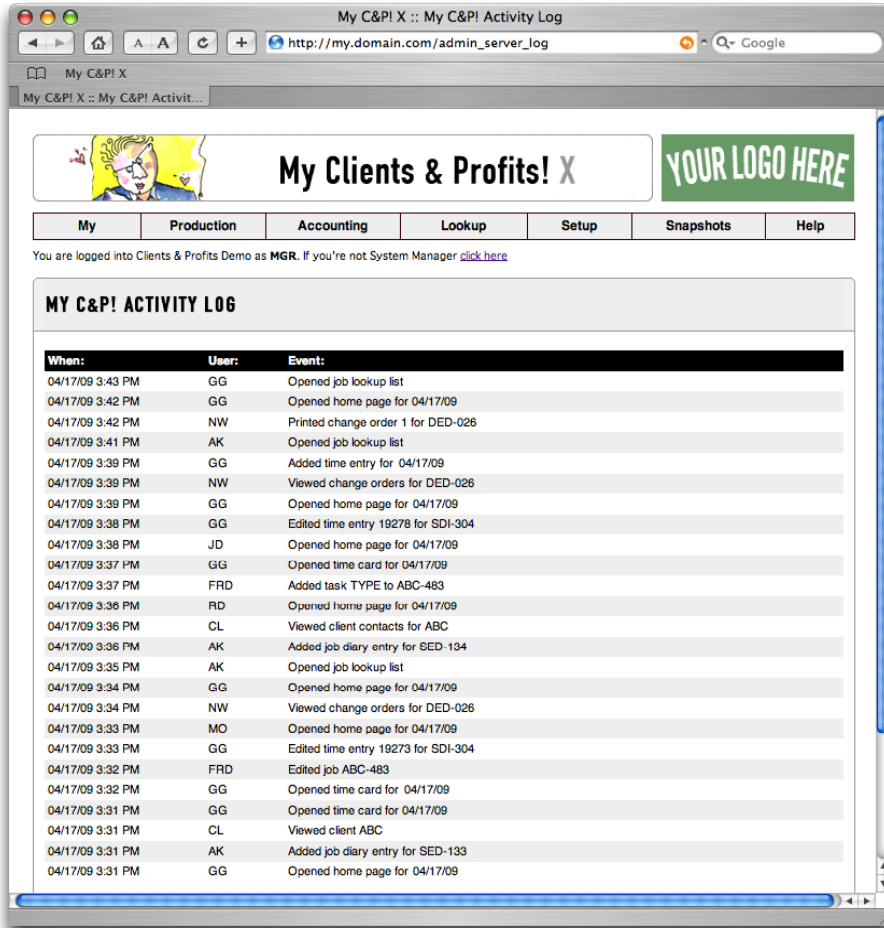
These tab-delimited text files can be opened in Excel, FileMaker, Access, or

any text editor. To keep all of the web log entries together in your database, leave this preference unchecked.

1 Click the Preferences button.

2 Check the *automatically archive activity log every Monday* option.

3 Click Save.



# Printing My C&P! X Server Reports

Server reports are your best source of up-to-date statistics on the My Clients & Profits! X web server's usage. These reports analyze the My C&P! activity log to determine the most-active users, most-popular web pages, and more. Web server reports can be printed for any range of dates, letting web administrators compare the server's performance and utilization for any period of time.

General reports are lists of users and other basic information about the My Clients & Profits! X server. These reports provide hard-copy printouts of staff members, freelancers, clients, and vendors and what they can do with My Clients & Profits! X

Performance reports look at the big picture—raw numbers of hits by days of the week, time of day, and week vs. week. These reports help web administrators track the busiest times for My Clients & Profits! X, which helps them better manage the system. The "hits" report series can be printed for one day, one week, or any time period. This exhibity allows web administrators to see more or less data on reports.

Utilization reports highlight the most and least active users, as well as the most- and least-used web pages. These reports help web administrators determine which parts of My Clients & Profits! X are useful and productive to staff members, freelancers, clients, and vendors.

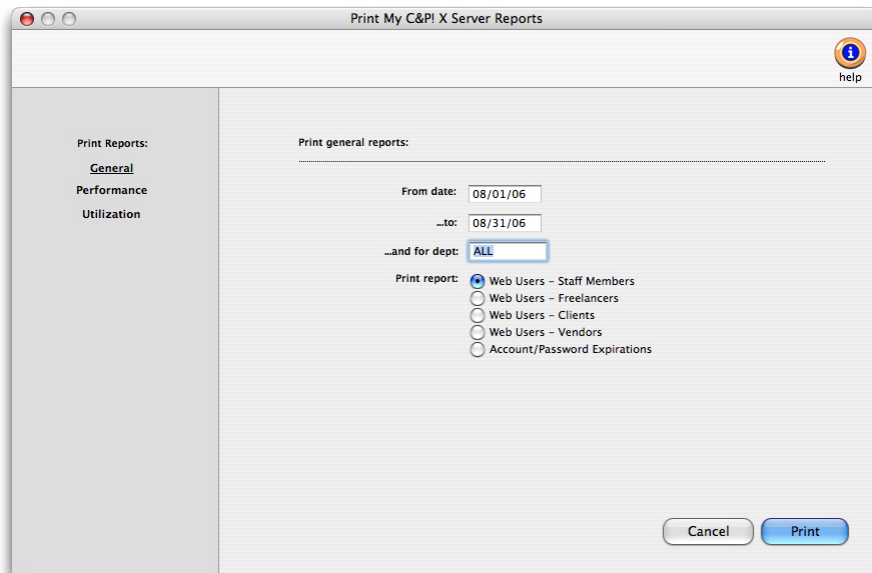
■ Each of the server reports has its own unique purpose. You may not need everyone to help web administrators manage the server. Instead of printing every report, experiment with each report (and its various options) to see which one gives web administrators the best information they need to stay on top of the server's performance.

**Who's using what?** My Clients & Profits! X reports analyze how the server is being used for a day, week, month, quarter, or any period of time based on entries saved in the server's activity log.

## To print server reports

Most of the web server reports are based on entries in the activity log, which are selected for a range of dates. Entering a range of dates will search the log and analyze the entries for that time period.

- 1 Choose File > Print Server Reports, or click the print from the Web Server Status window.
- 2 Select the kind of report you wish to print (e.g., General, Performance, or Utilization).
- 3 Make your report selections.
- 4 Click Print.



2 Select the kind of report you wish to print (e.g., General, Performance, or Utilization).

3 Make your report selections.

4 Click Print.

Server reports that show a broad time period, such as a month or quarter, will take longer to print than reports based on a day or week, since there are more log entries to analyze.

## Tips for printing My C&P! X server reports

■ Use the Peak Usage report to keep track of the My Clients & Profits! X web server's busiest times. Web administrators can use this analysis to better plan maintenance and other downtime, and well as determine whether the server hardware is adequately handling the work load.

■ Since web users can't choose or change their own passwords, it's up to the web administrator to maintain them. The Account/Password Expiration report lists accounts and passwords that are emiently expiring within the next 30 days and need attention. If the web administration doesn't update these expiration dates, the web users will suddenly lose access to My Clients & Profits! X This report should be printed monthly.

## My Clients & Profits! X Server Reports

General	
<b>Web Users - Staff Members</b>	The Web Users report lists staff members by user ID. This report shows each user's last access date and other account information.
<b>Web Users - Freelancers</b>	This version of the Web Users report shows only users marked as "freelancers" in the Users list. Freelancer users can have the same access privileges as staff members.
<b>Web Users - Clients</b>	This version of the Web Users report only shows individuals who work for the shop's clients, displaying each user's account information. Users are grouped by client number.
<b>Web Users - Vendors</b>	This version of the Web Users report displays web users who work for the shop's vendors.
<b>Account/Password Expirations</b>	This report lists expiring web accounts. The report has two parts: one for expiring accounts and another for expiring passwords. Since users can't change passwords themselves, web administrators can use this report to update old passwords.
Performance	
<b>Hits by Day</b>	This report analyzes users requests, or hits, for each day of a selected week. This report calculates the total hits per day to help web administrators track the server's volume.
<b>Hits by Time</b>	The Hits by Time report analyzes how web users used My Clients & Profits! X throughout the day. The report totals up hits by hour for any range of dates.
<b>Hits by Week</b>	The Hits by Week report compares hits to the My Clients & Profits! X web server week-by-week for any selected period of time. The report helps analyze My C&P! usage over a longer time frame.
<b>Peak Usage</b>	The Peak Usage report calculates the web server's busiest times based on the number of hits per hour for a range of dates.
<b>Errors</b>	The Errors report analyzes the web server's activity log for error log entries. Web administrators can use this report to monitor the number, frequency, and type of errors occurring in My C&P!
Utilization	
<b>Most-Active Users</b>	The Most-Activity report displays the users with the most connections to the My C&P! X server.
<b>Least-Active Users</b>	The Least-Activity report displays web users who have the fewest connections to the server.
<b>Most-Popular Pages</b>	The Most-Popular report analyzes the activity log for the most frequently used web pages.
<b>Least-Popular Pages</b>	The Least-Popular report displays pages with the least number of hits from web users.
<b>User Connections</b>	The User Connections report lists connections to the My C&P! X web server by IP address.

# Remotely Managing My C&P!

Parts of the My Clients & Profits! X web server can be monitored and managed remotely from any internet connection using a web browser. This ability lets My C&P! X web administrators monitor the server's usage and performance when they're outside the office—from home, an airport, a trade show, or a client's office.

The remote administration functions include server status monitoring, viewing the activity log, setting the My C&P! X web server's preferences, adding new web users, and updating web user access privileges. These functions appear as links on the web administrator's home page. Remote administration has no effect on regular My C&P! X users, and is completely optional. All changes you make take affect immediately.

■ Only web administrators can remote monitor and manage the My Clients & Profits! X server from a web browser. Any web user who is a staff member (i.e., not a client, freelancer, or vendor) can become a web administrator by checking the web server administrator option in the user's access privileges window.

Remote administration is not a standard option, so must be enabled in the My C&P! X preferences. Once enabled, any My C&P! X user with web administrator privileges can connect to the server, monitor it, and make changes.

## Restricting remote administration

My Clients & Profits! X features a special high-security option to prevent unauthorized people from remotely monitoring and changing the web server. The restrict remote administration to IP address option appears when the allow remote administration option is checked. This security option restricts My Clients & Profits! X from being remotely administered by only

one specific computer based on its IP address. If an IP address is entered here, only the computer that has this address will be allowed to monitor and manage My Clients & Profits! X. My C&P! X can still be accessed from any other addresses, but the remote administration links will not appear on your home page. This setting effectively restricts My C&P! X from being monitored and managed from an unknown computer—and more than one web administrator, since it allows for only one IP address. It should be used at sites where security is more of a concern than easy accessibility by web administrators.

The screenshot shows a web browser window titled "My C&P! X :: Web Server Status" with the URL "http://my.domain.com/validate". The page features a navigation menu with links for My, Production, Accounting, Lookup, Setup, Snapshots, and Help. Below the menu is a "WEBSERVER STATUS" section with the following details:

- Database: Hard Disk:databases:2009 C&P X 10.1.df1
- Status: Listening for hits on 192.168.1.102:1025
- Started: 04/08/2009 2:52:47 PM

Below this is a "TODAY'S ACTIVITY" table:

Date:	User:	Action:	IP:
04/08/2009 2:54:23 PM	MGR	Opened My C&P! server status page	--
04/08/2009 2:53:49 PM	MGR	Opened home page for MGR.	--
04/08/2009 2:53:49 PM	MGR	Login successful	--
04/08/2009 2:53:41 PM	--	Request to login from 192.168.1.102	--
04/08/2009 2:52:47 PM	MGR	Web server (trial demo) started	--

At the bottom, there is a "CONNECTED USERS" table:

Name:	Address:	Last access:
Mark G. Robillard	04/08/2009 2:54:23 PM	

The page footer includes the copyright notice "© 2008 Clients & Profits Worldwide".

Monitoring the server's status The My Clients & Profits! X server status web page shows who is using My C&P! as well as the day's hits.

■ This option will only work for computers with fixed IP addresses, such as the ones on your LAN. It won't work for web administrators who use a laptop and a dial-up modem connection to My C&P! X, since its IP address changes with each new connection.

## To enable remote administration

- 1 Click Setup > Preferences.
- 2 Click on the allow remote administration option to select it.
- 3 If the restrict option is to be used, enter the web administrator's IP address; otherwise, leave it blank to allow any web administrator to remotely control My C&P! X from any computer.
- 4 Click Save.

Once the allow remote administration option is selected, a web administrator can monitor the server from a browser immediately.

## To remotely monitor the server's status

- 1 Open your web browser then log onto My Clients & Profits! X with your user ID and password.

Your customized home page appears, which now includes links for remote



server administration: server status, users, activity log, and preferences.

2 Click on any admin link to monitor or manage the server.  
**To monitor the server's status**

1 Click on Setup > Web Server Status.

The server status link opens the My C&P! X Web Server Status page (see above). This page is the web-page equivalent of the My C&P! X Server Status window. It shows the currently opened database, the server's current status, and the date and time the server was started. The page also lists the server's connected users (listed in order of last access to the server) and the day's activities (i.e., log entries).

**To view a list of My C&P! X web users**

1 From the home page, click on the Users link.

The users link opens the My C&P! X Users page, which lists your web user accounts. User accounts are listed in alphabetical order by ID. Clicking on an account lets you edit the user's access privileges.

**To edit a web user's access privileges**

1 From the Users web page, click on the user's initials.

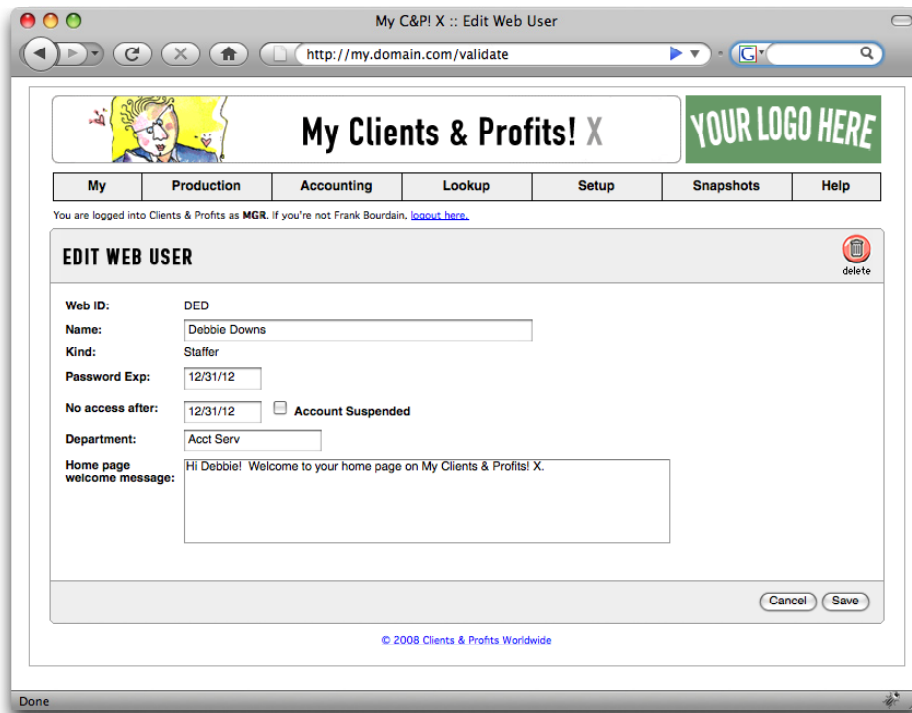
The user's access privileges web page opens. There are limits to what user account information can be seen and changed remotely. For example, the user's password can't be changed here; for security reasons, it must be

changed from the My C&P! X application itself.

2 Make your changes, then click Save.

**To add a new web user account**

A new user account can also be created remotely, which can be convenient for webmasters who aren't always near the My C&P! X server.



1 From the Users web page, click on the Add New User link.

The user's access privileges web page opens.

2 Enter the new web user's account information.

3 Click Save.

The new user can access My Clients & Profits! X using their ID and password immediately.

**To view the server's activity log**

1 From the home page, click on the Activity Log link.

**Monitoring the server's log** The My Clients & Profits! X activity log web page shows all of the server's hits in chronological order, newest ones first. If the log web server errors preference is enabled, any kind of TCP/IP error will be logged and displayed in red. This setting should be used for troubleshooting only since it generates a large number of web log entries.

The activity log link opens the Log web page, which lists the server's hits in chronological order (newest ones first). This page can take several minutes to display if the log is large.

**To change the web server's preferences**

1 Click Setup > Preferences.

The preferences link opens the My C&P! X preferences web page. Since preferences can't be changed from the My C&P! X application while it's running, this web page is the only way to change preferences without stopping the server.

2 Make your changes to the server's preferences, then click Save.

# Appendix A: Security Issues

My Clients & Profits! X was designed to offer reasonable security to the shop's Clients & Profits database, while making it available to the widest number of users. It is a custom, proprietary HTTP server, so can't be accessed anonymously like other web servers.

The My Clients & Profits! X server itself contains no company data. All of the data it uses is stored in the Clients & Profits database on your file server. If My C&P! can't access your file server for any reason, then it can't serve data to web users.

The My C&P! web pages themselves contain no company data, either. Pages contain tags (called OMFLDs; see page 30) that are used by the My C&P! CGI to access records from the shop's Clients & Profits database. A web page only shows actual data when it is processed by the My Clients & Profits!'s CGI, which can only happen if someone logs on with a valid user ID and password. If someone copies an HTML page from My C&P!, they will only see the page's OMFLDs. This effectively prevents spiders and bots from indexing My Clients & Profits! X

The server does not support SSL, so cannot establish secure encrypted connections between users and the web server. For this reason, My Clients & Profits! X offers only limited access to your accounting data. There is no access whatsoever to anything financial, such as checks, client payments, or the general ledger.

My Clients & Profits! X contains many built-in security features which, when used together with responsible management practices, help ensure that confidential company data stays private.

My Clients & Profits! X's security features include:

**Starting My Clients & Profits! X** Only Clients & Profits system managers can configure the C&P database for My Clients & Profits! X, set up web users, then start the web server.

**Individual user accounts** While My Clients & Profits! X can be accessed from any internet connection, it is not a publicly available server. It is only accessible to staff members, freelancers, clients, and vendors who are authorized My C&P! web users. Each individual person has their own web account, including people who work for the shop's clients and vendors. Users can't create their own accounts; instead, they must be set up by the My C&P! web server administrator. User accounts can be set to expire at a selected date.

**User passwords** Each web account has its own password. Passwords are not defined by the user; instead, they must be assigned by the My C&P! X web administrator ("webmaster"). User passwords can be set to expire at certain dates to help keep passwords from being circulated. Passwords are stored in the Clients & Profits database as encrypted data.

**Access Privileges** The functions that a web user can see and do are based

on their My Clients & Profits! X access privileges. Each web user can be given access to clients, jobs, time cards, expenses, etc. by the My C&P! web administrator. Clients and vendors have limited access to the database, while staff members and freelancers can add jobs, edit estimate, etc. based on their access privileges to Clients & Profits.

**No guest access** There is no temporary "guest" access to the My Clients & Profits! X web server. Unlike other web sites, anonymous users can't create their own My C&P! X account and get temporary, limited access to the system. Instead, user accounts can only be created and managed by a My C&P! X web administrator.

**Cookies control user access** Cookies must be enabled on the users' browsers to access the My C&P! web server. When a user successfully logs onto My C&P!, a cookie is automatically set in their browser that lasts for 24 hours. The user can then repeatedly access My C&P! X web pages during that period without reentering their ID and password. The cookie's expiration date can be changed (for example, to a week instead of one day) by changing the Javascript in the introduce.htm page.

**No bookmarks** Web users can only access My Clients & Profits! X from the "introduce yourself" page. This ensures that My C&P! X knows exactly who has accessed every web page. If a user bookmarks any My C&P! X page (other than the Introduce Yourself page) the server will open the introduce page instead.

**Restrictions to client, vendor accounts** A web user can be restricted to seeing only one client's account information, jobs and costs as part of their access privileges. The same restriction can be made to web users who are vendors; they are limited to only seeing their POs. This option can be used with staff members and freelancers, as well as clients. Vendors can't access client information in any way, and clients can't see vendor data.

**Failed login notification** A notify webmaster of failed logins via e-mail preference (see page 17) automatically sends an alert via e-mail to the My C&P! X webmaster whenever someone tries to access the web server with an invalid user ID or password. An entry is also made in the server's web log.

**Bad password notification** My Clients & Profits! X will notify the webmaster via e-mail whenever a web user tries to log onto the server with a bad password.

**3 bad passwords suspend web accounts** The optional disable web accounts after 3 bad passwords preference will automatically suspend a web account if the user enters a bad password three times in a row. The user will see an error page explaining why their account has been suspended, and the My C&P! X webmaster will be notified via e-mail. The account can be reactivated from the My C&P! X user access window (see page 20) or remotely from the user access web page.

All hits are logged. The activity log tracks all hits to the My Clients & Profits! X web server. For faster performance, logging can be stopped by enabling the disable activity log preference—but then you'll have no idea of who's using My Clients & Profits! X and what they're doing.

Users are tracked by IP address. The My C&P! Server Status window shows the IP address of every current and recent web user, helping webmasters track down who's using the server. If a user who's connected to My C&P! logs in from a different computer, the new IP address replaces the original one.

Only web administrators can remotely monitor My C&P! X. Unless the web server administrator option is enabled for a web user, he or she won't be able to remotely monitor or manage the My C&P! web server.

Remote administration is an option. If the allow remote administration preference is unchecked, the home page links for server status, users, activity log, and preferences are not available. This prevents anyone outside the office from monitoring the My Clients & Profits! X server.

Remote administration can be limited to a preset IP address. The restrict remote administration preference allows a web administrator to remotely monitor and manage the My Clients & Profits! X server from a single specified IP address. If anyone else tries to remotely administer the server from a different computer they will be rejected.

## Backups and Security

The web server can be configured to stop and start at specified times to allow nightly backups of the database, though the program does not actually quit. If the program is quit for any reason (e.g., restarting the server to install updates), it will have to be manually restarted afterwards. This cannot be automated because it would require storing login information to the database, which would be a security vulnerability.

While it may be possible to use macro/automation software to log in automatically, Clients & Profits does not provide any support for this.

## Security Tips for My Clients & Profits! X

- Don't let users share the same web account.
- Use long passwords of random characters and number instead of recognizable names, words or phrases.
- Use the automatic e-mail notification for errors and bad logins.
- Change web user passwords frequently.
- Check the web log for excessive or suspicious use by particular users.

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# My Clients & Profits! X Web Pages Flow Chart

