



GETTING STARTED GUIDE

Version 2.0

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Welcome

Thank you for your interest in OnRamp. We at OnRamp Solutions designed the OnRamp ERP to meet and exceed your manufacturing resource planning demands. We know manufacturing and we believe that we have created an ERP system that is easy to learn, easy to use, and powerful enough to help you and your business overcome any challenge.

To help your business successfully adopt OnRamp as quickly as possible, we have designed this document to guide you through some of our most commonly used features.

Overview

This guide was written to help you learn how to navigate and use OnRamp. Many of the controls will be intuitive to computer users with an intermediate skill level. This guide describes how to get started with OnRamp, including:

- navigating the menu and home screen,
- using screens and reports, and
- using the various screen controls.

Conventions

This manual uses the following typographical conventions:

- **Bold** text - used to highlight important information in text. Used to denote click actions in procedures.
- *Italic* text - used to label tables and images. Used in notes.
- **Notes** - used to denote important notes related to the text.
- **Warnings** - used to denote warning messages. Ignored warnings can result in permanent negative consequences.


Customer Feedback

For questions, comments, or complains related to OnRamp Solutions documentation, training, or presentations, please contact us at: info@onramp-solutions.com.

Install the OnRamp portal

Once your OnRamp ERP system is set up, we recommend installing the portal on all workstations.


To install the OnRamp portal:

1. On your workstation, open a new browser window.
2. Navigate to portal.onramp-solutions.com.
3. Click .
4. Run the downloaded **setup.exe** file as **Administrator**.

Tip: By default, the file will be saved to your workstation in the **Downloads** folder.

5. In the **OnRamp Install Wizard** screen, click **Next** and **Accept** as required.

Result


You have installed the OnRamp portal. You can launch the OnRamp Portal by double-clicking on the  icon on your desktop.

Sign in

After getting the OnRamp portal set up on your desktop, you can open OnRamp via a Windows desktop, or Start menu, shortcut.

To launch OnRamp:



1. On your workstation desktop or **Start** menu, double click .
2. Select your **site environment**.
3. Enter your **username** and **password**.
4. Click **Login**.

Result

You have logged in to OnRamp.

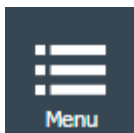
The OnRamp home screen

The OnRamp home screen is made up of four sections:

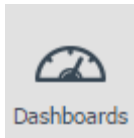
- the apps bar
- the menu and search bar
- the toolbar
- and the workspace

The apps bar

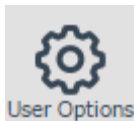
The apps bar consists of six apps:



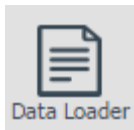
The menu icon launches the **OnRamp menu**. By default, the menu is pinned  to always be open.



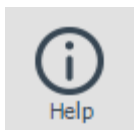
The dashboards icon launches the **Dashboards** page in the workspace.



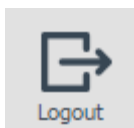
The user options icon launches the **User Options and Preferences** screen in the workspace.



The data loader icon launches the **Data Loader** screen in the workspace. This is used to load data into OnRamp.



The help icon launches the **OnRamp help system**, which includes tutorials, a forum, our blog, and a location to submit a support ticket.



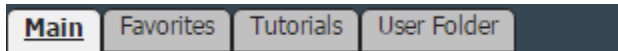
And finally, the **Logout** icon safely exits you from OnRamp.

The OnRamp menu

The menu divided up in to three parts:

- the user tabs
- the search bar
- and the explorer window

The user tabs



The tabs are:

- The **Main** tab, containing the work **screens** and **reports** under folders and sub-folders.
- The **Favorites** tab, containing a list of your favorite reports and screens.
- The **Tutorials** tab, containing a list of PDF tutorial documents to help you learn various procedures and concepts related to OnRamp.
- The **User Folder** tab, which is no longer in use.

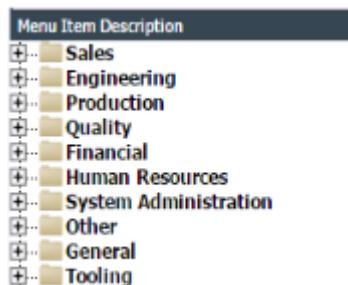
The search bar



The search bar is used to find **screens** and **reports** within the menu. The search bar is an active smart search, so as you type, the explorer window will display items with a title that match what you typed. Once you find the report or screen you are looking for you can launch it by double clicking on it.



To see under which folder and sub folder the item is located in the menu, right click on the item and click **Find In Menu**.

The Menu



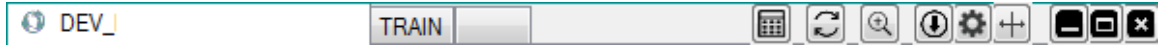
The default OnRamp menu

The menu works very similarly to most other file explorer systems:

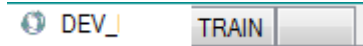







- You can expand and collapse items by clicking the  and  respectively.
- The **screens** and **reports** seen within a sub-folder are opened by clicking on the item.

The toolbar

The toolbar is at the top of the OnRamp screen.

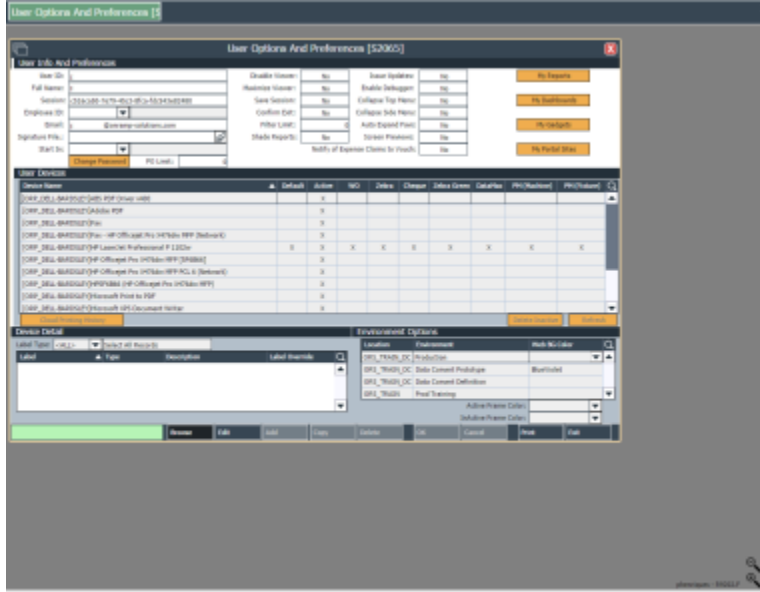


The toolbar buttons perform the following functions:



- | | |
|---|--|
|  | <p>The server tabs display what server you are currently connected to and can be used to launch or switch to another server on a different tab. Right clicking on a server allows you to close that server connection or to open the server in your default browser.</p> |
|  | <p>The calculator button launches your Windows Calculator.</p> |
|  | <p>The refresh button refreshes your currently selected screen or report.</p> |
|  | <p>The zoom button opens the zoom controls, allowing you to zoom in or out of the current screen.</p> |
|  | <p>The downloads button launches the OnRamp download location in Windows Explorer.</p> |
|  | <p>The server button opens a new OnRamp server sign in window, allowing you to sign into another server.</p> |
|  | <p>The expand button expands OnRamp to cover all your windows screens.</p> |
|  | <p>The windows controls minimize, maximize, or close OnRamp.</p> |

The Workspace

The workspace is where you action all your screens and reports and it consists of two areas:



Example Workspace with User Options and Preferences open

- The task bar at the top of the workspace lists the title of all your open screens and reports. By default, the task bar is pinned  to always be open. In the task bar, you can click on a title to go to that screen or report, or you can close that item by moving your mouse cursor over the title and clicking .



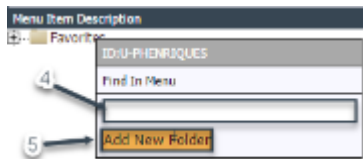
- The workspace area displays all your open screens and reports. This is where you can enter, update, or delete data.

Favorites

You can mark any folder, sub-folder, screen, or report in OnRamp as a favorite. This allows you to quickly access the folders, screens, and reports you most commonly visit quickly and efficiently.

You can also create your own folders and sub-folders to better organize your favorites folder.

To add personal folders to your Favorites:



Add a Favorites folder screen

1. In OnRamp, navigate to the **Menu**.
2. Select the **Favorites** tab.
3. Right click on the **Favorites** folder.
4. In the text box, enter the desired name for the new folder.
5. Select **Add New Folder**.

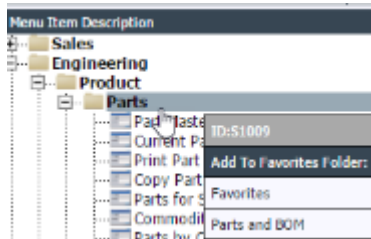
Result

You have added a new personal folder to your **Favorites** tab. When adding an item to your favorites from the **Menu**, your new folder will be listed as an option.

Add Items to Favorites

Add a screen, report, or folder to the Favorites tab to make it easy to find.

To add an item from the File Explorer to your Favorites:



Example Add To Favorites Folder screen

1. In OnRamp, navigate to the **Menu**.
2. Search for, or navigate to, the desired screen, report, or folder.
3. Right click on the item.
4. Under the **Add To Favorites Folder**, select the desired folder.

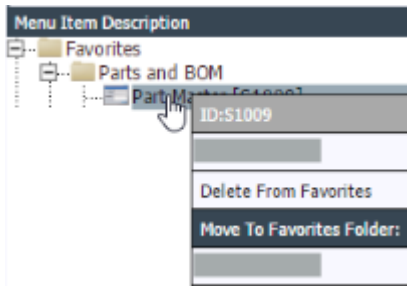
Notes

- Marking a folder as favorite adds all the sub-folders, screens, and reports within that folder to your Favorites tab.
- If you mark a folder as a favorite, you cannot remove screens or reports that are within that folder from the Favorites tab.

Remove Items from Favorites

You can also remove screens, reports, or folders from the Favorites tab to make it easy to find.

To remove an item from your Favorites:



1. In OnRamp, navigate to the **Menu**.
2. Select the **Favorites** tab.
3. Right click on the desired item.
4. Select **Delete From Favorites**.

Delete From Favorites folder screen

Result

You have removed the selected item from your **Favorites** tab.

Notes

- If you mark a folder as a favorite, you cannot remove screens or reports that are within that folder from the Favorites tab.

Navigating screens

Use screens to add, update, and view data in OnRamp. Screens are made up of the following sections and elements:

- **Frames** - OnRamp screens are composed of frames. Some screens have one frame, most have two, a few have three. When a screen has more than one frame, the first frame, the header frame, is the frame that includes the record number and description and the sub-frames, usually called detail frames, include detailed information related to the record. The screen task bar, detailed below, actions the currently active frame.

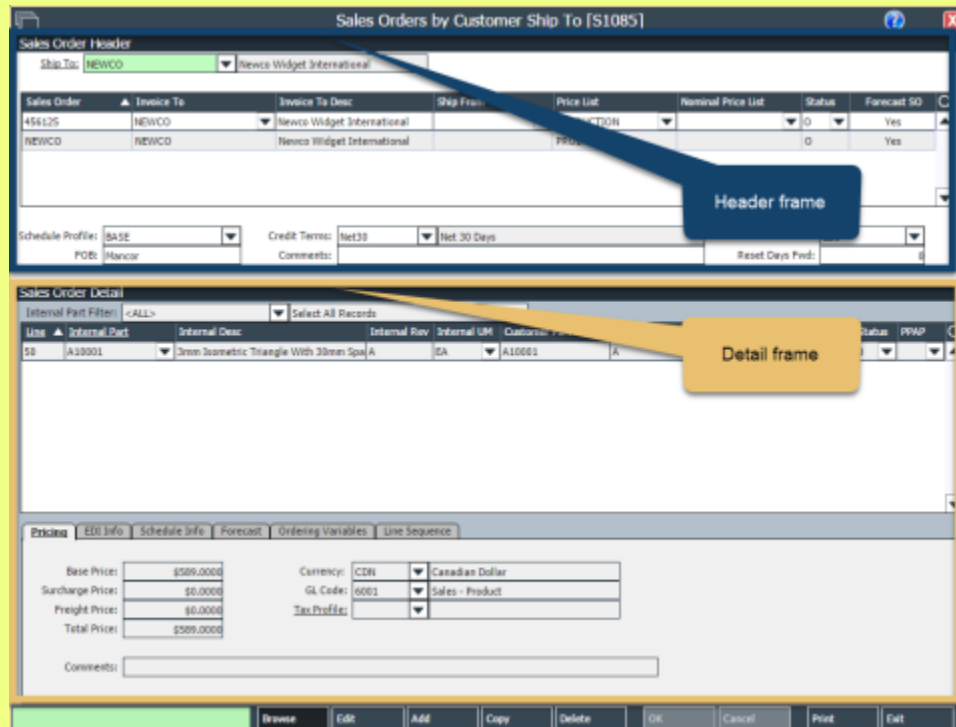
The currently active frame will feature a white background while the inactive frame has a light blue background.

Frame example

On **Sales Orders by Customer Ship To [S1085]**, the header frame lists the **Ship To** customer and a grid displaying all the **Sales Orders** created for the customer. Under that, the **Sales Order Detail** frame displays the detailed information for the record selected in the grid above.


The currently active frame is the header frame. Clicking **Add** would add a new **Sales Order** record.

Selecting the detail frame and clicking **Add** would add a line item to the sales order.



- **Drop-down menus** - Click the drop-down arrow to open a list of selectable records. Click on the desired record in the drop-down menu to select it.
- **Fields** - View, edit, or add information regarding the record.
- **Tabs** - Where available, select the different tabs to enter more information relating to the record.

Please note the following functionality for OnRamp screens:

- Click on a field and press **F1** on your keyboard to view the **field ID**.
- White fields cannot be edited.
- Search fields feature active smart search. As you type, the explorer window will display items with a title that match what you typed.
- When adding or updating field data, do not use special characters such as: space, comma, period, semi-colon, asterisk (*), at (@), or slash (/). The underscore character (_) is acceptable.
- An underlined field name indicates a shortcut. To view or update the field, double-click on the field to open the respective screen.
- Accessing a field containing a file name will open the file picker screen.
- Click the date picker  to update fields used to store the date.
- Screens can have multiple sections, or frames. For example, **Customer Master [S1092]** contains two frames titled **Customer Master** and **Contacts**.
 - The active frame has a white background and the inactive frame has a light blue background. Inactive frames cannot be edited until they are selected. Click anywhere within the frame to select it.
 - The upper frame displays overview details related to the information displayed in the lower frame.

The screen task bar

The screen task bar is displayed at the bottom of all OnRamp screens.



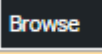
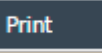
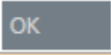
The task bar has a search box and buttons to **Browse**, **Edit**, **Add**, **Copy**, **Delete**, and **Print** the screen. The toolbar also has **OK**, **Cancel**, and **Exit** buttons.

The task bar allows you to access the four action modes in OnRamp: Browse, Edit, Add, and Delete. To enter a different mode, click the appropriate button:

- **Browse mode** - allows you to view data but you cannot make changes:
 - Browse mode is the default mode when launching a screen.
 - Certain buttons can only be selected while in Browse mode.
 - In Browse mode, selectable fields have a light green background.

- **Edit mode** - allows you to edit data:
 - Select the desired frame and record, then click **Edit**.
 - In Edit mode, editable fields have a light green background.
 - Fields that have been edited, but not saved, have a light blue background.
 - Fields with invalid data have a red background.
 - Click **OK** to save or **Cancel** to discard any changes.
- **Add mode** - allows you to add new records:
 - Select the desired frame before clicking **Add**.
 - In Add mode, required fields have a red background and light green fields are optional.
 - Fields that are populated with a default value, but not saved, have a light blue background.
 - Click **OK** to save or **Cancel** to discard any changes.
- **Delete mode** - allows you to delete records:
 - Select the desired frame and record, then click **Delete**.
 - Click **OK** to save or **Cancel** to discard any changes.

The task bar works on the active frame. If certain modes are unavailable to that frame, the buttons will be unavailable. You can see what modes are available by the color of the buttons:

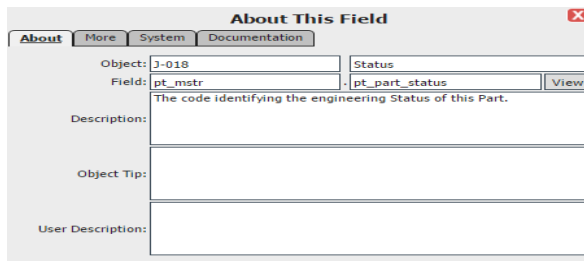
- Dark blue is the currently active mode 
- Medium blue is available for selection 
- Light blue is unavailable for selection 

Screen controls

The following items add functionality and usability in OnRamp screens.

F1 Key

Within any screen, you can press **F1** with the cursor active in any field or drop-down menu and OnRamp will display the field information on the **About This Field** pop-up screen. On **About This Field** are 4 tabs: **About**, **More**, **System**, and **Documentation**.

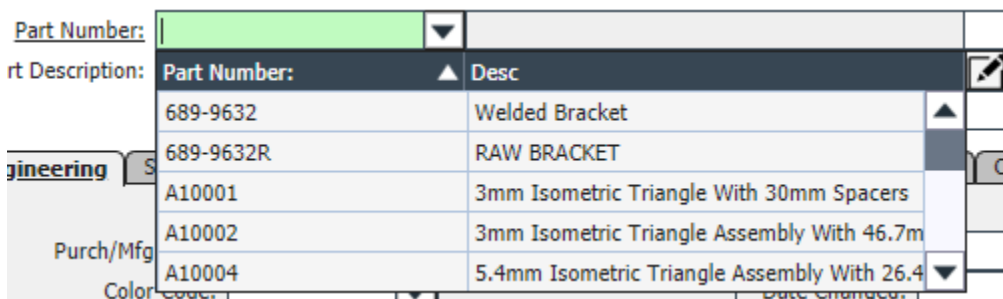


Example About This Field screen that displays after pressing F1 on the Part Number field

Drop-down menu

Drop-down menus in OnRamp are sortable, filterable, tables that are used to select previously entered records and support the following functionality:

- Click the drop-down menu icon to open the record list.
- On certain menus, click the **Add New** icon (📄) to create a new record.
- The drop-down menu can be one or two columns.
- The fields have an active smart search. As you type, the record list will display items that match what you typed. Once you find the record you are looking for, you can select it by clicking on it.
- In menus with multiple columns, both columns can be searched and sorted.
- To sort a different column, select it.
- Click the column header to change the record list sort order.
- Right-click on the column header to filter that column or to export to Excel.

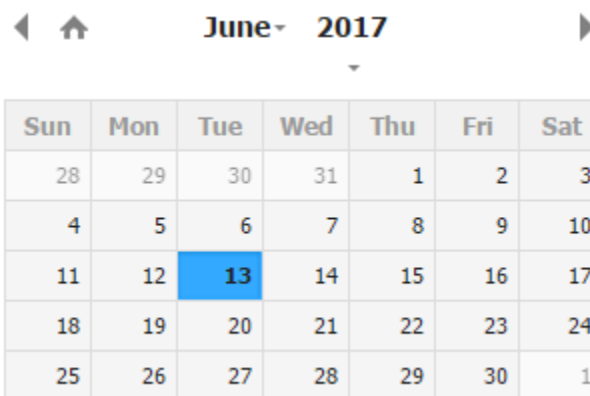


Example drop down menu on the Part Master screen

Date picker

Use the date picker to select a date for date-only fields. The date picker supports the following functionality:

- Click the date picker icon to open the calendar table.
- If the field has a date set, clicking the date picker will open the calendar to the set month/ year with the day highlighted.
- If the field has a blank date, clicking the date picker will open the calendar to the current month/ year with the current day (today) highlighted.
- Click on a day to select that date.
- Click the:
 - **Back arrow** ◀ to go back one month
 - **Forward arrow** ▶ to go forward one month
 - **Home** ⬆ to go to the current month in the current year
 - **Drop-down menus** ▾ to select a month or year for a list



Example of the date picker app

Screen shortcuts


In OnRamp, some screens contain underlined fields. These are screen shortcuts. Double clicking within the field opens a relevant screen where you can update records related to the field.

Logic fields

Logic fields are fields that can only contain two values: Yes or No, True or False, etc. While in **Edit** or **Add** mode, clicking these fields will toggle the value between the two possible selections.

Grid

A grid is a table within a frame made up of rows and columns and a sortable header row:

- Click the column header to change the record list sort order.
- Each row is a separate record.
- Right-click on the column header to filter that column or to export to Excel.
- Tabs and fields listed below the grid are associated to the currently selected grid record.
- Use the search button  to filter the grid records



Note: Some grids are filtered to only show active records. To remove the default filter, right-click on the column header and select <ALL>.

Tool tips


Tool tips are pop-up text boxes that appear if you hover over some executable buttons to explain what clicking the button will do.

Tree view

A tree view structure organizes the data on a screen into folders and sub-folder to display parent-child relationships. For example, the OnRamp Menu is organized in a tree view structure.

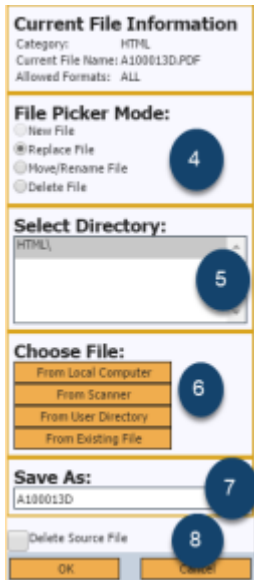
You can expand and collapse items by clicking the  and  respectively.


File picker

In some fields, you will find the file picker icon , which opens the file picker screen where you can add, replace, rename, move, or delete a file attached to a record.

Managing files associated to an item

To add, replace, rename, move, or delete a file attached to an item:



1. Navigate to the desired screen and item.
2. To modify the file attached to an existing item, click **Edit**.
3. Click . The **File Picker** screen will appear.
4. Select the desired File Picker Mode: **New, Replace, Move / Rename, or Delete**.
5. Select the directory.
6. Under **Choose File**, select the location and the file.
7. Under **Save As**, enter the name.
8. If desired, select **Delete Source File**. This means the file will not be stored in this window.
9. Click **OK**.

Example of the file picker options sidebar

Result

You have updated the files related to that item.


Notes

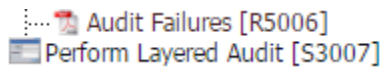
- Select **From Scanner** to add a file from a scanner. Clicking **From Scanner** will bring up the **Select Source** window, allowing you to select which scanner to use.
- Files that can be edited before uploading will display the **Enter Edit Mode** button. You can:
 - Change the orientation (Portrait or Landscape).
 - Change the size (Small, Medium, or Large). Click **Resize the Above** to apply the changes.
 - Adjust the brightness.
 - Click **Save Change to Picture** to save.

Navigating Reports

Use reports to review data in OnRamp. The report data is pulled from your database. Errors, omissions, or incorrect data will lead to inaccurate reporting.

Reports can be found on your OnRamp menu, or your favorites. Reports can be differentiated from screens by the icon and the number:

- Reports have an Adobe PDF icon 
- Report numbers start with R instead of S



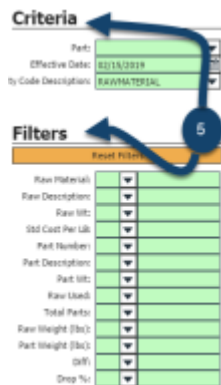
On the report action bar, the drop-down menu allows you to select a *Normal* or *PDF* output. By default, reports are generated in PDF format, which allows you to use the on-screen controls to print, download, or bookmark the file. To generate the report in Normal mode, which is a full screen mode in OnRamp:

1. Click on the drop-down menu.
2. Select **Normal**.
3. Click **Generate**.

Notes

- You can use the on-screen controls to print, download, or bookmark the file.
- Reports can be modified with [Adobe Acrobat](#) and other tools.

Generating a report



1. In OnRamp, navigate to the **Menu**.
2. Search for, or navigate to, the desired report.
3. Double-click on the report.
4. Click **Set Criteria**.
5. Set the desired criteria and filters.
6. Click **Generate**.

Example of the report criteria and filters sidebar

Print or Save Reports

Save or print your OnRamp reports to keep as a reference.

To action the report (save, export, print, or email):

1. In the generated OnRamp report, select the desired button on the task bar:



2. Follow the prompts.

Result

You have saved, exported, emailed, or printed the report, based on your input.

User Options and Preferences

On the **User Options and Preferences** screen, you can set up your:

- Information
- Preferences
- Device functions
- Reports
- Dashboards
- Gadgets

Accessing the User Options

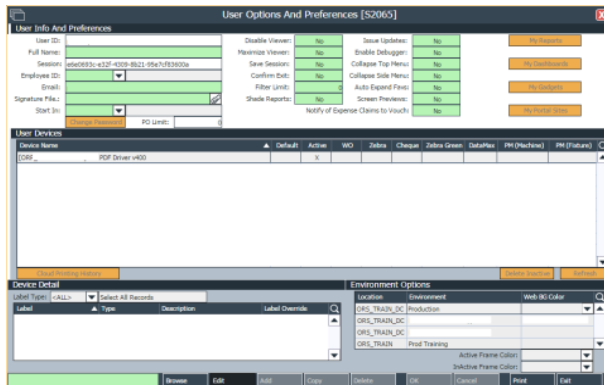
Access the **User Options and Preferences** screen to manage your personal information and preferences.

To access the User Options and Preferences screen:

1. Sign into OnRamp.

2. Click  User Options

Modifying user information and preferences



User Info and Preferences screen

To modify your user information and preferences:

1. Navigate to the **User Options and Preferences [S2065]** screen.
2. Click **Edit**.
3. Update the desired fields.
4. Click **OK**.

Result

You have updated your information and preferences.

Notes

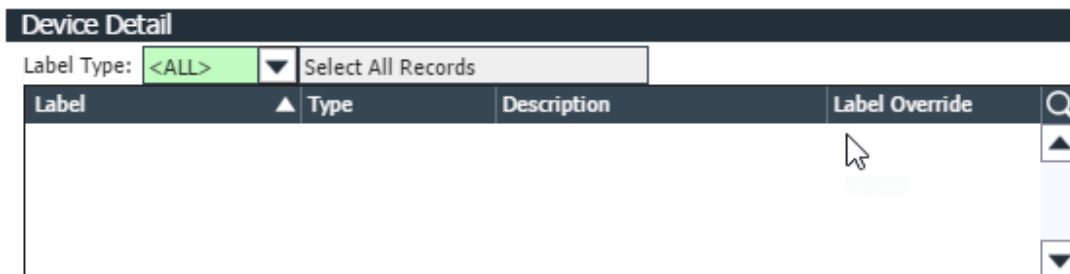
- Once your employee ID record has been added into OnRamp, use the **Employee ID** field to sync your user ID to the employee ID.
- Syncing your user ID helps you avoid having to select the employee record when entering data on certain screens, like **Work Order Reporting by Work Center** [S2517].

Set a Device to Print a Specific Label

You can set your device(s) to only print a specified label.

To set a device to only print a specific label:

1. Navigate to the **User Options and Preferences** [S2065] screen.
2. Under **User Devices**, select the device.
3. Click the **Device Detail** frame.



User Info and Preferences > Device Detail frame

4. Click **Add**.
5. Select the desired **Label** and **Label Override**.
6. Click **OK**.

Result

You have set your device to override a label with a different label.

Manage Automatically Generated Reports

You can set up OnRamp to automatically generate a report, or a group of reports, via email or print, with certain criteria at a specified date and time, with a repeating schedule.

Note: A report group consists of one or more reports and is always required for automatically generated reports.

Step 1 - To add a report group:

1. Navigate to the **User Options and Preferences** [S2065] screen.
2. Click **My Reports**.
3. Click **Add**.
4. Enter the report group name, description, frequency, frequency factor, and schedule 1 and 2.
5. Click **OK**.

Step 2 - To add reports to a report group:

1. Navigate to the **User Options and Preferences** [S2065] screen.
2. Click **My Reports**.
3. Select the desired report group.
4. Click **Report Group Detail**.
5. Click **Add**.
6. Enter the report type, ID, description, sort order, and toggle the values for print and email.
7. Click **OK**.

Step 3 - To edit report criteria:

1. Navigate to the **User Options and Preferences** [S2065] screen.
2. Click **My Reports**.
3. Select the desired report group and report.
4. Click **Report Criteria**.
5. Click **Edit**.
6. Update the values as desired.

Note: After changing the **Custom Value** you must toggle **Use Default?** to **No**.

7. Click **OK**.

Manage Dashboards

You can set up OnRamp dashboards to view data relevant to your operation.

To add a dashboard group:

1. Navigate to the **User Options and Preferences** [S2065] screen.
2. Click **My Dashboards**.
3. Click **Add**.
4. Enter the sort, name, description, and cycle time.
5. Click **OK**.

To add a dashboard to a dashboard group:

1. Navigate to the **User Options and Preferences** [S2065] screen.
2. Click **My Dashboards**.
3. Select the desired dashboard group.
4. Click **Available Dashboards**.

Note: You can filter the list of dashboards by category, template, or you can search for a specific dashboard.

5. On the desired dashboard, click **Add**.

Result

You have added a dashboard to your dashboard group.

Notes

- Due to customizations, you may have multiple versions of the same Dashboard.

Shortcut keys

The following shortcut keys enable you to navigate OnRamp without the use of the mouse:

Shortcut	Command	Used	Description
Ctrl + G	Go To	Anywhere	Opens the Go To Screen pop-up window. Entering the screen number will launch that screen and make it active.
Ctrl + A	Add	On a screen	Adds a record to the active screen.
Ctrl + E	Edit	On a screen	Edits the current record on the active screen.
Ctrl + D	Delete	On a screen	Deletes the current record on the active screen.
Ctrl + B	Browse	On a screen	Switches to browse mode on the active screen. Note: This is the default mode when you activate a screen.
Ctrl + S or Ctrl + Enter	Save	On a screen	Saves the current record on the active screen.
Esc	Cancel	On a screen	Undoes changes made to the current record on the active screen.

Glossary

B

BOM

A bill of material, or BOM, is a list of parts required to build another part.

Business blueprint

Business blueprints are a base for a future knowledge management database that can be used to train employees on the ERP system and processes. They can also be used on future projects, since the target process flow becomes the current process. This will facilitate needs analyses in future IT and operations initiatives.

E

EDI

Electronic Data Interchange, or EDI, is the electronic interchange of business information using a standardized format; a process which allows one company to send information to another company electronically rather than with paper.

ERP

ERP or Enterprise Resource Planner is a software suite used to help you better manage your enterprise resources.

EVA

Economic value added (EVA) is a measure of a company's financial performance based on the residual wealth calculated by deducting its cost of capital from its operating profit, adjusted for taxes on a cash basis. EVA can also be referred to as economic profit, as it attempts to capture the true economic profit of a company.

F

Frequency

Frequency is how often a scenario occurs: daily, weekly, etc.

G

Gage R&R

Gage Repeatability and Reproducibility (Gage R & R) defines the amount of variation in a measurement. This is then compared to the total variability observed, defining the capability of the measurement system.

S

SME

Subject Matter Expert, or SME, is a person that is an expert in a certain area, or matter, within the company.