SIMPLICITY
Software Technologies Inc.

MAINTENANCE COORDINATOR

VERSION 8.x NET USERS GUIDE

PROFESSIONAL AND ADD-ON FEATURES

356 Torito Lane

Diamond Bar, CA 91765

www.simsofttech.com

LICENSE AGREEMENT

YOU SHOULD CAREFULLY READ THE FOLLOWING TERMS AND CONDITIONS BEFORE INSTALLING THIS SOFTWARE PACKAGE. INSTALLING THE SOFWARE PACKAGE INDICATES YOUR ACCEPTANCE TO THE CONTAINED TERMS AND CONDITIONS. IF YOU DO NOT AGREE WITH THEM, YOU SHOULD PROMPTLY RETURN THIS PACKAGE, IN REUSABLE CONDITION, FOR A FULL REFUND OF THE PURCHASED PRICE.

SIMPLICITY SOFTWARE TECHNOLOGIES provides single copies of this software ("computer program") and licenses its use. You are responsible for the selection of the program and the installation, use and results obtained.

You may not sub-license, assign or transfer the license or the program without expressed permission from SIMPLICITY SOFTWARE TECHNOLOGIES.

You further agree that this is the complete and exclusive statement of agreement, oral or written, and any other communications between us relating to the subject matter of this Agreement.

SIMPLICITY SOFTWARE TECHNOLOGIES licenses this software as either a single user version or as a site license, unlimited users version. This is done through the activation file that is supplied by SIMPLICITY SOFTWARE TECHNOLOGIES. Once the software is activated, this licensing condition is also indicated in the About dialog screen found within the main section of the application.

For Single User licenses, THIS LICENSE permits you to:

1. Use the program on a maximum of one computer or workstation at a single facility.
2. Copy the program onto a hard drive or other media for use on a maximum of one computer or workstation located at the same facility.
3. Modify the program and/or merge it into another program for use on the maximum of one computer or workstation.
4. Transfer the program and license to another party if the other party agrees to accept the terms and conditions of this Agreement. If you transfer the program, you must at the same time transfer all copies of the original single copy to the same party or destroy any copies not transferred, and
5. Copy the databases used by this program to single computer or to a network drive to be shared by no more than 1 computer or workstation.

For Site licenses, THIS LICENSE permits you to:

1. Use the program on as many computers or workstations as needed, at a single facility.
2. Copy the program onto a hard drive or other media for use on as many computers or workstations as needed, located at the same facility.
3. Modify the program and/or merge it into another program for use at a single facility.
4. Transfer the program and license to another party if the other party agrees to accept the terms and conditions of this Agreement. If you transfer the program, you must at the same time transfer all copies of the original single copy to the same party or destroy any copies not transferred, and
5. Copy the databases used by this program to single computer or to a network drive to be shared by a single facility.

The conditions above also apply to any portions of the program contained or merged in other programs. You must reproduce and include the copyright notice on any copy, modification, or portion merged into another program.

YOU MAY NOT USE, COPY, MODIFY, OR TRANSFER THE PROGRAM OR ANY COPY, MODIFICATION, OR MERGED PORTION IN WHOLE OR IN PART, EXCEPT AS EXPRESSLY PROVIDED FOR IN THIS LICENSE. IF YOU TRANSFER ANY COPY, MODIFICATION, OR MERGED PORTION OF THIS PROGRAM TO ANOTHER PARTY, THIS LICENSE IS AUTOMATICALLY TERMINATED.

YOU MAY NOT USE, COPY, MODIFY, OR TRANSFER THE ACTIVATION FILE SUPPLIED BY SIMPLCITY SOFTWARE IN ANY WAY WHATSOEVER. You may however make a single copy of the file for backup purposes only.

This license is effective until terminated. You may terminate it at any time by destroying the program along with all copies, modifications and merged portions in any form. It will also be terminated upon conditions set forth elsewhere in this Agreement.

THIS PROGRAM IS PROVIDED "AS IS" WITHOUT WARRANTY OF ANY KIND, EITHER EXPRESSED OR IMPLIED. THE ENTIRE RISK AS TO THE PERFORMANCE OF THE PROGRAM IS WITH YOU, IF THE PROGRAM PROVE DEFECTIVE. YOU ASSUME THE ENTIRE COST OF ALL NECESSARY SERVICING, REPAIR, OR CORRECTION. SOME COUNTRIES DO NOT ALLOW EXCLUSION OF IMPLIED WARRANTITES, SO THE ABOVE EXCLUSION MAY NOT APPLY.

SIMPLICITY SOFTWARE TECHNOLOGIES does not warrant the function contained in the program will meet your requirements or the operation of the program will be uninterrupted or error-free. However, SIMPLICITY SOFTWARE TECHNOLOGIES does warrant that the media on which the program is furnished is to be free of defects in materials and workmanship under normal use for 180 days from the date of shipment.

SIMPLICITY SOFTWARE TECHNOLOGIES ENTIRE LIABILITY AND YOUR EXCLUSIVE REMEDY FOR THE PROGRAM SHALL BE THE REPLACEMENT OF ANY DISKETTE OR CD-ROM FOUND TO BE DEFECTIVE. IN NO EVENT WILL SIMPLICITY SOFTWARE TECHNOLOGIES BE LIABLE FOR DAMAGES, INCLUDING ANY LOST PROFITS, LOST SAVINGS, OR OTHER INCIDENTAL OR CONSEQUENTIAL DAMAGES ARISING OUT OF THE USE OR INABLILTY TO USE SUCH SOFTWARE. SOME COUNTRIES DO NOT ALLOW EXCLUSION OF IMPLIED WARRANTITES, SO THE ABOVE EXCLUSION MAY NOT APPLY.

IF THIS SOFTWARE IS INSTALLED AS A "TRIAL VERSION", IT SHOULD EITHER BE REGISTERED WITH SIMPLICITY SOFTWARE TECHNOLOGIES, OR REMOVE FROM ALL COMPUTERS WITHIN FOURTY-FIVE DAYS OF INITIAL INSTALLATION.

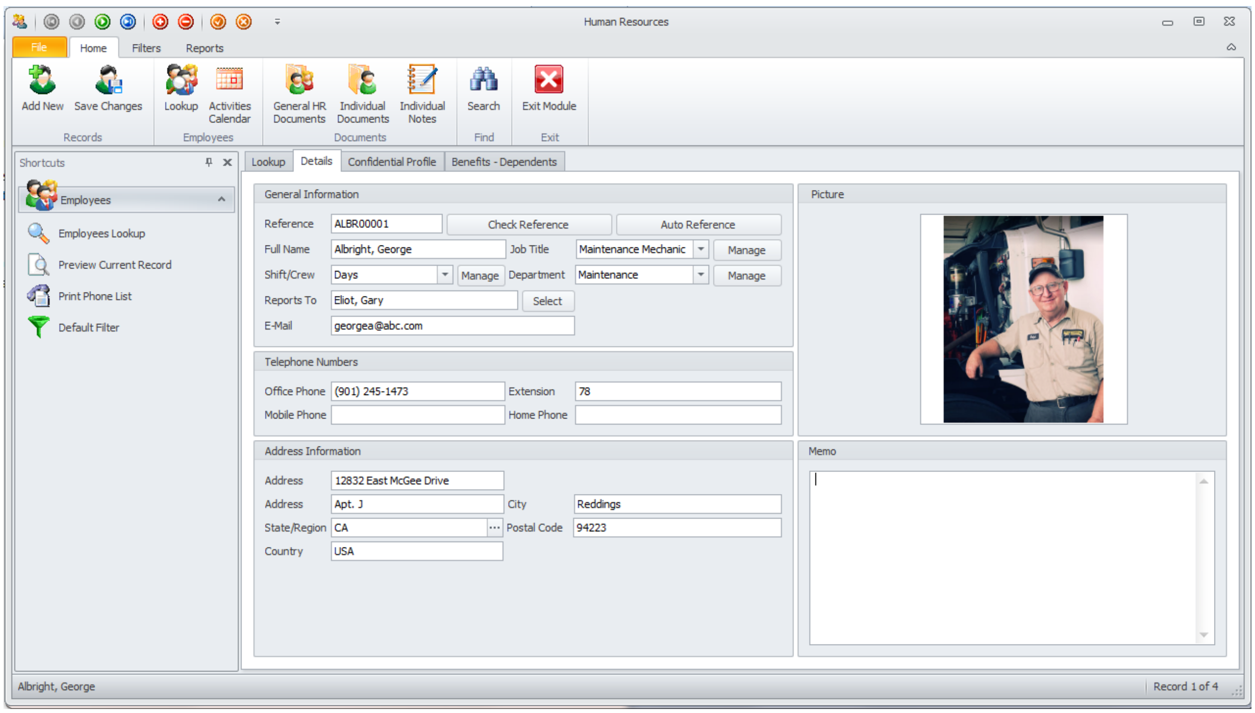
THIS LICENSE CAN ONLY BE MODIFIED BY AN AUTHORIZED REPRESENTATIVE OF SIMPLICITY SOFTWARE TECHNOLOGIES, AND MUST BE SIGNED BY AN AUTHORIZED REPRESENTATIVE.

Table of Contents

Human Resources

The **Human Resources** module is used to store important information about your work force or associates. Information found here includes their position, address, telephone numbers, emergency contacts and more.

Please note that this database is the same database used by the Scheduler module where you create work assignments. It's also used in virtually every module in the system that use employee assignments of one type or another

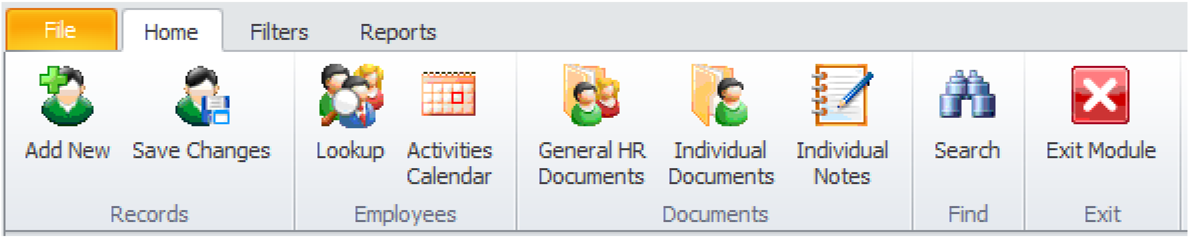


This module does not stop at just being used as an employee assignments database. There are many other features such as training scheduled and completed, insurance options elected, scheduled activities, dependents and more. Each employee can even include their own **Documents Database** where the information tracked can be almost unlimited.

Ribbon Control

The comprehensive functionality of the ***Human Resources*** module is provided via a set of Ribbon tabbed pages. Ribbon pages are structurally and visually split into logical groups. Each of these groups includes commands that perform specific functions.

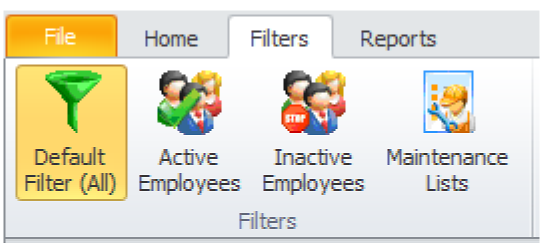
HOME TAB



The following are the elements on the **Home** ribbon tab, reading left to right:

- **Add New** – Creates a new blank record in the database.
- **Save Changes** – Saves all current changes from all elements of a record (master save).
- **Lookup** – Invokes the **Employees Lookup** dialog to select a record.
- **Activities Calendar** – Invokes the HR Calendar or Scheduler where you can view scheduled training, vacations, leaves and more.
- **General HR Documents**- Invokes the **Documents Database** routines as it related to the ***Human Resources*** database and discussed in the ***Common Features*** *chapter.*
- **Individual Documents**- Invokes the **Documents Database** routines as it related to the currently selected associate record and discussed in the ***Common Features*** *chapter.*
- **Individual Notes –** Allows the viewing and editing of the notes assigned to the current record.
- **Search -** Invokes the search/find routine on the Lookup Grid.
- **Exit Module** - Close and exits the module.

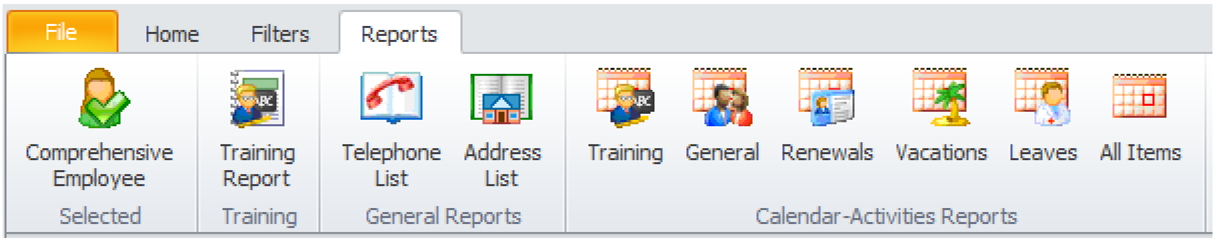
FILTERS TAB



The following are the elements on the **Filters** ribbon tab, reading left to right:

- **Default Filter** – Shows every record in the database.
- **Active Employees** – Shows every record in the database that has not been marked as Inactive.
- **Inactive Employees** – Shows every record in the database that has been marked as inactive.
- **Maintenance Lists** – Show only those records that have the **Include in Maintenance Lists** set.

REPORTS TAB



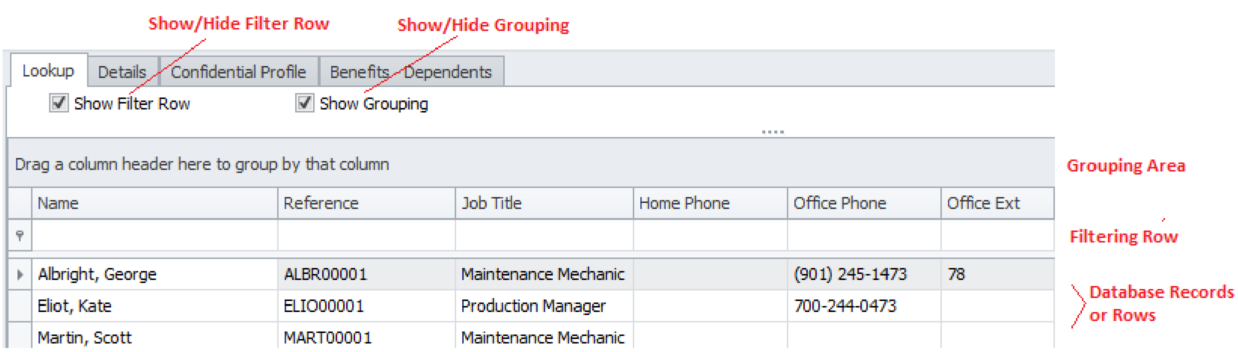
The following are the elements on the **Reports** ribbon tab, reading left to right:

- **Comprehensive Employee** – This allows you print on selectable elements of an employee's record.
- **Training Report** – Invokes the **Training Report Setup** wizard to assist creating a training report.
- **Telephone List** – Create a telephone list report.
- **Address List** – Creates a report with all employees and their addresses and phone numbers.
- **Calendar – Activities Reports** – All the available reports in this section invokes a date selection dialog to report on the scheduled activities of the selected type.

Lookup Tab

This tab helps in locating records by grouping, filtering and sorting them. All the records in the current filter are located in the grid found here. To select a record and make it the active record, the user needs only to click on the record from within the grid. Once selected the user can click on the other tabs to view or edit the record itself.

The following image illustrates the features available on the **Lookup** tab:



The functions of the **Lookup** tabs are used through-out the system and are fairly common regardless of the modules that use them. Please review the chapter on ***Common Features*** to read about the functionality of the controls located on this tab. Pay special attention to the following:

- Using the Lookup Grids
- Searching

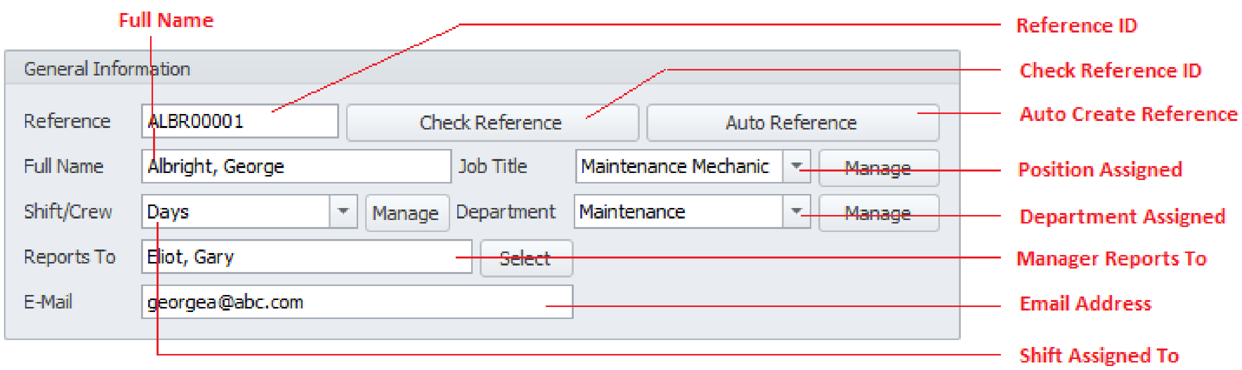
Details Tab

Under the **Details** tab you can setup your identification information, and general assignments for the selected associate.

General Information

This section allows you to specify general information about the current associate. This information is found in the **General Information** group, location within the **Details** tab.

The following illustrates the elements found in this section:



Reference ID

This field should be unique in your database, but it's not an enforced rule. It is used to help identify your associate. Edit this field by typing in the space provided. This field can accept up to 30 alpha/numeric characters.

Once the **Full Name** field has been entered you can click on the **Auto Reference** button to have the application create the **Reference** field for you.

To insure the **Reference** is unique in the database, click on the **Check Reference** button.

Full Name

This alpha/numeric field will accept up to 40 characters and represents the employee's full name. For lookup purposes it is recommended that you use the format: last name, first name.

Job Title

This alpha/numeric field will accept up to 30 characters and represents the associate's assigned job.

Shift/Crew

This alpha/numeric field will accept up to 30 characters and represents the associate's assigned shift or crew.

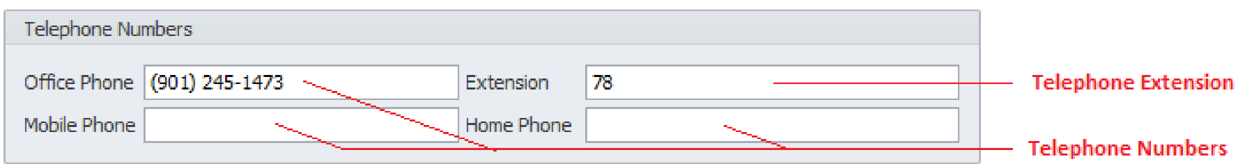
Department
This alpha/numeric field will accept up to 30 characters and represents the associate's assigned department.

Reports To
This alpha/numeric field will accept up to 40 characters and represents the associate's assigned supervisor or team leader. Clicking the **Select** button adjacent to this field will invoke the **Employee Database** lookup dialog which can be used to make the assignment.

E-Mail
This alpha/numeric field has no size limitations and represents the associate's email address.

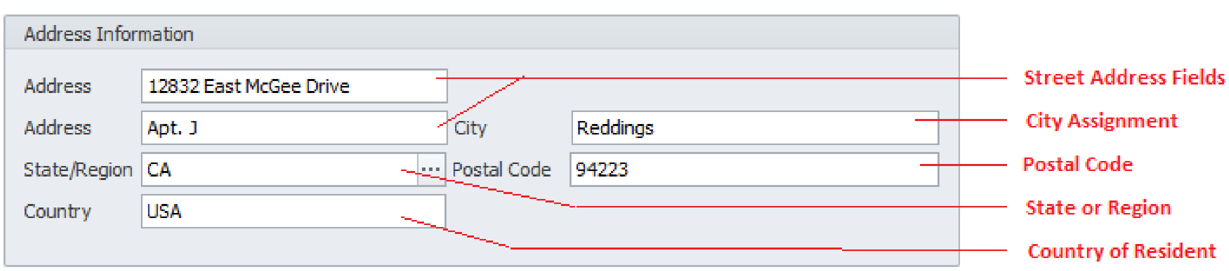
Telephone Numbers
The information stored in this area represents the phone numbers related with the selected associate. Each of these alpha/numeric fields can contain up to 15 characters each with the exception of the **Extension** field. The **Extension** field is limited to 5 characters.

The following illustrates the elements found in this section:



Address Information
The information stored in this area would represent the resident information as it applies to the selected associate.

The following illustrates the elements found in this section:



Address
Both of the address fields found in this section would indicate the street addresses of the selected record. These alpha/number fields can contain up to 30 characters each.

City

This alpha/numeric field can contain up to 30 characters and represents the city the associate resides in.

State/Region

This alpha/numeric field can contain up to 30 characters and represents the state or region the associate resides in.

Postal Code

This alpha/numeric field can contain up to 10 characters and represents the postal code used for the associate's resident.

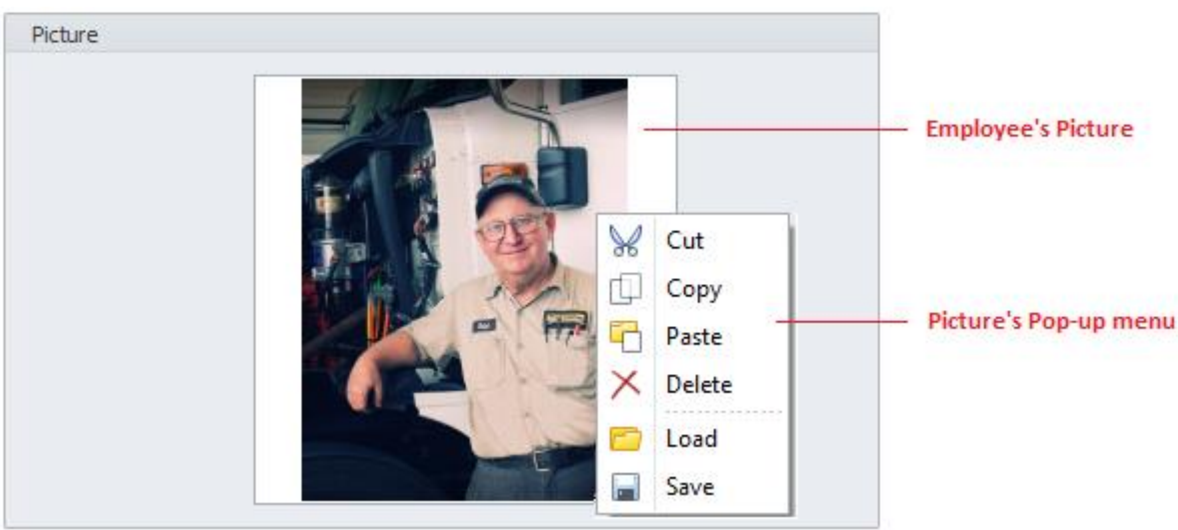
Country

This alpha/numeric field can contain up to 30 characters and represents the country the associate resides in.

Picture

This section allows you to set or store a picture of your associate. Options available to this feature are accessible from the pop-up menu associated with the image.

The following illustrates the elements found in this section:



To set the Associate's picture

- Move to the **Picture** group found on the **Detail** tab.
- Right mouse click on the picture control to invoke the pop up menu.
- Click on the **Load** option.
- Using the **Open** dialog, browse to where you have the picture stored on your system. Supported formats include: bmp, gif, jpg, ico, png and tif.
- Click on the image file to select it and click the **Open** button.

- Save your changes by clicking on the **Save Changes** option in the ribbon.

Memo

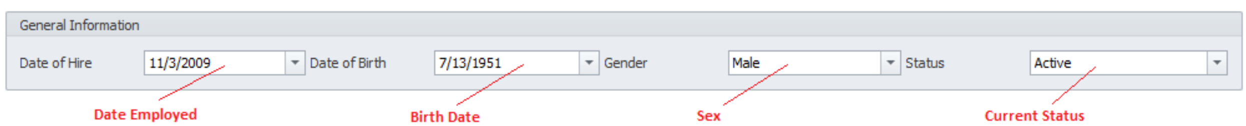
This is an on screen notes section and can be directly edited. This alpha/numeric field has no size limitations.

Confidential Profile Tab

Under the **Confidential Profile** tab you can continue making assignments as they apply to the selected record.

Confidential General Information

This section allows you to record some additional, general type information on the selected associate. The following illustrates the elements found in this section:



Date of Hire

This date only field would indicate the date the associate was hired.

Date of Birth

This date only field would indicate the date of the associate birthday.

Gender

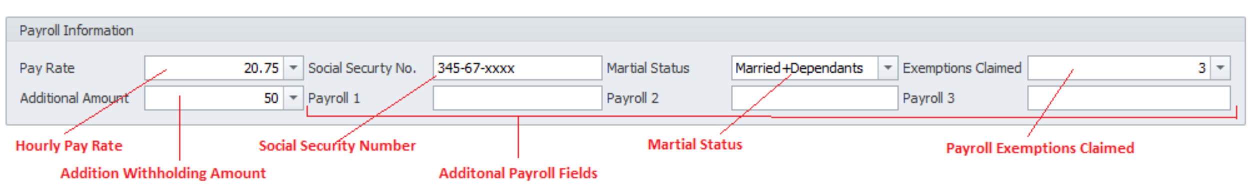
Selectable from the drop down, this would indicate the sex of the associate.

Status

Selectable from the drop down, this would indicate the current status of the associate. Options include: Active, Leave of Absence, Medical – Personal, Medical – Business, Family Medical Leave and Terminated.

Payroll Information

This section allows you to record payroll information on the selected associate. The following illustrates the elements found in this section:



Hourly Rate
This floating point field is used to record an associate's hourly pay rate. This information is used with work order labor calculations.

Social Security Number
This alpha/numeric field can contain up to 12 characters and is used to record an employee's social security number.

Marital Status
This alpha/numeric field can contain up to 12 characters and is used to record an employee's marital status.

Exemptions Claimed
This is a numeric only field and is used to record tax related exemptions.

Additional Amount
This floating point only field is used to record any additional amount an associate my want withheld from the pay.

Payroll 1 – 3
These 3 alpha/numeric fields can each hold up to 30 characters each, and are used to record any additional payroll information you may want to maintain (union dues, etc.).

Emergency Contact Information
This section allows you to record contact information to be used in the case of an emergency.

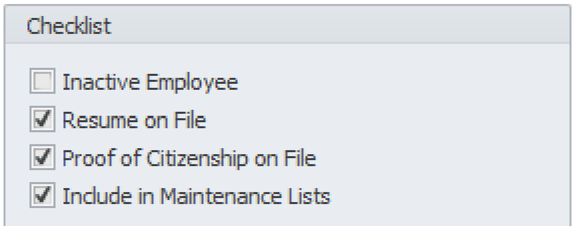
Emergency Contact Name
This alpha/numeric field can contain up to 40 characters and is used to record the name of the associate's emergency contact.

Emergency Contact Relationship
This alpha/numeric field can contain up to 30 characters and is used to record the relationship the emergency contact has with the selected associate.

Emergency Contact Telephone Number
This alpha/numeric field can contain up to 15 characters and is used to record the telephone number to use when contacting the emergency contact.

Miscellaneous Checklist

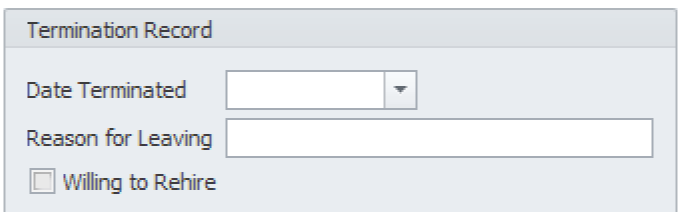
Found on the **Confidential Profile** tab, and the sub tab of **Miscellaneous,** this section allows you to check-off specifics on the selected associate.



These fields are self-explanatory, and you would place a checkmark for each item that apply.

Termination Record

Found on the **Confidential Profile** tab, and the sub tab of **Miscellaneous,** this section allows you to record termination information on the selected employee.



Date Terminated

This is a date only field and would indicate the date that employment with the company was terminated.

Reason for Leaving

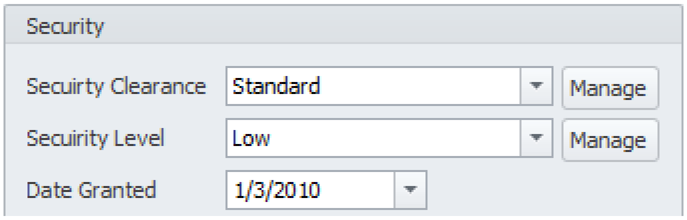
This alpha/numeric field can contain up to 50 characters and is used to record why an employee left the company.

Willing to Rehire

Checking this field would indicate your willingness to rehire a former employee.

Security (Clearance)

Found on the **Confidential Profile** tab, and the sub tab of **Miscellaneous,** this section allows you to record an associate's security clearance.



Security Clearance

This alpha/numeric field can contain up to 30 characters and is used to record the assigned security clearance of the selected employee.

Security Level

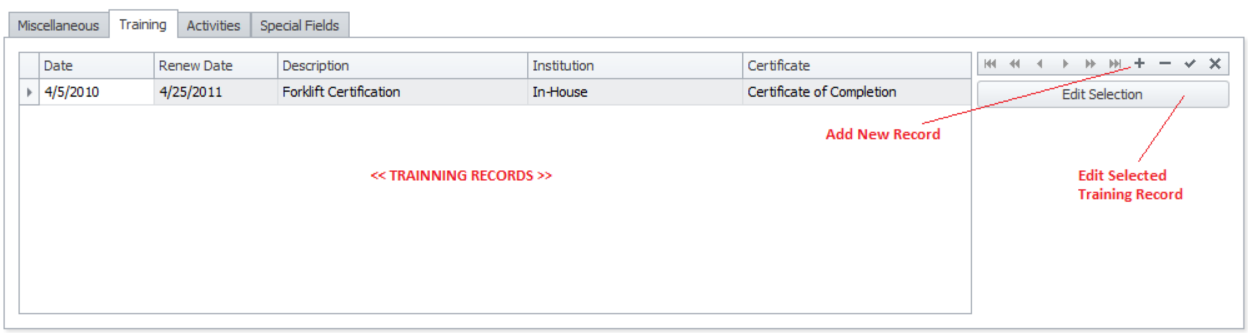
This alpha/numeric field can contain up to 30 characters and is used to record the assigned security level of the selected employee.

Date Granted

This is a date only field and would indicate when the above security information was granted.

Training (Database)

Found on the **Confidential Profile** tab, and the sub tab of **Training,** this section allows you to record training the employee has received by the company. The following illustrates the elements of this section:



Creating a New Training Record

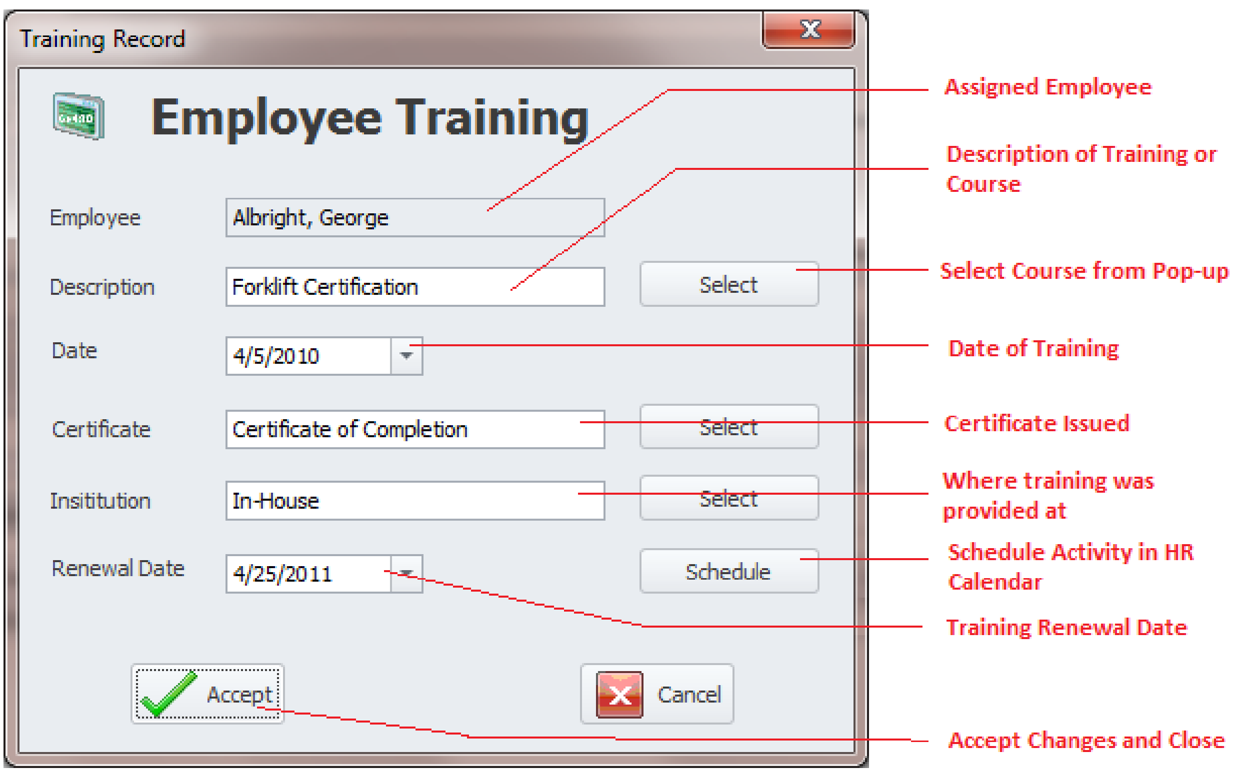
- Move to the **Confidential Profile** tab and click on the sub tab of **Training**
- Locate the data control found in this section and click on the **Append (+)** button.
- From the invoked **Training Record** dialog, move through the various fields and enter the appropriate information.
- Click on the **Accept** button when done.
- Click on the **Post** (checkmark) button in the data control to save the new record back to the database.

Editing a Training Record

- Move to the **Confidential Profile** tab and click on the sub tab of **Training.**
- Locate and make active the training record you want to edit from those listed in the grid located there.
- Click on the **Edit Selection** button.
- From the invoked **Training Record** dialog, move through the various fields and edit the appropriate information.
- Click on the **Accept** button when done.
- Click on the **Post** (checkmark) button in the data control to save the modified record back to the database.

Using the Training Record Dialog

Training records are created and edited using the **Training Record** dialog screen. The following illustration shows the elements of this dialog:

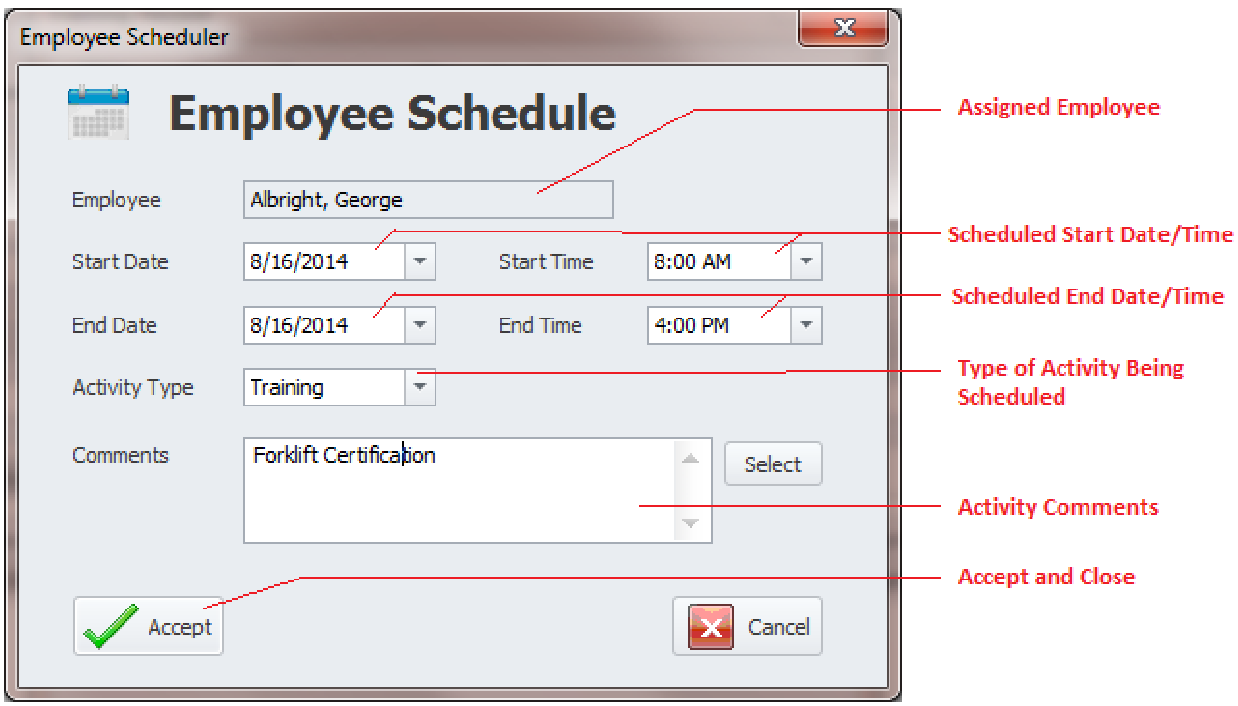


- **Employee** – This field is automatically set by the application and indicates the associate this record applies to.
- **Description –** This alpha/numeric field can contain up to 30 characters and is used to identify the type of training that was provided.
- **Date** – This date only field indicates the date the training was provided. This is set by using the attached drop down calendar.

- **Certificate –** This alpha/numeric field can contain up to 30 characters and is used to identify the type of certificate (if any) that was provided on the completion of the training.
- **Institution -** This alpha/numeric field can contain up to 30 characters and is used to show where the training was conducted.
- **Renewal Date** – This date only field would indicate when training on this subject will be required again (re-certification).
- **Schedule** – Clicking this button will invoke the **Employee Scheduler** where you can schedule an event to be included with the **Activities Calendar**. See the section on the ***Employee Scheduler*** found in this chapter.
- **Accept** – Clicking this button accepts any changes and closes the dialog.

Employee Scheduler

The **Employee Scheduler** is used to create and edit planned activities as they relate to individual associates. The following illustration shows the elements of this dialog:

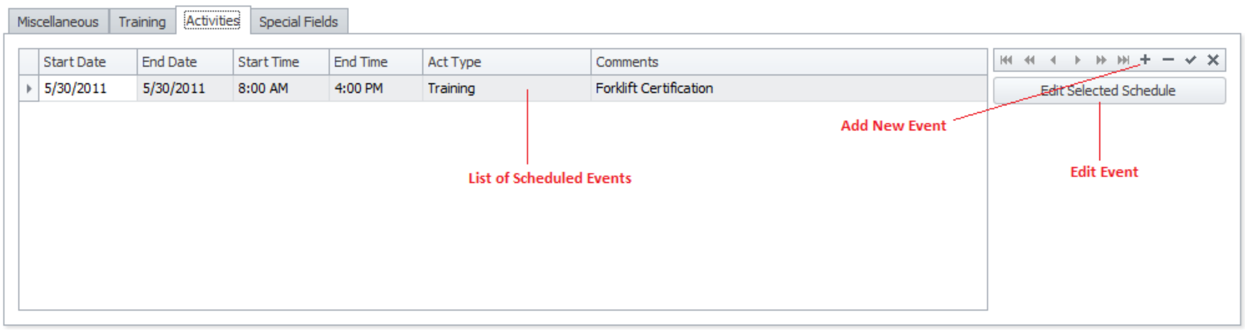


- **Employee** – This field is automatically set by the application and indicates the associate this schedule applies to.
- **Start Date and Time** – These two fields are used to schedule the start date and time of the event.
- **End Date and Time** – These two fields are used to schedule the end date and time of the event.
- **Activity Type –** This field is selectable from the drop down list box and would indicate the type of event being scheduled. Options include: Training, General, Renewal, Vacation and Leave.

- **Comments** –There is no size limitations to the alpha/numeric field and is used to record any additional information you want to include on the current schedule.
- **Accept** – Accepts any new or changed information and closes the dialog.

Employee Activities

Found on the **Confidential Profile** tab, and the sub tab of **Activities,** this section allows you to schedule and maintain scheduled events for the selected associate. The following illustrates the elements of this section:



Creating a Scheduled Event

- Move to the **Confidential Profile** tab and click on the sub tab of **Activities.**
- Locate the data control found in this section and click on the **Append (+)** button.
- From the invoked **Employee Schedule** dialog, move through the various fields and enter the appropriate information. See the section on the ***Employee Scheduler*** found in this chapter for more information.
- Click on the **Accept** button when done.
- Click on the **Post** (checkmark) button in the data control to save the new record back to the database.

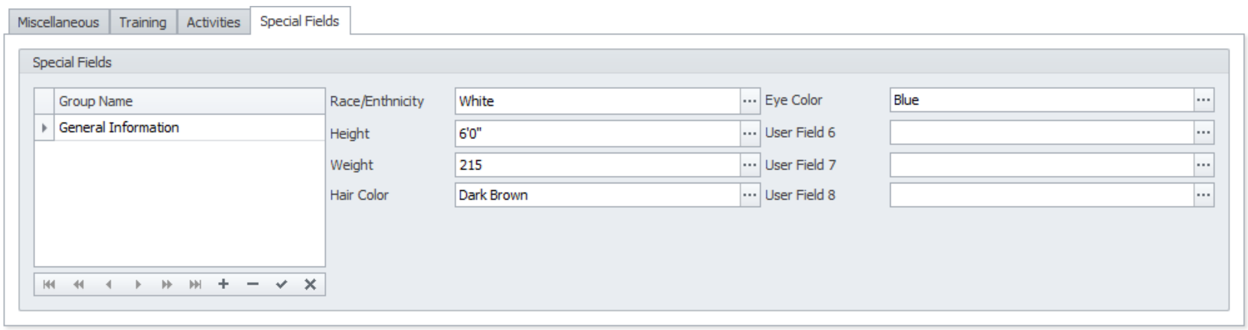
Editing a Scheduled Event

- Move to the **Confidential Profile** tab and click on the sub tab of **Activities.**
- Locate and make active the event you want to edit from those listed in the grid located there.
- Click on the **Edit Selected Schedule** button.
- From the invoked **Employee Schedule** dialog, move through the various fields and enter the appropriate information. See the section on the ***Employee Scheduler*** found in this chapter for more information.
- Click on the **Accept** button when done.
- Click on the **Post** (checkmark) button in the data control to save the modified record back to the database.

Special Fields

Found on the **Confidential Profile** tab, and the sub tab of **Special Fields**, this section allows you to create and use **Special Fields**. **Special Fields** can be thought of as groups of User Defined Fields. Each group can have a Group Name and 8 fields with user defined titles.

The following illustrates the elements found in this section:



For more information about this feature please refer to the ***Special Fields*** section of the ***Common Features*** chapter.

Manage Selected Special Fields

To setup the titles for the current set of special fields:

- Select the **Special Fields** tab as found on the **Confidential Profile** tab.
- Select the group you want to modify from those listed in the grid.
- Open the **File** menu and expand the **Manage Special Fields** sub menu.
- Click on the **Manage Selected Fields** option.

WARNING: The above action will overwrite the existing user titles.

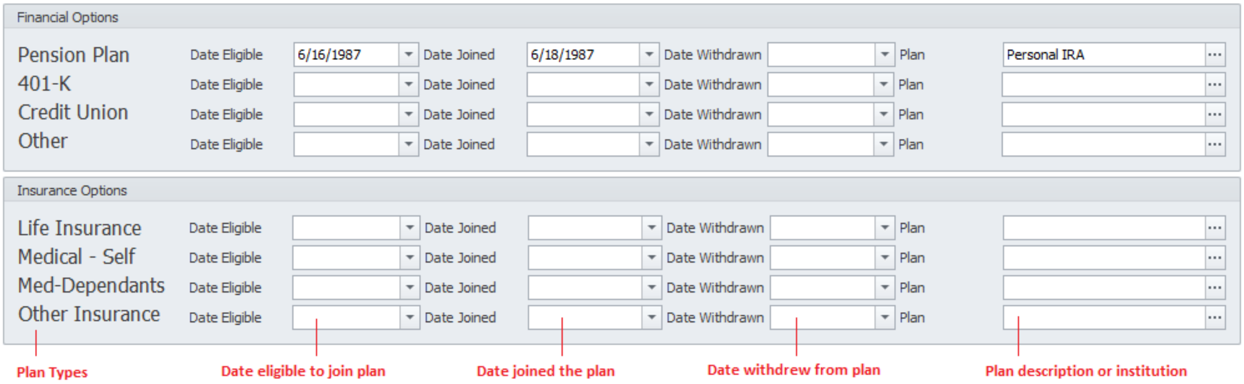
For more information about this feature please refer to the ***Special Fields*** section of the ***Common Features*** chapter.

Benefits - Dependents Tab

Under the **Benefits - Dependents** tab you can continue making assignments as they apply to the selected associate. Information maintained on this tab deals with employee financial options, insurance options and dependents tracking.

Financial and Insurance Options

Found on the **Benefits – Dependents** tab, the options available to both the **Financial Options** and **Insurance Options** are almost identical in nature and will be group together in this discussion. The following illustrates the elements of this section:



- **Plan Type** – This section indicates the type of financial or insurance plan you are dealing with.
- **Date Eligible** – This date only field is used to indicate the date the selected employee is eligible to join the selected plan.
- **Date Joined** – This date only field would indicate the date the selected employee commenced, or joined the selected plan.
- **Date Withdrawn** – This date only field would indicate the date the employee withdrew from the selected plan.
- **Plan** – This alpha/numeric field can contain up to 40 characters and is used to indicate the plan, and or institution the plan is associated with.

Employee Dependents

Found on the **Dependents** section of the **Benefits – Dependents** tab**,** this section allows you to track an associate's defendants.

Creating a Dependent Record

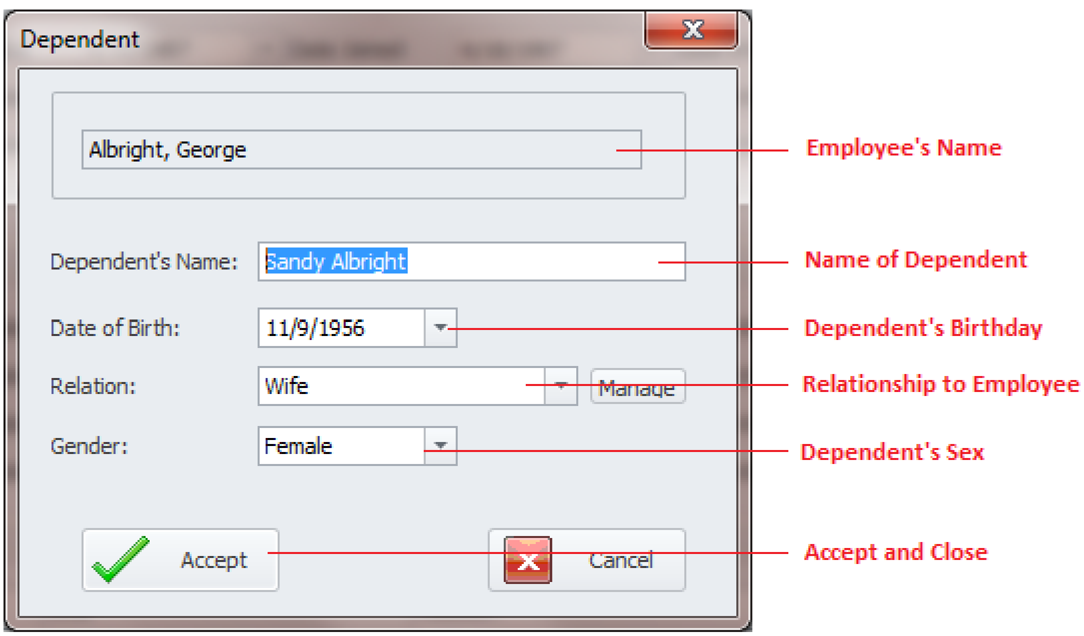
- Move to the **Benefits – Dependents** tab and move to the **Dependents** group**.**
- Locate the data control found in this section and click on the **Append (+)** button.
- From the invoked **Dependent** dialog, move through the various fields and enter the appropriate information. See the section on the ***Dependent Editor*** found in this chapter for more information.
- Click on the **Accept** button when done.
- Click on the **Post** (checkmark) button in the data control to save the new record back to the database.

Editing a Dependent Record

- Move to the **Benefits – Dependents** tab and move to the **Dependents** group**.**
- Locate and make active the record you want to edit from those listed in the grid located there.
- Click on the **Edit Dependent** button.
- From the invoked **Dependent** dialog, move through the various fields and enter the appropriate information. See the section on the ***Dependent Editor*** found in this chapter for more information.
- Click on the **Accept** button when done.
- Click on the **Post** (checkmark) button in the data control to save the modified record back to the database.

Dependent Editor

The **Dependent Editor** is used to create and edit individual dependent records. The following illustrates the element of this editor:



- **Employee's Name** – This field is automatically set by the application and indicates the associate this dependent record belongs to.
- **Dependent's Name** – This alpha/numeric field can contain up to 40 characters and represents the name of the dependent.
- **Date of Birth** – This date only field would represent the birth date of the dependent.
- **Relation** – This alpha/numeric field can contain up to 30 characters and relates to the relationship the dependent has to the employee.
- **Gender** – This field would indicate the sex of the dependent.
- **Accept** – Clicking this button accept any added or changed values and closes the dialog.
- **Cancel** – Clicking this button closes the dialog without applying any changes made.

Add a Record

To add a new employee record:

- Move to the **Home** tab in the ribbon and click on the **Add New** option.
- Move through the various tabs and edit the new record.

Save Changes

To save changes to the main record, click on the **Post** (✓ check) button in the *Data Control* located within the ribbon's ***Quick Access*** toolbar.

To save changes to the main record and all the underlying records (links, attachments, etc.), click on the **Save Changes** button found on the **Home** tab of the ribbon control.

Employee Lookup

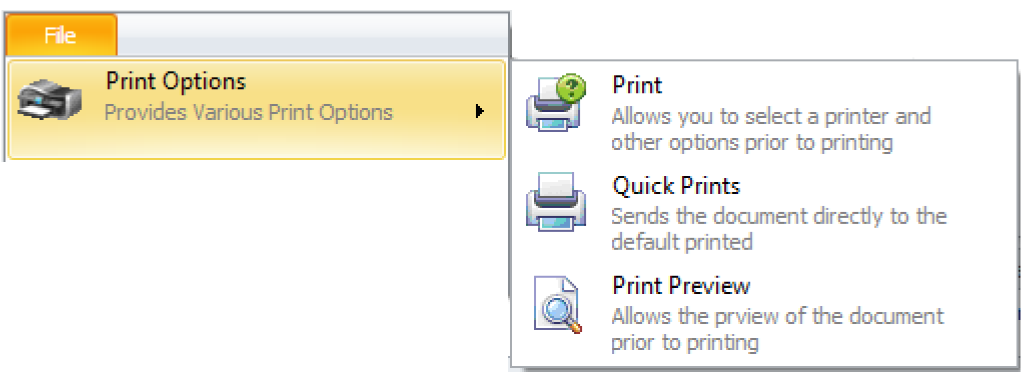
Use the Employee Lookup dialog to locate an employee record:

- Move to the **Home** tab in the ribbon and click on the **Lookup** option.

Please refer to the ***Lookup Dialogs*** section of the ***Common Features*** chapter to view procedures on using this dialog.

Print Options

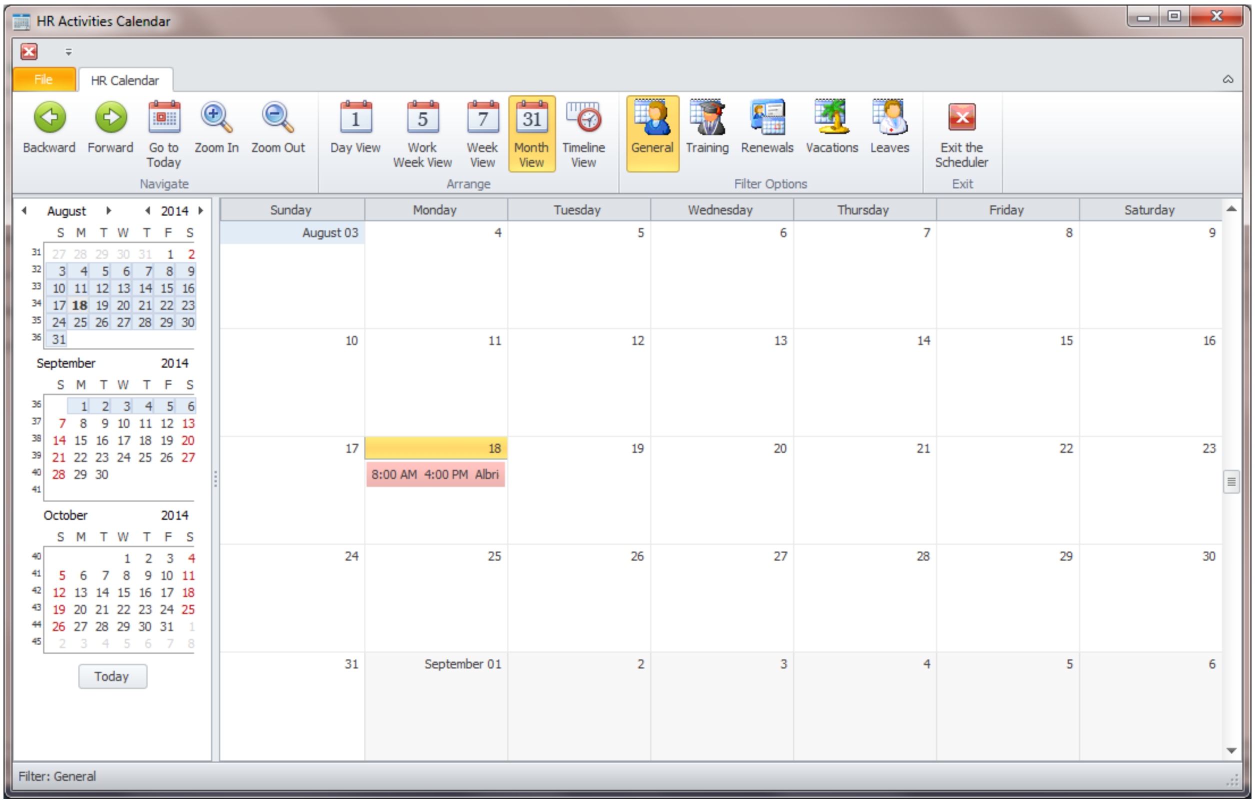
To print basic information the current employee record:



- Locate and select the record you want to print.
- Open the **File** menu and expand the **Print Options** menu by clicking on it.
- Click on the Print Option of your choice:
    - **Print Current Contact** - Allows printer selection and other options before printing.
    - **Quick Print** - Sends the document directly to the default printer.
    - **Print Preview** - Provides a print preview of the current record.

Activities Calendar

The HR Calendar is used to show scheduled activities as it relates to your employees in calendar form. You can display, print and edit activities in single day, week, work week, month and time line views. It supports scheduled events for training, renewals, vacations, leaves and other general types.



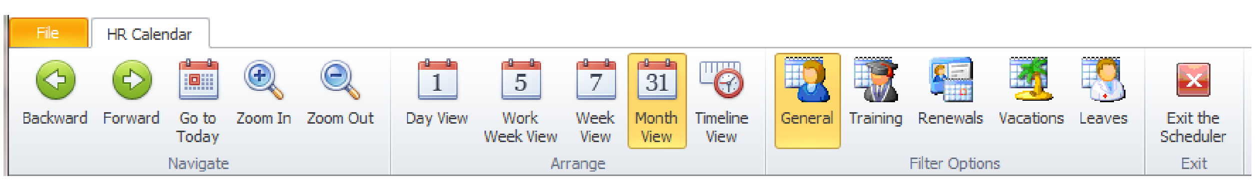
Access the Activities Calendar

To access the **Activities Calendar**:

- Click the **Activities Calendar** option found on the **Home** tab of the ribbon.

Calendar - Ribbon

The functionality of the **Activities Calendar** is provided via the ribbon control. This control is structurally and visually split into logical groups. Each of these groups includes commands that perform specific functions.



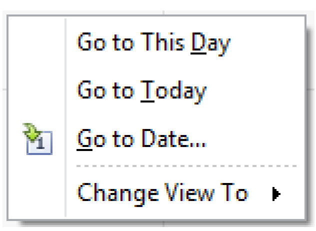
The following are the elements on the **Calendar** ribbon control, reading left to right:

- **Backward** – Moves backwards through the current Active View.

- **Forward** – Moves forwards through the current Active View.
- **Go To Today** - Moves focus to the current date, preserving the existing view mode.
- **Zoom In** – Zooms in on the current view.
- **Zoom Out** – Zooms out on the current view.
- **Day View** - This view provides the most detailed view of appointments for a certain day.
- **Work Week View** - This view displays appointments for the working days in a particular week.
- **Week View** - This view displays appointments for any given week.
- **Month View** - The month view is the least detailed of the views, and is designed to allow browsing and long-term plan analysis. This view positions the days one after another horizontally, so that they form weeks, while weeks are placed one under the other.
- **Timeline View** - This view plots appointments as horizontal bars along the timescales, and provides a clearer overview for scheduling purposes.
- **General** – Shows all scheduled activities regardless of their type assignments.
- **Training** – Filters the calendar to show only those events marked as a Training type.
- **Renewals** – Filters the calendar to show only those events marked as a Renewal type.
- **Vacations**– Filters the calendar to show only those events marked as a Vacation type.
- **Leaves** – Filters the calendar to show only those events marked as a Leaves type.
- **Exit the Scheduler** – Close the Activities Calendar/Scheduler.

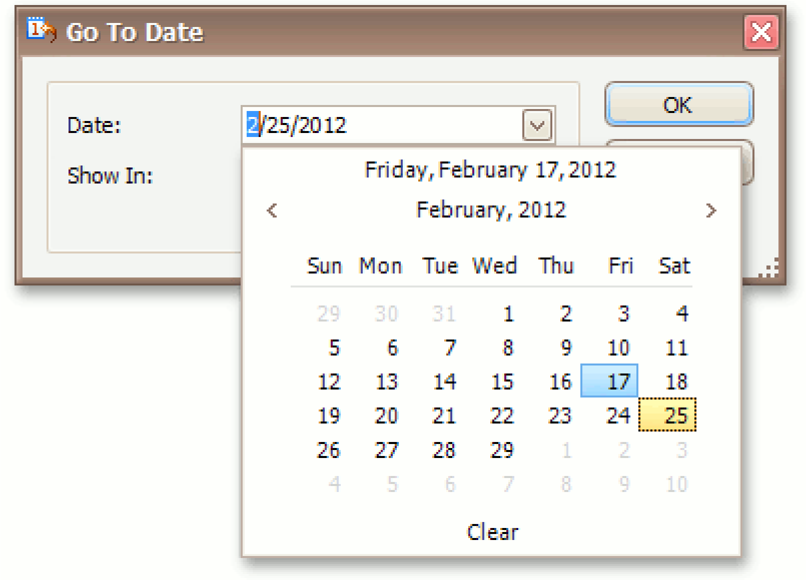
Calendar Popup Menu

The **Activities Calendar** has a pop up menu associated with it. This menu is invoked by right mouse clicking over the calendar control. The following illustrate this popup menu:



The following are the options found on this popup menu:

- **Go to This Day** - Only available in the **Week View** and **Month View** modes. This item is active when only one day is selected, and when activated, displays the target day in the **Day View** mode.
- **Go to Today** - Moves focus to the current date, preserving the existing view mode.
- **Go to Date...** - Invokes the **Go To Date** dialog to select the date and view type. The date can be selected either by using the calendar or by entering a string with the placeholders. To select the desired view type, use the **Show In** drop-down box.



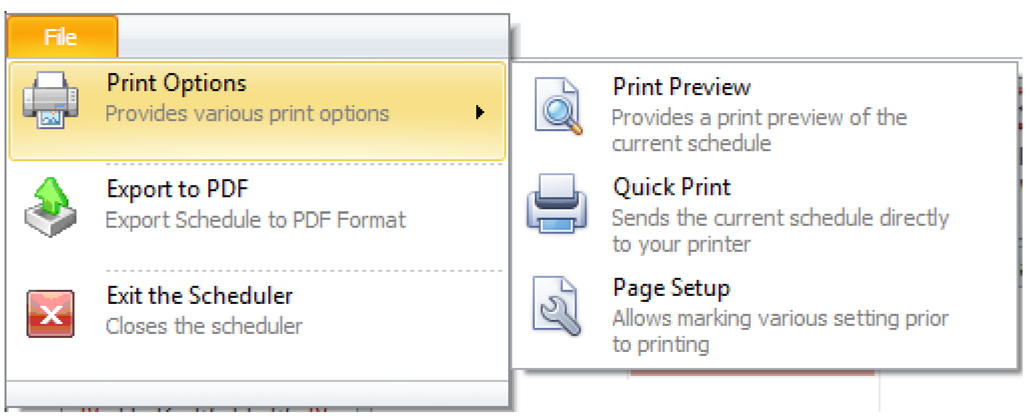
- **Change View To** – This pop out menu allows you to change calendar view types by clicking on an option available.

Activities Calendar Filters

In the **Filter Options** group of the ribbon's **HR Calendar** tab are several filtering options available. These were already outlined in the ***Calendar – Ribbon*** section of this chapter. You activate a filter just clicking on the appropriate option in the ribbon.

Print Options

To print the current schedule:



- Select the calendar view you want to print.
- Open the **File** menu and expand the **Print Options** menu by clicking on it.
- Click on the Print Option of your choice:

- **Print Preview** - Provides a print preview of the current record.
- **Quick Print** - Sends the document directly to the default printer.
- **Page Setup** - Allows you to setup properties for the document prior to printing.

Editing an Event within the Activities Calendar

You can edit or reschedule events from within the Activities Calendar. To edit an event:

- From within the calendar, locate the event you would like to edit.
- Double click on the event to invoke the **Employee Scheduler.**
- Refer to the section on the ***Employee Scheduler*** found in this chapter for more information.

General HR Documents Database

This module supports its own **Documents Database**. To see how to use this feature, please refer to the ***Documents Database*** section of the ***Common Features*** chapter.

To access the HR Documents database:

- Move to the **Home** tab in the ribbon and select the **HR Documents** option.

Individual Documents Database

The **Individual Documents** database work in exactly the same way as the **HR Document** databases. The difference is that the **HR Documents** database is designed to support HR in general, with documents related to HR activities or functions. The **Individual Documents** database is assigned to each individual employee record. This is to say that each employee is assigned their own separate database without sharing information with other records.

To see how to use this feature, please refer to the ***Documents Database*** section of the ***Common Features*** chapter.

To access the Individual Documents database:

- Move to the **Home** tab in the ribbon and select the **Individual Documents** option.

Individual Notes

You can keep detailed notes on each associate record in the database. These notes use our built in word processor that is used throughout the system. To find how to use the features of this word processor please refer to the ***Word Processor*** chapter.

To access the Individual Notes option:

- With the record selected, move to the **Home** tab in the ribbon.
- Click on the **Individual Notes** button.

Search

To perform a search on the ***Human Resources*** database:

- Move to the **Home** tab in the ribbon.
- Click on the **Search** option.
- Refer to the ***Search*** section of the ***Common Features*** chapter for more information.

Filtering the Human Resources Database

On the **Filters** tab of the ribbon are a few filters that can be used to filter the database by. Each of these available filters are activated simply by clicking on the option of your choice.

The following are the elements on the **Filters** ribbon tab, reading left to right:

- **Default Filter** – Shows every record in the database.
- **Active Employees** – Shows every record in the database that has not been marked as Inactive.
- **Inactive Employees** – Shows every record in the database that has been marked as inactive.
- **Maintenance Lists** – Show only those records that have the **Include in Maintenance Lists** set.

Comprehensive Employee Report

The **Comprehensive Employee Report** allows you to pick and choose the elements of an employee's record to include in the report. This includes some very basic information, to more sensitive information such as payroll.

Comprehensive Employee

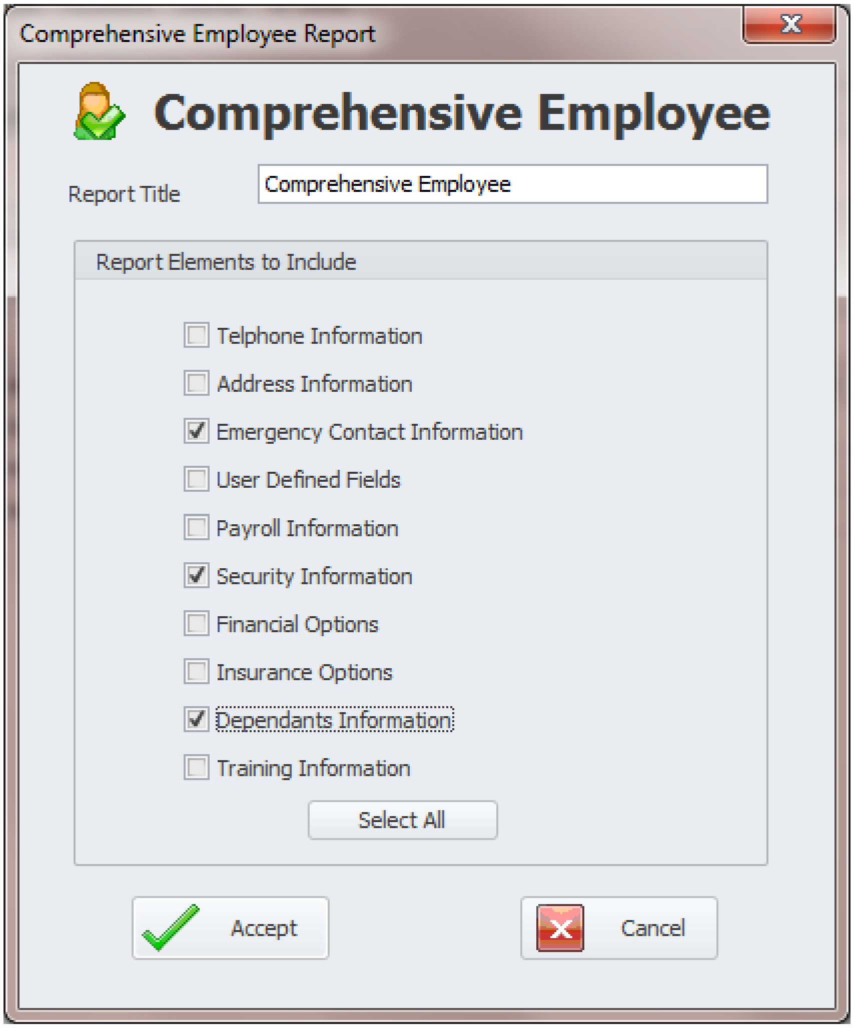
General Information

Reference	**ALBR00001**
Full Name	**Albright, George**
Job Title	**Maintenance Mechanic**
Shift/Crew	**Days**
Department	**Maintenance**
E-Mail	**georgea@abc.com**

Telephone Numbers

To create the Comprehensive Employee Report:

- Select and make active the employee record you want to base your report on.
- Click on the **Reports** tab in the ribbon, and then click on the **Comprehensive Employee** option.



- Move to the **Report Title** input box and type in an optional title for your report.
- Move to the various checkboxes found on this dialog and check the items you want included on the report.
- To include all items on your report, click on the **Select All** button.
- Click on the **Accept** button to create your report.

Training Report

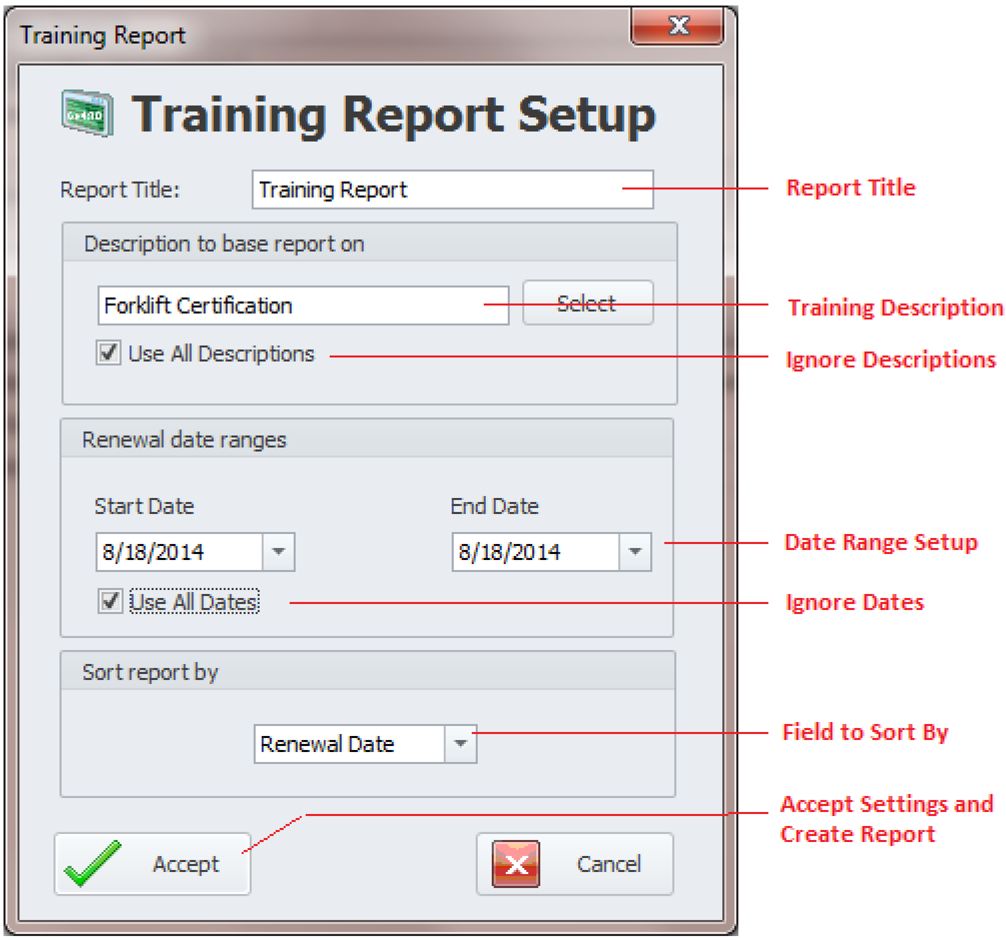
The Training Report allows the creation of a report based on completed training for all employees in the database.

Training Report

Name	Description	Date	Certificate	Renewal
Albright, George	Forklift Certification	4/5/2010	Certificate of Completion	4/25/2011

To create a training report:

- Move to the **Reports** tab in the ribbon and click on the **Training Report** option.
- Move to the **Report Title** input box and type in an optional title for your report.



- Move to and click on the **Select** button in the **Description to base report on** group.
- From the invoked lookup dialog, move to the grid and select the description you want to use.
- Click the **Select** button.
- To report on all training regardless of description, place a check in the **Use All Descriptions** checkbox.
- Move to the **Start Date** and **End Date** fields and setup the date range for your report.
- To ignore dates, place a check in the **Use All Dates** checkbox.

- Move to the drop down list in the **Sort report by** group and select how you want the report sorted.
- Click on the **Accept** button to create the report.

Telephone List Report

This report provides a Telephone List including all employees.

Employees Telephone List

Albright, George	(901) 245-1473
Eliot, Kate	700-244-0473
Martin, Scott	901-245-1818

To create the Telephone List Report:

- Move to the **Reports** tab in the ribbon and click on the **Telephone List** option.

Address List Report

This report provides an Address List including all employees.

Employees Address List

Albright, George Maintenance Mechanic georgea@abc.com	12832 East McGee Drive Apt. J Reddings, CA 94223	(901) 245-1473 Ext: 78
Eliot, Kate		700-244-0473

To create the Address List Report:

- Move to the **Reports** tab in the ribbon and click on the **Address List** option.

Calendar – Activities Reports

There are 6 reports found in this section and are all basically the same. The only difference is found in the type of calendar activity being reported on.

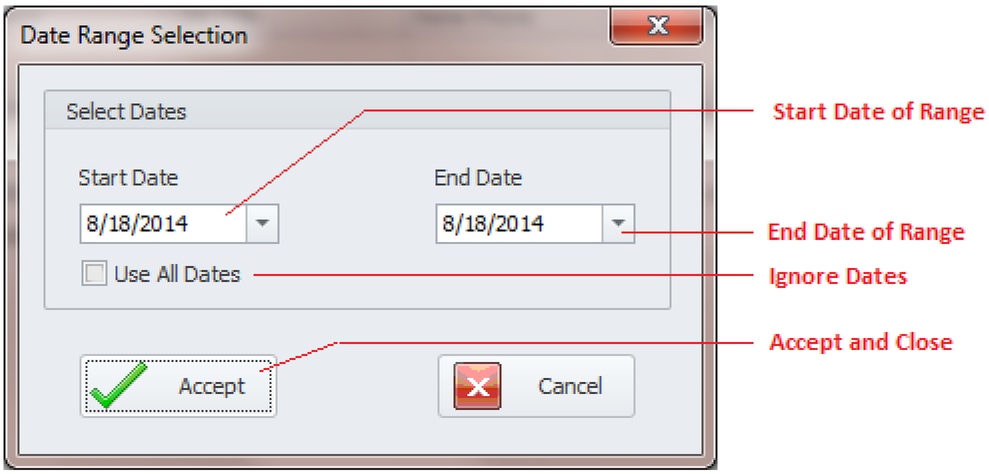
Training Report

Training

Name	Start Date	End Date	Comments
Murray, Fred	9/27/2011	9/28/2011	CPR Training
Albright, George	8/18/2014	8/18/2014	Forklift Certification

To create a Calendar – Activity Report:

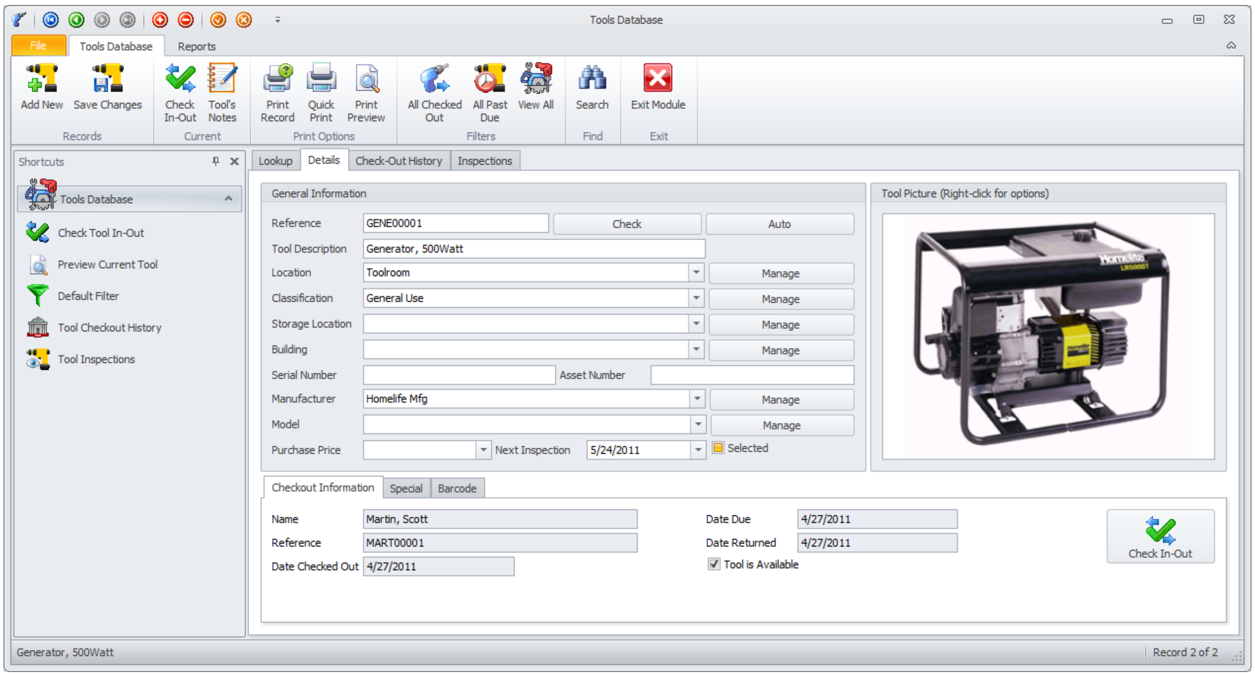
- Move to the **Report** tab in the ribbon and locate the **Calendar – Activities Report** section.
- Select one of the available options found in this ribbon group. Options include:
    - **Training** – This report is based on scheduled training events.
    - **General** – This report is based on scheduled general type of events.
    - **Renewals** – This report is based on scheduled renewal events.
    - **Vacations** – This report is based on scheduled vacations.
    - **Training** – This report is based on scheduled training events.
    - **Leaves** – This report is based on scheduled leaves of absents.
    - **All Items** – This report is based on all scheduled activities.



- From the invoked Date Range Selection dialog setup the date range you want to base your report on.
- Click on the **Accept** button to create the report.

Tools Database

The **Tools Database** module was designed to help you keep track of your tools inventory. With this module you can maintain all the important information on each of your tools. This includes the description of the tools, serial numbers, asset numbers, storage locations, a picture of the tool and more. The program tracks the complete check out history of the tool, including when the tool should be returned, and who has it.

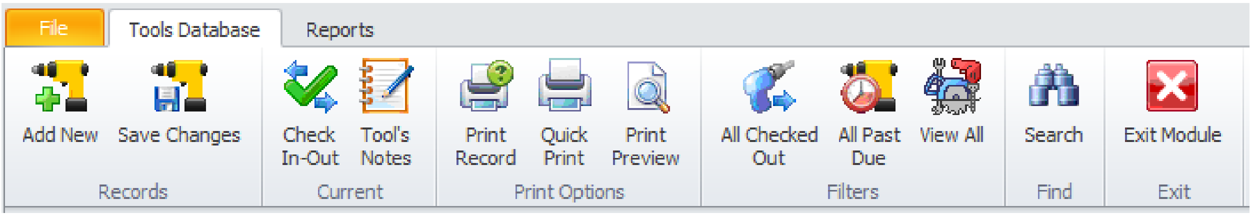


This module also tracks the inspection history of your tools. This is valuable as OSHA requires electrical tools and such to be inspected at regular intervals. These inspection records can be printed and kept in a safe place to prove compliance to these regulations. By running one of the built in reports the program can flag when these tools are due for re-inspection. Some of the other available reports include tools that are overdue for return, all available tools, and all tools currently checked out.

Ribbon Control

The comprehensive functionality of the ***Tools Database*** module is provided via a set of Ribbon tabbed pages. Ribbon pages are structurally and visually split into logical groups. Each of these groups includes commands that perform specific functions.

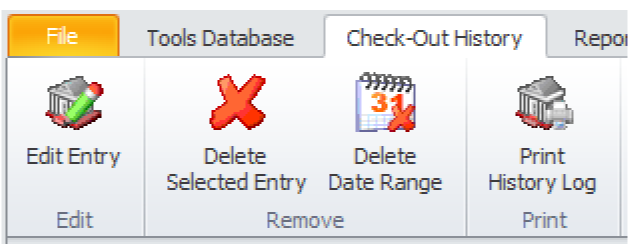
TOOLS DATABASE TAB



The following are the elements on the **Tools Database** ribbon tab, reading left to right:

- **Add New** – Creates a new blank record in the database.
- **Save Changes** – Saves all current changes from all elements of a record (master save).
- **Check In-Out** – Invokes the check-In or Out dialog.
- **Tool's Notes –** Allows the viewing and editing of the notes assigned to the current record.
- **Print Record** - Allows printer selection and other options before printing.
- **Quick Print** - Sends the document directly to the default printer.
- **Print Preview** - Provides a print preview of the current record.
- **All Checked Out** – Filters the database to show all records that are currently checked out.
- **All Past Due** – Filters the database to show all records that are overdue for return.
- **View All** – This is the default filter and shows all records in the database.
- **Search -** Invokes the search/find routine on the Lookup Grid.
- **Exit Module** - Close and exits the module.

CHECK OUT HISTORY TAB

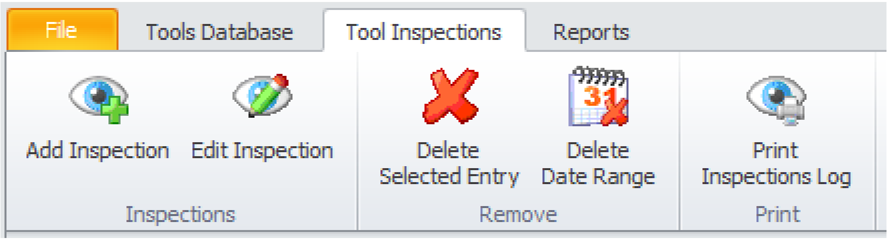


NOTE: This ribbon tab is only available when the main Check-Out History tab is selected.

The following are the elements on the **Check-Out History** ribbon tab, reading left to right:

- ***Edit Entry*** *– Allows you to edit a checked out history record.*
- ***Delete Selected Entry*** *– Allows you to delete or remove the selected record.*
- ***Delete Date Range*** *- Allows you to delete a date range of entries.*
- ***Print History Log*** *– Allow you receive a print preview of the current log.*

TOOL INSPECTIONS TAB

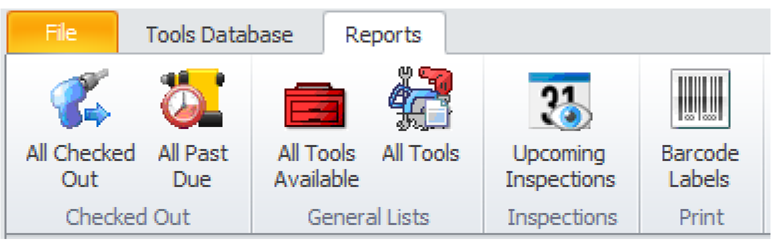


NOTE: This ribbon tab is only available when the main Inspections tab is selected.

The following are the elements on the **Tool Inspections** ribbon tab, reading left to right.

- ***Add Inspection*** *– Invokes the* ***Tool Inspection Editor*** *to assist in creating a new record.*
- ***Edit Inspection*** *– Allows you to edit an inspection record.*
- ***Delete Selected Entry*** *– Allows you to delete or remove the selected record.*
- ***Delete Date Range*** *- Allows you to delete a date range of entries.*
- ***Print Inspections Log*** *– Allow you receive a print preview of the current log.*

REPORTS TAB

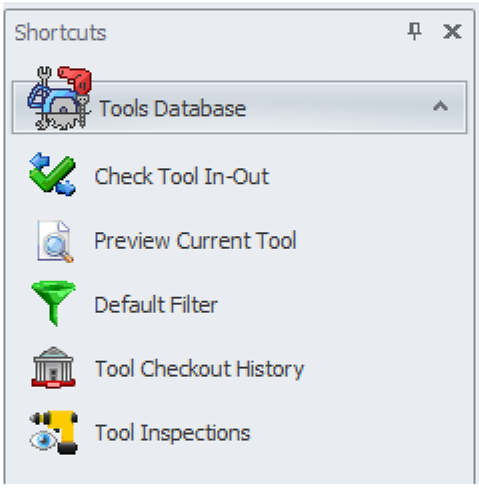


The following are the elements on the **Reports** ribbon tab, reading left to right.

- ***All Checked Out*** *– Provides a listing of all tools currently checked out.*
- ***All Past Due*** *– Provides a listing of all tools overdue for return.*
- ***All Tools Available*** *– Provides a listing of all tools available for checkout.*
- ***All Tools*** *– Provide a listing of all tool records.*
- ***Upcoming Inspections*** *– Provides a listing of all tools coming up for inspections.*
- ***Print Barcode Labels*** *– Allows you print barcode labels.*

Shortcut Bar

Located on the far left side of the **Tools Database** is a **Shortcut bar**. Items found in this **Shortcut** bar are normally duplicated in other area of the module. They are only provided here as shortcuts.



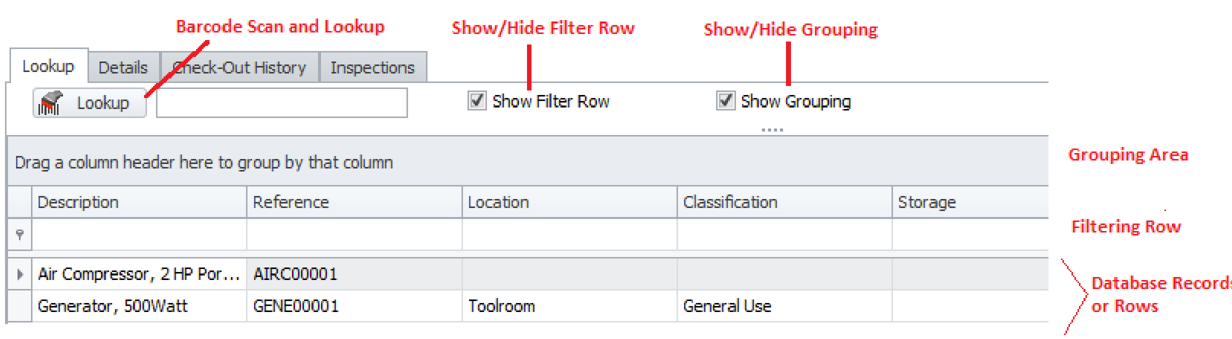
Features of the Tools Database Module

There are various features of the **Tools Database** module, with the majority of these features found on either the tabbed pages found there, or within the tabbed ribbon control. We are going to explain the use of these features as we move through the tabbed pages.

Lookup Tab

This tab helps in locating record by grouping, filtering and sorting them. All the records in the current filter are located in the grid found here. To select a record and make it the active record, the user needs only to click on the record from within the grid. Once selected the user can click on the other tabs to view or edit the record itself.

The following image illustrates the features available on the **Lookup** tab:



The functions of the **Lookup** tabs are used through-out the system and are fairly common regardless of the modules that use them. Please review the chapter on ***Common Features*** to read about the functionality of the controls located on this tab. Pay special attention to the following:

- Using the Lookup Grids
- Searching

- Scanned Lookups (Barcodes Support)

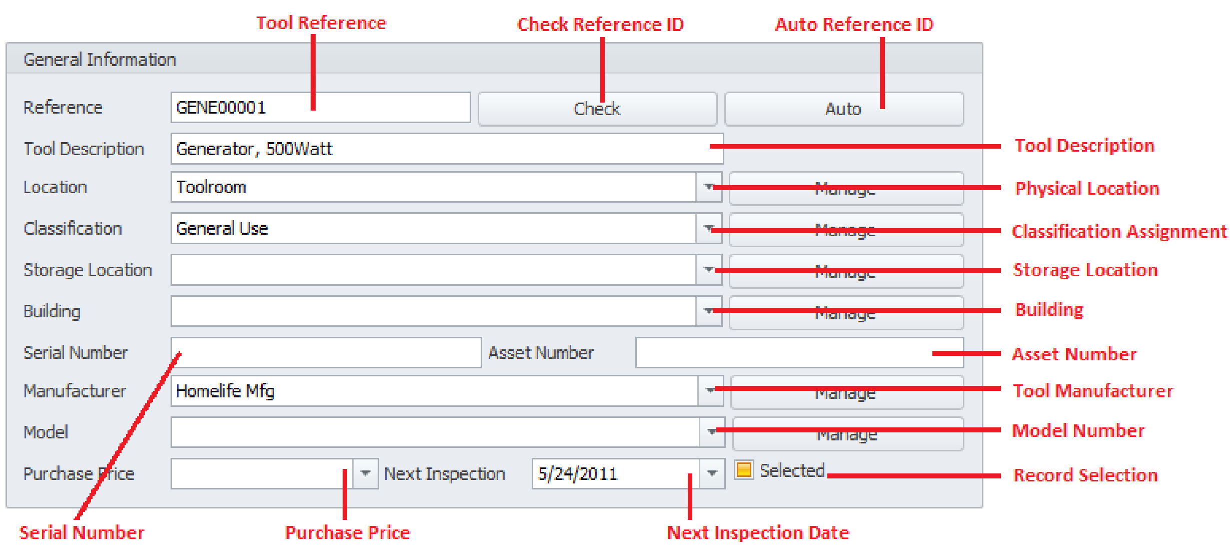
Details Tab

Under the **Details** tab you can setup your identification information, and general assignments for selected tools. You also have the ability to check tools in and out of the Tool room or crib.

General Information

This section allows you to specify a description, reference ID, manufacturer and other general information specific to the current record.

The following illustrates the elements found in this section:



Reference ID

This field should be unique in your database, but it's not an enforced rule. It is used to help identify your tool, and is also used in conjunction with barcode scans. Edit this field by typing in the space provided. This field can accept up to 25 alpha/numeric characters.

Once the **Description** field has been entered you can click on the **Auto** button to have the application create this field for you.

To insure the **Reference ID** is unique in the database, click on the **Check** button.

Tool Description

This field should provide a brief description of the tool. This field can contain up to 50 alpha/numeric characters.

Location

This alpha/numeric field can contain up to 30 characters and would be used to track the physical storage location of the tool. This could represent a property or facility.

Classification

This alpha/numeric field can contain up to 30 characters and would be used to record the Classification you want to assign the current record.

Storage Location

This alpha/numeric field can contain up to 30 characters and would be used to indicate the storage location of the tool.

Building

This alpha/numeric field can contain up to 30 characters and would be used to represent the building the tool is stored in.

Serial Number

This alpha/numeric field can contain up to 30 characters and would be used to record the serial number of the tool.

Asset Number

This alpha/numeric field can contain up to 30 characters and would be used to record the asset number assigned to the tool in the case tool is considered an asset.

Manufacturer

This alpha/numeric field can contain up to 40 characters and would be used to record the manufacturer of the tool.

Model

This alpha/numeric field can contain up to 30 characters and would be used to record the model type of the tool.

Purchase Price

This floating point only type field would be used to record the price paid when the tool was purchased.

Next Inspection

This date only field would indicate the date in which the next inspection should be conducted on the tool.

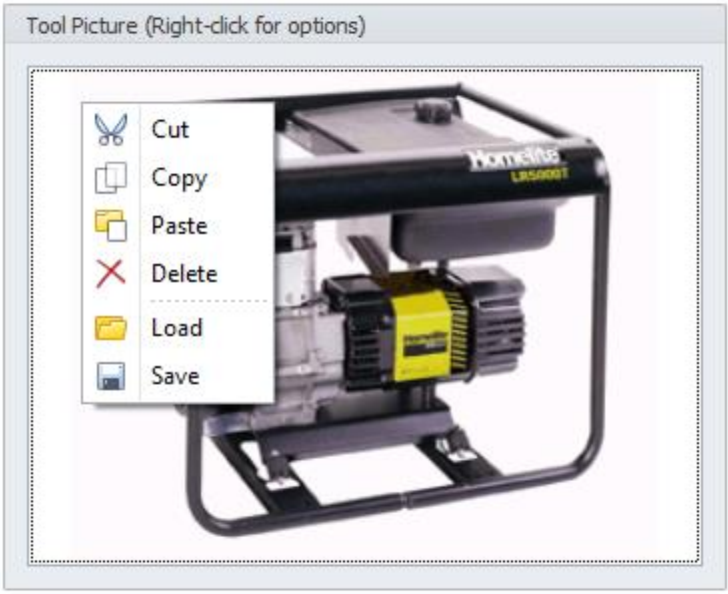
Selected

When checked, this would indicate that the record is selected. This is normally used with barcode printing routines.

Tool Picture

This section allows you to set or store a picture of your tool. Options available to this feature are accessible from the pop-up menu associated with the image.

The following illustrates the elements found in this section:

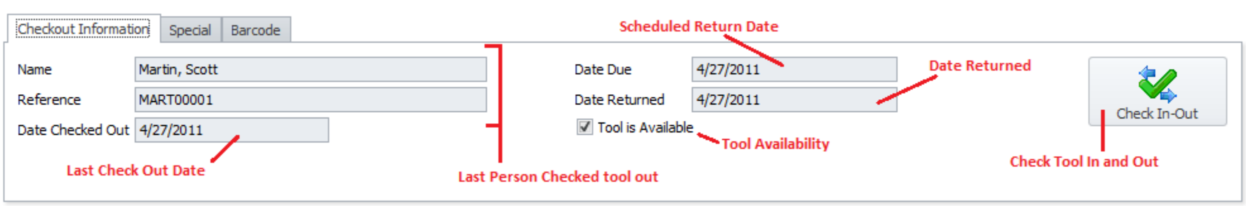


To set the tool's picture

- Move to the **Tool Picture** group found on the **Detail** tab.
- Right mouse click on the picture control to invoke the pop up menu.
- Click on the **Load** option.
- Using the **Open** dialog, browse to where you have the picture stored on your system. Supported formats include: bmp, gif, jpg, ico, png and tif.
- Click on the image file to select it and click the **Open** button.
- Save your changes by clicking on the **Save Changes** option in the ribbon.

Checkout Information

This section displays check in and checkout information as it relates to the selected tool record. The following illustrates the elements of this section:

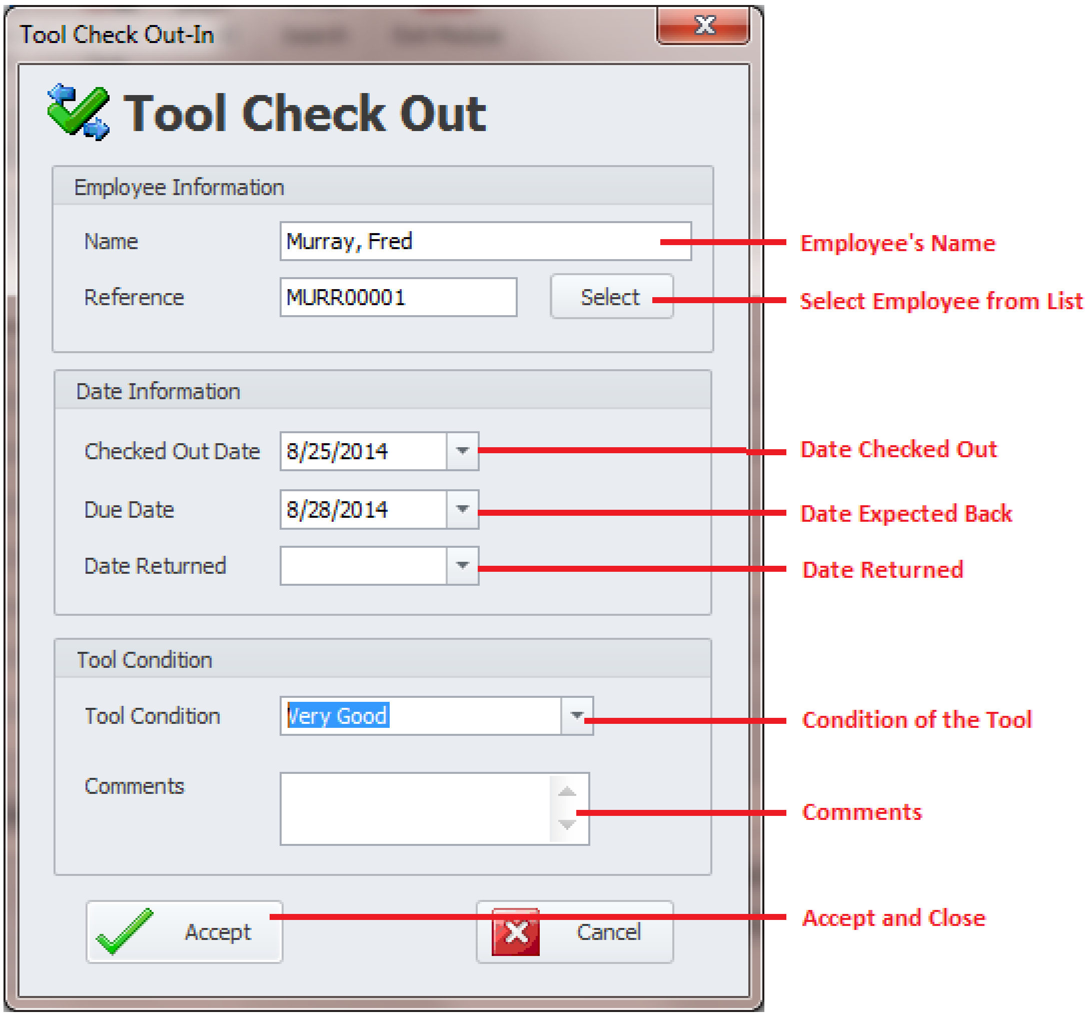


All the fields of this section are completed for you as tools are checked in and checked out of the database.

Tool Check Out-In Editor

*The **Tool Check Out-In** Editor is used both when checking tools out, and checking them in. It is also used with editing a check out record in the **Check-Out History** log.*

The following illustrates the elements found in this editor:



- ***Name** – This alpha/numeric field can contain up to 40 characters. You can set this field by typing in it or use the **Select** button in the **Employee Information** group. To use the **Select** button:*
  - *Move to the **Employee Information** group and click on the **Select** button.*
  - *Select the Employee you want to assign from the grid of the invoked Lookup dialog.*
  - *Click on the **Select** button.*
- ***Reference** – This field is filled in for you when an employee is selected as outlined above.*
- ***Check Out Date** – This is a date only field and represents the date of tool checkout.*

- ***Due Date*** *– This is a date only field and represents the date you require the tool to be returned.*
- ***Date Returned*** *– This is a date only field and represents the date the tool was actually returned to the tool room or crib.*
- ***Tool Condition*** *– This alpha/numeric field can be up to 30 characters in length, and represents the tool's physical condition when returned.*
- ***Comments*** *– This alpha/numeric field can be up to 100 characters in length and would include any addition comments you want recorded.*
- ***Accept*** *– Accepts the information as entered and closes the dialog.*

Tool Check Out – Check In

To check a tool in or out of the database:

- Locate and make current the tool record you want to work with.
- Move to the **Tool Database** page in the ribbon and click on the **Check In-Out** option. Or
- Move to the **Details** tab, and the secondary tab of **Checkout Information**. Click on the **Check In-Out** button.
- Follow the instructions on the ***Tool Check Out-In Editor*** found in this chapter.

Special

This section allows you to create and use **Special Fields**. **Special Fields** can be thought of as groups of User Defined Fields. Each group can have a Group Name and 8 fields with user defined titles. This section is found on the **Special** tab, located on the lower section of the **Details** tab.

For more information about this feature please refer to the ***Special Fields*** section of the ***Common Features*** chapter.

Manage Selected Special Fields

To setup the titles for the current set of special fields:

- Move to the **Details** tab, and then select the secondary tab of **Special**.
- Select the **Special Fields** group as found within the grid.
- Open the **File** menu and expand the **Manage Special Fields** sub menu.
- Click on the **Manage Selected Fields** option.

For more information about this feature please refer to the ***Special Fields*** section of the ***Common Features*** chapter.

Barcodes

You can create and use barcodes and labels with this module. Being that this is a fairly common feature throughout the system we invite you to the ***Creating Barcodes and the Designer*** section of the ***Common Features*** chapter.

The following illustration shows this feature:

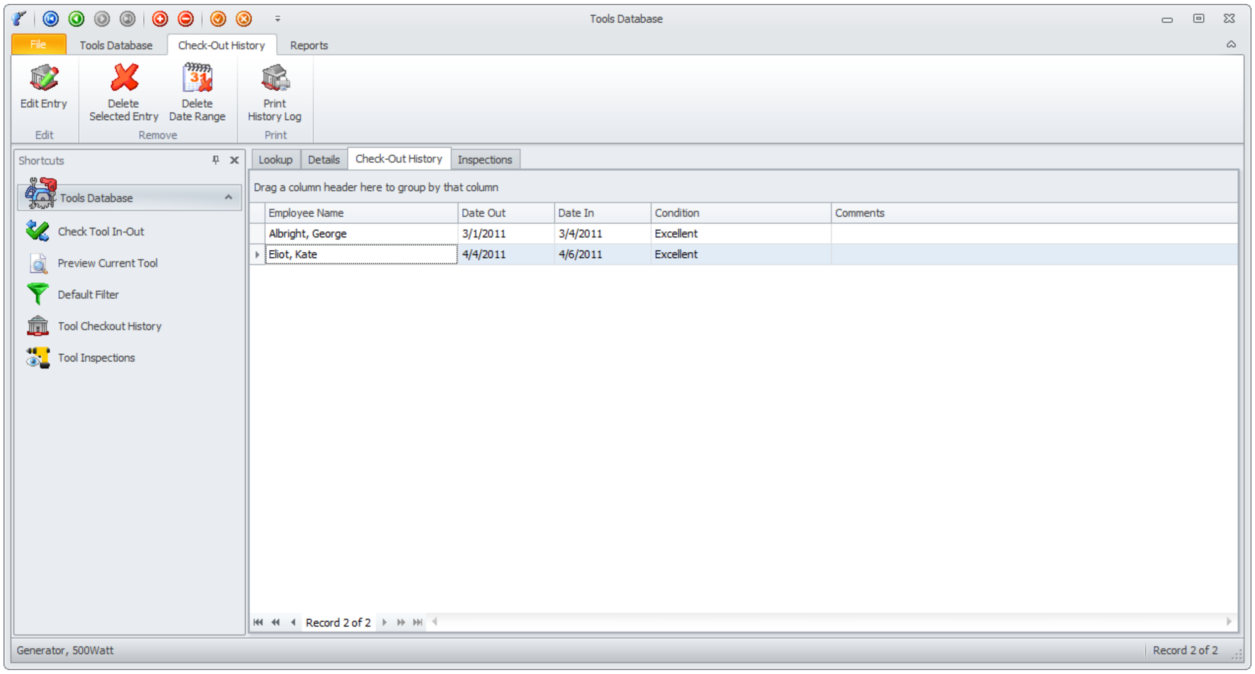
To access the Barcodes routines from within the ***Tools Database*** module:

- Move to the **Details** tab of the tools database and then click on the **Barcode** tab near the bottom.

Check Out History Tab

This tab is used to store the checkout history as it applies to the selected tool record. On this tab you can edit records, print the log and remove records from the log.

Note that the **Check-Out History** ribbon page is only available when this tab is selected.

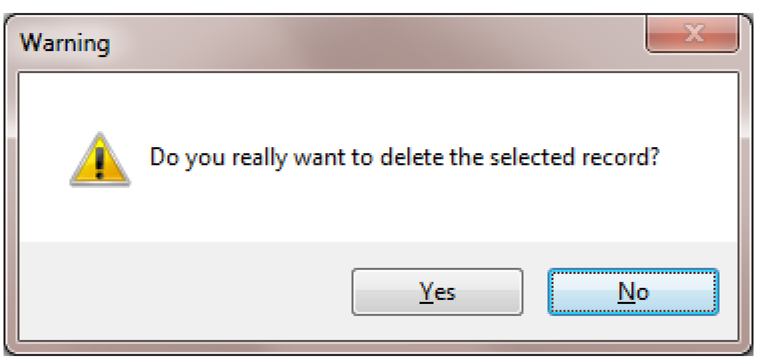


To Edit a Check-Out Record

- Move to the **Check-Out History** tab.
- Select the record you want to edit from within the grid.
- Either double click on the record or click on the **Edit Entry** option on the **Check-Out History** page of the ribbon.
- Please refer to the ***Tool Check-Out Editor*** section found in this chapter on how to use the invoked editor.

To Delete a Check-Out Record

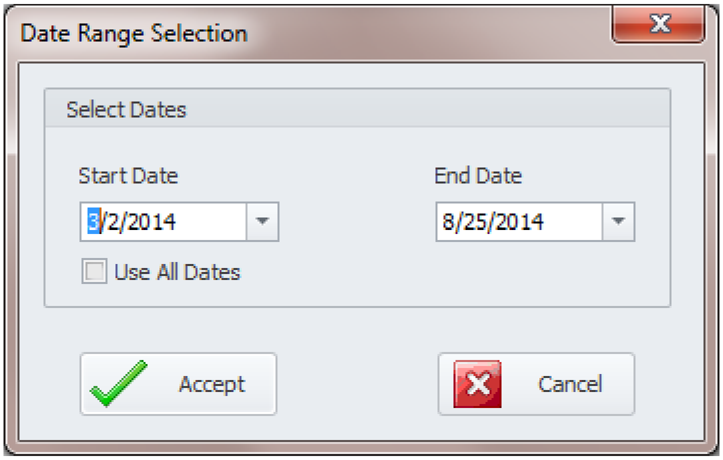
- Move to the **Check-Out History** tab.
- Select the record you want to delete from within the grid.
- Click on the **Delete Entry** option on the **Check-Out History** page of the ribbon.



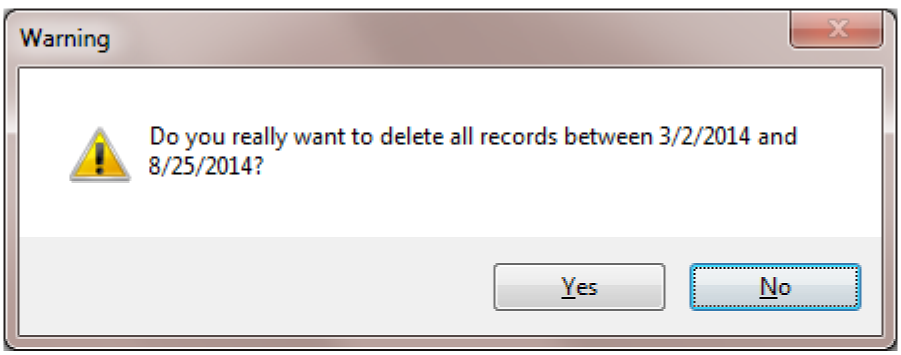
- When prompted about the deletion, click **Yes**.

Deleting a Date Range of Check-Out Records

- Move to the **Check-Out History** tab.
- Move to the **Check-Out History** page in the ribbon and click on the **Delete Date Range** option.

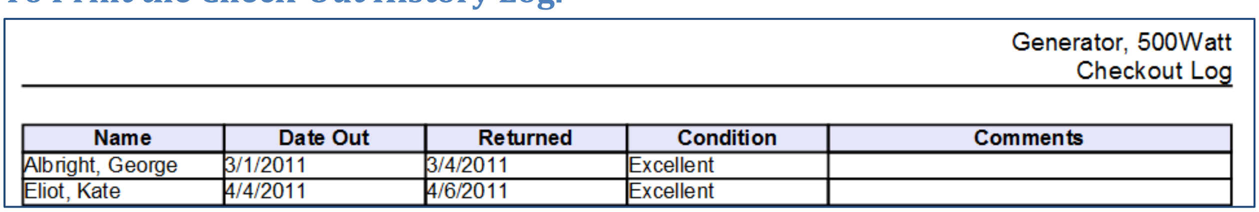


- Setup the **Start Date** and **End Date** of the range of records you want to remove from the database.
- To delete all record, select the **Use All Dates** checkbox.



- When warned about the deletion, click on the **Yes** button.

To Print the Check-Out History Log.



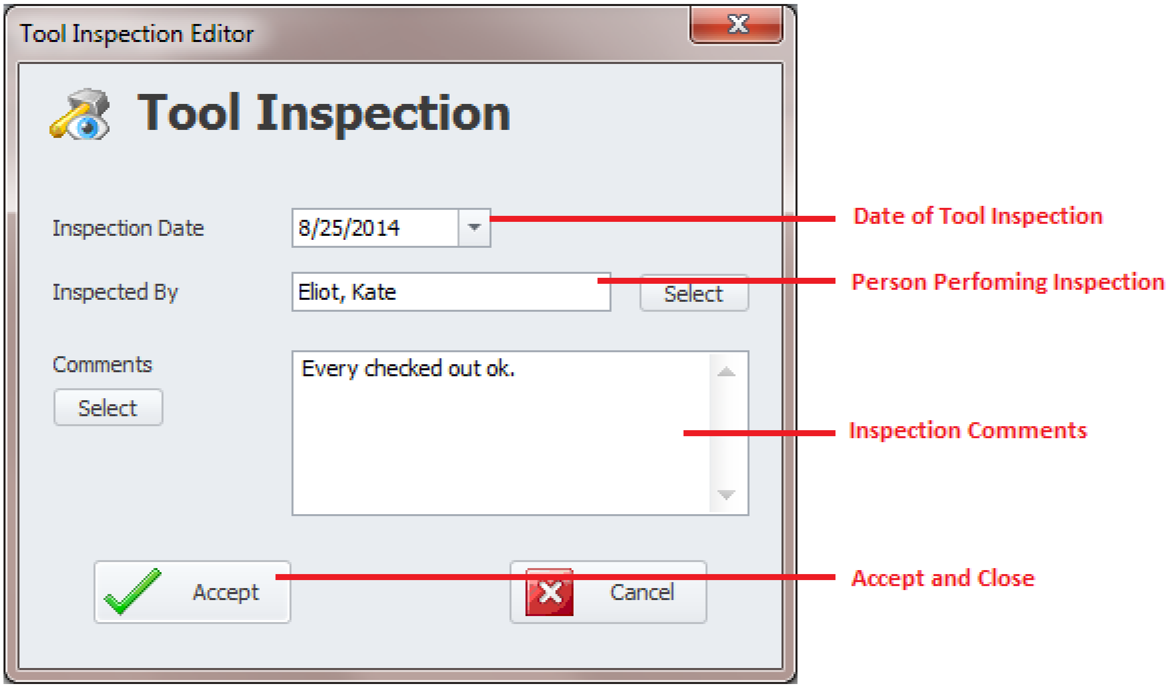
Generator, 500Watt
Checkout Log

Name	Date Out	Returned	Condition	Comments
Albright, George	3/1/2011	3/4/2011	Excellent	
Eliot, Kate	4/4/2011	4/6/2011	Excellent	

- Move to the **Check-Out History** tab.
- Move to the **Check-Out History** page in the ribbon and click on the **Print History Log** option.

Tool Inspection Editor

The **Tool Inspection Editor** is used to both create and edit tool inspection records. The following illustrates the elements of this editor.

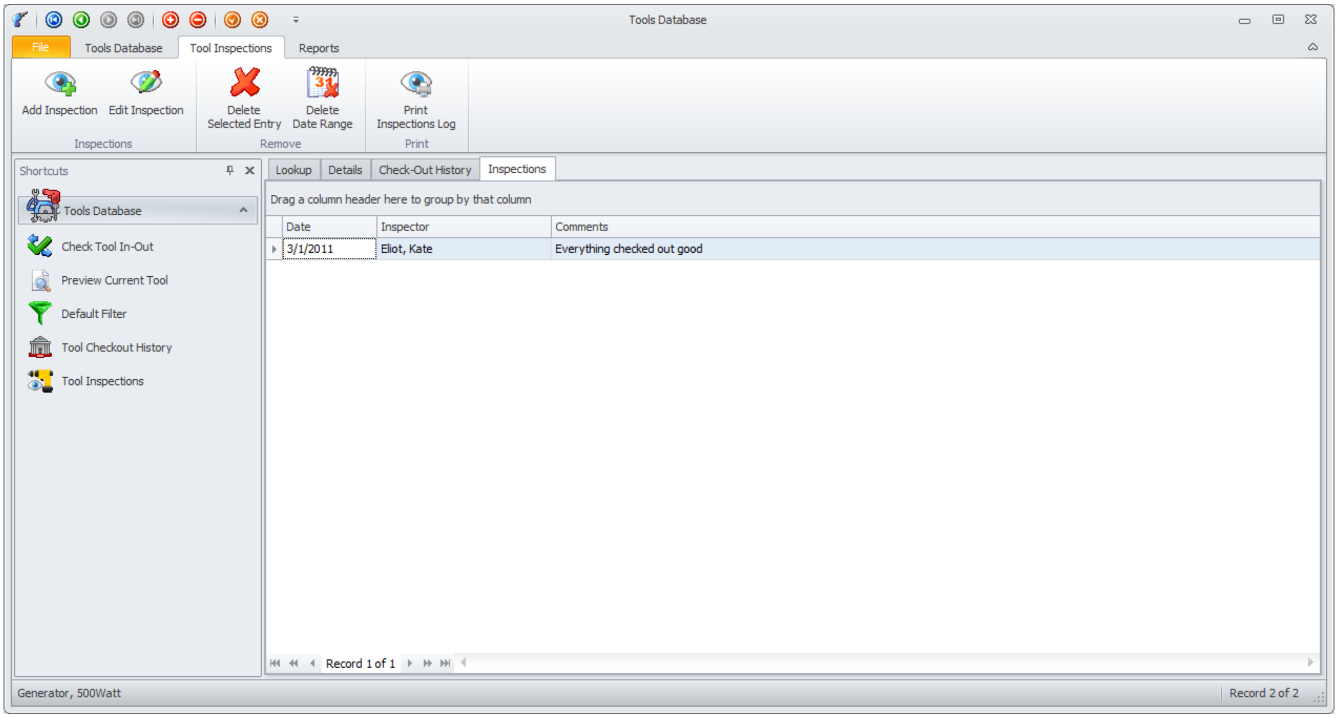


- **Inspection Date** – This date only field would indicate the date an inspection was completed.
- **Inspected By**– *This alpha/numeric field can contain up to 40 characters. You can set this field by typing in it or use the **Select** button adjacent to this field. To use the **Select** button:*
    - *Move to the **Employee Information** group and click on the **Select** button.*
    - *Select the Employee you want to assign from the grid of the invoked Lookup dialog.*
    - *Click on the **Select** button.*
- **Comments** – There's no size limitation to this field, and it can be used to record the outcome of the inspection.
- **Accept** – Click the button to accept changes and close the dialog.

Inspections Tab

This tab is used to store the inspection history as it applies to the selected tool record. On this tab you can create records, edit records, print the log and remove records from the log.

Note that the **Tool Inspections** ribbon page is only available when this tab is selected.



To Create a New Inspection Record

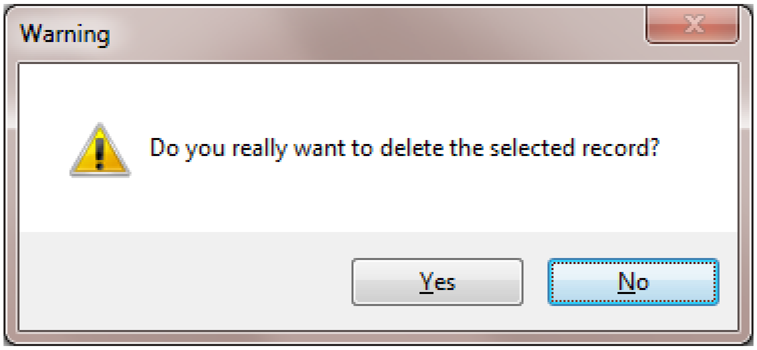
- Move to the **Inspections** tab.
- Move to the **Tool Inspection** page in the ribbon and click on the **Add Inspection** option.
- Please refer to the ***Tool Inspection Editor*** section found in this chapter on how to use the invoked editor

To Edit an Inspection Record

- Move to the **Inspections** tab.
- Select the record you want to edit from within the grid.
- Either double click on the record or click on the **Edit Inspection** option on the **Tool Inspections** page of the ribbon.
- Please refer to the ***Tool Inspection Editor*** section found in this chapter on how to use the invoked editor.

To Delete a Check-Out Record

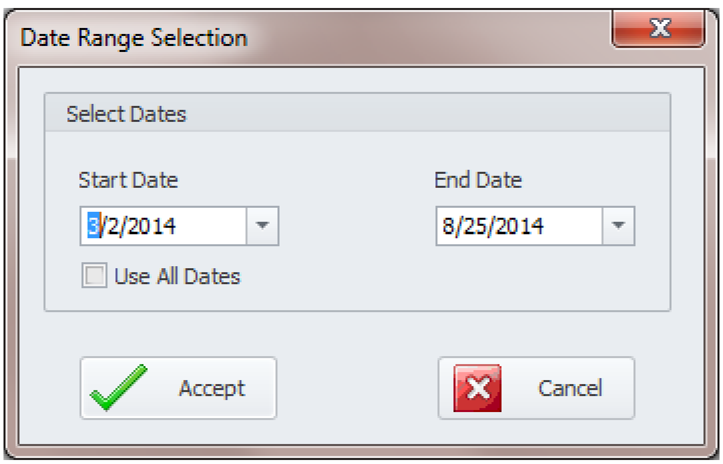
- Move to the **Tool Inspections** tab.
- Select the record you want to delete from within the grid.
- Click on the **Delete Inspection Entry** option on the **Tool Inspections** page of the ribbon.



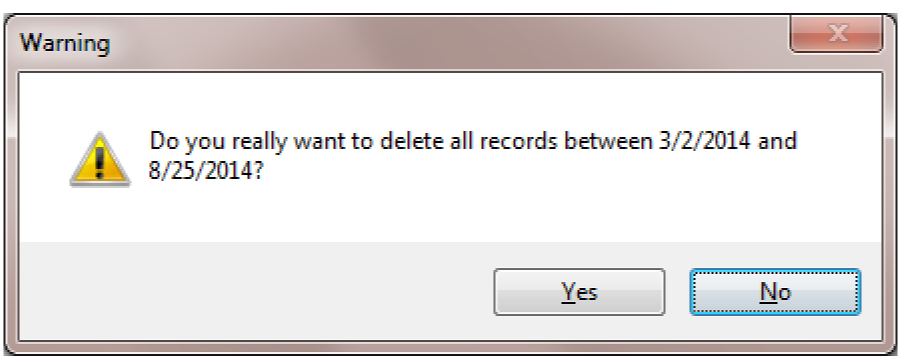
- When prompted about the deletion, click **Yes**.

Deleting a Date Range of Inspection Records

- Move to the **Inspections** tab.
- Move to the **Tool Inspections** page in the ribbon and click on the **Delete Date Range** option.



- Setup the **Start Date** and **End Date** of the range of records you want to remove from the database.
- To delete all record, select the **Use All Dates** checkbox.



- When warned about the deletion, click on the **Yes** button.

To Print the Inspections Log

- Move to the **Inspections** tab.
- Move to the **Tool Inspection** page in the ribbon and click on the **Print Inspection Log** option.

Add a New Tool Record

To add a new tool record:

- Move to the **Tool Database** tab in the ribbon and click on the **Add New** option.
- Move through the various tabs and edit the new record.

Save Changes

To save changes to the main record, click on the **Post** (✓ check) button in the *Data Control* located within the ribbon's ***Quick Access*** toolbar.

To save changes to the main record and all the underlying records (links, attachments, etc.), click on the **Save Changes** button found on the **Home** tab of the ribbon control.

Print Options

To print the current record:

- Locate and select the record you want to print.
- Open the **File** menu and expand the **Print Options** menu by clicking on it.
- Click on the Print Option of your choice:
    - **Print Record** - Allows printer selection and other options before printing.
    - **Quick Print** - Sends the document directly to the default printer
    - **Print Preview** - Provides a print preview of the current document

Tool's Notes

You can keep detailed notes on each tool in the database. These notes use our built in rich text editor that is used throughout the system. To find how to use the features of this rich text editor please refer to the ***Rich Text Editor*** chapter.

To access the Notes option:

- Locate and make active the record you want to maintain notes on.
- Move to the **Tools Database** tab in the ribbon and click on the **Tool's Notes** option.

Filter Options

On the **Tool Database** page of the ribbon, you have the following database filter options:

- **All Checked Out** – Filters the database to show only those records that are currently checked out.
- **All Past Due** – Filters the database to show all records that are overdue for returning.
- **View All** – This is the default filter and shows all records in the database.

To filter the database by one of the above options:

- Move to the **Tools Database** tab in the ribbon.
- Click on the filter option of your choice.

Search

To perform a search on the Tools Database:

- Move to the **Tools Database** tab in the ribbon.
- Click on the **Search** option.
- Refer to the ***Search*** section of the ***Common Features*** chapter for more information.

General Reports

On the **Reports** tab of the ribbon are the following general types of reports:

- ***All Checked Out*** – *Provides a listing of all tools currently checked out.*
- ***All Past Due*** – *Provides a listing of all tools overdue for return.*
- ***All Tools Available*** – *Provides a listing of all tools available for checkout.*
- ***All Tools*** – *Provide a listing of all tool records.*

All Tools

Description	Reference	Serial No	Manufacturer	Model No	Location	Storage	Building
Air Compressor, 2 HP Portable	AIRC00001						
Generator, 500Watt	GENE00001		Homelife Mfg		Toolroom		

To create one of the general reports:

- Move to the **Reports** tab in the ribbon.
- Click on the report options of your choice, and as just explained.

Upcoming Inspections Report

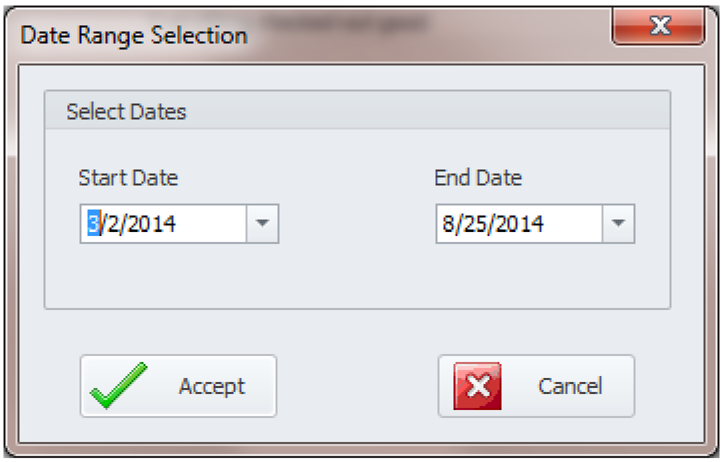
This report returns the schedule for upcoming tool inspections.

All Tools Requiring Inspection
5/3/2009 - 8/25/2014

Description	Reference	Serial No	Manufacturer	Model No	Checked Out	Next Inspection	Available
Air Compressor, 2 HP Portable	AIRC00001				Murray, Fred	5/11/2011	No
Generator, 500Watt	GENE00001		Homelife Mfg		Martin, Scott	5/24/2011	Yes

To create the Upcoming Inspection Report

- Move to the **Report** tab in the ribbon.
- Click on the **Upcoming Inspections** option.



- Setup the **Start Date** and **End Date** of the range of records you want to report on.
- Click on the **Accept** button.

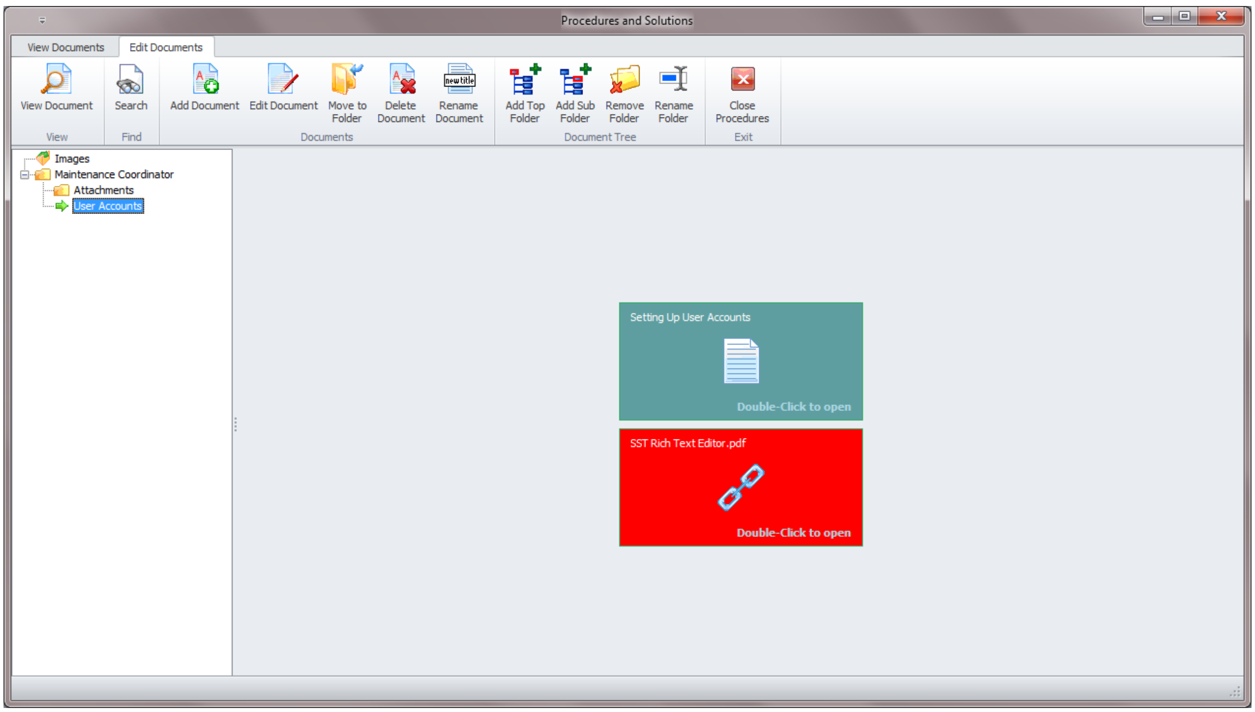
Print Barcodes

You can print barcode labels with this module. To print barcodes:

- Select and make current the tool record you want create the report on.
- Move to and click on the **Reports** tab in the ribbon.
- Click on the **Barcode Labels** option.
- Follow the instructions as outlined in the ***Printing Barcode Labels*** section of the ***Common Features*** chapter.

Procedures Database

One thing I'm sure any maintenance department could use is a database full of Troubleshooting procedures and other training related materials. Well, with the **Procedures and Solutions** module we allow you to build just this. With this module you can begin building a complete database full of useful procedures. In this way as team members learn new techniques, they go to this module and enter this information. As other team members need information for a similar problem, they return to this module and look up these procedures for their own personal use.



The more information that can be shared between team members the better. If someone has solved a complex problem before, and that problem arises again with a different person, wouldn't it be nice to know what the other person did when they fixed it? Of course it would. Knowing what the other person did could save a lot of down time by already knowing a couple of possible fixes.

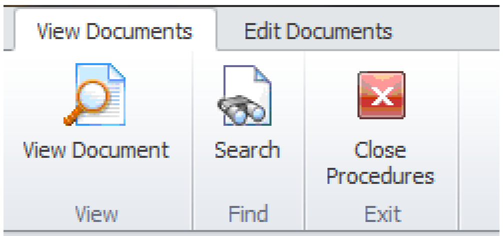
This module can also be used as a Training Database we you can record a countless number of procedures or training materials. These procedures can be store within the database as rich text documents or as links to external documents. These external documents can be specified as either general type of documents or as image files.

Links to files can be almost any file type, and supports the same features as the Run command of Windows itself. In the most part, if you have a file that is has an associated program assigned to it, it should be useable. Examples: A documents with an extension of docx assigned to it, and Word is installed on your computer, opening a link to this document would open the document in Word.

Ribbon Control

The functionality of the ***Procedures Database*** module is provided via a set of Ribbon tabbed pages. Ribbon pages are structurally and visually split into logical groups. Each of these groups includes commands that perform specific functions.

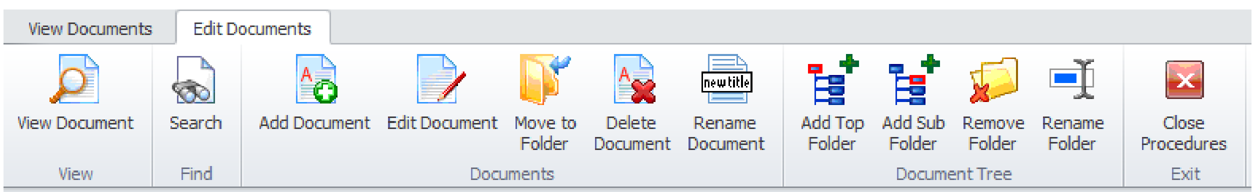
VIEW DOCUMENTS TAB



The following are the elements on the **View Documents** ribbon tab, reading left to right:

- **View Documents** – This option will attempt to open the selected document.
- **Search** – This option invokes the document search routine.
- **Close Procedures** – Exits this module.

EDIT DOCUMENTS TAB



The following are the elements on the **Edit Documents** ribbon tab, reading left to right:

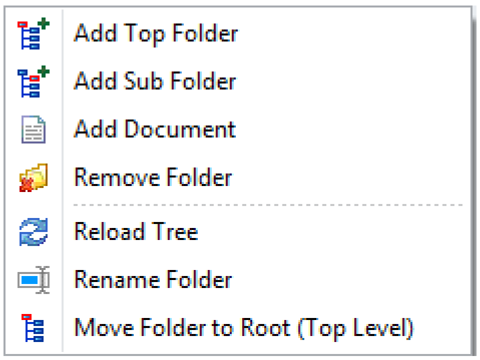
- **View Documents** – This option will attempt to open the selected document.
- **Search** – This option invokes the document search routine.
- **Add Document** – Invokes the **Add New Procedure** dialog.
- **Edit Document** – Depending of the document type, this option:
    - **RTF Editor Type** – Opens the document with the built in rich text editor.
    - **Link Type** – Opens the **Attachments** dialog and allows editing the link properties.
- **Move to Folder** – Invoke the **Move Document** dialog which allows assigning the document to a different folder.
- **Delete Document** – Allows removing the selected document from the database.
- **Rename Document** – Allows renaming a document's title.
- **Add Top Folder** – Allows adding a new top or root folder to the documents tree.
- **Add Sub Folder** – Allows adding a sub or child folder to the selected folder.
- **Remove Folder** – Allowing removing or the deletion of the selected folder.
- **Rename Folder** – Allows you rename the selected folder.
- **Close Procedures** – Exits this module.

Pop-up or Context Menus

Most of the options in the Ribbon are duplicated with context menus. Context menus availability is dependent of the feature that is selected. That is to say the Document tree has a different menu assigned to it, as if clicking on a Document.

Context menu are activated by placing your mouse cursor over a control and right mouse click the feature. The options available are activated by clicking on the option.

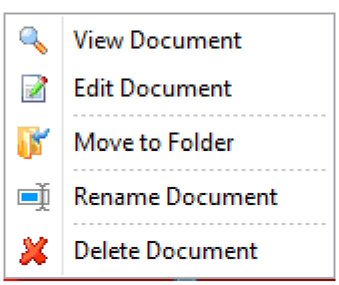
DOCUMENTS TREE CONTEXT MENU



The following are the elements on the **Documents Tree** context menu:

- **Add Top Folder** – Allows adding a new top or root folder to the documents tree.
- **Add Sub Folder** – Allows adding a sub or child folder to the selected folder.
- **Add Document** – Allows adding a new document to the selected folder.
- **Remove Folder** – Allowing removing or the deletion of the selected folder.
- **Reload Tree** – Rereads and re-populates the Documents Tree (refresh)
- **Rename Folder** – Allows you rename the selected folder.
- **Move Folder to Root (Top Levels)** - Reassigns the selected folder as a top or root folder.

DOCUMENTS CONTEXT MENU



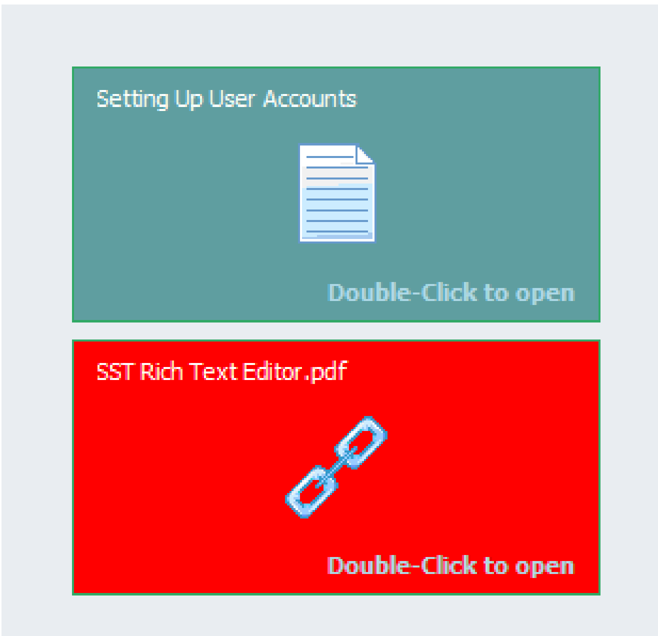
The following are the elements on the **Documents** context menu:

- **View Document** – Opens the document for viewing.
- **Edit Document** – Depending of the document type, this option:
    - **RTF Editor Type** – Opens the document with the built in rich text editor.
    - **Link Type** – Opens the **Attachments** dialog and allows editing the link properties.

- **Move to Folder** – Invoke the **Move Document** dialog which allow assigning the document to a different folder.
- **Delete Document** – Allows removing the selected document from the database.

Navigating Procedure Documents

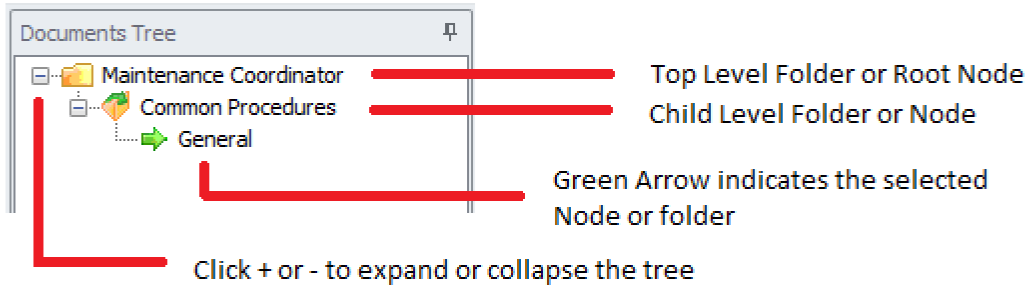
Procedure Documents are stored in folders. Once a folder that has documents assigned to them is selected, the document can be opened by double clicking on the button that contains its description.



To navigate the stored procedures:

- Move to the **Documents Tree** found on the left side of the screen.
- Expand the folders by clicking on them until the folder that contains the document you want to access is located.
- Move to the right side of the screen where the documents are stored.
- Do one of the following:
    - Double click on the document to view it.
    - Right click on the document and select either the **View Document** or **Edit Document** options.
    - Click on the document to select it. Then select an option as found in the ribbon.

Understanding and Using the Documents Tree



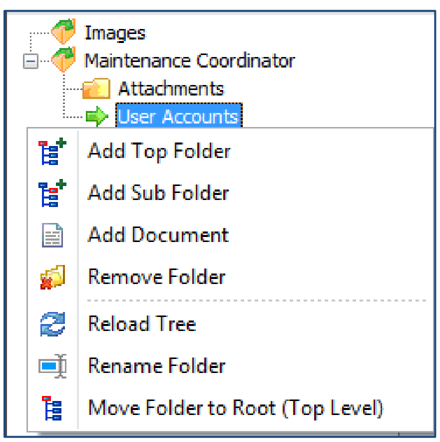
The **Documents Tree** allows for the organization of your documents in **Folders** or nodes. Basically you are not limited to the number of folders you can create and use. You can also create as many levels of these folders as maybe needed (parent – child folders). The supplied illustration shows the elements of a typical tree control.

IMPORTANT NOTE: Most of the procedures outlined in this section refer to the use of pop-up menus, however many of these procedures can also be duplicated and be found in the ribbon control as well.

Create a Document Folder

Each document in the system will be assigned to a folder or tree node in the **Documents Tree**. Once a folder is created documents can be added to it.

To create a new Document "Root" or "Top Level" folder:



- **Right mouse clicking** within a **Documents Tree** section will invoke a popup menu.
- Click on the **Add Top Folder** option.
- From the invoked dialog enter the name you want to use for this folder and click **OK.**

To create a new "Sub Folder" or "Child Node":

- Move to the **Documents Tree** and click and select the folder that you want to add a new sub folder to.
- **Right mouse click** within the **Documents Tree** section to invoke a popup menu.
- Click on the **Add Sub Folder** option.

- From the invoked dialog enter the name you want to use for this folder and click **OK.**

To Remove a Folder:

- Move to the **Documents Tree** and click on the folder you want to remove.
- Ensure there are no child folders or documents assigned to this folder. If there are items then either move and reassign these items or delete them. *You cannot remove a folder if anything is assigned to it.*
- **Right mouse click** on the folder you want to remove to invoke a popup menu.
- Click on the **Remove Folder** option.

To Rename a Folder:

- Move to the **Documents Tree** and click on the folder you want to rename.
- **Right mouse click** on the folder you want to remove to invoke a popup menu.
- Click on the **Rename Folder** option.
- From the invoked dialog edit the folder name to the way you want it and then click **OK**.

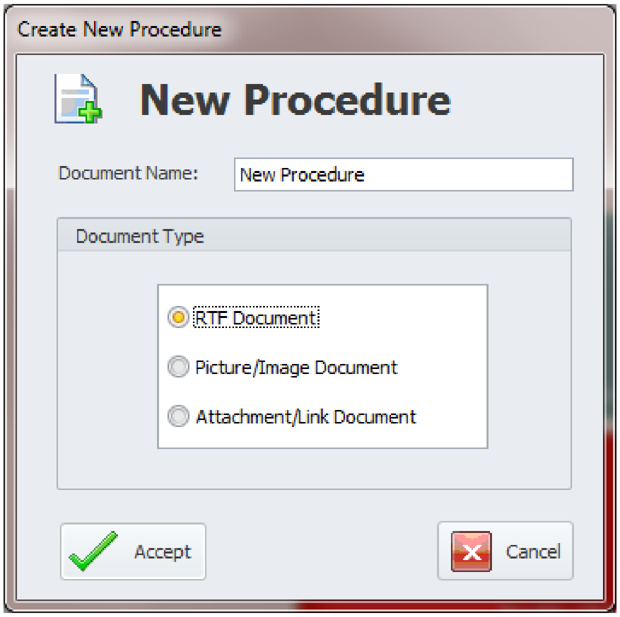
To move a Folder to the Top Level or Root position:

- Move to the **Documents Tree** and click on the folder you want to move.
- **Right mouse click** on the folder you want to move to invoke a popup menu.
- Click on the **Move Folder to Root (Top Level)** option.

To move a Folder and Reassign its position in the tree:

- Move to the **Documents Tree** and click on the folder you want to move.
- **Left mouse click** and hold on the folder you want to move.
- **Drag** the folder over the folder you want to move it to.
- Release the mouse button to **drop** the folder in to its new location.

To create a New Rich-Text document



- Move to the **Documents Tree** and select the folder that you want to assign the new document to.
- Click on the **Add Document** option in the ribbon control
- From the invoked **Create New Procedure** dialog, move to the **Document Name** text box and enter a name for your new document. This title can contain up to 30 characters.
- Move to the **Document Type** section and select the **RTF Document** option.
- Click on the **Accept** button and the Rich-Text editor will open with your new document ready for editing.

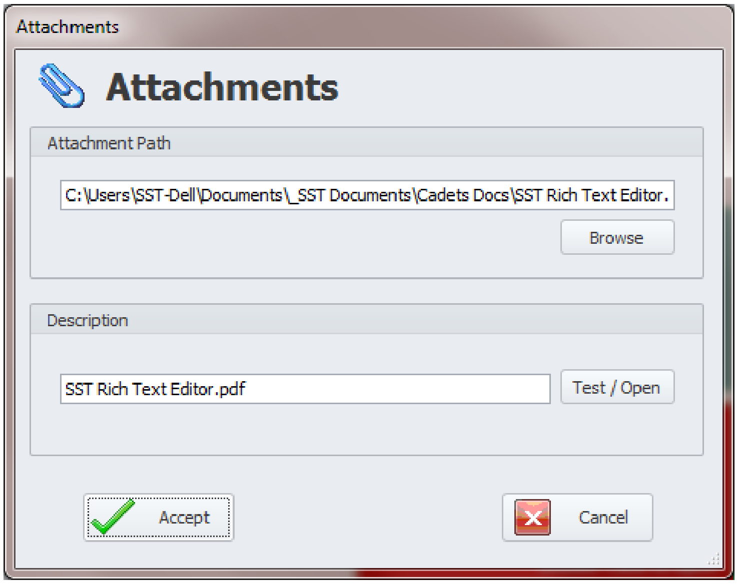
To create a New Picture/Image Document

- Move to the **Documents Tree** and select the folder that you want to assign the new document to.
- Click on the **Add Document** option in the ribbon control
- From the invoked **Create New Document** dialog, move to the **Document Name** text box and enter a name for your new document. This title can contain up to 30 characters.
- Move to the **Document Type** section and select the **Picture/Image Document** option
- Click the **Accept Button** to invoke a file open dialog box.
- Browse to where the images file is store and select the image by clicking on it.
- Click on the **Open** button to assign the image.

To create a New Link Document

- Move to the **Documents Tree** and select the folder that you want to assign the new document to.

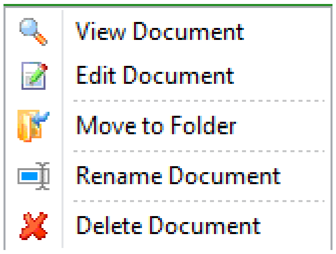
- Click on the **Add Document** option in the ribbon control.
- From the invoked **Create New Document** dialog, move to the **Document Name** text box and enter a name for your new document.
- Move to the **Document Type** section and select the **Attachment/Link Document** option
- Click the **Accept Button** to invoke the Link Setup dialog.



- Move to the **Attachment Path** section and click on the **Browse** button.
- Navigate to where the file you want to use is stored. Select the file and click **Open.**
- The program will ask if you want to replace the current description with one based on the file's name. To accept the new description reply by clicking on the **OK** button.
- You can edit the document's description by editing the text in the **Description** section.
- You can test the link by clicking on the **Test/Open** button.
- When everything is set to your liking, click on the **Accept** button.

To open or view a document:

- Move to and click on the folder that contains your document from within the **Documents Tree** to display the documents assigned to that folder.
- To open the document:
  - **Right click** on the document to invoke a pop up menu. Select the **View Document** option. Or…
  - **Double click** on the document to open it.

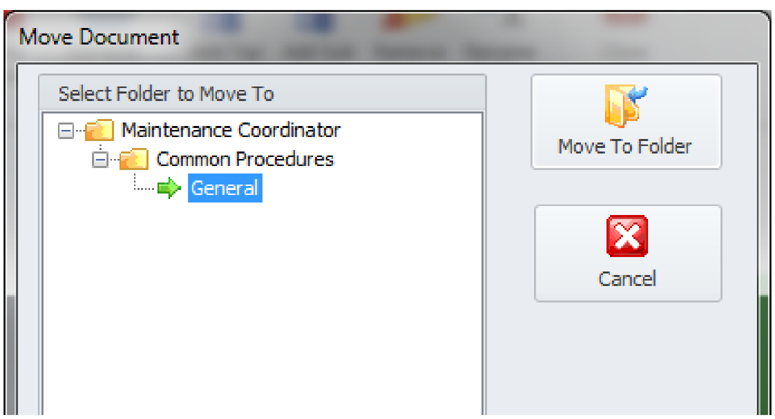


To Edit a Document

- Move to and click on the folder that contains your document from within the **Documents Tree** to display the documents assigned to that folder.
- **Right click** on the document to invoke a pop up menu. Select the **Edit Document** option.
- For the Rich-Text type documents the document will be displayed in the **Editor**. For the other two document types you will edit a document's properties in the same manner it was created.

To Move or Reassign a Document to different parent Folder

- Move to and click on the folder that contains your document from within the **Documents Tree** to display the documents assigned to that folder.
- **Right click** on the document to invoke a pop up menu. Select the **Move to Folder** option.



- From the **Move Document** dialog move and select the **folder** you want to move the document to from the displayed tree.
- Once the **Folder** is selected click on the **Move to Folder** button.

To Rename a Document

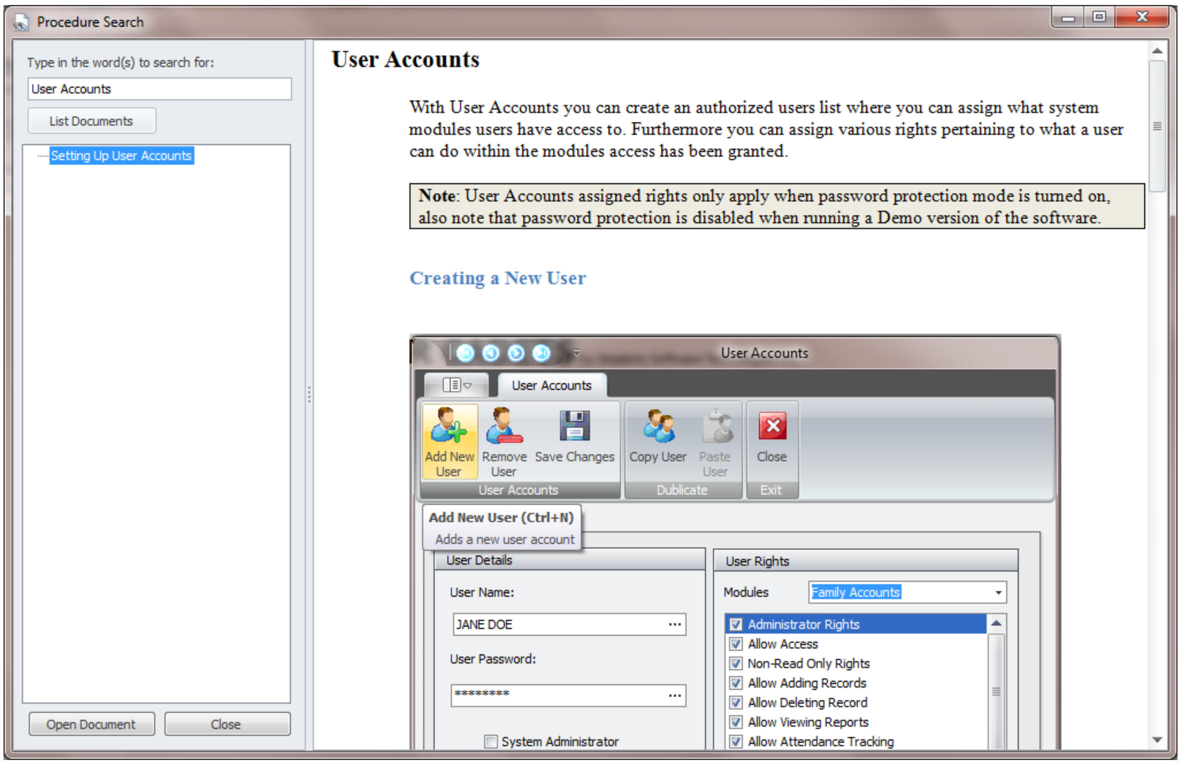
- Move to and click on the folder that contains your document from within the **Documents Tree** to display the documents assigned to that folder.
- **Right click** on the document to invoke a pop up menu. Select the **Rename Document** option.
- From the **Rename Document** dialog edit or rename the document's title in the space provided.
- Click **OK** to apply the changes.

To Delete a Document

- Move to and click on the folder that contains your document from within the **Documents Tree** to display the documents assigned to that folder.
- **Right click** on the document to invoke a pop up menu. Select the **Delete Document** option.
- When prompted about deleting the document, click the **Yes** button.

Procedures Search

Once you start populating the Procedure Database, finding documents may become more of a challenge. For this reason we have included a document search routine. This search allows you to include up to 20 key words to search for, and then searches the main document for matches.

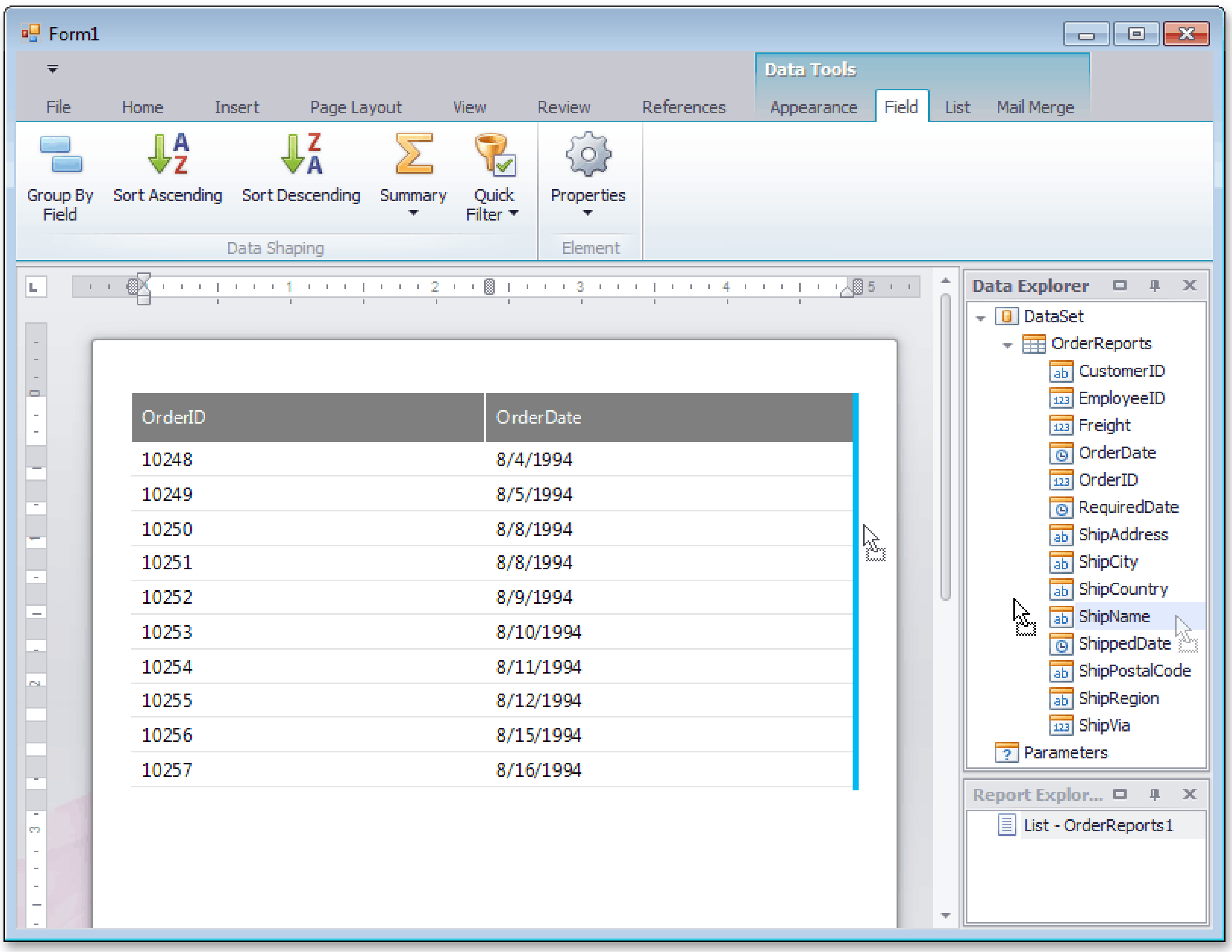


To perform a Procedure Search:

- Move to the ribbon and click on the **Search** option.
- Move to the **Type in the words to search for** text box, and do just that.
- Click on the **List Documents** button. If matches are found, the list box under this button will be populated with the search results.
- To preview one of the matching documents, click on it from within the list
- To open one of the matching documents, first click on it from within the list. Then click one the **Open Document** button.

Reports and Graphics Module

This module could actually be considered as three modules in one. The first component would be the **Spreadsheet Report** Writer. This feature allows you to connect to a database, select one or two tables from that database, select fields from these tables, setup sorting and selection criteria, and then generates a report. This report can then be even further customized with fonts, colors and more. The generated report is created in a spreadsheet format.

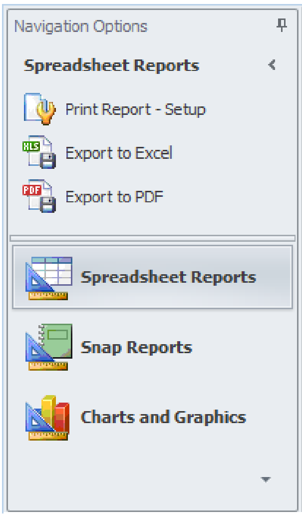


The second component of this module is called **Snap Reports** - the next generation reporting module intended for embedding dynamic data in your rich text documents. Use **Snap** for the quick creation of standard reports with the capabilities of data shaping (grouping, sorting), hierarchical data representation (master-detail reports) and so much more.

The third or final component is the **Charts and Graphics** suite that provides over 60 different 2D and 3D chart types, ranging from simple bar and pie charts, to complex financial charts such as stock and candle stick charts. With the built-in **Charts Wizard**, you can configure a chart of any complexity quickly and easily.

Navigating the Reports and Graphics Module

The following outlines the possible options that can be used in the navigation between the components of this module.



The navigation bar is located on the left side of the screen, and can be used to navigate through the components of this module.

- Click on a group within the **Navigation Options** Bar to branch to that component. The groups are the larger of the available items shown, with larger text and icons.
- Once a group is expanded, you can click on one of the available options to active that option or feature

To open components simply click on its name. Options include:

- **Spreadsheet Reports**
- **Snap Reports**
- **Charts and Graphics**

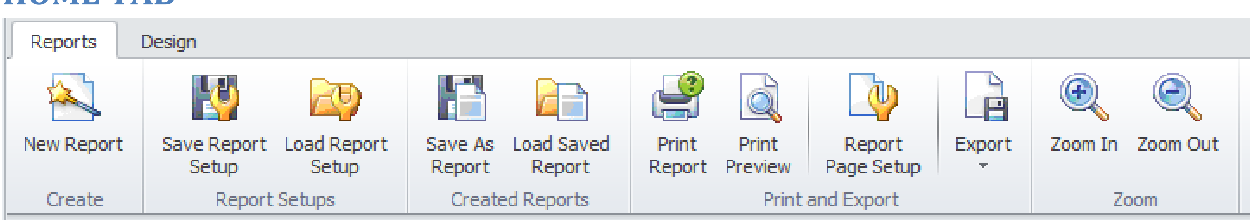
Spreadsheet Reports

This option allows you to quickly create reports based on a spreadsheet format. You can join up to 2 tables from within a single database, and the report is exportable to the following formats: rxml, xml, xls, and html.

Ribbon Control

The comprehensive functionality of the **Spreadsheet Reports** component is provided via a set of Ribbon tabbed pages. Ribbon pages are structurally and visually split into logical groups. Each of these groups includes commands that perform specific functions.

HOME TAB



The following are the elements on the **Reports** ribbon tab, reading left to right:

Create Group

- **New Report** – Invokes the **Reports Generation Wizard** that steps you through the creation of a new report.

Report Setups Group

- **Save Report Setup** – This options saves a report configuration to file. This is based on the information that was setup with the wizard.
- **Load Report Setup** – Loads a saved report setup and loads the information into the **Report Generation Wizard**.

Created Reports Group

- **Save as Report** – This option allows you to save the report to file.
- **Load Saved Report** – This option allows you to open a saved report.

Print and Export Group

- **Print Report** – Allows you to select a printer and other options prior to printing the report.
- **Print Preview** – Provide a print preview of the selected report.
- **Report Page Setup** – Invokes the **Page Setup** dialog that allows various options such as headers, scale to printing, and more.
- **Export** – Allow to directly export the report to:
    - **Export to Excel**
    - **Export to HTML**
    - **Export to PDF**

Zoom Group

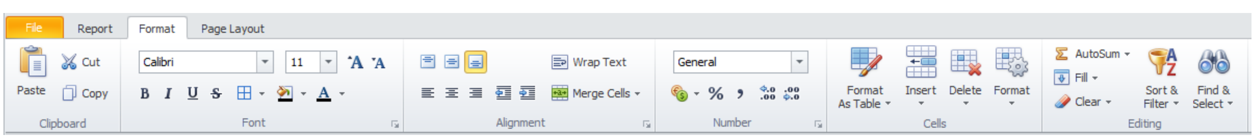
- **Zoom In** – Zooms in on the report.
- **Zoom Out** – Zooms out on the report.

Chart Group

- **Create** – Allows for the creation of a chart based on the selection.

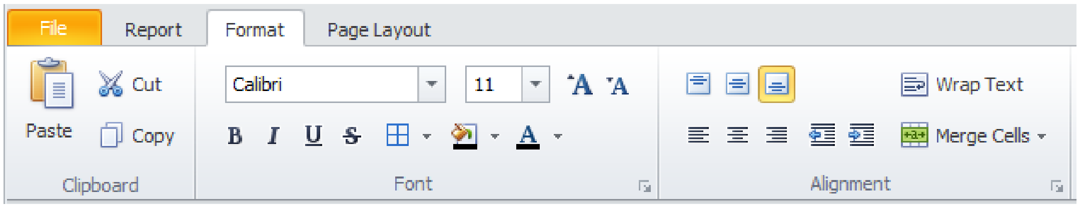
FORMAT TAB

Because there are so many options available on the ribbon's **Format** tab, we have broken the illustration into two halves, the left and right halves so you can better view the available options.



The following are the elements on the **Format** ribbon tab, reading left to right, top to bottom:

(LEFT HALF)



Clipboard

- **Paste** – Paste content that was previously stored in the clipboard into the selected cell or cells.
- **Cut** – Cuts the selection from the documents and places it in the clipboard.
- **Copy** – Copies the selection and places in in the clipboard.

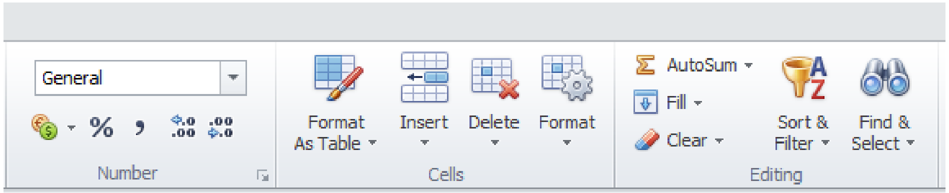
Font Group

- **Font Style** – Allows you to specify the font style of selected text or cells.
- **Font Size** – Allows you to specify the font point size of selected text or cells.
- **Grow Font** – Increase the font size in selected cells.
- **Shrink Font** – Decrease the font size in selected cells.
- **Bold** – Allows you to toggle the font **bold** attributes of selected text or cells.
- **Italic** - Allows you to toggle the font *italic* attributes of selected text or cells.
- **Underline** - Allows you to toggle the font <u>underline</u> attributes of selected text or cells.
- **Strikethrough** - Draws a line through selected text.
- **Cell Borders** – Drop down options include cell border styles, colors and thickness.
- **Fill or Highlight Color** – Allows you to specify the highlight color to be used for the selection.
- **Font or Text Color** – Allows you to specify the text color to be used for the selection.

Alignment Group

- **Align Top** - Aligns cell contents to the top of the cell.
- **Middle Align –** Aligns text so that it is centered between the top and bottom of a cell.
- **Align Bottom** - Aligns cell contents to the bottom of the cell.
- **Word Wrap** – Allows text to wrap within the selected cells.
- **Align Left** – Aligns text in the selected cells to be left justified.
- **Align Center** – Aligns text in the selected cells to be centered.
- **Align Right** – Aligns text in the selected cells to be right justified.
- **Decrease Indent** – Decrease the margin between the border and the text in the cell.
- **Increase Indent** – Increase the margin between the border and the text in the cell.
- **Merge Cells** – Allows the merging and splitting of table cells.
  - **Merge & Center** - Merge the selected cells and center the text in a merged cell.
  - **Merge Across** - Merge each row of the selected cell range into larger cells.
  - **Merge Cells** - Merge the selected cells into a single cell.
  - **Unmerge Cells** – Splits or unmerge selected cells.

(RIGHT HALF)

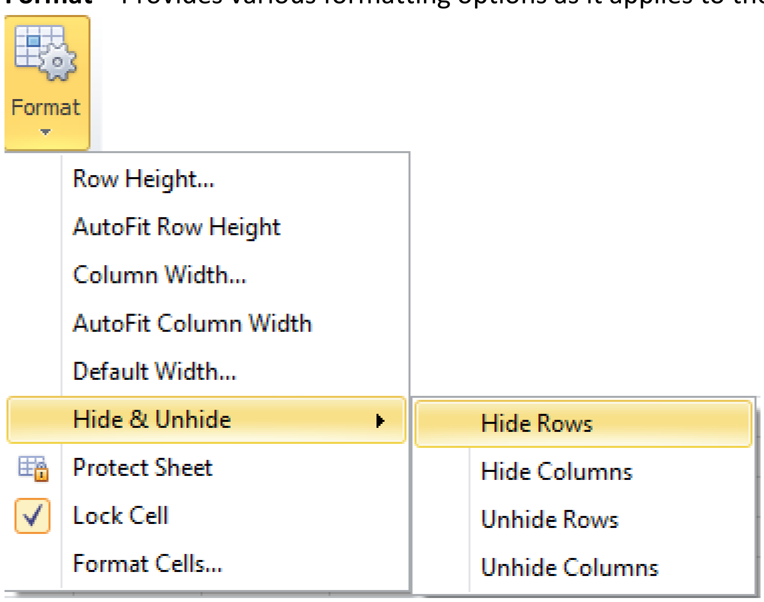


Number Group

- **Format Drop Down** – Allows you to format select text by an item selected in the list.
- **Accounting Number Format** - Choose an alternate currency format for the selected cell. For instance, choose Euros instead of Dollars.
- **Percent Style** - Display the value of the cell as a percentage.
- **Comma Style** - Display the value of the cell with a *thousands* separator. This will change the format of the cell to Accounting without a currency symbol.
- **Increase Decimal** -Show more precise values by showing more decimal places.
- **Decrease Decimal** - Show less precise values by showing fewer decimal places.

Cells Group

- **Format As Table -** Quickly convert a range of cells to a table with its own style.
- **Insert** – Allows the insertion of columns and rows. Options include:
  - **Insert Rows** - Add new rows to document.
  - **Insert Columns** - Add new columns to worksheet**.**
- **Delete** – Allows for the removal of columns and rows. Options include:
  - **Delete Rows** - Delete rows from the document.
  - **Delete Sheet Columns** -Delete columns from the document.
- **Format** – Provides various formatting options as it applies to the entire report, or selected cells.



  - **Row Height...** - Row height.
  - **AutoFit Row Height**- AutoFit row height.
  - **Column Width...** - Column width.
  - **AutoFit Column Width** - AutoFit column width**.**

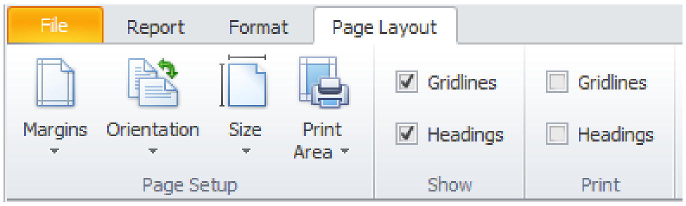
- **Default Width...** - Standard column width**.**
- **Hide & Unhide** - Hide & Unhide.
  - **Hide Rows** – Hide Selected Rows.
  - **Hide Columns** – Hide Selected Columns.
  - **Unhide Rows** – Unhide Rows
  - **Unhide Columns** – Unhide Columns
- **Protect Sheet** - Prevent unwanted changes to the data in a document by specifying what information can be edited. For example, you can prevent people from editing locked cells or changing the formatting of the document. You can specify a password that can be entered to unprotect the sheet and allow these changes.
- **Lock Cell** - Lock the selected cells to keep people from making changes to them. You must turn on Protect Sheet in order for this feature to work.
- **Format Cells...** - Show the Format Cells dialog box.

Editing Group

- **AutoSum** - Click here to display the result of a simple calculation, such as Average or Maximum Value, after the selected cells.
  - **Sum** - Provides a sum for selected cells.
  - **Average** – Provides an average for selected cells.
  - **Count Numbers** – Provides the number of cells containing numbers.
  - **Max** – Returns the highest value in the selected cells**.**
  - **Min** – Returns the lowest value in the selected cells**.**
- **Fill -** Continue a pattern into one or more adjacent cells. You can fill cells in any direction and into any range of adjacent cells.
  - **Fill Down -** Continue a pattern into one or more adjacent cells.
  - **Fill Right -** Continue a pattern into one or more adjacent cells.
  - **Fill Up -** Continue a pattern into one or more adjacent cells.
  - **Fill Left -** Continue a pattern into one or more adjacent cells.
- **Clear** - Delete everything from the cell, or selectively remove the formatting, the contents, or the comments.
  - **Clear All -**Clear everything from the selected cells. All contents, formatting, and comments are cleared from the selected cells.
  - **Clear Formats** - Clear only the formatting that is applied to the selected cells.
  - **Clear Contents (Delete)** - Clear only the contents in the selected cells. The formatting is not cleared.
- **Sort & Filter** - Arrange data so that it is easier to analyze. You can sort the selected data in ascending or descending order.
  - **Sort A to Z** - Sort the selection so that the lowest values are at the top of the column.
  - **Sort Z to A** - Sort the selection so that the highest values are at the top of the column.
- **Find & Select** - Find and select specific text, formatting, or type of information within the document. You can also replace the information with new text or formatting.
  - **Find** - Find and select specific text, formatting, or type of information within the document.

- **Replace** - Find and select specific text, formatting, or type of information within the document. You can also replace the information with new text or formatting.

PAGE LAYOUT TAB



The following are the elements on the **Page Layout** ribbon tab, reading left to right:

Page Setup Group

- **Margins** - Select the margin sizes for the document.
- **Orientation** - Switch the pages between portrait and landscape layouts.
- **Size** - Choose a paper size for the current sheet.
- **Print Area** - Mark a specific area of the sheet for printing.
  - **Set Print Area** - Mark a specific area of the sheet for printing.
  - **Clear Print Area**- Clear print area.

Show Group

- **Gridlines** - Show the lines between rows and columns in the sheet to make editing and reading easier.
- **Headings** - Show row and column headings. Row headings are the row numbers to the side of the sheet. Column headings are the letters or numbers that appear above the columns on a sheet.

Print Group

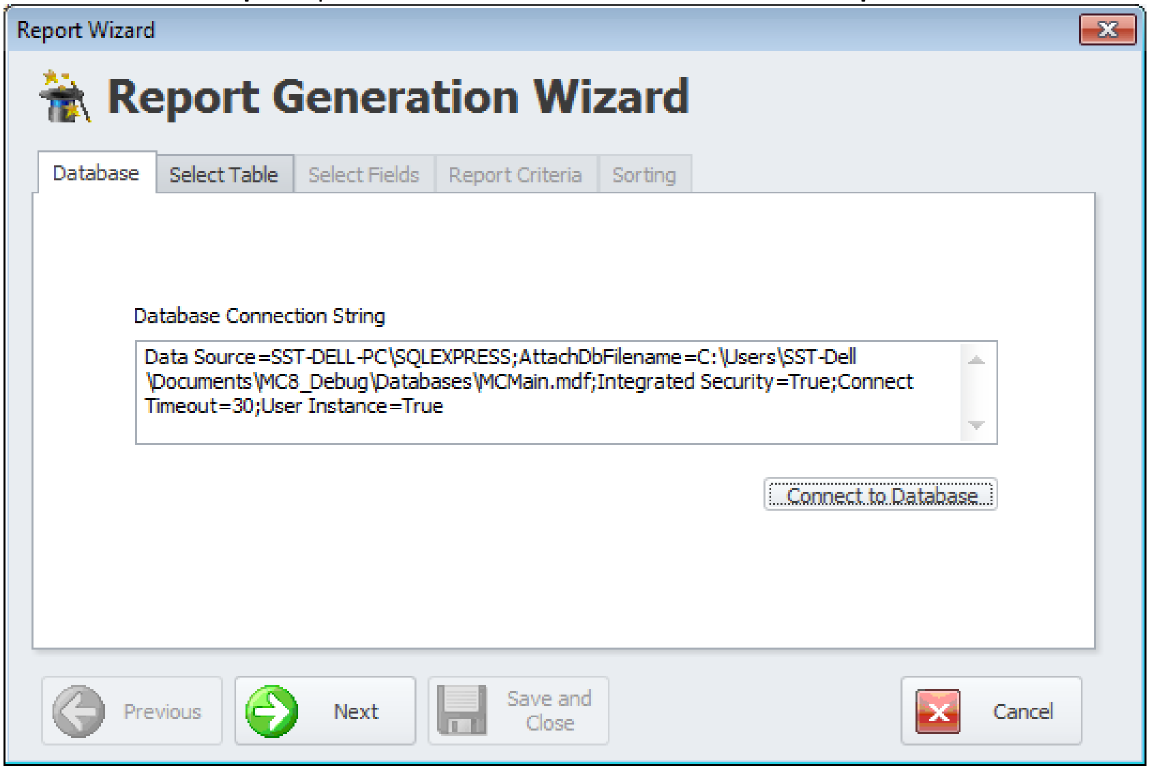
- **Gridlines** - Print the lines between rows and columns in the sheet to make reading easier.
- **Headings** - Print row and column headings. Row headings are the row numbers to the size of the sheet. Column headings are the letters or numbers that appear above the columns on a sheet.

Creating a New Report (Report Wizard)

To create a new report:

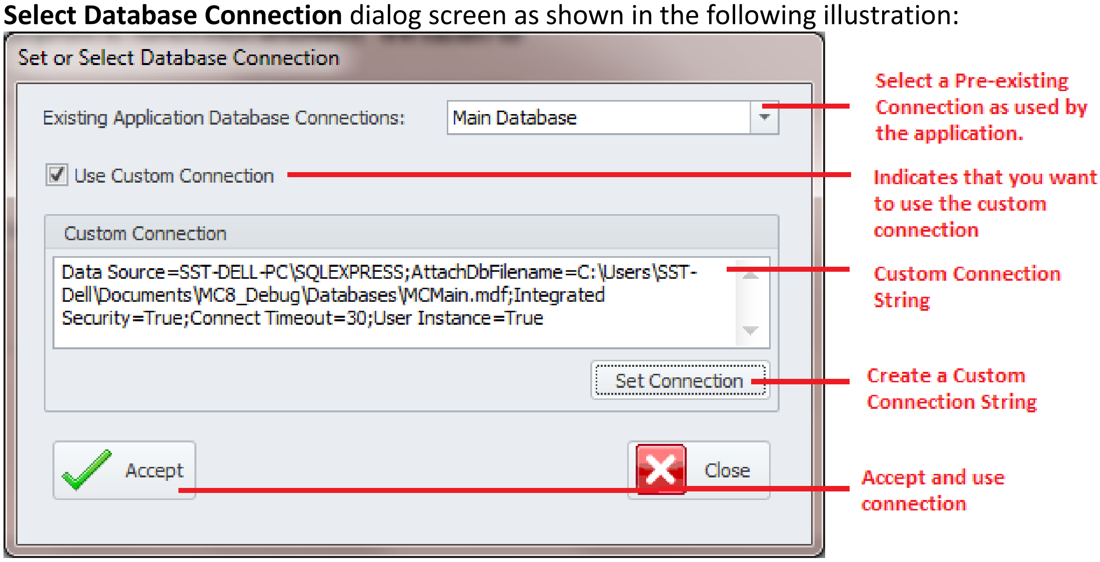
- Click on the **Spreadsheet Reports** option in the **Navigation** bar.

- Click on the **New Report** option in the ribbon. This should launch the **Report Wizard**.



To Use an Existing Connection

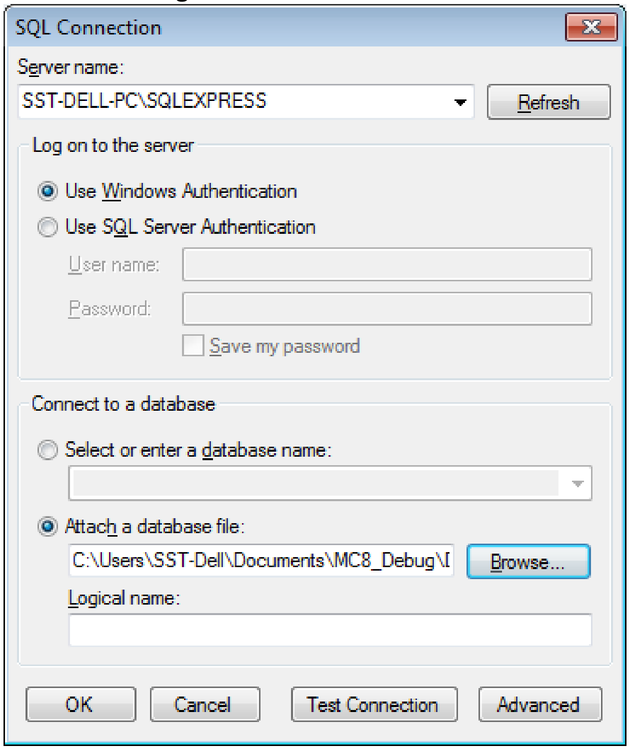
- From the **Database** tab, click on the **Connect to Database** button. This will invoke the **Set or Select Database Connection** dialog screen as shown in the following illustration:



- Move to drop down list adjacent to the **Existing Application Database Connections** and select the database connection you want to use. These connections are the same ones that currently setup for main program use.
- Ensure that the **Use Custom Connection** checkmark is not checked.
- Click on the **Accept** button.

To Use a Custom Connection

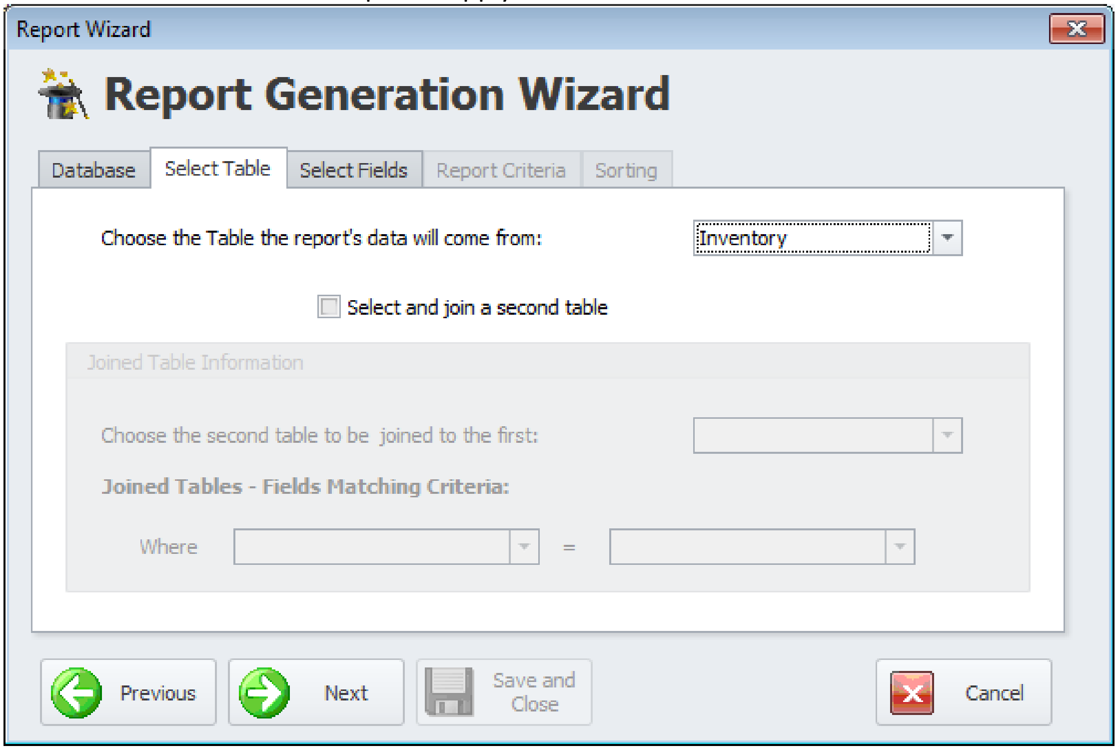
- Move to and check the **Use Custom Connection** checkbox.
- Click on the **Set Connection** button. This will invoke the **SQL Connection** dialog screen as shown in the following illustration:



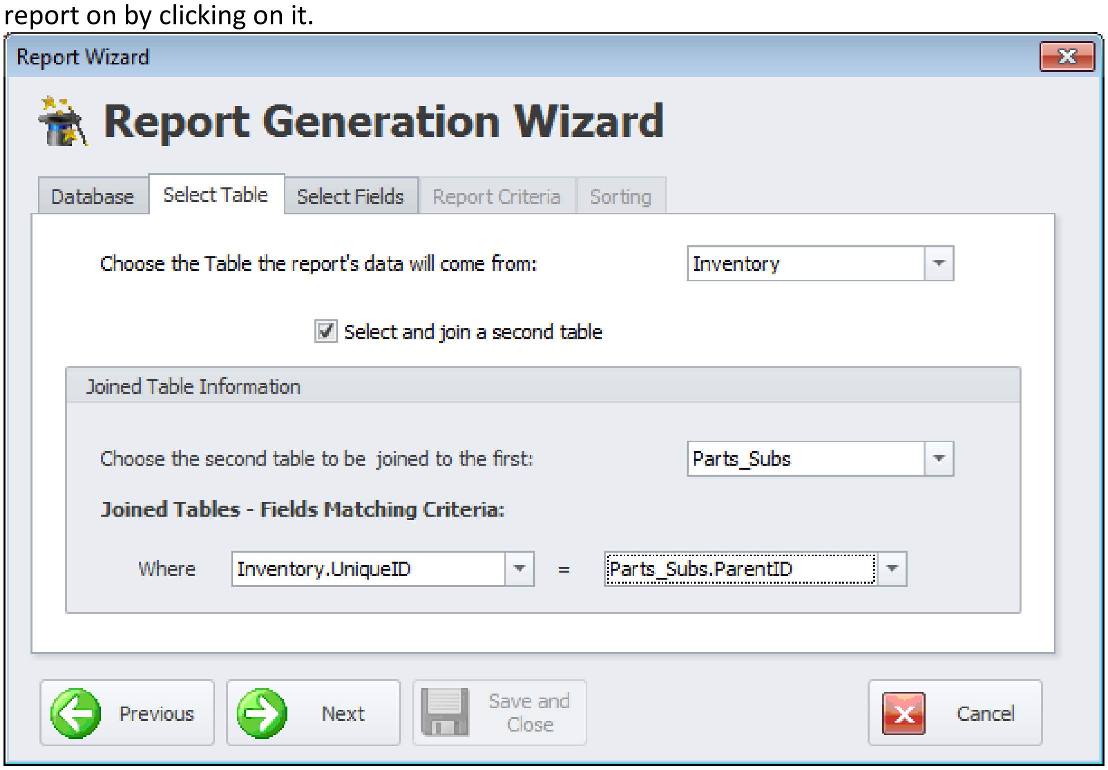
- Move to the **Sever name** drop down box and select the name of your instance of the SQL server you're using. If the server is not listed, try clicking on the **Refresh** button.
- Move to the **Log on to the server** group and setup your log on authentication information.
    - **Using SQL Express** - If you are using the Express database engines as supplied by us, you'll probability want to check the **Use Windows Authentication** option.
    - **SQL Server** - If you are connecting to full blown SQL Server then complete the **SQL Server Authentication** information.
        - Check the **Use SQL Server Authentication** option.
        - Fill in the **User Name** and **Password** fields.

- Next move to the **Connect to a database** group to connect to the actual database.
    - **SQL Server**:
        - Check the **Select or enter a database name** option.
        - Move to the drop down found here and either select or enter the name of the database you are connecting to.
    - **SQL Express**: (Attached database file)
        - Check the **Attach a database file** option.
        - Either use the **Browse** button here to select the database file, or type in the full path to the database (mdf) file in the space provided.
- **Test Connection** – Move to and click on the **Test Connection** button to ensure you have a good connect. If it fails, you may want to click on the **Advanced** button to further define you connection properties.

- Click on the **OK** button to accept and apply the connection.

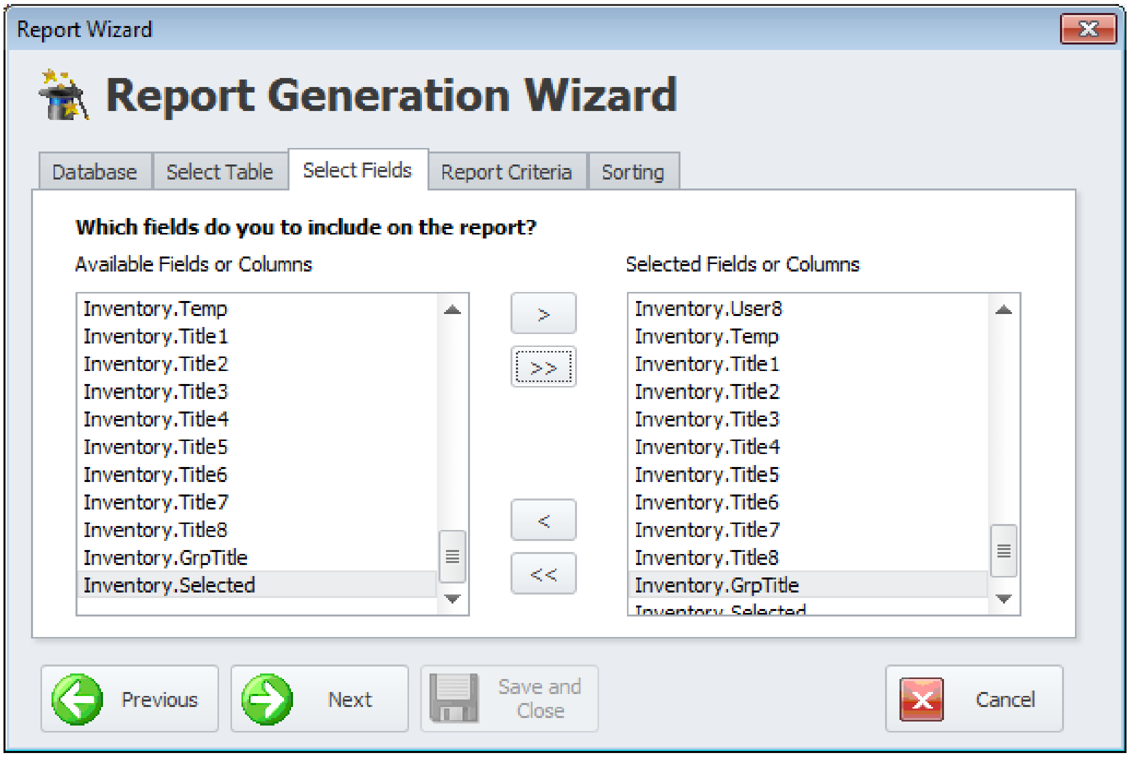


- Click either **Next** or the **Select Table** tab.
- The drop down list here will contain all tables found within the selected database. Move to the **Choose the Table the report's data will come from** list and select the table you want to base your report on by clicking on it.



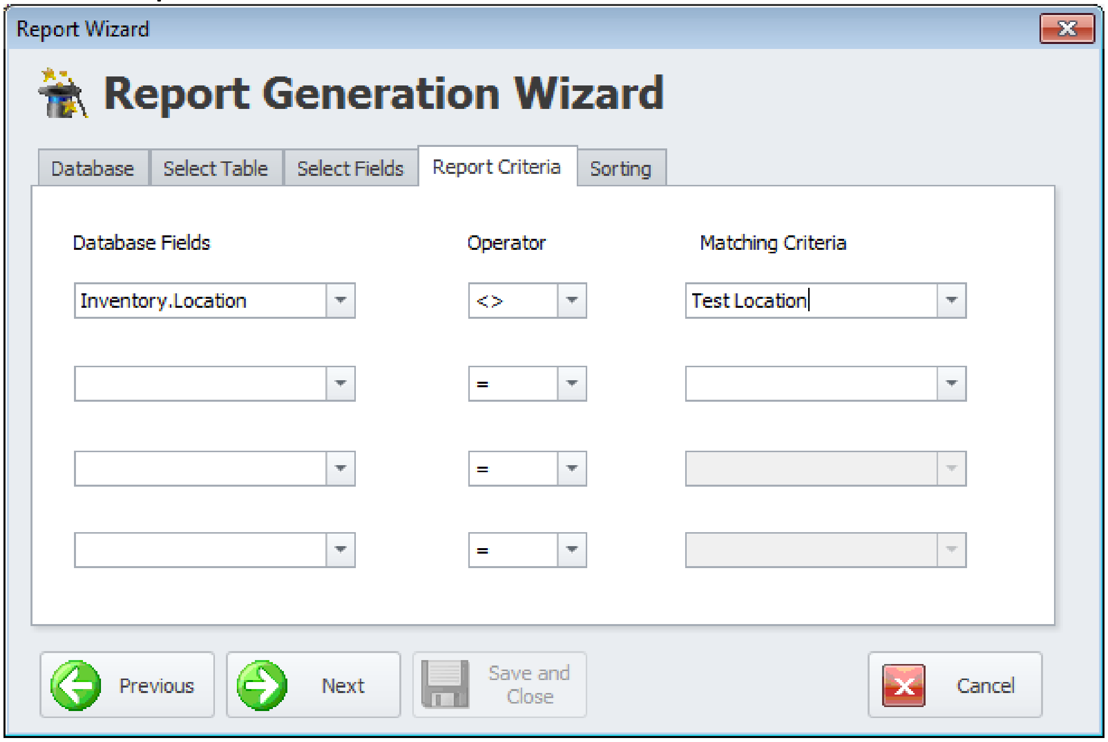
- To join a second table to the first table selected:

  - Check the **Select and join a second table** checkbox.
  - Move to the **Choose the second table to be joined to the first** drop down and select the second table to be joined with the first.
  - Next you need to setup the criteria as to how these tables interact with one another. This is normally accomplished by fields that point to one another and would share the same values (parent/child relationship).
  - Move to the **Where** drop down and select the field or column name for the parent table.
  - Move to the **=** drop down and select the field or column name of the child table.
- Once you are done setting up your table or tables, either click on the **Next** button or click on the **Select Fields** tab.

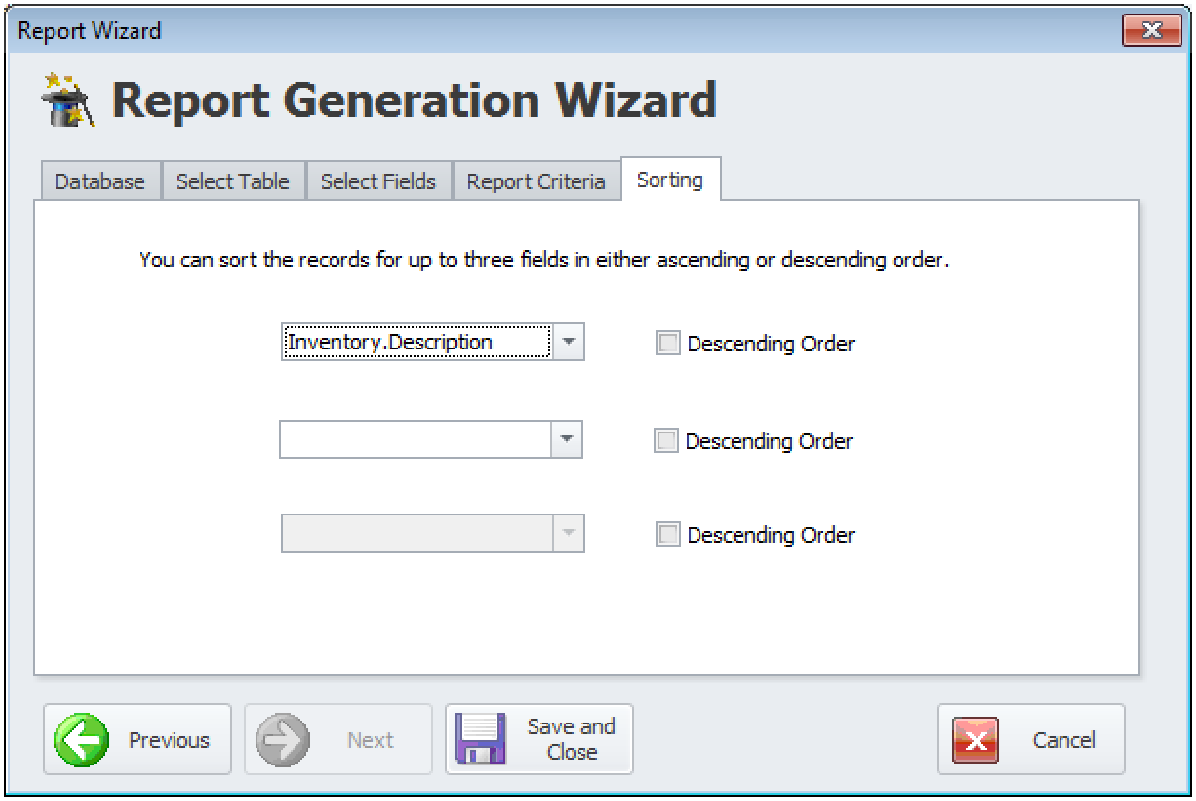


- All the database fields from the selected table or tables will be displayed on the **Available Fields or Columns** list box. You now need to select the fields to include in your report.
  - To select one field at a time, move to the **Available Fields or Columns** list and click on the field title of your choice. Next click on **>** button to move the field to the **Selected Fields or Columns** list. Double clicking on a field will also move it to the right list.
  - To move all the available fields from the **Available Fields or Columns** list to the **Selected Fields or Columns** list, click on the **>>** button.
- All database fields or column that will be included in your report will be displayed in the **Selected Fields or Columns** list box. To remove some of these selected fields:
  - To remove one field at a time, move to the **Selected Fields or Columns** list and click on the field title of your choice. Next click on **<** button to remove the field from the list. Double clicking on a field will also remove it.
  - To remove all the fields in the **Selected Fields or Columns** list, click on the **<<** button.

- Once you are done setting up the fields or columns to include in your report, click on the **Next** button or **Report Criteria** tab.



- Setup on this tab is optional. If no criteria is setup, the report will return all available records.
- To setup filtering criteria for your report:
    - Move to the top most **Database Fields** drop down and select a field to be used as a selection filter.
    - Move to the **Operator** drop down and select an operator to use with the selection criteria you are setting up.
    - Move to the **Matching Data** field and setup the filtering criteria. Sample data is included in the drop down list.
    - If you want, you can repeat the above 3 steps for the remaining 3 criteria setups.
- When done setting up your report criteria, , click on the **Next** button or **Sorting** tab



- Move to the top most drop down and select a field in which to sort your report by. If you want the report to be sorted in descending order, place a checkmark in the **Descending Order** checkbox. No checkmark, ascending is assumed.
- You can repeat the above step for up to three fields to sort your report by.
- Click on the **Save and Close** button and the basic report will be created.

Saving a Report Setup

You can save a report setup to file, thereby eliminating the need to recreate everything from scratch. Once re-opened, you will only need to change some of the report criteria to your new specifications.

To save a report setup:

- Create the report using the **Report Wizard** and as explained in the ***Creating a New Report*** section.
- Click on the **Save Report Setup** option on the **Reports** tab of the ribbon.
- From the invoked **Save Setup** browse to and select folder you wish to save the file in.
- Move to the **File name** text box and type in a name for the file.
- Click on the **Save** button.

Loading a Saved Report Setup

To open a saved report setup:

- Click on the **Load Report Setup** option on the **Reports** tab of the ribbon.

- From the invoked **Open Setup** dialog, browse to and open the folder you have the saved file stored in.
- Click on the file to select it, or type its name in the **File Name** text box.
- Click the **Open** button.
- The **Report Wizard** should now load with the basic report settings and criteria as previously saved.
- Modify your report settings as outlined in the ***Creating a New Report*** section.

Saving a Report to File

You can save a finished report to file for viewing later or for sharing with others.

To save a report:

- Click on the **Save As Report** option on the **Reports** tab of the ribbon.
- From the invoked **Save Report** dialog, browse to and select folder you wish to save the file in.
- Move to the **Save as type** drop down and select the file type you want to save the file as.
- Move to the **File name** text box and type in a name for the file.
- Click on the **Save** button.

Loading a Save Report

To open a saved report file:

- Click on the **Load Saved Report** option on the **Reports** tab of the ribbon.
- From the invoked **Open Report** dialog, browse to and open the folder you have the saved file stored in.
- Click on the file to select it, or type its name in the **File Name** text box.
- Click the **Open** button.

Printing a Report

To print a report:

- Click on the **Print Report** option on the **Reports** tab of the ribbon.

Print Preview a Report

To print preview a report:

- Click on the **Print Preview** option on the **Reports** tab of the ribbon.

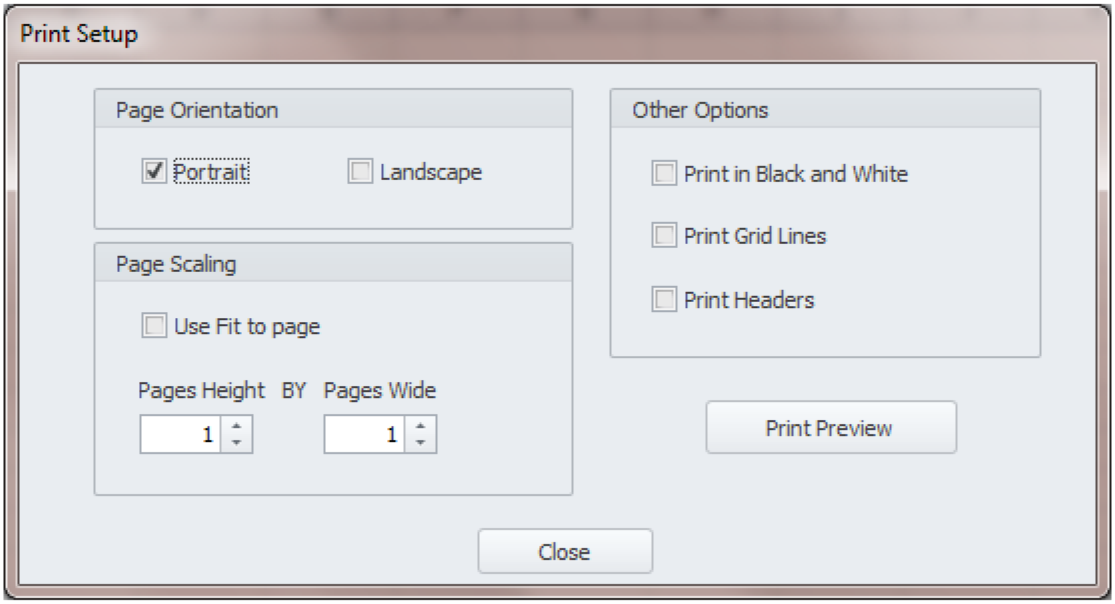
Report Page Setup

The **Report Page Setup** allows you to specify various options that affect the printed document, it also allows you to preview your document. To use the Page Setup:

- Click on the **Report Page Setup** option on the Reports tab of the ribbon.

Page Setup Dialog

The following are the elements of the **Print Setup** dialog:



Page Orientation

This section allows you to setup the print orientation of the printed document. To specify this value, just check the appropriate checkbox. Options include:

- Portrait
- Landscape

Page Scaling

This section allows you to scale your document to fit X pages tall by X pages wide. To set this option:

- Move to and check the **Use Fit to page** checkbox.
- Move to the **Page Height** spin box, and set how many page high you want to scale to.
- Repeat for the **Pages Wide** spin box.

Other Print Options

You have other print options that you can turn on or off by placing or removing a checkmark. These options include:

- **Print in Black and White**
- **Print Grid Lines**
- **Print Headers** (grid)

Print Preview

To preview you document from this dialog, click on the **Print Preview** button.

Close

Clicking the **Close** button will apply the options you have set.

Export Options

The available export options work in the same basic way as **Saving a Report File**. To export a report:

- Click on the **Export** option on the **Reports** tab of the ribbon.
- Now, from the expanded drop down, click on the export option of your choice. Choices include:
    - **Export to Excel**
    - **Export to HTML**
    - **Export to PDF**
- From the invoked **Save Report** dialog, browse to and select the folder you wish to save the file in.
- Move to the **File name** text box and type in a name for the file.
- Click on the **Save** button.

Document Display Zooming

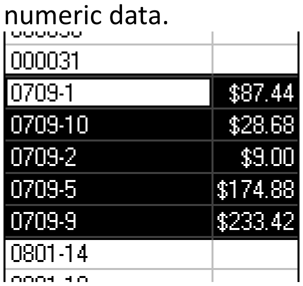
You can change the viewing size of your document by zooming in and out on it. To zooming in or out of the loaded document:

- Move to the **Report** tab in the ribbon.
- Click on either the **Zoom In** or **Zoom Out** options.

Creating a Chart from Report Data

You can create charts and graphs directly from report data, to use this feature:

- Create your report as outlined previously in this chapter. Try to select you report fields so that one column will hold the labels for your chart, and the next adjacent field(s) contain report numeric data.



- Select the rows and columns that you want to create a chart on from within the report grid.
- Move to the **Design** tab in the ribbon and locate the **Chart** group, click on the **Create** option.

Format Cells

Cell formatting can be done from within the **Format** tab of the ribbon, and many options are provided from the **Format Cells** Dialog screen. Both methods require the selection of cells to be formatted.

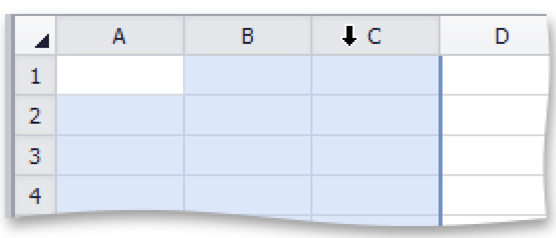
Selecting Cells in the Document

To select cells in the document, use the following mouse actions and keyboard shortcuts.

- To select a **single cell**, click the cell or press the arrow keys to move to the required cell.
- To select a **range of cells**, do one of the following.
    - Click the first cell in the range and drag it to the last cell.
    - Hold down the **SHIFT** key, and then press the arrow keys to extend the selection.
    - Click the first cell in the range, hold down the **SHIFT** key, and then click the last cell in the range.
- To select the **entire worksheet**, click the Select All button at the intersection of the column and row headings, or press **CTRL+A**.

- To select **nonadjacent cells**, hold down the **CTRL** key, and then select other cells.
- To select **an entire row** or **column**, click the row or column heading.

- To select **multiple columns** or **rows**, drag across the row or column headings.



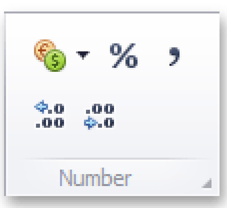
- To select several **nonadjacent rows** or **columns**, click the heading of the first row or column in the selection, hold down **CTRL**, and then click the headings of other rows or columns you wish to select.

The following table lists the default keyboard shortcuts used for selecting cells in the Designer.

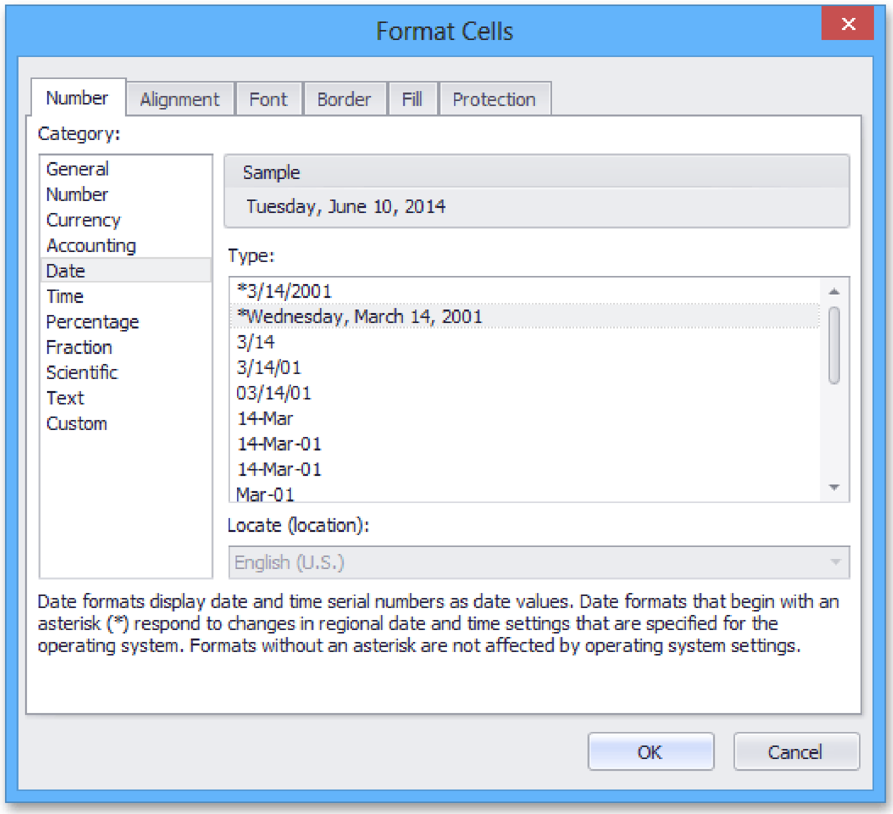
CTRL+RIGHT ARROW	Selects the last cell in a row.
CTRL+LEFT ARROW	Selects the first cell in a row.
CTRL+DOWN ARROW	Selects the last cell in a column.
CTRL+UP ARROW	Selects the first cell in a column.
CTRL+HOME	Selects the first cell on a worksheet.
CTRL+END	Selects the last cell that contains data or formatting on a worksheet.
CTRL+A	Selects the entire worksheet.
CTRL+SHIFT+END	Extends the selection to the last used cell on a worksheet.
CTRL+SHIFT+HOME	Extends the selection to the beginning of the document.

Number Formatting

The Designer allows you to format numbers in cells to make them easier to read and understand. For example, you can display numbers as monetary values or dates. The default format for cell content is the General style. Notice that number formatting does not change the value you enter, it only influences the way the number is displayed in a cell. Number formatting options are available in the **Number** group within the **Format** tab.



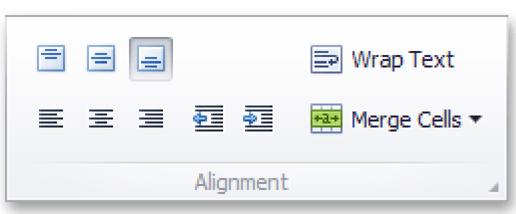
Depending on the format you wish to apply, click one of the buttons in the **Number** group, such as Accounting Number Format, Percent Style or Comma Style.



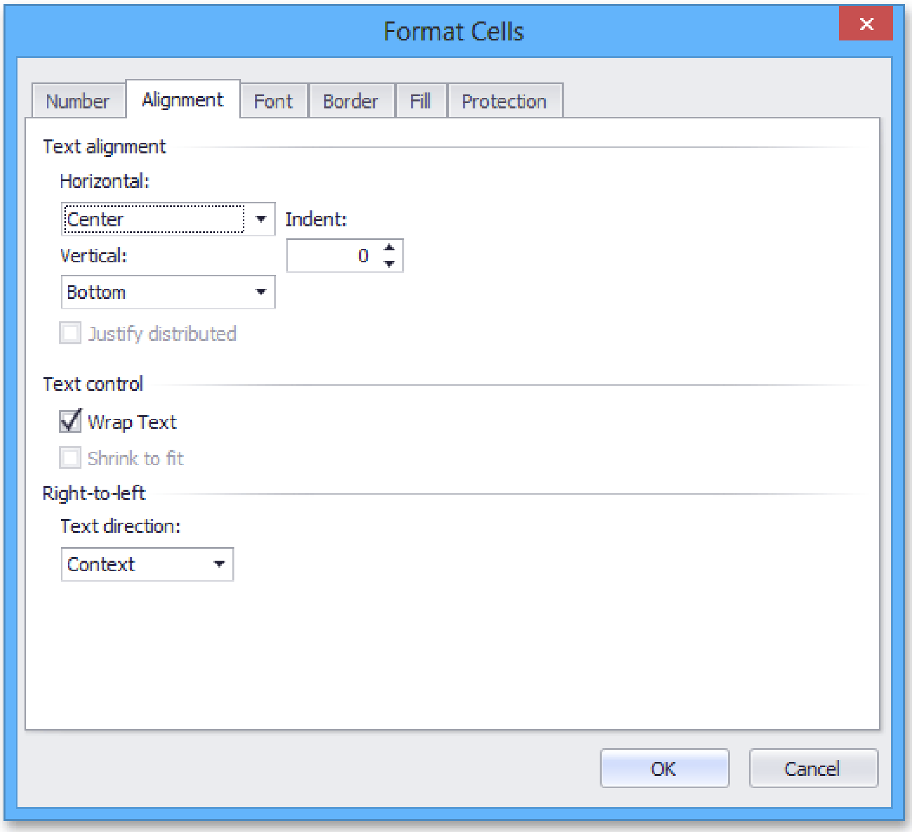
If you wish to set more formatting parameters, click the Number dialog box launcher to invoke the **Format Cells** dialog box. Select the desired number format, and then specify formatting options in the right pane of the dialog box.

Alignment Formatting

To position text within a cell so that it is centered, aligned to the left or aligned to the right, select the appropriate alignment options in the Alignment group within the **Format** tab.



To specify additional alignment options, click the arrow in the bottom right corner of the Alignment group. The dialog box launcher invokes the **Format Cells** dialog. In the Alignment tab, specify all required parameters and click OK to apply them to the selected cells.

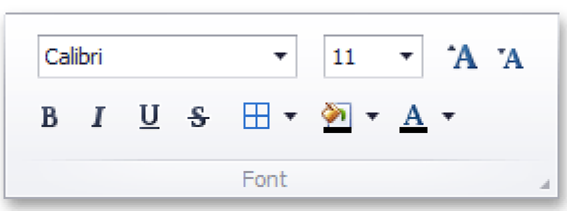


Font or Text Formatting

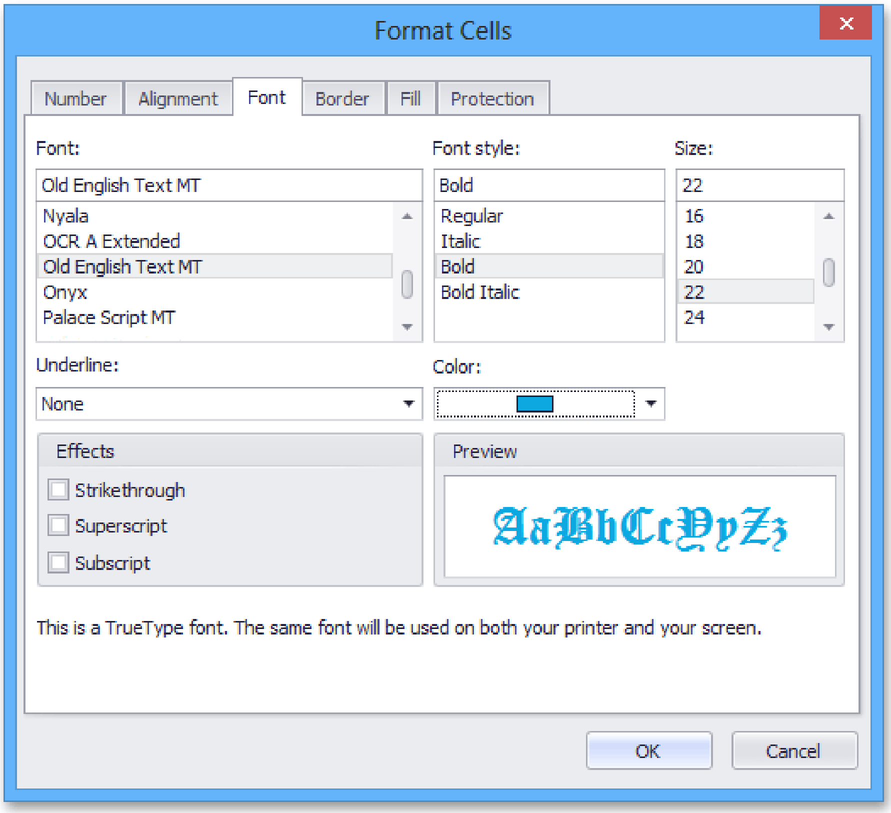
The Designer provides the capability to set font style, size, color and text alignment in a cell.

To format cell content, follow the steps below.

- Select a cell or a cell range that you wish to format.
- To change the font, use the Font group within the Home tab to specify the font family, size, style, color, etc.



You can also modify cell font using the Font tab of the **Format Cells** dialog box. To invoke this dialog, click the **arrow** in the bottom right corner of the **Font** group. In the Font tab, you can specify the required font characteristics and apply them to the selected cells.



Applying Specific Formatting

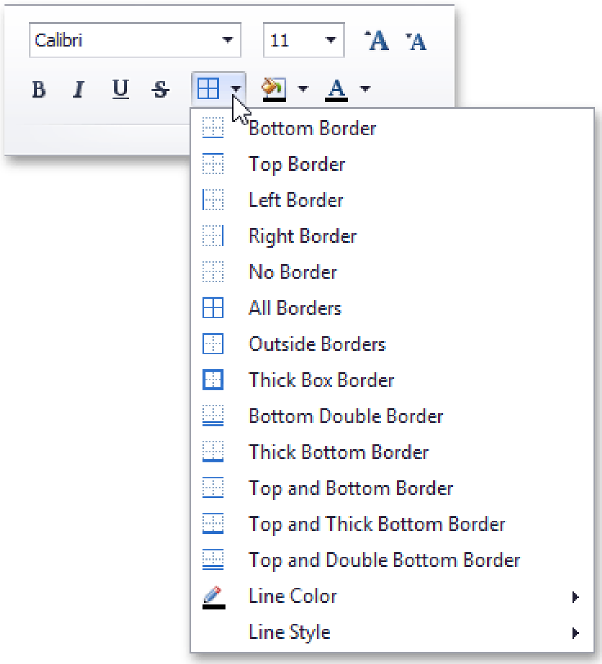
To specify your own formatting options:

- Select the cell or cells you want the formatting to effect.
- Click on the **Design** tab in the ribbon.

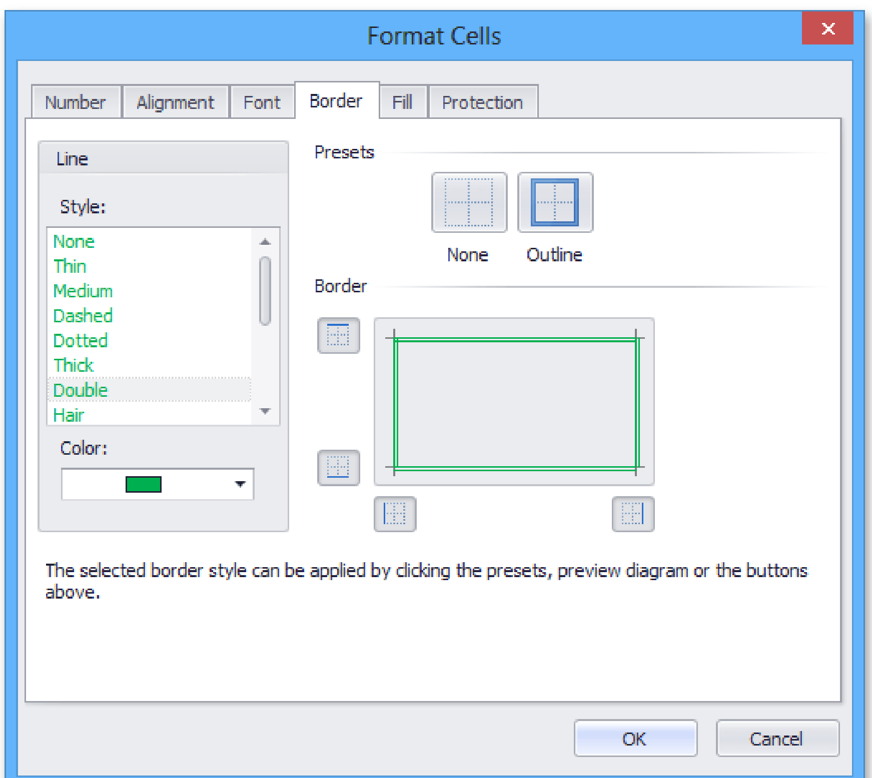
Borders

- To add borders to the selected cells, do one of the following.

- In the **Font** group within the **Format** tab, click the Borders button's drop-down menu and select the border type. This menu also allows you to select the line style and line color of borders.



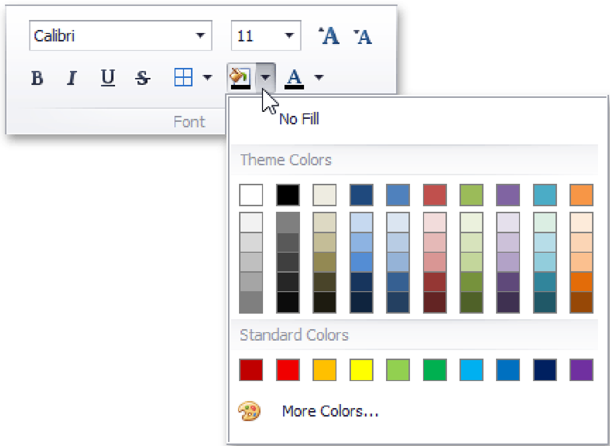
- Click the **Font dialog** box launcher to invoke the **Format Cells** dialog box. Click the **Border** tab and specify all required parameters. Then click **OK.**



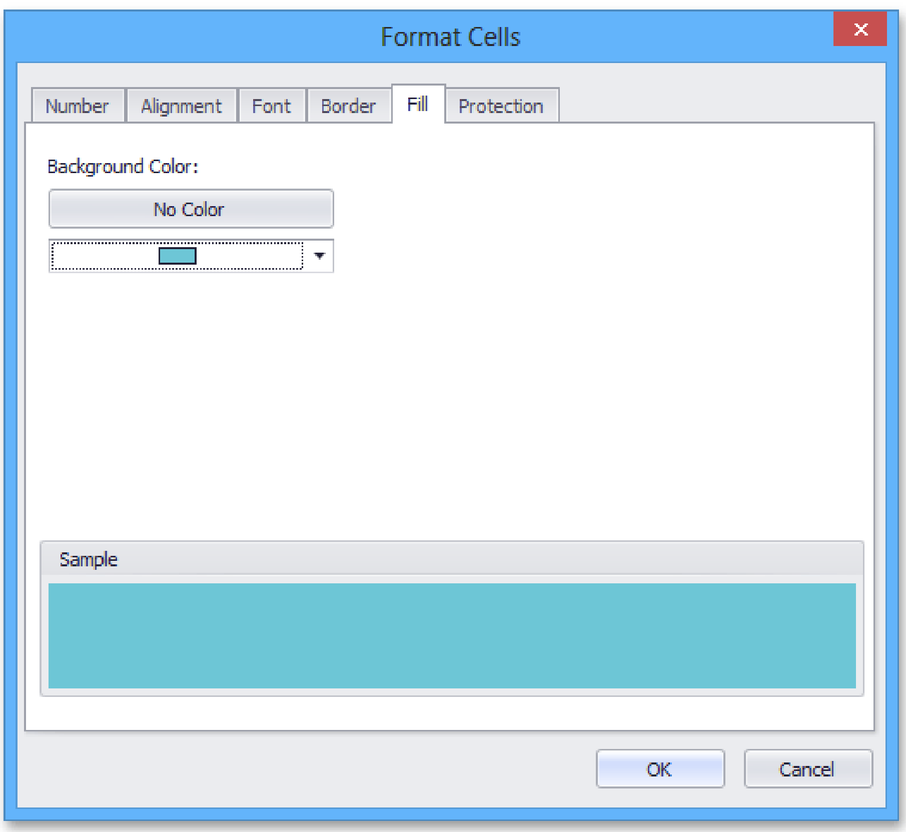
Background Color

To set the background color of the selected cells, do one of the following.

- In the Font group within the **Format** tab, click the **Fill Color** button's drop-down menu and select the desired color.



- Click the Font dialog box launcher, and in the invoked **Format Cells** dialog box, open the **Fill** tab. Specify all required parameters and click OK.



Clear Cell Formatting

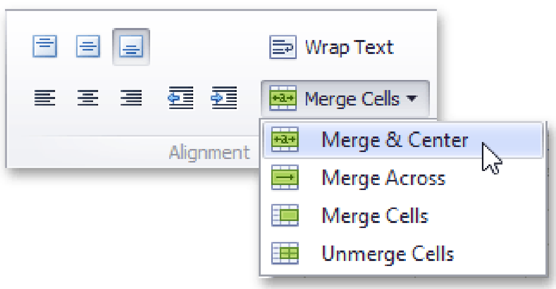
To remove all formatting from cells, do one of the following.

- In the **Editing** group within the **Format** tab, click the **Clear** button, and select **Clear Formats** from the drop-down menu.

Merging Cells

To merge cells, follow the instructions below.

- Select the cells that you wish to merge.
  Note: Make sure that the data you wish to display in the merged cell is contained in the upper-left cell of the selected range, because only the contents of this cell will remain in the merged cell. The data in the other cells will be deleted.
- In the **Alignment** group within the **Format** tab, click the **Merge Cells** button's drop-down arrow and select one of the following items.
  - **Merge & Center** - merge the selected cells and center the text in a merged cell.
  - **Merge Across** - merge each row of the selected cell range into larger cells.
  - **Merge Cells** - merge the selected cells into a single cell.



- If you change your mind and wish to split a merged cell, select this cell and click the **Unmerge Cells** item in the **Merge Cells** button's drop-down menu. The data of the merged cell appears in the upper-left cell of the range of split cells

Wrapping Text in a Cell

To wrap text in a cell, do the following:

- Select a cell or a range of cells containing the text you wish to wrap.
- In the **Alignment** group within the **Format** tab, click the **Wrap Text** button. The text is displayed on multiple lines within the cell.
- To unwrap the text, click the **Wrap Text** button again. The text is displayed in the same way as it was before the wrap option was applied.

Format as a Table

To format a range of cells as a table:

- Select the range of cells that you want to apply the formatting to.
- Move to the **Format** tab in the ribbon and select the **Format As Table** option.

- Select the desired style from the gallery.

Insert a New Blank Column into your Report

To insert a new blank column into your report document:

- Select a column in the document just after the insertion point of the new column.
- Move to the **Format** tab in the ribbon and click on the **Insert** option.
- From the drop down, select the **Insert Sheet Columns** option.

Insert a New Blank Row into your Report

To insert a new blank row into your report document:

- Select a row in the document just below the insertion point of the new row.
- Move to the **Format** tab in the ribbon and click on the **Insert** option.
- From the drop down, select the **Insert Sheet Row** option.

Delete Rows(s) and Column(s) in your Report

To remove columns or rows from your report:

- Select the column(s) or row(s) you wish to delete by clicking its heading.
- Do one of the following:
  - In the **Cells** group within the **Format** tab, click the **Delete** button and select the **Delete Sheet Rows** or **Delete Sheet Columns** item from the drop-down list.

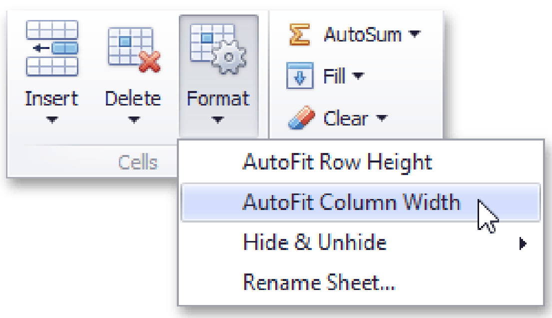
- Right-click a cell within the selected column(s) or row(s), and then click the **Delete** item in the invoked menu. The specified column(s) or row(s) will be deleted.

Setting the Column Width

In the Designer, the column width can vary from zero to 255 characters of the default font specified by the predefined Normal style. If you set the column width to zero, the column will be hidden.

To change the column width, do one of the following:

- Drag the right boundary of the column heading to resize the column width. To set the width of multiple columns, select these columns, and then drag the right boundary of any selected column.
- To change the column width to automatically fit the contents, select the column and do one of the following.
    - On the **Format** tab, in the **Cells** group, click the **Format** button and select the **AutoFit Column Width** item from the drop-down list.



    - Double-click the right boundary of the selected column.

Set the Row Height

In the Designer the row height should be between zero and 409 points. If you set the row height to zero, the row is hidden.

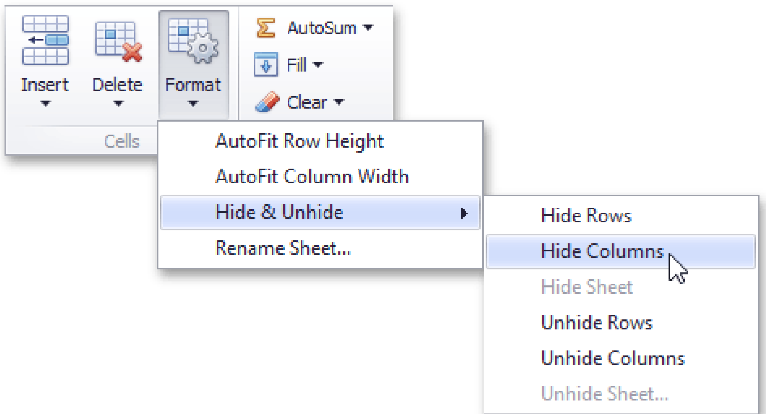
To change the row height, do one of the following:

- Drag the lower boundary of the row heading until the row is the height you want. To set the height of multiple rows, select them, and then drag the lower boundary of any selected row.
- To change the row height to automatically fit the contents, select the row and do one of the following:
    - On the **Format** tab, in the **Cells** group, click the **Format** button and select **the AutoFit Row Height** item from the drop-down list.
    - Double-click the lower boundary of the selected rows.

Hide and Unhide Columns

Select the column to be hidden.

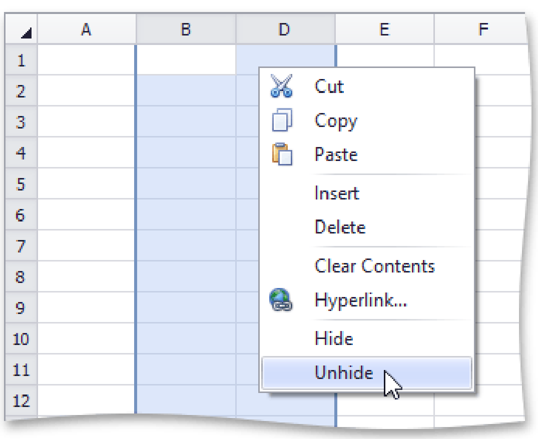
- Do one of the following:
    - Set the column width to zero. To do this, drag the boundary of the column heading until the column is hidden.
    - On the **Format** tab, in the Cells group, click the **Format** button and select **Hide & Unhide** | **Hide** Columns;



    - Right-click the selected column and select the **Hide** item from the context menu.

To show the column you hid, select the columns adjoining to either side of the hidden column, and then do one of the following:

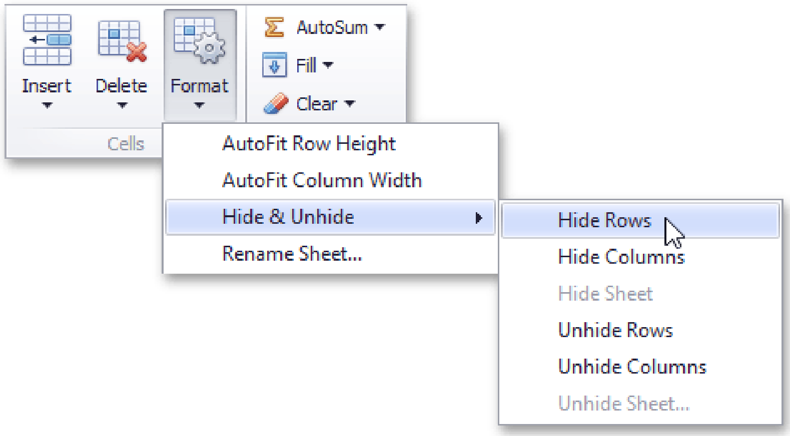
- On the **Format** tab, in the **Cells** group, click the **Format** button, and then select **Hide & Unhide** | **Unhide Columns**;
- Right-click the selected columns and select the **Unhide** item from the context menu.



Hide and Unhide Rows

Select the row to be hidden.

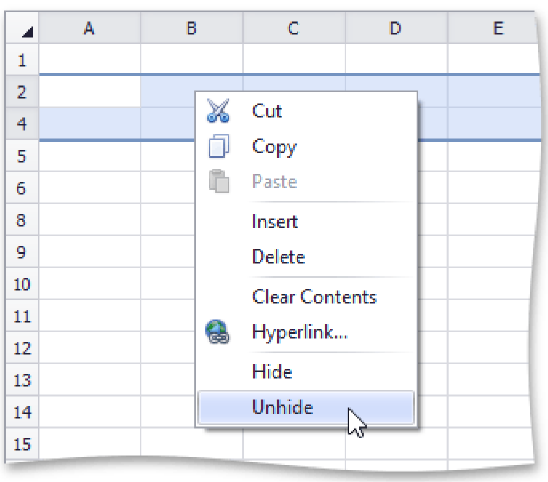
- Do one of the following:
    - Set the row height to zero. To do this, drag the boundary of the row heading until the row is not displayed;
    - On the **Format** tab, in the **Cells** group, click the **Format** button and select **Hide & Unhide** | **Hide Rows**;



    - Right-click the selected row and select the **Hide** item from the context menu.

To display the row you hid, select the rows that are above and below the hidden row, and then do one of the following:

- On the **Format** tab, in the **Cells** group, click the **Format** button, and then select **Hide & Unhide** | **Unhide Rows**;
- Right-click the selected rows and select the **Unhide** item from the context menu;



Display all hidden columns and rows

Click the **Select all** button at the intersection of the column and row headings, or press CTRL+A.

- Do one of the following:

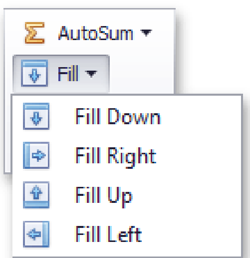
- On the **Format** tab, in the **Cells** group, click the **Format** button, and then select **Hide & Unhide** | **Unhide Rows** or **Unhide Columns**;
- Right-click the selection and select the **Unhide** item from the context menu.

Fill Data Automatically

The Designer provides the capability to fill adjacent cells with data automatically.

To fill a selected cell or a range of cells with the data contained in adjacent cells, do the following.

- Select the cell (or range of cells) adjacent to the cell (or range of cells) of the data you wish to repeat.
- In the **Editing** group within the **Format** tab, click the **Fill** button and select one of the following items from the drop-down list.



    - **Fill Down** (or press CTRL+D) - pastes the contents of the cell that is above the selected cell, or pastes the contents of the topmost cell in the selected range to the cells below.
    - **Fill Up** - pastes the contents of the cell below the selected cell, or pastes the contents of the lowermost cell in the selected range to the cells above.
    - **Fill Right** (or press CTRL+R) - pastes the contents of the cell or cell range to the left of the selected cell(s).
    - **Fill Left** - pastes the contents of the cell or cell range to the right of the selected cell(s).

Auto Sum Cells

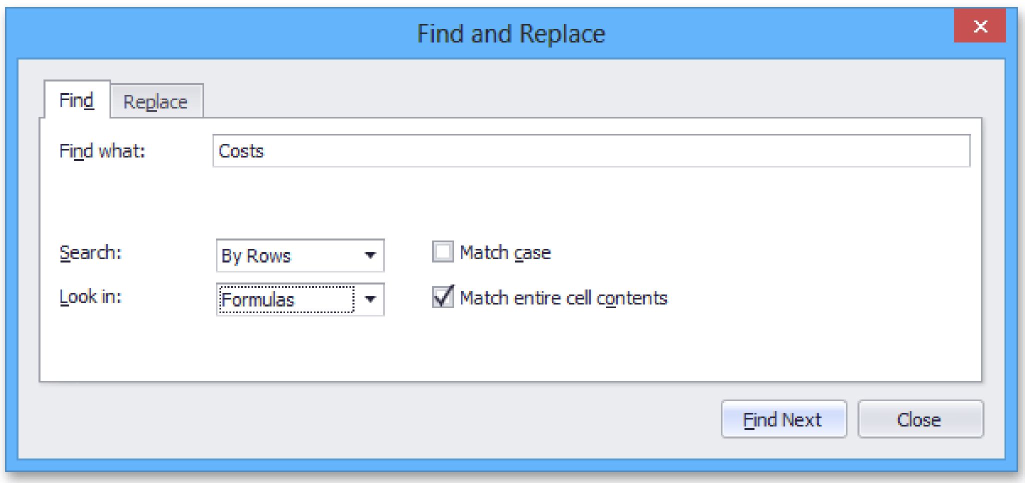
If you have numeric information within your report, and you would like to add this information together and provide a total, please follow these steps.

- Select all the cells in the report that you want to add together, either by row or column.
- Continue the cells selection stopping at an empty cell just beyond the ones you want added together.
- Move to the **Format** tab in the ribbon and click on the **AutoSum** option.
- From the drop down, select the **Auto Sum Cells** option.
- The total of the selected cells with be inserted into the last cell of the selection range.

Find and Replace

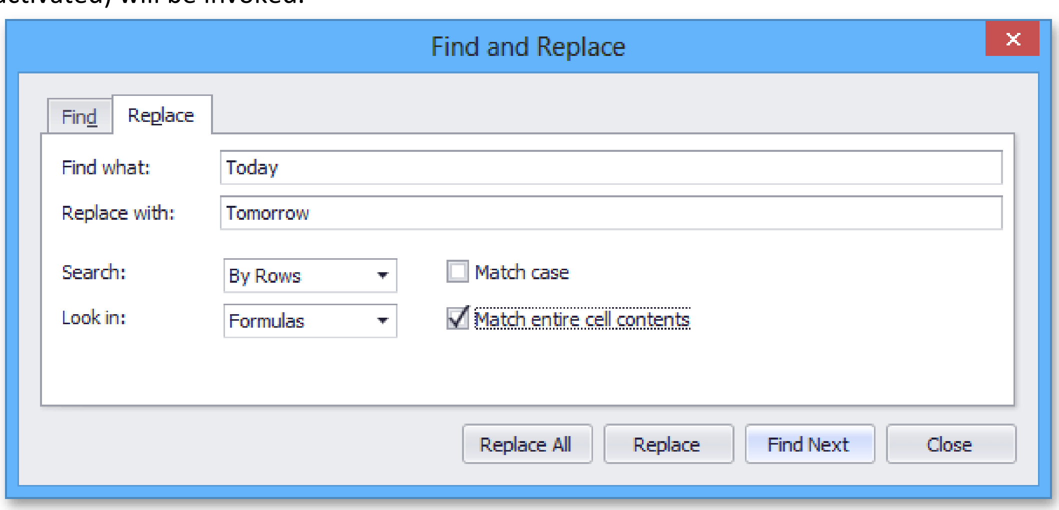
The Designer allows you to search for specific data in the current document.

- To perform a search, on the **Format** tab, in the **Editing** group, click the **Find & Select** button. The button's drop-down menu will be displayed.
- Next, do one of the following.
    - Click **Find** in the **Find & Select** drop-down menu (or press CTRL+F) to perform a search in the active document. The **Find and Replace** dialog (with the **Find** tab activated) will be invoked.



    - In the **Find what** field, enter the text or number you wish to find, and click the **Find Next** button to start the search. To define the direction of the search, in the **Search** field, select the **By Rows** or **By Columns** drop-down item. In the Look in field, select Values (to search cell values only). To perform a case-sensitive search, select the **Match Case** check box. To restrict the search to the entire cell content, select the **Match entire cell contents** check box.

- Click **Replace i**n the **Find & Select** drop-down menu (or press CTRL+H) to search for a text string and optionally replace it with another value. The **Find and Replace** dialog (with the **Replace** tab activated) will be invoked.

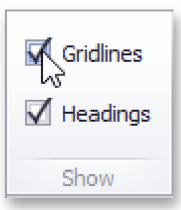


- To replace a value, enter the search term in the **Find what** field and the replacement text for this search term in the **Replace with** field, and then click the **Find Next** button to find the first occurrence of the search term. Next, click the **Replace** button to replace only the value of the selected matching cell, or **Replace All** to replace all occurrences of the search term. Note that the **Replace** tab provides the same search options as the **Find** tab.

Hide Gridlines and Headings

The **Designer** allows you to hide gridlines and headings that are displayed on a document by default.

In the **Show** group within the **Page Layout** tab, uncheck the **Gridlines** check box to hide gridlines on a worksheet.



To hide the column and row headers, uncheck the **Headings** check box.

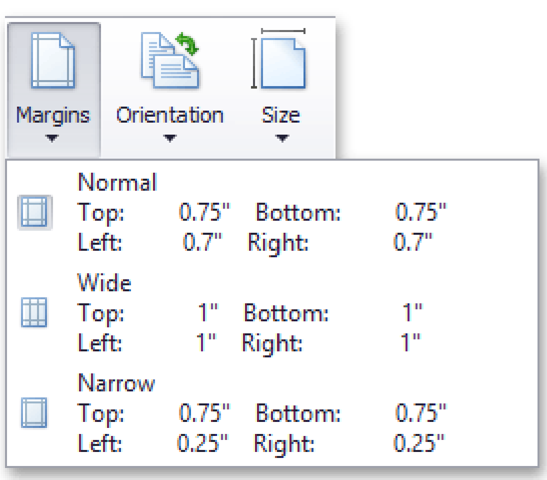
To display gridlines and headers, select the **Gridlines** and **Headings** check boxes, respectively.

Adjust Page Settings

Before you print a report, you can change page layout settings such as page margins, page orientation and paper size.

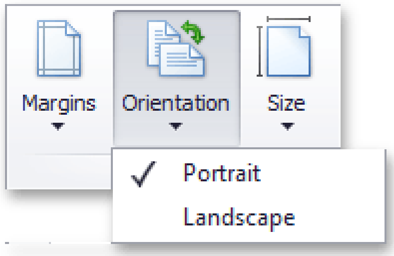
Set Page Margins

- In the **Page Setup** group within the **Page Layout** tab, click the **Margins** button and select the margin sizes to be set for the current worksheet.



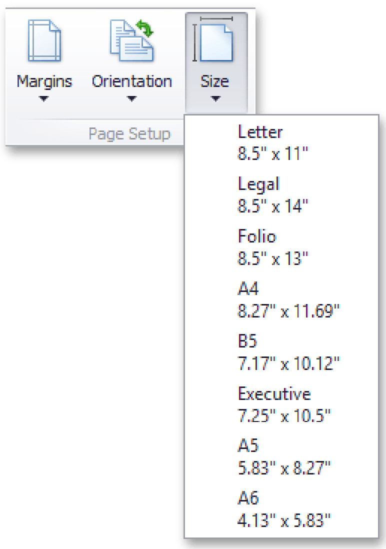
Set Page Orientation

- In the Page Setup group within the Page Layout tab, click the Orientation button and select Portrait or Landscape from the invoked drop-down list.



Change Paper Size

- In the Page Setup group within the Page Layout tab, click the Size button and select one of the predefined paper sizes from the invoked drop-down list.



Print Gridlines and Headings

The **Designer** allows you to hide gridlines and headings that are printed on a document by default.

In the **Print** group within the **Page Layout** tab, uncheck the **Gridlines** check box to hide gridlines on a worksheet.

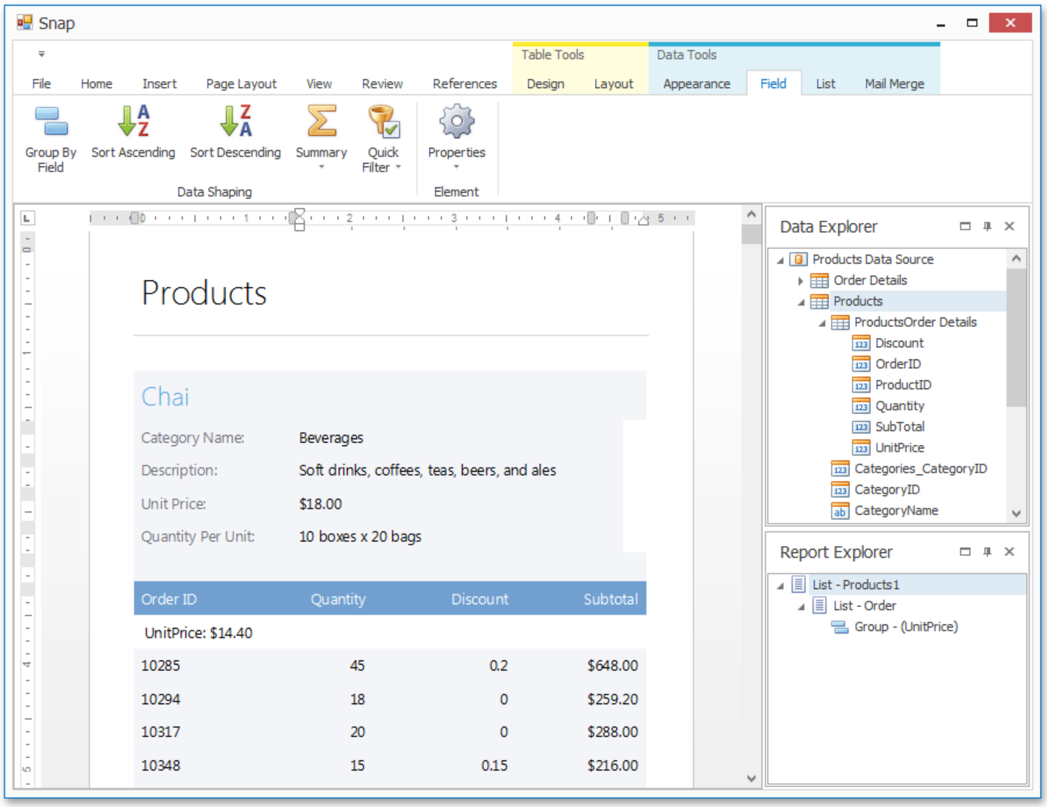
To hide the column and row headers, uncheck the **Headings** check box.

To display gridlines and headers, select the **Gridlines** and **Headings** check boxes, respectively.

Snap Reporting Engine

This section provides information on the basic principles of creating reports with Snap.

Snap is a WYSIWYG reporting engine that provides a user interface that allows for a quick creation of standard reports with the capabilities of data shaping (grouping, sorting and filtering), hierarchical data representation (master-detail reports), mail merge and much more.



Graphical User Interface

The topics in this section describe various aspects of the Snap graphical user interface (GUI).

- Snap Application Elements
- Main Toolbar

Snap Application Elements

The topics in this section describe the main elements that make up the user interface of a Snap application.

This section consists of the following topics.

- Snap User Interface Overview
- Main Toolbar
- Design Surface
- Data Explorer
- Report Explorer
- Print Preview

Snap User Interface Overview

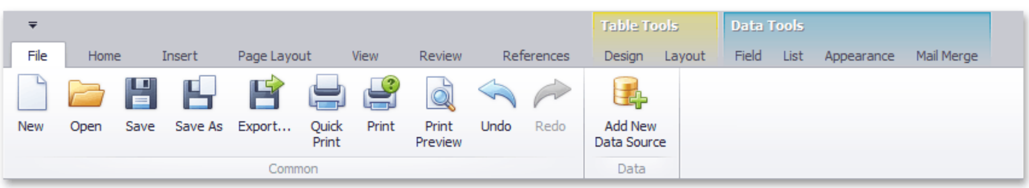
This document lists the essential elements of the Snap user interface, and provides links to specific topics that describe these elements in more detail.

The main elements of the Snap user interface are as follows.

- **Main Toolbar**

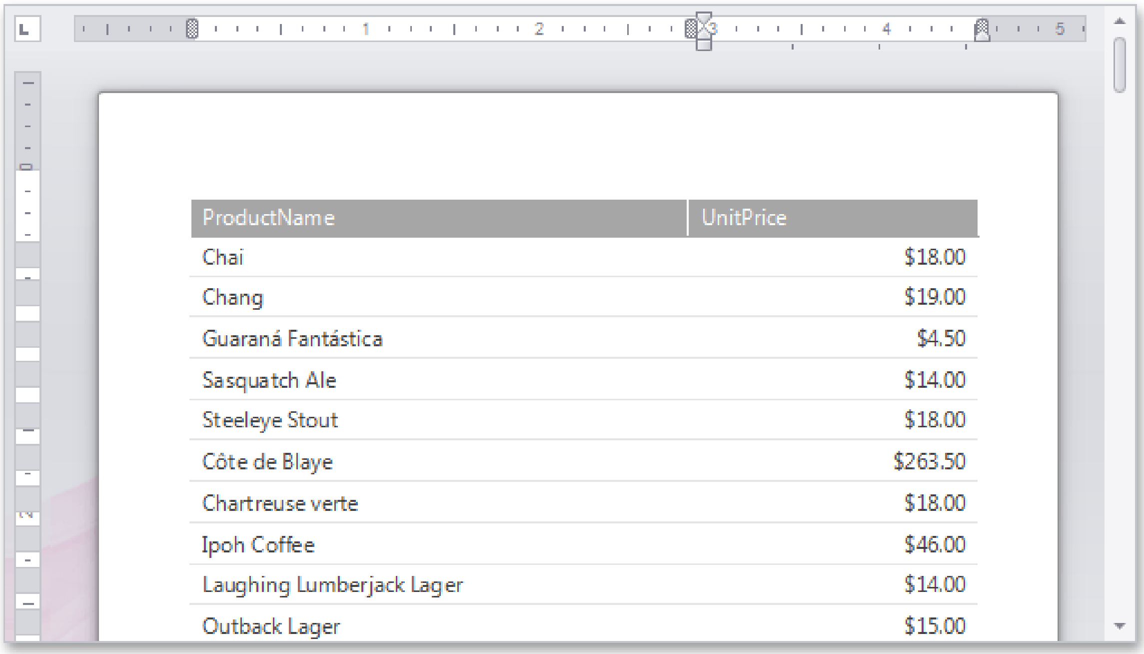
  The **Main Toolbar** in a Snap application provides quick access to the available document editing tools. Tools are provided via the Ribbon Control interface.

  Tools are organized in various sections, contained in different tabs.



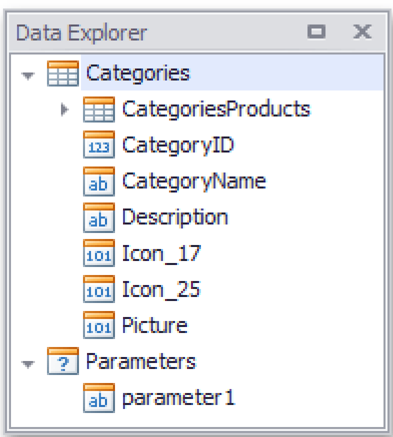
- **Design Surface**

  The body of a report in the designer. In this region, you can design your report layout and immediately view the result.



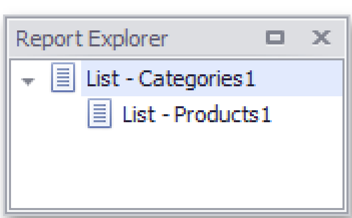
- ### Data Explorer

Reflects the structure of available data, allowing you to manage a report's data sources. You can add the data shown in this pane to your report via drag-and-drop.



- ### Report Explorer

Reflects the hierarchy of the elements of a Snap document.



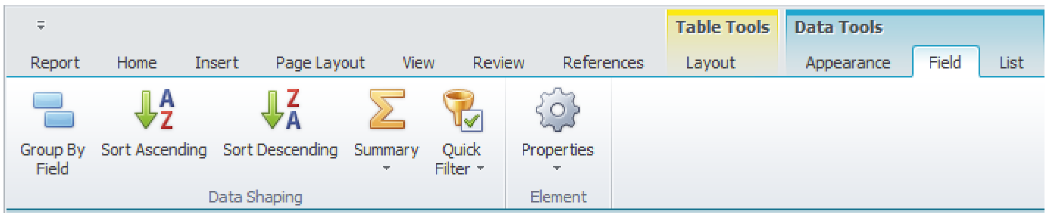
Main Toolbar

The topics in this section describe all ribbon tabs available in the toolbar of a Snap application.

After executing a command in a Snap application, the corresponding **field codes** are automatically added to the **document markup**.

Data Tools: Field

This toolbar is context sensitive, and becomes active after selecting a **Snap field** in the document.



The commands available in the **Field** toolbar of the **Data Tools** category are divided into the following sections.

Data Shaping Group

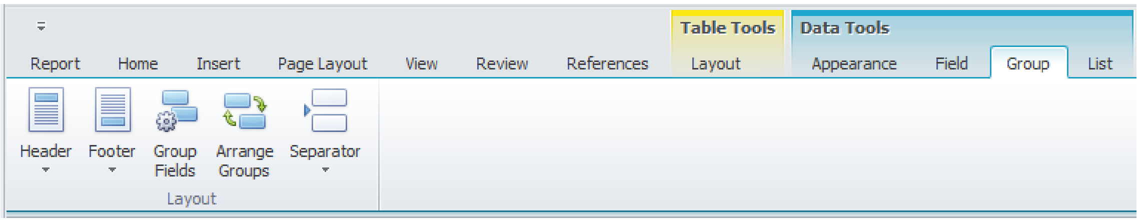
- **Group By Field** - Groups a **Snap list** by the selected field.
  All groupings added to a Snap report are displayed as nodes in the Report Explorer.
- **Sort Ascending** - Sorts a Snap list by the selected column in ascending order. To manage the sort levels in a mail merge document, use the **Sort** command of the Data Tools: Mail Merge toolbar.
- **Sort Descending** -Sorts a Snap list by the selected column in descending order. To manage the sort levels in a mail merge document, use the **Sort** command of the Data Tools: Mail Merge toolbar.
- **Summary** - Calculates a summary for a selected field. Summary results are shown in the list footer. The following summary functions are available.
  - **Count**
  - **Sum**
  - **Average**
  - **Max.**
  - **Min.**
- **Quick Filter** - Allows you to select which values of a selected field to show. This command is not applicable to nested lists of a master-detail report. To apply complex filtering criteria to a Snap list, use the **Filter** command of the Data Tools: List or Data Tools: Mail Merge toolbar.

Element Group

- **Properties -** Shows the list of properties for a selected field. The set of available properties depends on the **element type**.

Data Tools: Group

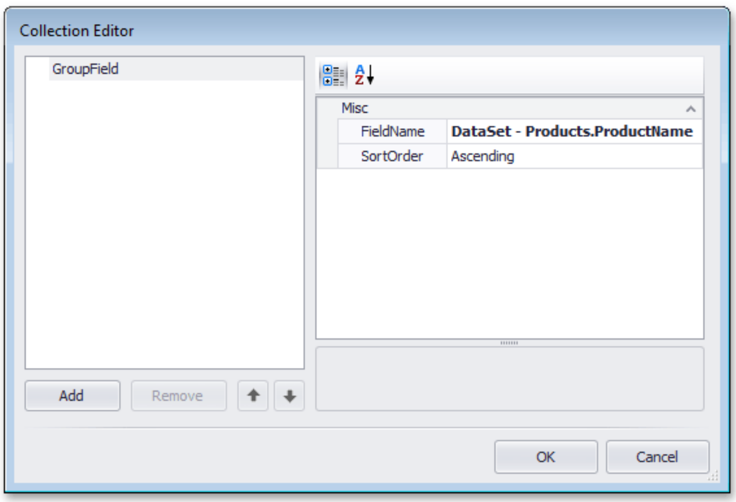
This toolbar is context sensitive, and becomes active after placing the text cursor in a group header or footer.



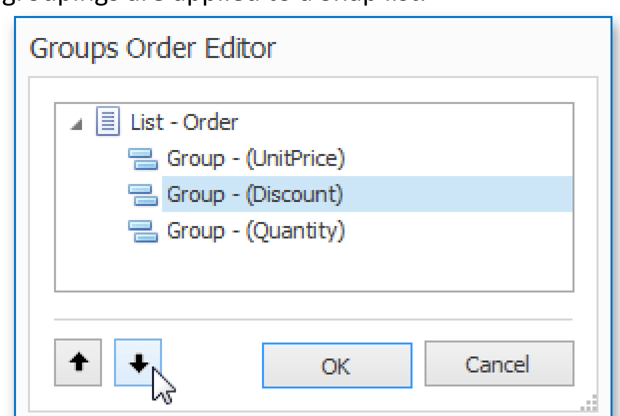
To create a new group, use the **Group By Field** command of the Data Tools: Field toolbar.

Layout Group

- **Header** -Adds or removes a group header. Removing both the group header and group footer removes grouping from the Snap List.
- **Footer** - Adds or removes the group footer. Removing both the group header and group footer removes grouping from the Snap List.
- **Group Fields** - Invokes a dialog allowing you to add or remove grouping criteria for the selected group.



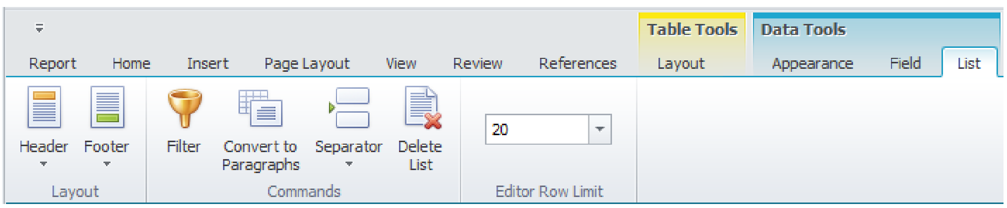
- **Arrange Groups** - Invokes the Groups Order Editor, which allows you to set the order in which groupings are applied to a Snap list.



- **Separator** - Inserts the selected separator between groups in a Snap list. The following separators are available.
  - **Page Break**
  - **Section (Next Page)**
  - **Section (Even Page)**
  - **Section (Odd Page)**
  - **Empty Paragraph**
  - **Empty Row**
  - **None**

Data Tools: List

This toolbar is context sensitive, and becomes active after selecting a **Snap list** in the document.



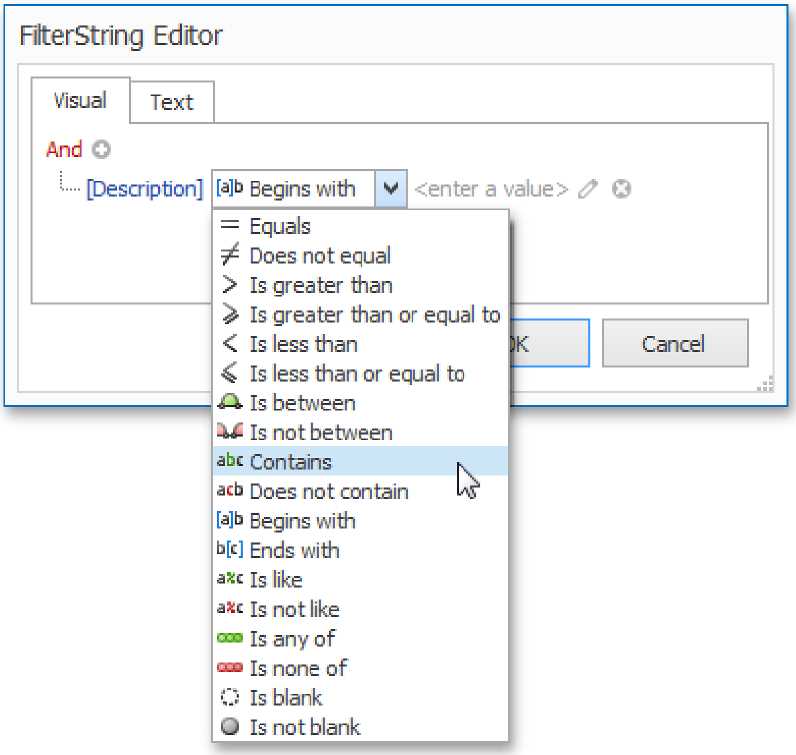
The commands available in the **List** toolbar of the **Data Tools** category are divided into the following sections.

Layout Group

- **Header** - Adds or removes the header of a selected Snap list.
- **Footer** - Adds or removes the footer of a selected Snap list.

Commands Group

- **Filter** - Invokes the **FilterString Editor**, which allows you to define complex filtering criteria for a selected Snap list.



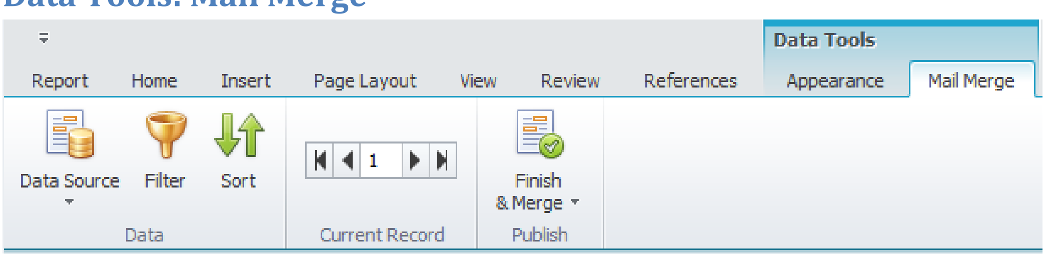
To select which data records to display for a specific field, use the **Quick Filter** command from the Data Tools: Field toolbar.

- **Convert to Paragraphs** - Removes the table layout of a Snap list. The content of the removed table columns is presented as separate paragraphs. There is no reverse action to convert paragraphs back to a tabular representation.
- **Delete List** - Removes the selected list from a document.

Edit Row Limit Group

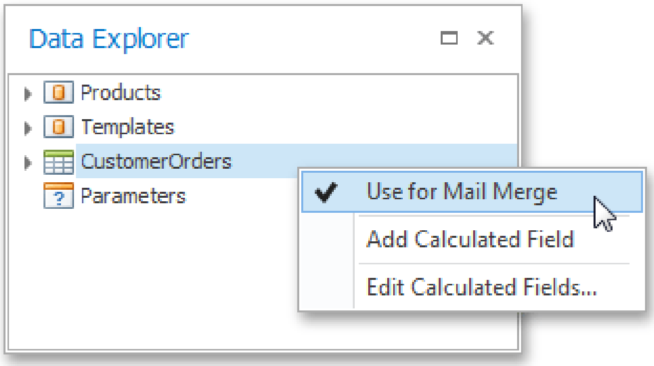
- **Edit Row Limit** - Allows you to define the maximum number of rows to be shown in a selected Snap list.
  The **Editor Row Limit** setting does not affect the number of records shown in the Print Preview, which shows the final presentation of the document with all Snap fields replaced with actual data.

Data Tools: Mail Merge



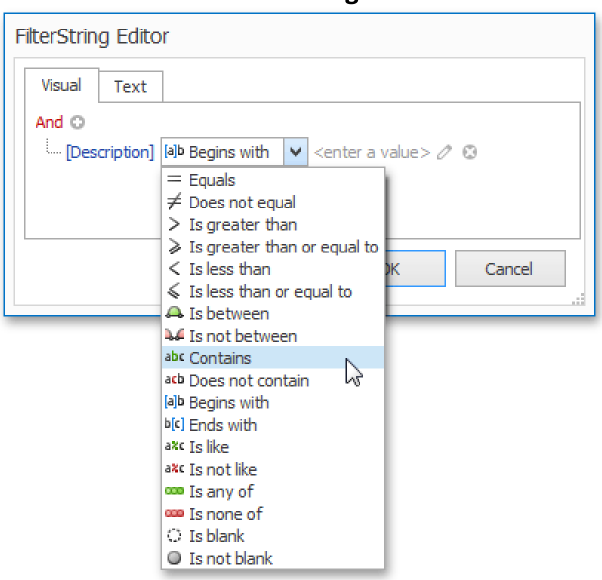
Data Group

- **Data Source** - Enables **mail merge** for a connected data source. After enabling this mode, the data source icon is displayed in green in the Data Explorer.

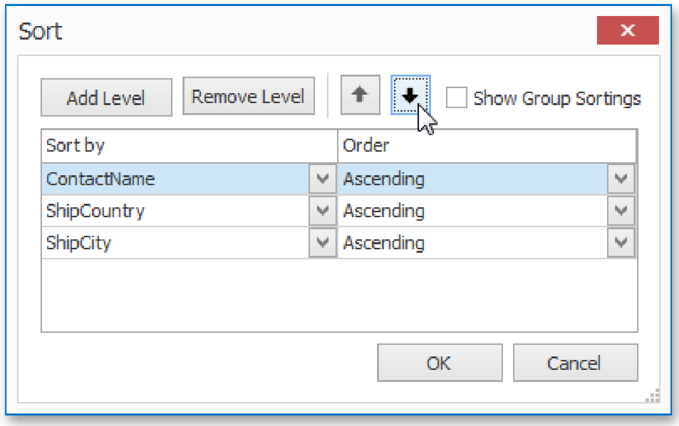


There is no functionality for disabling mail merge once it has been implemented.

- **Filter** - Invokes the **FilterString Editor** to filter data in a mail merge document.



- **Sort** - Invokes the **Sort** dialog to sort data in a mail merge document



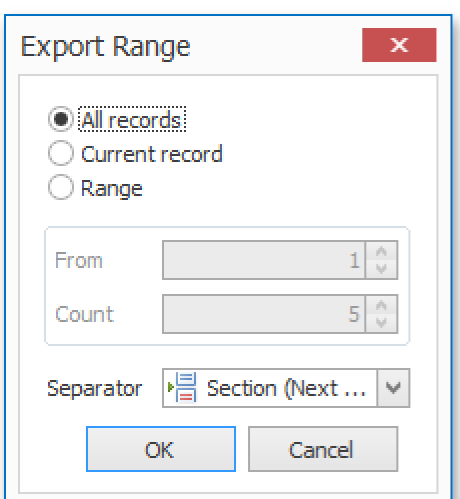
Current Record Group

- **Current Record (Data Control)** - Allows you to navigate through records in a mail merge document. You can navigate to the **Next Page**, the **Previous Page**, the **First Page** or the **Last Page**.

Publish Group

- **Finish and Merge** - Finalizes a mail merge document by supplying actual values to data elements added to a document template. This command invokes a drop-down menu to select the publishing format of a document. The following options are available.
  - **Export** - exports the created document to a selected third-party format
  - **Print** - invokes the print dialog to adjust the page options of the document before sending it to a printer
  - **Print Preview** - displays the created document in a print preview window that provides options to navigate, print and/or export the document.

After selecting the document's output format, the **Export Range** dialog is invoked to specify the range of data records that the document should include.



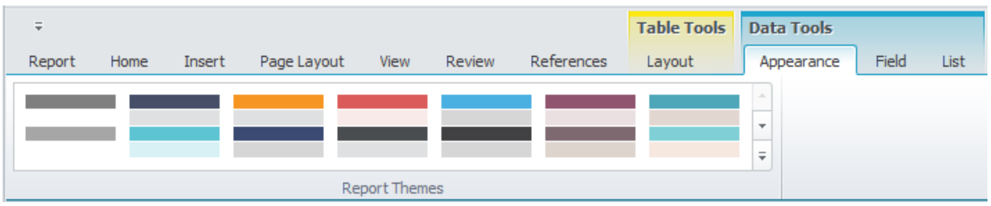
In this dialog, you can choose from the following separators to isolate different data records.

- **None**

- **Page Break**
- **Section (Next Page)**
- **Section (Even Page)**
- **Section (Odd Page)**
- **Paragraph**

Data Tools: Appearance

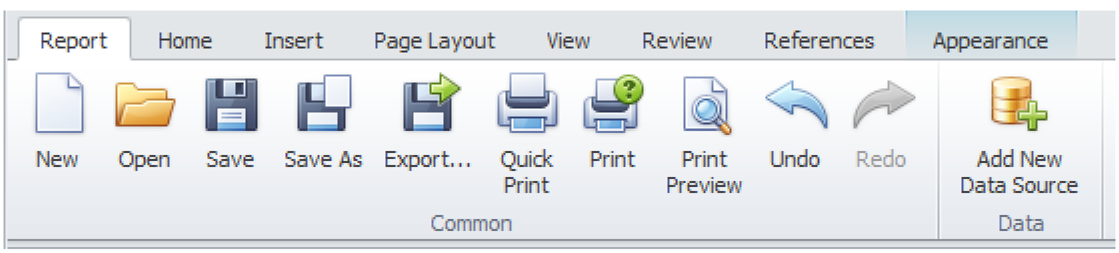
This toolbar is context sensitive, and becomes active after placing the text cursor in a document table.



Additional Reporting Commands

General Tools: Report

The **File** toolbar contains the basic file management and printing commands.



Common Group

- **New** - Creates a new Snap document.
- **Open** - Opens an existing document. A Snap document template can be created based on the following third-party file formats.
  - **DOC** (Microsoft® Word® 97 – 2003 document)
  - **DOCX** (Office® Open XML document)
  - **EPUB** (Electronic Publication)
  - **HTML** (HyperText Markup Language)
  - **MHTML** / **MHT** (Web archive, single file)
  - **PDF** (Portable Document Format)
  - **RTF** (Rich Text Format)
  - **TXT** (Plain text)
  - **ODT** (OpenDocument text document)
  - **XML** (Microsoft® Word® XML document)
  - **Image** (BMP, EMF, WMF, GIF, JPEG, PNG or TIFF format)

The SNX format stores a Snap report without the **document field** data.
Saving a document in any other format retrieves the required data values and excludes any information about the data connections defined by Snap.
To apply the uniform layout and style settings of a specific document to multiple reports, open this document as a template.
In this mode, the **Save** command is disabled to prevent open templates from being overwritten.

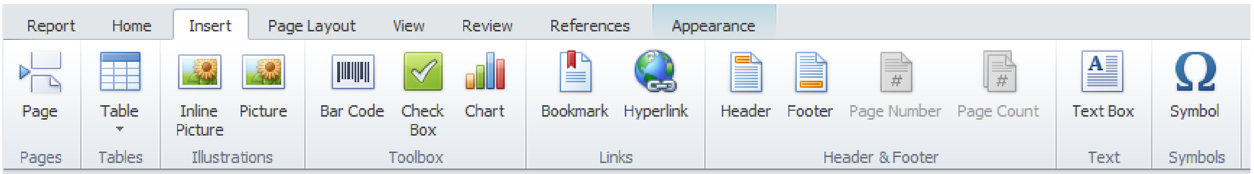
- **Save** - Saves a document template to an SNX file. When saving a document for the first time, the **Save As** dialog will appear.
- **Save As** - Saves a document template to a new SNX file. This command invokes the **Save As** dialog, allowing you to specify a name and location for the new file.
- **Export** - Exports a document into one of the supported third-party formats. A Snap report can be exported to one of the following third-party formats.
  DOC (Microsoft® Word® 97 – 2003 document)
    - **DOCX** (Office® Open XML document)
    - **EPUB** (Electronic Publication)
    - **HTML** (HyperText Markup Language)
    - **MHTML** / **MHT** (Web archive, single file)
    - **PDF** (Portable Document Format)
    - **RTF** (Rich Text Format)
    - **TXT** (Plain text)
    - **ODT** (OpenDocument text document)
    - **XML** (Microsoft® Word® XML document)
- **Quick Print** - Sends a document to the default printer with default printing options.
- **Print** - Invokes the **Print** dialog, allowing you to select a printer and specify the printing options.
- **Print Preview** - Retrieves all data required to populate the report **fields** to assemble and preview a document before publishing, ignoring the current Editor Row Limit setting.
  Calling this command for a mail-merge document renders only one page of the document.
  To render a mail-merge document for a specified range of data records, use the **Finish & Merge** option in the Data Tools: Mail Merge tab.
- **Undo** - Cancels the last change made to the document.
- **Redo** - Reverses the results of the last undo.

Data Group

- **Add New Data Source** - Invokes the **Create Data Source wizard**, allowing you to connect the document to a new data source and specify its data connection options (e.g., data provider, login information and connection name).

  A data table selected with the wizard is included in the data source. To add more tables and specify their data relations, use the Query Designer.

General Tools: Insert



Pages Group

- **Page Break** - Inserts a page break at the carriage position. A page break cannot occur within tables, **lists**, or document headers and footers.

Table Group

- **Table** - Inserts a table with a specified number of rows and columns at the carriage position. To customize the table layout, use the commands available in the Table Tools: Design and Table Tools: Layout tabs.

Illustrations Group

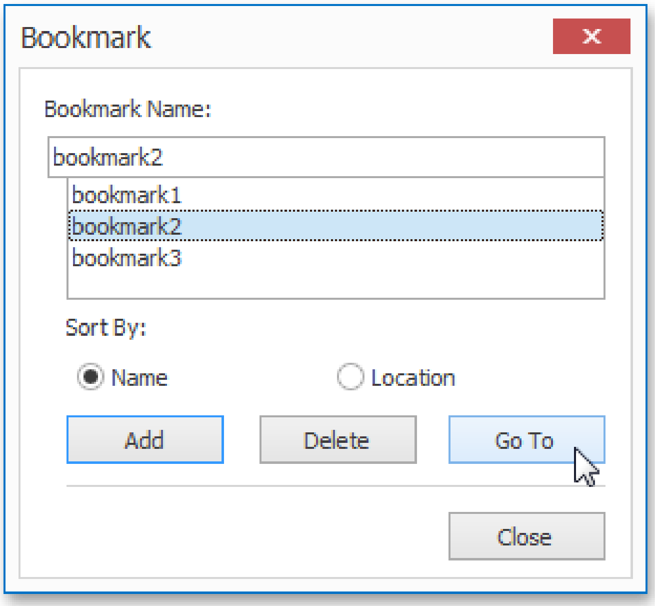
- **Inline Picture** - Inserts an inline picture at the carriage position. In a document, the inline picture behaves like an ordinary text symbol.
- **Picture** - Inserts a picture into a document. You can adjust the picture's outline, wrap text, position, and order using commands from the Picture Tools: Format tab.

Toolbox Group

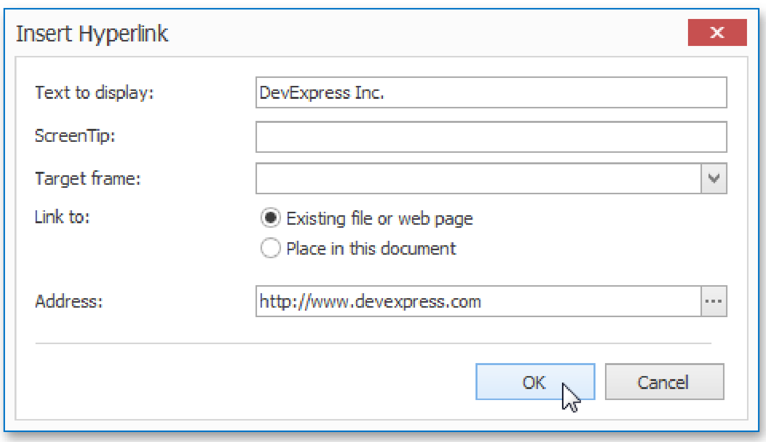
- **Barcode -** Inserts a **bar code** at the carriage position.
  After adding a bar code, specify its symbology, data binding and other options using the **Properties** command in the Data Tools: Field tab.
- **Checkbox** - Inserts a **check box** at the carriage position (e.g., to display Boolean values from a data source).
  To customize the check box state or bind it to external data, use the **Properties** command in the Data Tools: Field tab.
- **Chart** - Inserts a **chart** at the carriage position.

Links Group

- **Bookmark** - Invokes the **Bookmark** dialog to add a new bookmark at the carriage position, or navigate to an existing bookmark.



- **Hyperlink** - Invokes the **Insert Hyperlink** dialog to create a hyperlink and specify its text, screen tip and destination.
  A hyperlink's destination may be a web page, file, or specific position within a document.



- **Header** - Allows editing the page header. In a published document, the content added to the header will appear at the top of each page.
  To quickly switch to this mode, double-click the page header area.
  To quit page header editing, press **ESC**, double click the document area, or click **Close Header and Footer** on the Header & Footer tab.
  To make the first page header display unique content, or make odd- and even-numbered pages carry different headers, use the options available on the Header and Footer Tools: Design tab.
- **Footer** - Activates the page footer edit mode. In a published document, the content added to the footer will appear at the bottom of each page.
  To quickly switch to this mode, double-click the page footer area.
  To quit page footer editing, press **ESC**, double click the document area, or click **Close Header and Footer** on the Header & Footer tab.

To make the first page footer display unique content, or make odd- and even-numbered pages carry different footers, use the options available on the Header and Footer Tools: Design tab.

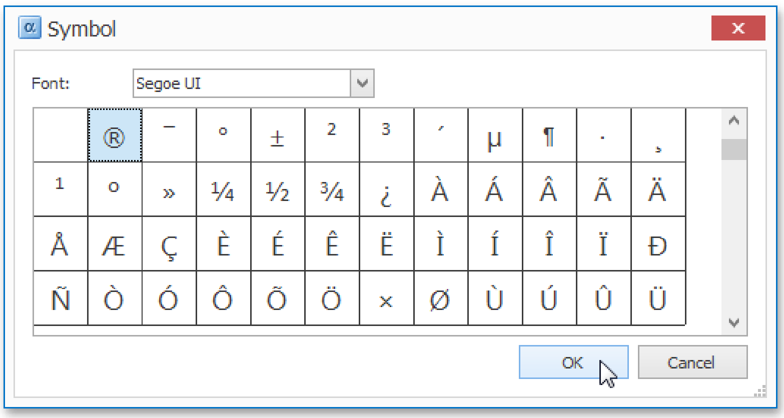
- **Page Number** - Inserts the number of the current page at the carriage position. The page statistics can only be added to a page header or footer.
- **Page Count** - Inserts the total page count at the carriage position. The page statistics can only be added to a page header or footer.

Text Group

- **Text Box** - Inserts a text box into a document. A text box is a floating container that is capable of displaying virtually any kind of content (including the most elaborate **lists**), posing no restrictions on its size and location within a document.

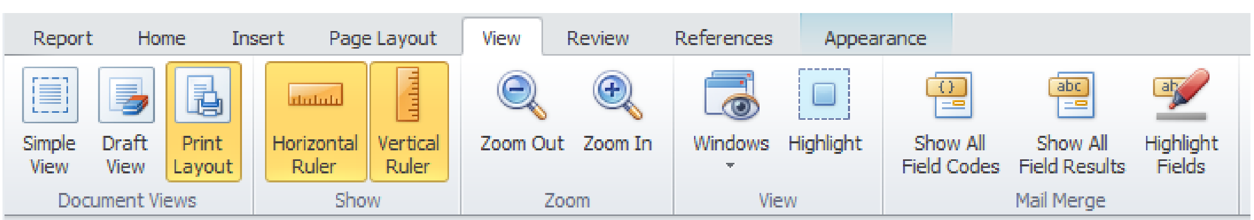
Symbols Group

- **Symbol** - Invokes the **Symbol** dialog, to insert characters that are not available on the keyboard.



General Tools: View

The **View** toolbar contains commands that control the presentation of document elements on the Design Surface.



Document View Group

- **Simple View** - Shows a document without the page layout.
- **Draft View** - Shows a document in a draft view that ignores certain document elements such as page breaks, and headers and footers.
- **Print Layout** - Shows a document as it will appear on the printed page.

Show Group

- **Horizontal Ruler** - Shows or hides the horizontal ruler at the top of the Design Surface.
- **Vertical Ruler** - Shows or hides the vertical ruler to the left of the Design Surface.

Zoom Group

- **Zoom Out** - Zooms the document out.
- **Zoom In** - Zooms the document in.

View Group

- **Windows** - Shows or hides the Snap application windows (i.e., Data Explorer and Report Explorer).
- **Highlight** - Highlights the boundaries of a **list element** after it receives input focus. The invoked frame displays the type of element that is highlighted.

Mail Merge Group

- **Show All Field Codes** - Toggles to show the **field codes** of all elements that provide dynamic content in a document.

- **Show All Field Results** - Switches back to the default mode, which displays the actual values fetched by **Snap fields** supplying dynamic content to a document.

  To effectively handle incoming data, only a portion of data is shown during real-time editing of a document. This restriction does not apply to a document created for print preview, and the report requests all data after it is set for publishing.

  When a document is being edited, only the first **20** rows from each data column are shown by default. To modify or disable this limit, use the **Editor Row Limit** option in the Data Tools: List tab.

- **Highlight Fields** - Highlights the **data fields** that have been added to a document from an external data source to distinguish these fields from the rest of the document content.

General Tools: References

The **References** toolbar contains commands that provide different kinds of references to a document, such as a table of contents and table captions.

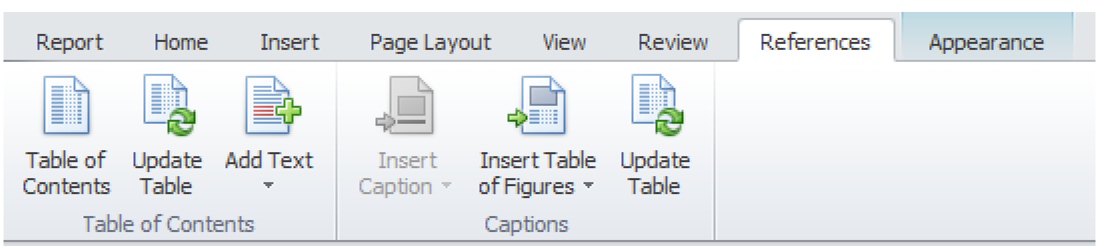


Table of Contents Group

- **Table of Contents** - Inserts a table of contents at the carriage position.
- **Update Table** - Updates the table of contents to ensure that all entries in it refer to the correct page numbers.
- **Add Text** - Adds the current paragraph as an entry to the specified level of the table of contents. If a data field is added to the table of contents, a separate table of contents entry is created for each data row in the Snap list.

Captions Group

- **Insert Caption** - Inserts sequentially numbered captions for different types of objects at the carriage position. The following caption types are available:
    - **Figures Caption** (automatically referenced by the table of figures)
    - **Tables Caption** (automatically referenced by the table of captions)
    - **Equations Caption** (automatically referenced by the table of equations).
- **Insert Table of Figures** - Creates a table of figures, table of tables, or table of equations, containing page numbers for objects of the corresponding types.
- **Update Table** - Updates the table of figures so that all entries refer to the correct page numbers.

Table Tools: Design

This toolbar is context sensitive, and becomes active after placing the text cursor in a document table.

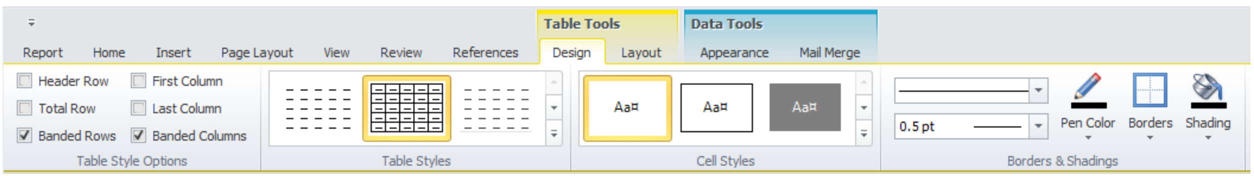


Table Styles Group

- **Header Row** - Enables formatting of the first row in a table.
- **First Column** - Enables special formatting for the last row in a table.
- **Total Row** - Enables special formatting for the first column in a table.
- **Last Column** - Enables special formatting for the last column in a table.
- **Banded Rows** - Enables special formatting for odd and even rows in a table.
- **Banded Columns** - Enables special formatting for odd and even columns in a table.

Table Styles Group

- **Table Styles** - Sets a table style for the selected table. Clicking the arrow button invokes the drop-down menu containing the following commands for managing table styles.
    - **New Table Style...**
    - **Modify Table Style...**
    - **Delete Table Style...**

  Creating a new table style or modifying an existing one invokes the **Modify Style** dialog, allowing you to specify a style name and adjust table formatting options (including special formatting options for different table parts).

  You can enable special formatting using commands from the Table Style Options section within this toolbar category.

Cell Styles Group

- **Cell Styles** - Sets a cell style for the selected table cell. Clicking the arrow button invokes the drop-down menu, containing the following commands for managing table cell styles.
    - **New Cell Style...**
    - **Modify Cell Style...**
    - **Delete Cell Style...**

  Creating a new table cell style or modifying an existing one invokes the **Modify Style** dialog, allowing you to specify a style name and adjust cell formatting options.

Borders and Shadings Group

- **Line Style** - Sets the style of a line that is used to draw borders.
- **Line Weight** - Sets the width of the line that is used to draw borders.
- **Pen Color** - Sets the color that is used to draw borders.
- **Borders** - Draws the specified borders for selected cells.
- **Shading** - Specifies the background color for the selected cells.

Table Tools: Layout

The commands available in the **Layout** toolbar of the **Table Tools** category are divided into the following sections.

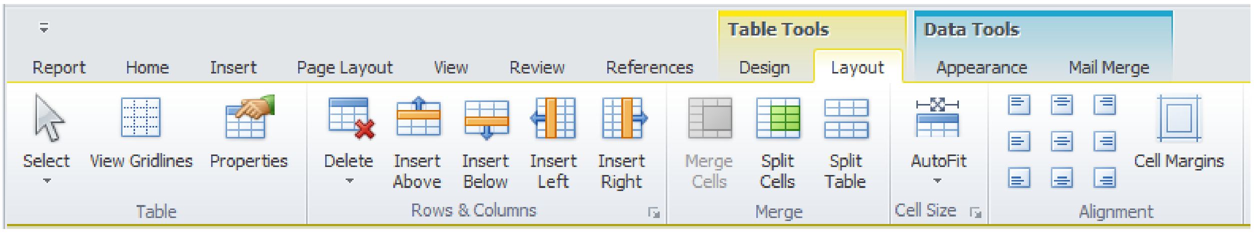
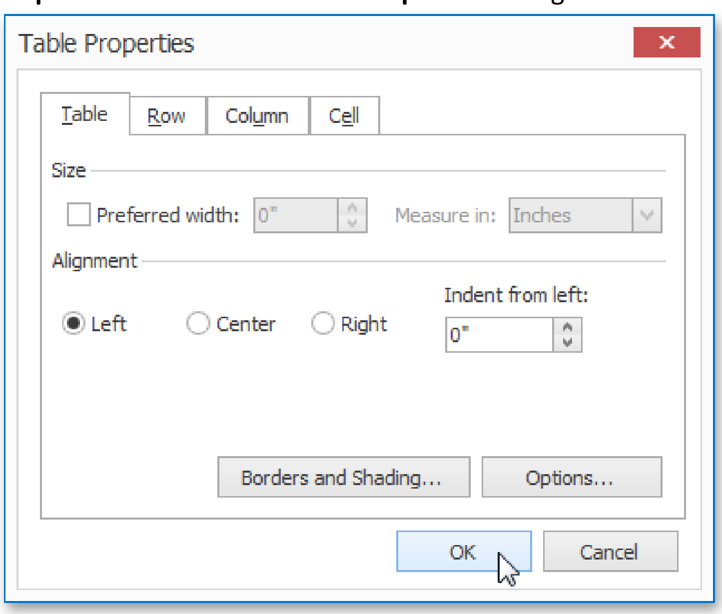


Table Group

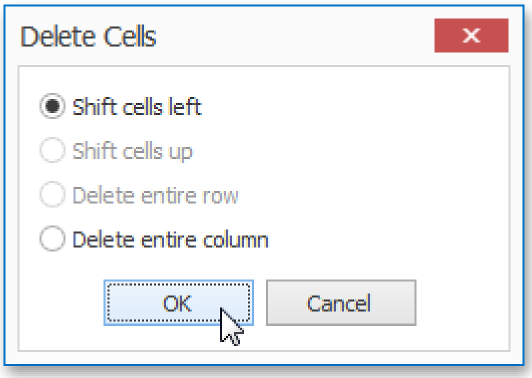
- **Select** - Allows you to select a cell, row, column or table.
- **View Gridlines** - Shows or hides table gridlines. This command is useful when working with tables that contain invisible borders. These lines are only displayed in the Design Surface - they do not appear in a published document.
- **Properties** - Invokes the **Table Properties** dialog for the selected table.



This dialog allows you to adjust the size and alignment properties of the current table cell, row, column or table.

Rows and Columns Group

- **Delete** - Deletes the specified cells or the currently selected row, column or table. To delete a single table cell, the Delete Cells dialog is invoked that allows you to select the "shift" mode for replacing the deleted cell.



To remove individual rows from a Snap List, use the Quick Filter command of the Data Tools: Field toolbar.

- **Insert Above** - Inserts a new row above the selected row.
- **Insert Below** - Inserts a new row below the selected row.
- **Insert Left** - Inserts a new column to the left of the selected column.
- **Insert Right** - Inserts a new column to the right of the selected column.

Merge Group

- **Merge Cells** - Merges selected cells. The content of merged cells is converted to paragraphs of an output cell.
- **Split Cells** - Splits the selected cell into a specified number of rows and columns. The content of the source cell is placed in the top-left output cell.
- **Split Table** - Splits the table into two tables. The selected row becomes the first row of the new table.

Cell Size Group

- **Auto Fit** - Sets the auto fit mode of the selected table. The following auto fit modes are available:
    - **AutoFit Contents** - table cells occupy the minimum width possible to fit content.
    - **AutoFit Window** - the table occupies the entire width of the page. Table cells are resized to fit their content.
    - **Fixed Column Width** - column width is fixed and can only be changed manually.

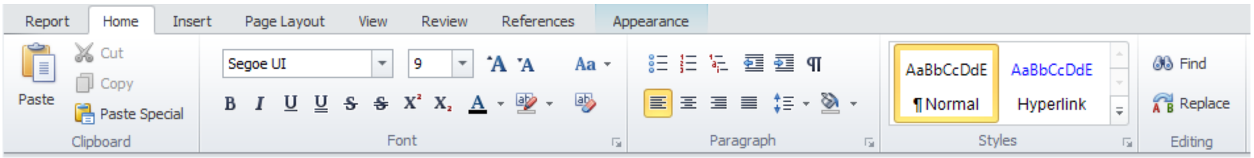
Alignment Group

- **Alignment** - Sets the text alignment for selected cells.
- **Cell Margins** - Invokes the **Table Options** dialog, allowing you to set the default cell margins for the selected table cells.

Word-Processing Commands

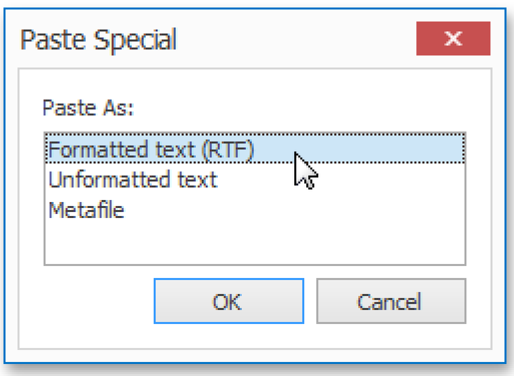
General Tools: Home

The **Home** toolbar contains text formatting and alignment commands.



Clipboard Group

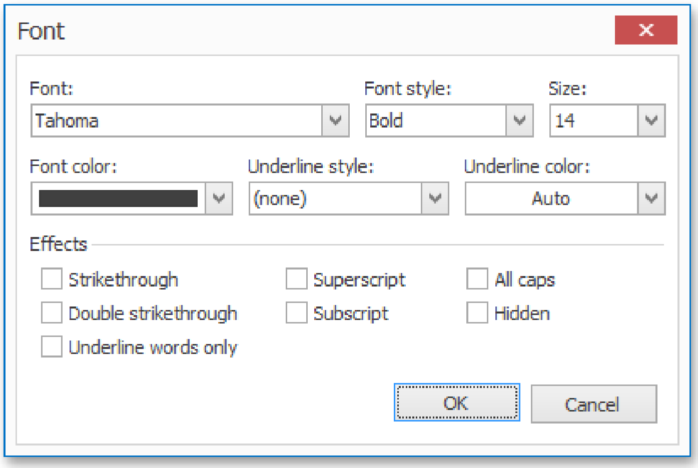
- **Paste** - Pastes the content of the clipboard into a carriage position.
- **Cut** - Cuts the selected content and places it in the clipboard.
- **Copy** - Copies the selected content and places it in the clipboard.
- **Paste Special** - Invokes the **Paste Special** dialog, allowing you to paste the content of the clipboard with a specified formatting.



Font Group

- **Font** - Specifies a font for the selected text.
- **Font Size** - Specifies a font size for the selected text.
- **Grow Font** - Increases the font size of the selected text.
- **Shrink Font** - Decreases the font size of the selected text.
- **Change Case** - Changes the case of the selected text to uppercase or lowercase.
- **Bold** - Makes the selected text bold.
- **Italic** - Italicizes the selected text.
- **Underline** - Draws a line under the selected text.
- **Double Underline** - Draws a double line under the selected text.
- **Strikethrough** - Draws a line through the middle of the selected text.
- **Double Strikethrough** - Draws a double line through the middle of the selected text.
- **Superscript** - Makes the selected text smaller and places it above the line of the text.
- **Subscript** - Makes the selected text smaller and places it below the line of the text.
- **Font Color** - Specifies a color for the selected text.
- **Text Highlight Color** - Specifies a highlight color for the selected text.
- **Clear Formatting** - Removes all formatting from the selection, leaving only plain text.

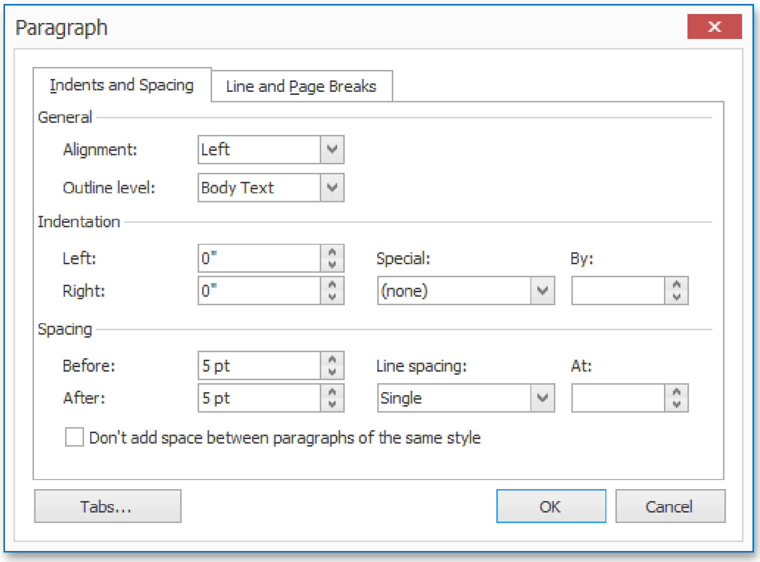
- **Font** - Invokes the **Font** dialog, allowing you to adjust different font options for the selected text.



Paragraph Group

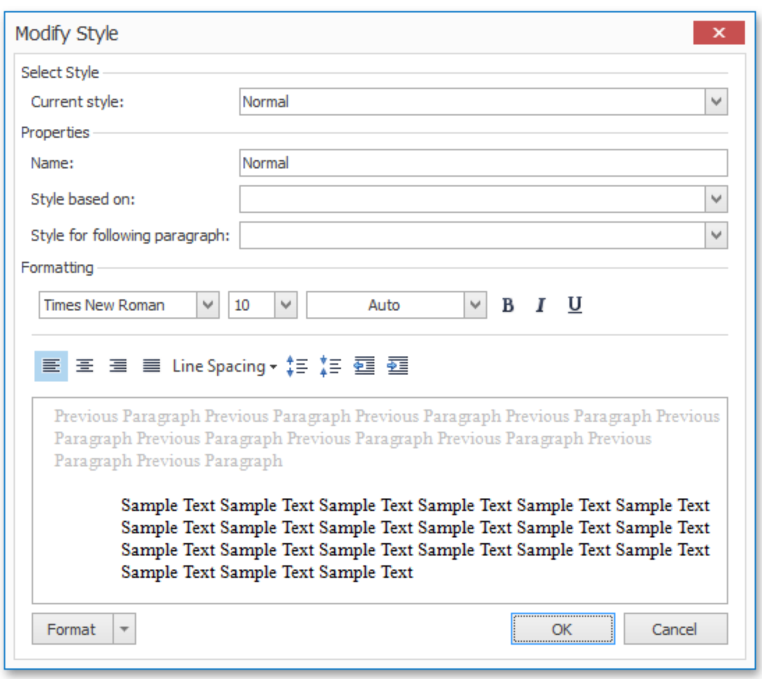
- **Bullets** - Converts the selected paragraphs into a bulleted list, or inserts a new bulleted list at the carriage position.
- **Numbering** - Converts the selected paragraphs into a numbered list, or inserts a new numbered list at the carriage position.
- **Multilevel List** - Converts the selected paragraphs into a multilevel list, or inserts a new multilevel list at the carriage position.
- **Decrease Indent** - Decreases the indent level of the paragraph or the hierarchical level of the multilevel list's items.
- **Increase Indent** - Increases the indent level of the paragraph or the hierarchical level of the multilevel list's items.
- **Show/Hide** - Shows or hides paragraph marks and other non-printable characters.
- **Align Text Left** - Aligns the current paragraph to the left.
- **Center** - Centers the selected paragraphs.
- **Align Text Right** - Aligns the selected paragraphs to the right.
- **Justify** - Aligns the text of the selected paragraphs to both the left and right margins, adding extra space between words as necessary.
- **Line Spacing** - Changes the spacing between the lines of the selected paragraphs.
  The amount of space added before and after the paragraphs can also be specified.
- **Shading** - Specifies a background color for the selected paragraphs.

- **Paragraph** - Invokes the **Paragraph** dialog, allowing you to adjust different layout options for the selected paragraphs.



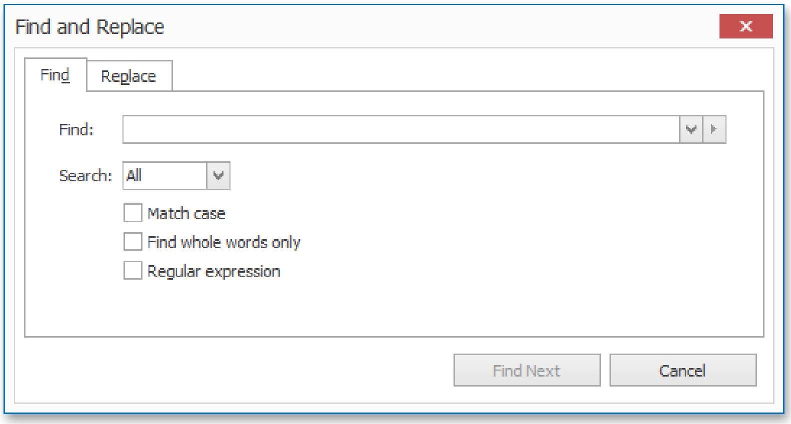
Styles Group

- **Quick Styles** - Applies a style to the selected text. A style is a group of formatting options. All options are applied to text or a paragraph at once when you apply a style.
  Styles allow you to change text and paragraph appearance quicker than setting each formatting option individually.
- **Modify Style** - Invokes the **Modify Style** dialog, allowing you to change the formatting options of the selected style.

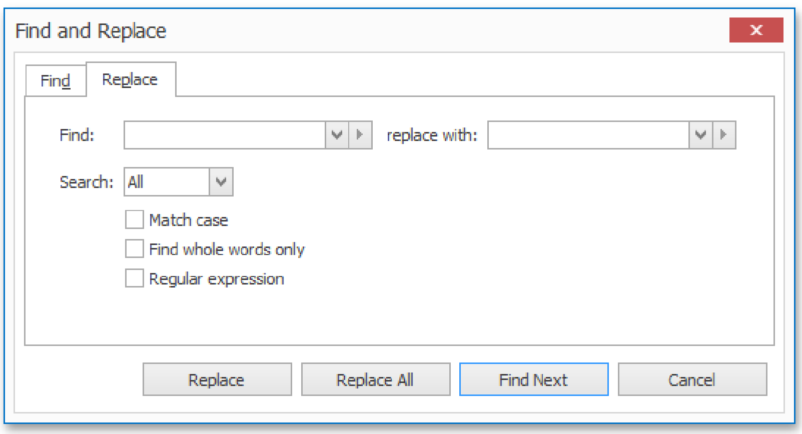


Editing Group

- **Find** - Invokes the **Find and Replace** dialog that allows you to find the specified text in a document.

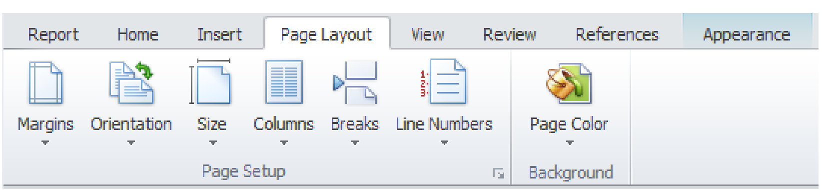


- **Replace** - Invokes the **Find and Replace** dialog that allows you to find the specified text in a document and replace it with other text.



General Tools: Page Layout

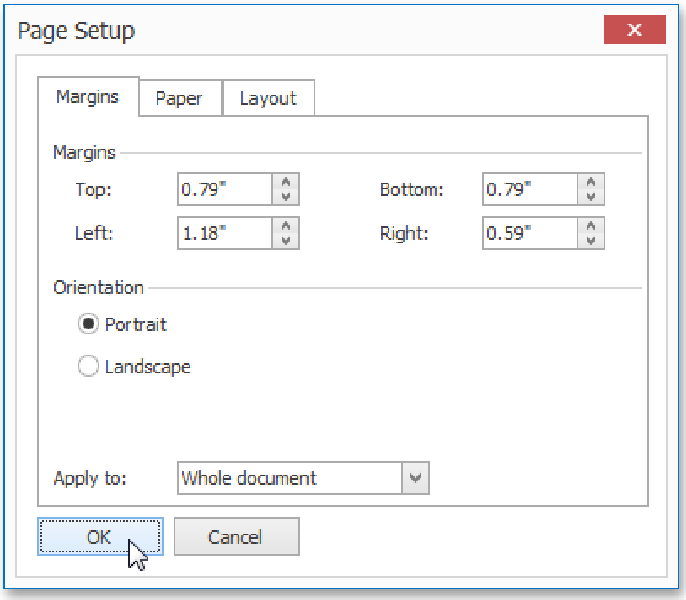
The **Page Layout** toolbar contains page layout options that include paper kind, margins and orientation.



Page Setup Group

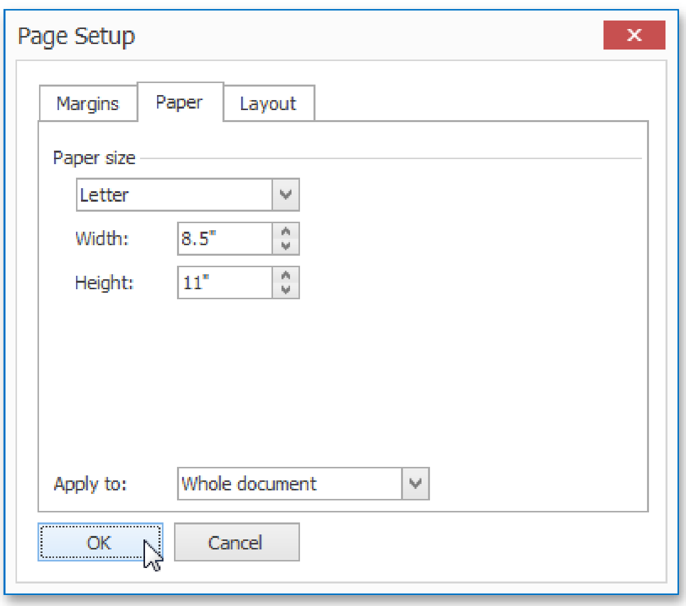
- **Margins** - Sets the size of page margins for the current document section.

You can select from a list of predefined margins, or invoke the **Page Setup** dialog and adjust the margin size manually.



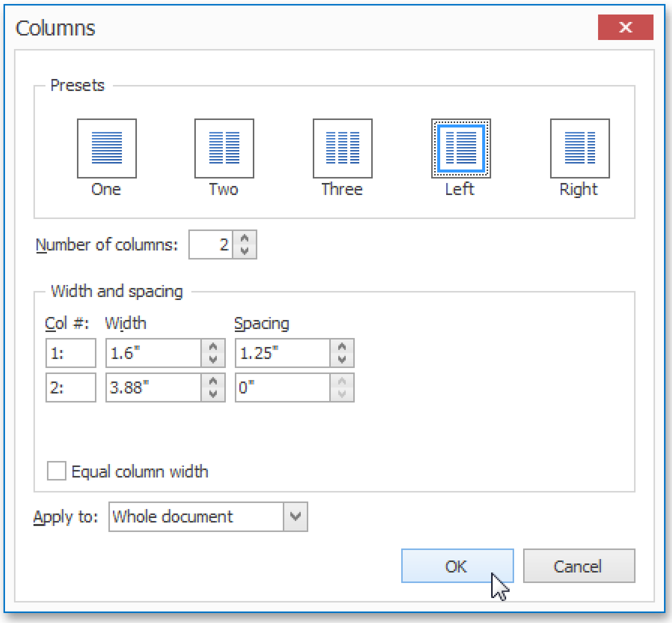
- **Orientation** - Sets the page orientation for the current document section.
- **Size** - Sets the page size for the current document section.

You can select one of the predefined page sizes from the list, or specify a custom page size in the **Page Setup** dialog.

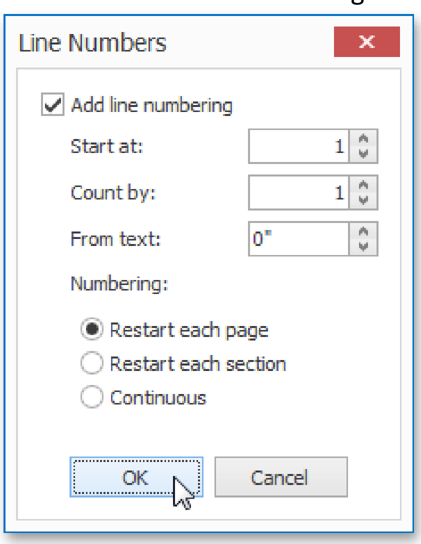


- **Columns** - Sets the number of columns for all pages in the current document section.

  You can also invoke the **Columns** dialog for more customization options.



- **Breaks** - Inserts one of the available breaks (e.g., page break, column break or section break) at the carriage position.
- **Line Numbers** - Displays line numbers in the current document section. You can select one of the predefined line numbering types from the list, or invoke the **Line Numbers** dialog to define custom line numbering.

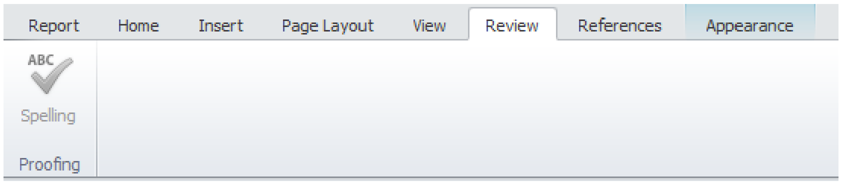


Background Group

- **Page Color** - Sets a page color for the entire document.

General Tools: Review

The **Review** toolbar contains tools related to proofreading.



Proofing Group

- **Spelling** - Checks the spelling of the document text. On detecting misspelled words, the **spell checker** invokes the **Spelling** dialog to type in the correct version, or select the correctly spelled word from the list of suggestions.

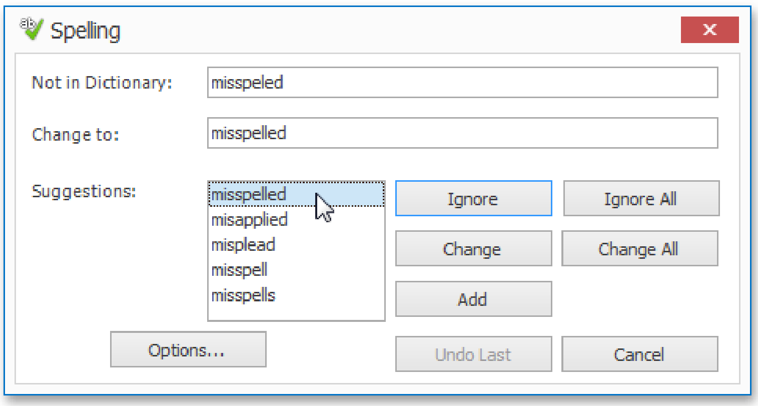


Chart Tools: Design

This toolbar is context sensitive, and becomes active after selecting a **chart** in the document.

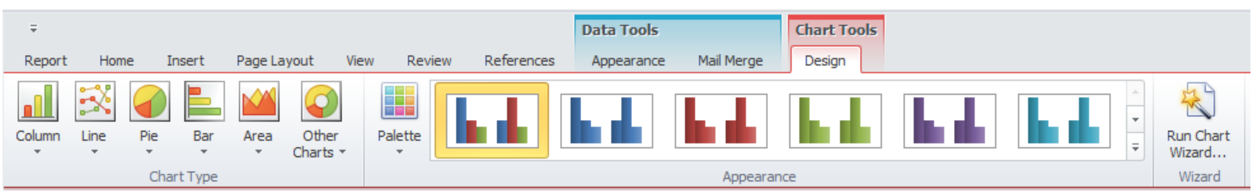


Chart Type

- **Column** - Changes the type of the selected chart to one of the available column chart types. Column charts are used to compare values across categories.
- **Line** - Changes the type of the selected chart to one of the available line chart types. Line charts are used to display trends over time.
- **Pie** - Changes the type of the selected chart to one of the available pie chart types. Pie charts display the contribution of each value to a total.
- **Bar** - Changes the type of the selected chart to one of the available bar chart types. Bar charts summarize and display categories of data, allowing you to compare the contribution of each value to the total across categories.
- **Area** - Changes the type of the selected chart to one of the available area chart types. Area charts are used to display trends over time.

- **Other Charts** - Changes the type of the selected chart to a point, funnel, financial, radar, polar, range, or Gantt chart.

Appearance Group

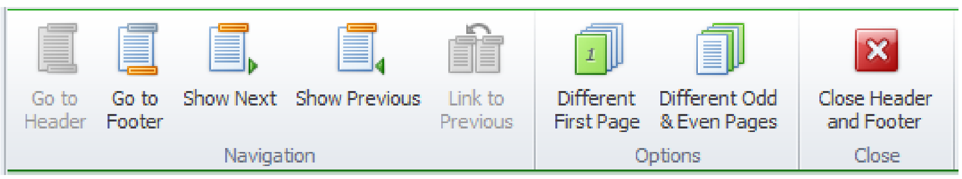
- **Palette** - Specifies the **color palette** for the selected chart.
- **Appearance** - Applies a specified appearance to the selected chart.
  The collection of style presets available for a chart depends on the chart's **palette**.

Wizard Group

- **Run Chart Wizard** - Invokes the Chart wizard, which allows you to adjust the main chart settings in a single user interface.

Header and Footer Tools: Design

This toolbar is context sensitive, and becomes active after double-clicking the page header or footer in a document.



To add a page header or footer, use the appropriate commands of the General Tools: Insert toolbar.

Navigation Group

- **Go to Header** - Allows you to switch to the page header of the current document section when editing a page footer.
- **Go to Footer** - Allows you to switch to the page footer of the current document section when editing a page header.
- **Show Next** - Allows you to navigate to the header or footer of the next document section.
- **Show Previous** - Allows you to navigate to the header or footer of the previous document section.
- **Link to Previous** - Makes the header or footer display the content of the header or footer of the previous document section.

Options Group

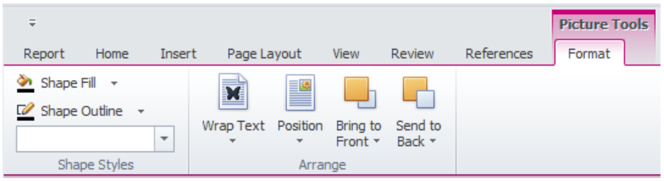
- **Different First Page** - Creates a unique header and footer for the first page.
- **Different Odd & Even Pages** - Allows you to specify different headers and footers for odd-numbered and even-numbered pages.

Close Group

- **Close Header and Footer** - Exits the header and footer edit mode. You can also do this by double-clicking the document area, or by pressing **ESC**.

Picture Tools: Format

This toolbar is context sensitive, and becomes active after selecting a picture in a document.



Shape Styles Group

- **Shape Fill** - Fills the selected shape with a specified color.
- **Shape Outline** - Applies the specified color to the outline of the selected shape.
- **Shape Outline Weight** - Specifies a width for the outline of the selected shape.

Arrange Group

- **Wrap Text** - Specifies the way in which text wraps around a selected object. The text wrap modes are as follows:
    - **Square**
    - **Tight**
    - **Through**
    - **Top and Bottom**
    - **Behind Text**
    - **In Front of Text**.
- **Position** - Specifies the position of the selected object on a page.
- **Bring to Front** - Moves the selected object forward. This command invokes a drop-down menu that contains the following actions:
    - **Bring Forward** (moves the selected object one layer forward)
    - **Bring to Front** (moves the selected object to the front of all other objects in a document)
    - **Bring in Front of Text** (places the selected object in front of the text)
- **Send to Back** - Moves the selected object backward. This command invokes a drop-down menu that contains the following actions:
    - **Send Backward** (moves the selected object one layer backward)
    - **Send to Back** (moves the selected object behind all other objects in a document)
    - **Send Behind Text** (moves the selected object behind the text).

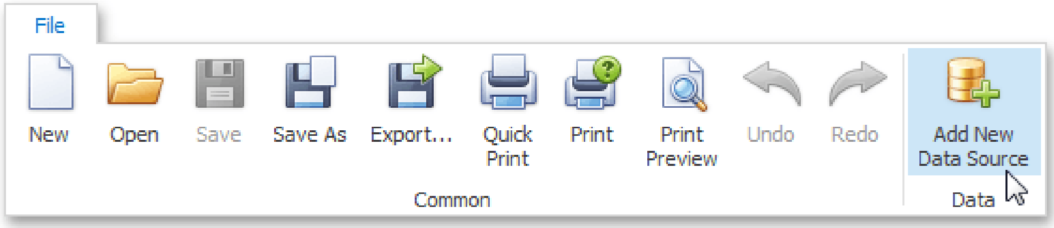
Connect to Data

The topics in this section describe the various aspects of providing data to a Snap document.

Connect a Document to a Data Source

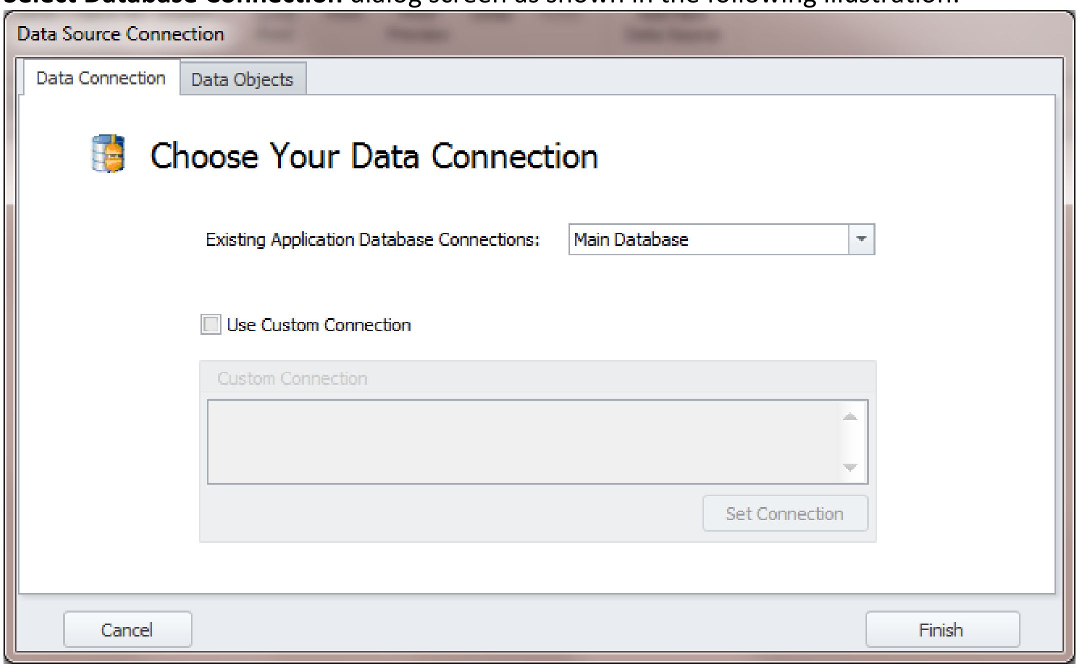
This tutorial describes the steps required to connect a Snap document to data by using the **Create Data Source wizard** and Query Designer.

1. Click **Data | Add New Data Source** on the Snap application's ribbon toolbar.



To Use an Existing Connection

- From the **Database** tab, click on the **Connect to Database** button. This will invoke the **Set or Select Database Connection** dialog screen as shown in the following illustration:

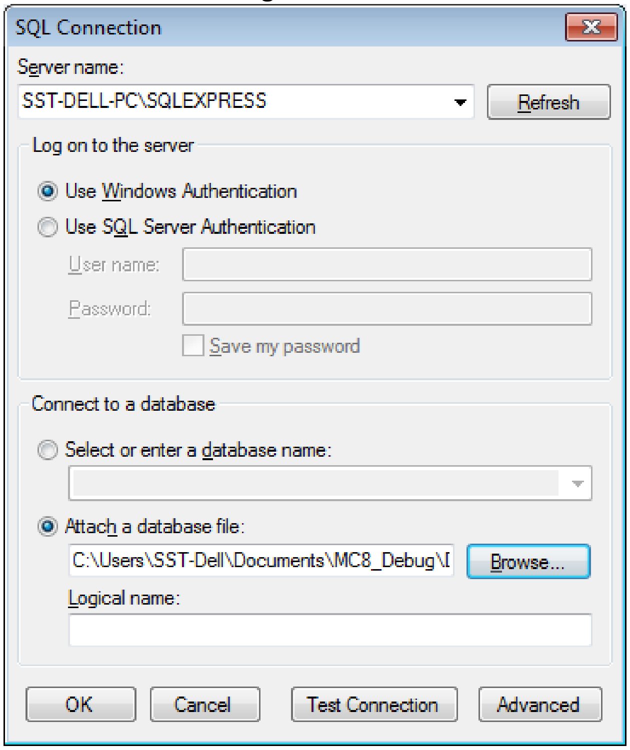


- Move to drop down list adjacent to the **Existing Application Database Connections** and select the database connection you want to use. These connections are the same ones that currently setup for main program use.
- Ensure that the **Use Custom Connection** checkmark is not checked..

To Use a Custom Connection

- Move to and check the **Use Custom Connection** checkbox.

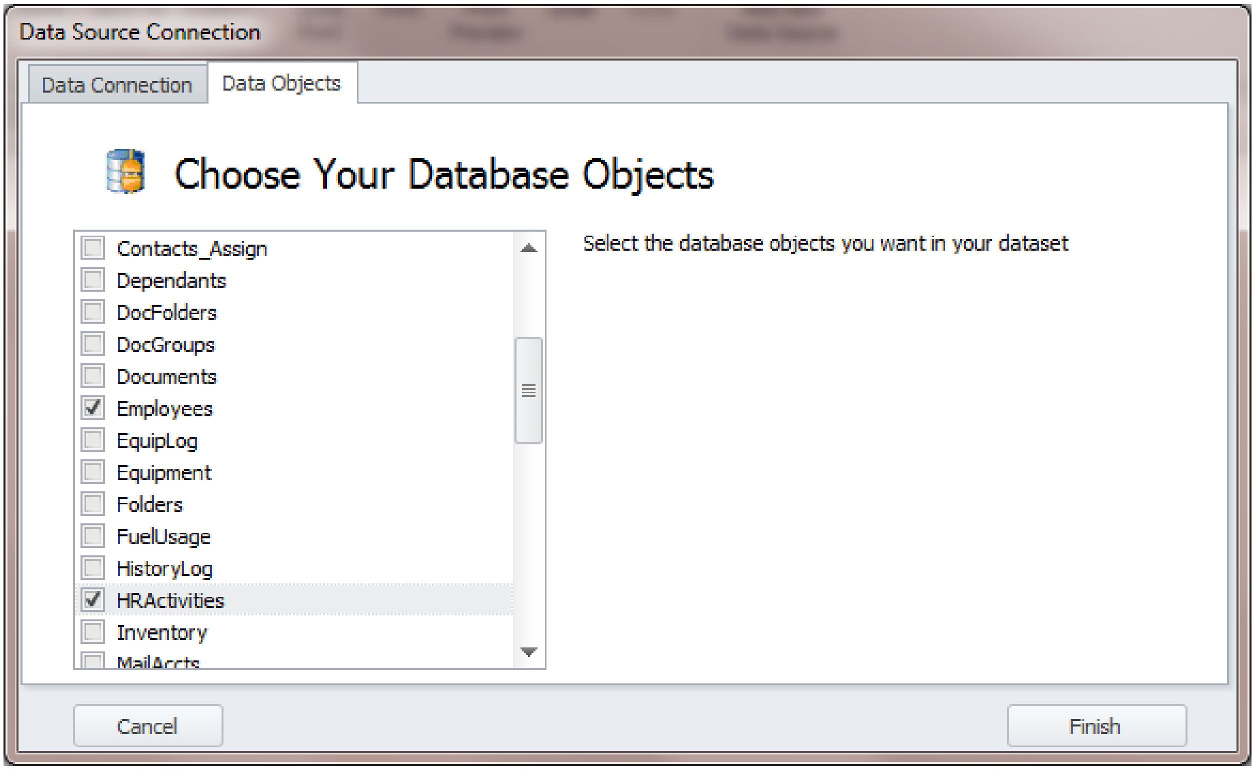
- Click on the **Set Connection** button. This will invoke the **SQL Connection** dialog screen as shown in the following illustration:



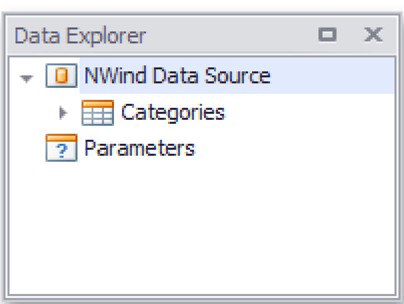
- Move to the **Sever name** drop down box and select the name of your instance of the SQL server you're using. If the server is not listed, try clicking on the **Refresh** button.
- Move to the **Log on to the server** group and setup your log on authentication information.
    - **Using SQL Express** - If you are using the Express database engines as supplied by us, you'll probability want to check the **Use Windows Authentication** option.
    - **SQL Server** - If you are connecting to full blown SQL Server then complete the **SQL Server Authentication** information.
        - Check the **Use SQL Server Authentication** option.
        - Fill in the **User Name** and **Password** fields.

- Next move to the **Connect to a database** group to connect to the actual database.
    - **SQL Server**:
        - Check the **Select or enter a database name** option.
        - Move to the drop down found here and either select or enter the name of the database you are connecting to.
    - **SQL Express**: (Attached database file)
        - Check the **Attach a database file** option.
        - Either use the **Browse** button here to select the database file, or type in the full path to the database (mdf) file in the space provided.
- **Test Connection** – Move to and click on the **Test Connection** button to ensure you have a good connect. If it fails, you may want to click on the **Advanced** button to further define you connection properties.

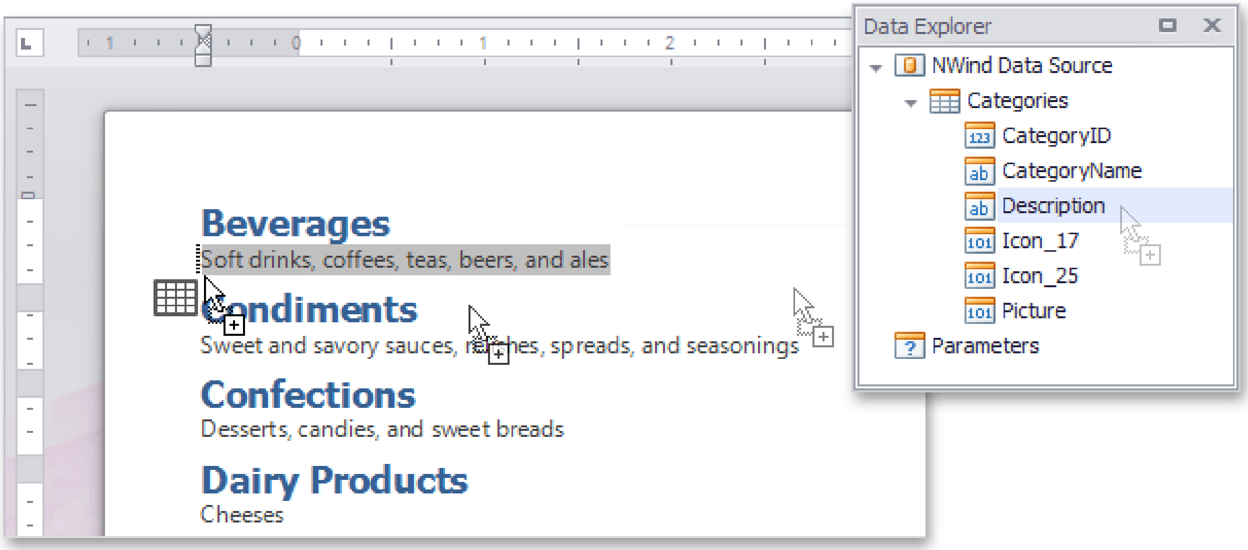
2. Click on the **OK** button to accept and apply the connection.On the first page of the invoked **Create Data Source** wizard, specify the name for the new data source and click **Next**.



2. Once the connection is setup, click on the **Data Objects** tab to move to that tab.
3. Select a data table(s) to include in the data source.
4. Click **Finish** when done.
5. After the data source has been added to the report, the hierarchy of its data members is reflected in the Data Explorer.



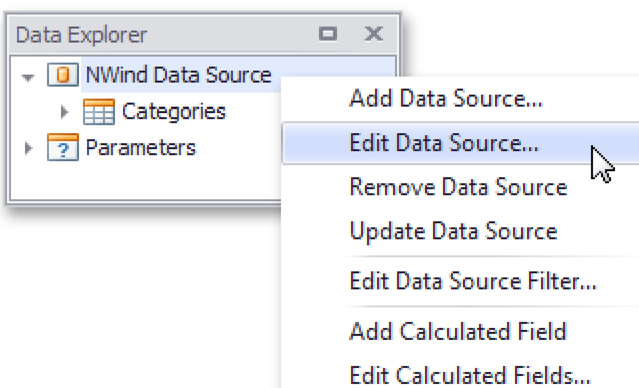
The Snap report is now connected to data. Drag-and-drop the **CategoryName** and **Description** data fields from the Data Explorer onto the document's body to create a simple data-aware report.



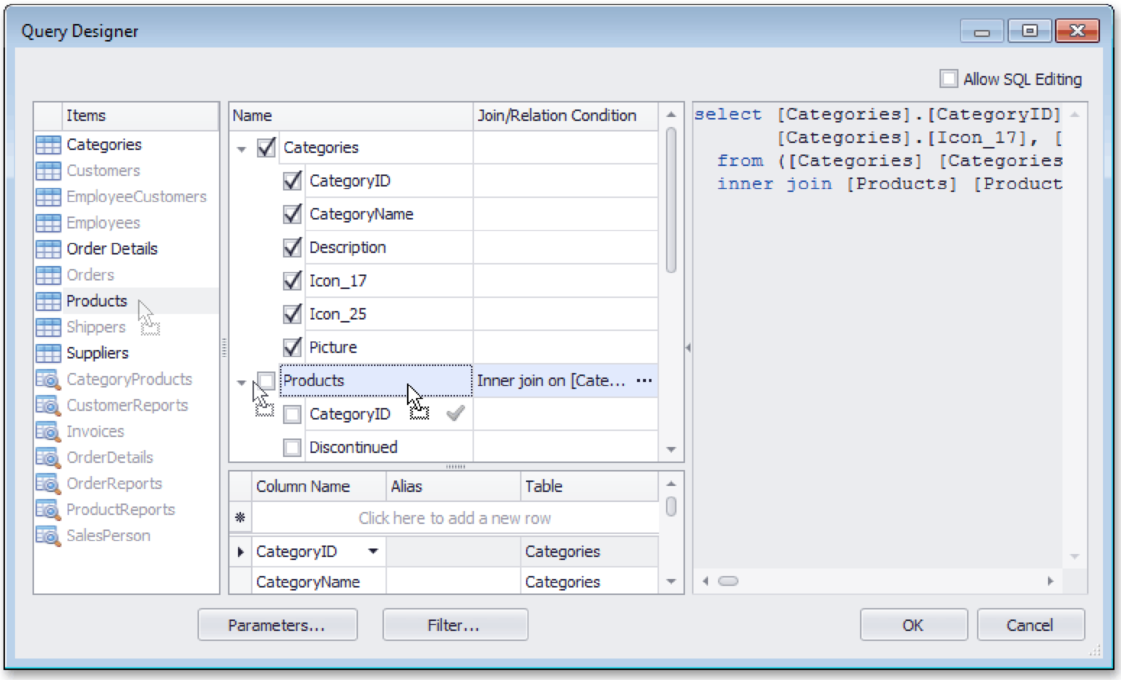
Create a Master-Detail Data Source

This tutorial describes how to add a master-detail relation to the document's data source.

1. Connect a Snap document to data as shown in the Connect a Document to a Data Source tutorial.
2. Right-click the added data source node in the **Data Explorer** window and select **Edit Data Source...** in the invoked context menu.

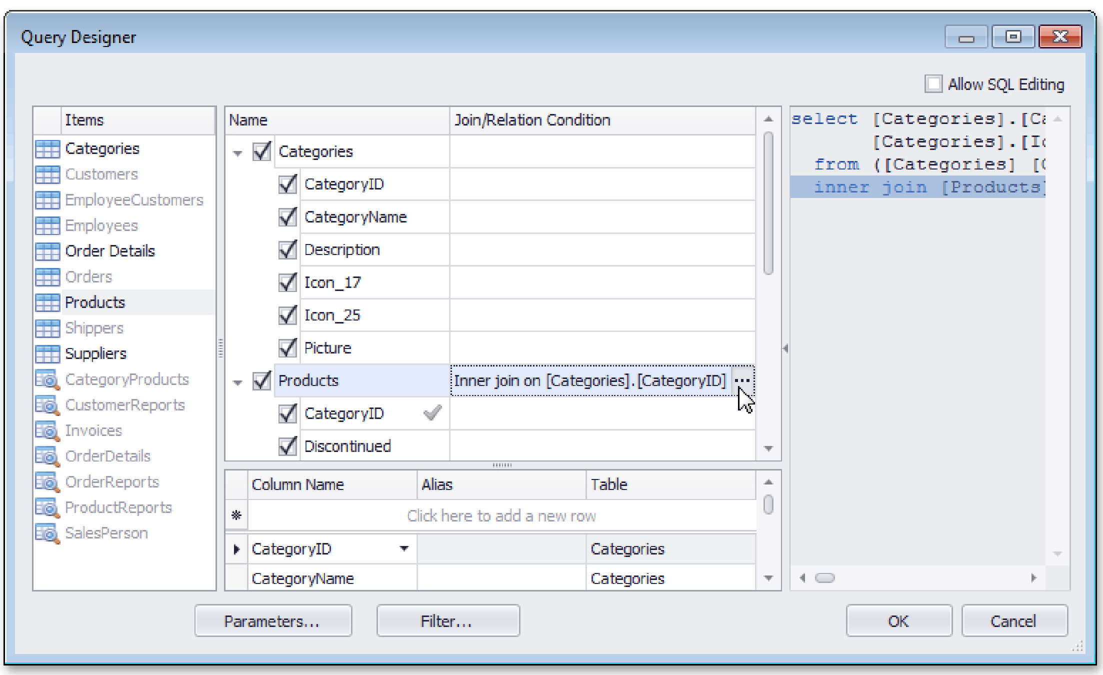


3. In the invoked **Query Designer** window, drag the **Products** item from the list of available tables on the left and drop it onto the list of data tables to be used.

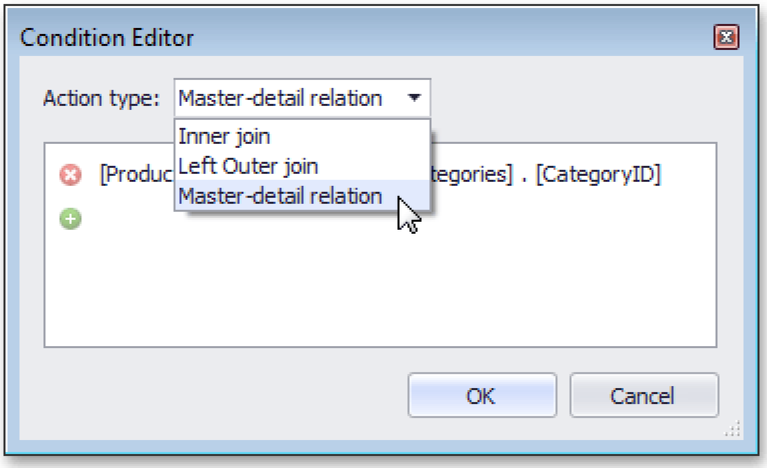


Enable the check box for the **Products** table, to include all of its fields in the view.

4. By default, the tables that are added to the query are joined. To create a master-detail relation between the **Categories** and **Products** tables, click the ellipsis for the **Join/Relation Condition** in the **Products** table.

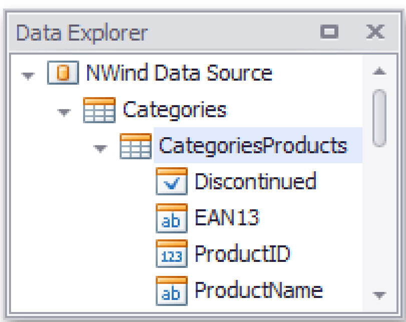


In the invoked **Condition Editor** dialog, set the **Action type** to **Master-detail relation** and click **OK** to exit the dialog.



Next, click **OK** in the **Query Designer** to apply all changes to the document data source and exit.

The content of the **Data Explorer** will be updated to reflect the new structure of the document data source.

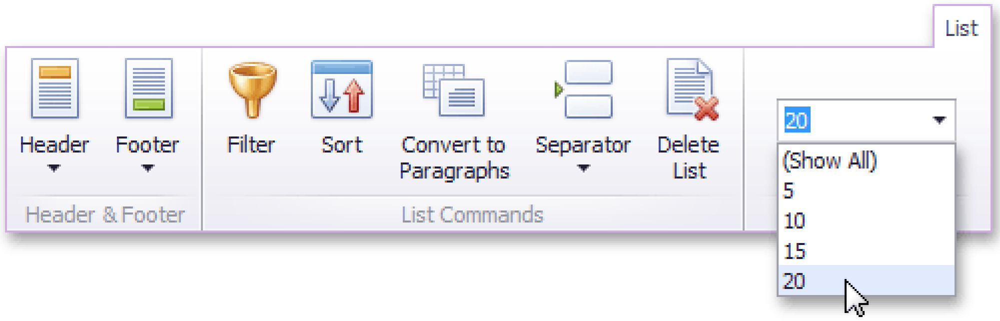


Filter Data

This document describes how to filter dynamic data within a **Snap** document.

Filter Data on the Design Surface

To improve performance, the Snap Design Surface displays only the first **20** data rows while the document layout is being designed. To change the number of data rows displayed, specify the **Editor Row Limit** option, which is located in the **List** tab of the main toolbar.

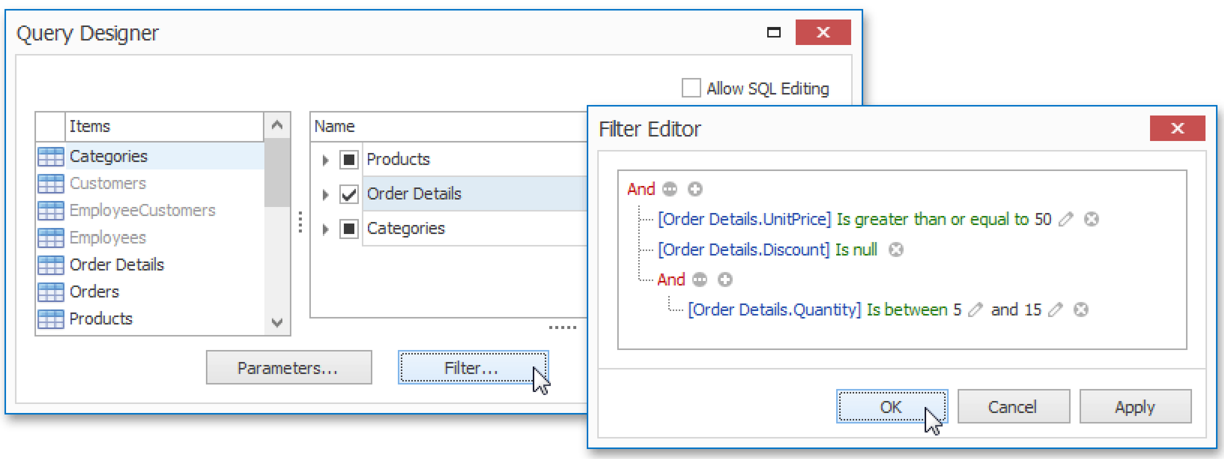


This setting does not affect the final document.

Filter Data at the Data Source Level

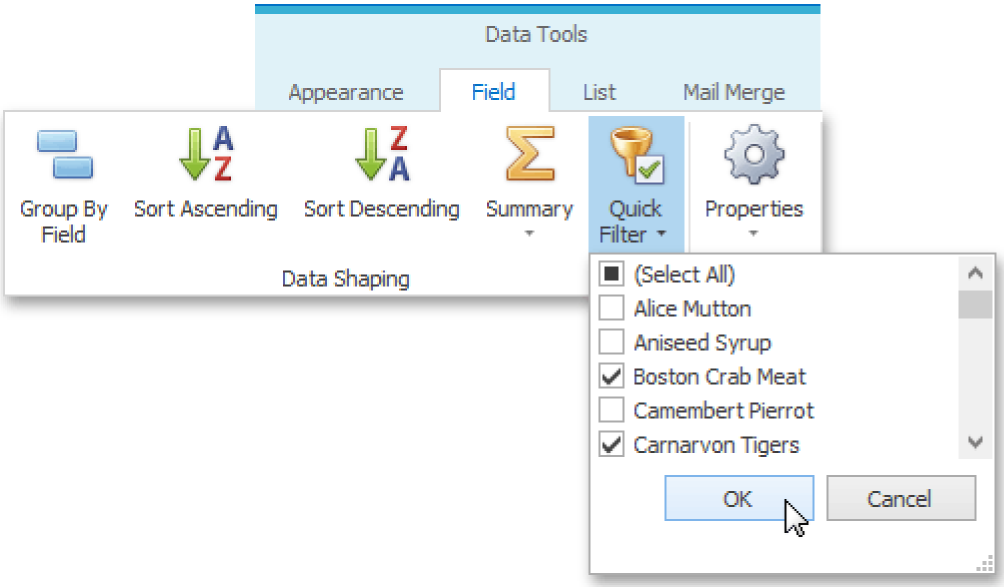
Filtering data at the data source level is useful when dealing with large data sources because it reduces data retrieval time, and thus speeds up document generation.

To filter data at the data source level, use the Query Designer.



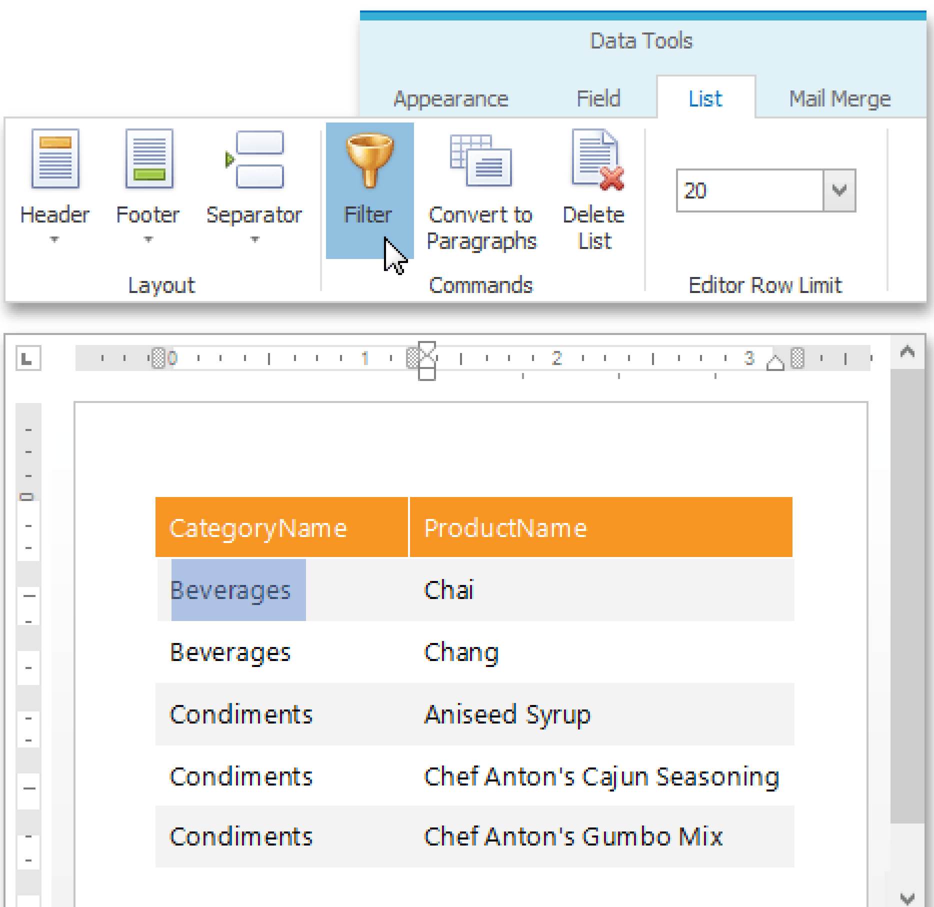
Filter Snap List Data

To select which data records to include in the document, click the **Quick Filter** command in the **Field** tab of the contextual **Data Tools** toolbar category. In the invoked drop-down menu, select the required records and click **OK** to apply the filtering.

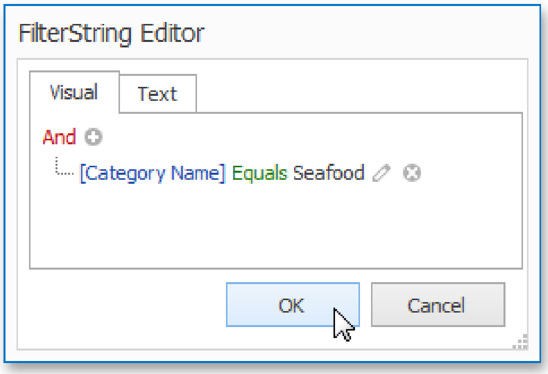


To specify the filtering criteria for **Snap list** data, do the following.

1. Place the text cursor inside the Snap list that you wish to filter and click the **Filter** command in the **List** tab of the contextual **Data Tools** toolbar category.



2. In the invoked **FilterString Editor**, construct the required filter expression and click **OK** to apply the filtering.

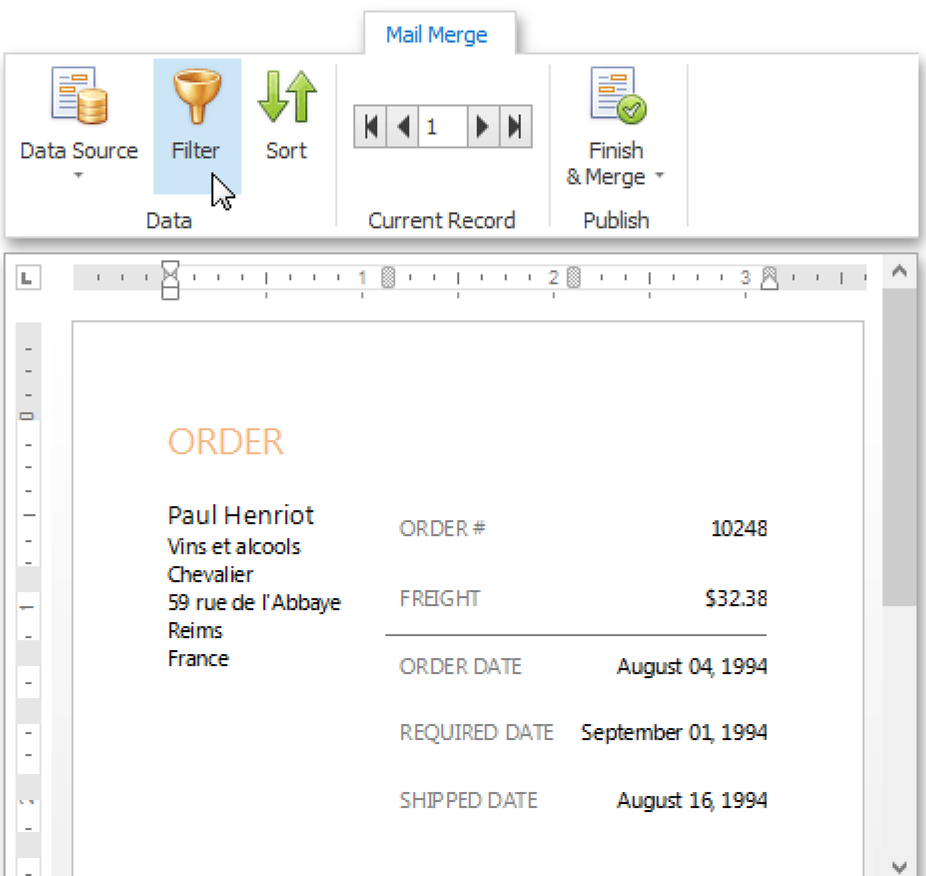


Filter Mail Merge Document Data

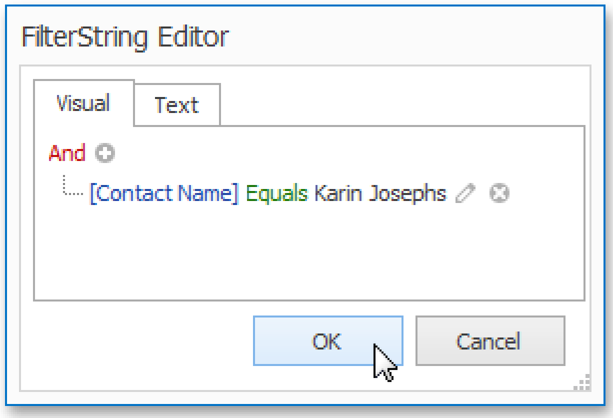
Filtering a **mail merge document** defines which data entries will appear as pages of the final document.

To filter a mail merge document, do the following.

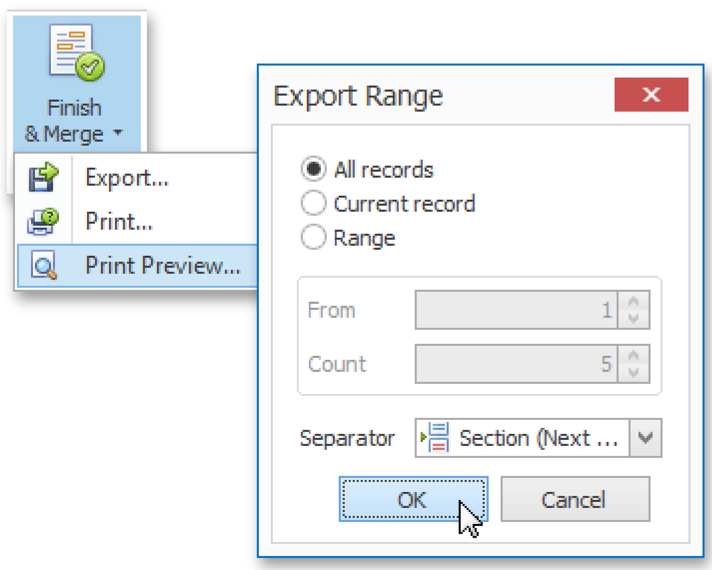
1. Switch to the **Mail Merge** tab of the contextual **Data Tools** toolbar category, and click the **Filter** command.



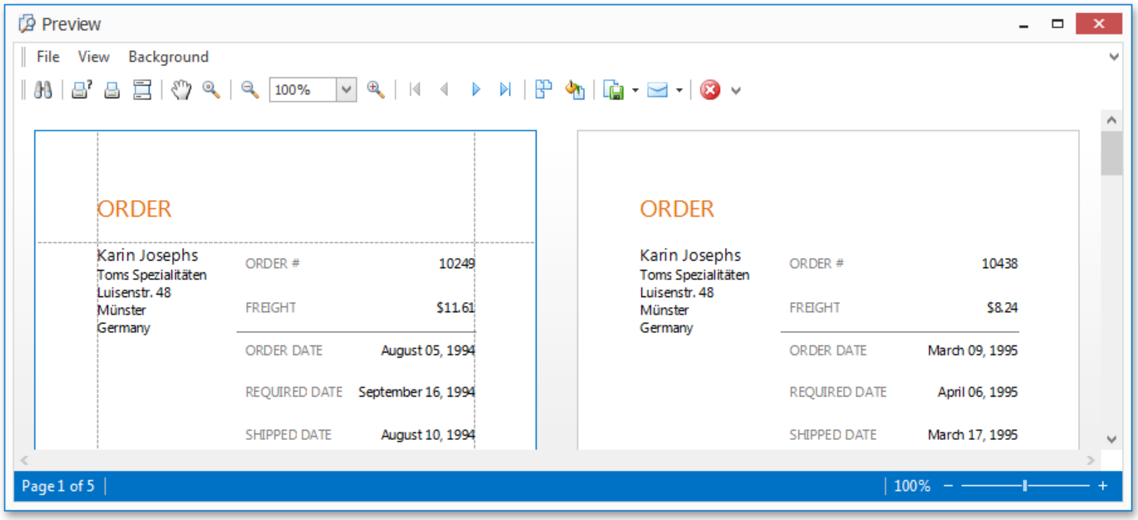
2. In the invoked **FilterString Editor**, construct the required expression and click **OK** to apply the filtering.



3. To view the result, click the **Finish & Merge** button in the **Mail Merge** tab of the contextual **Data Tools** toolbar category, and select **Print Preview...** in the drop-down menu. In the invoked **Export Range** dialog, select **All records** and click **OK**.



The following image illustrates a print preview for a filtered mail merge document.

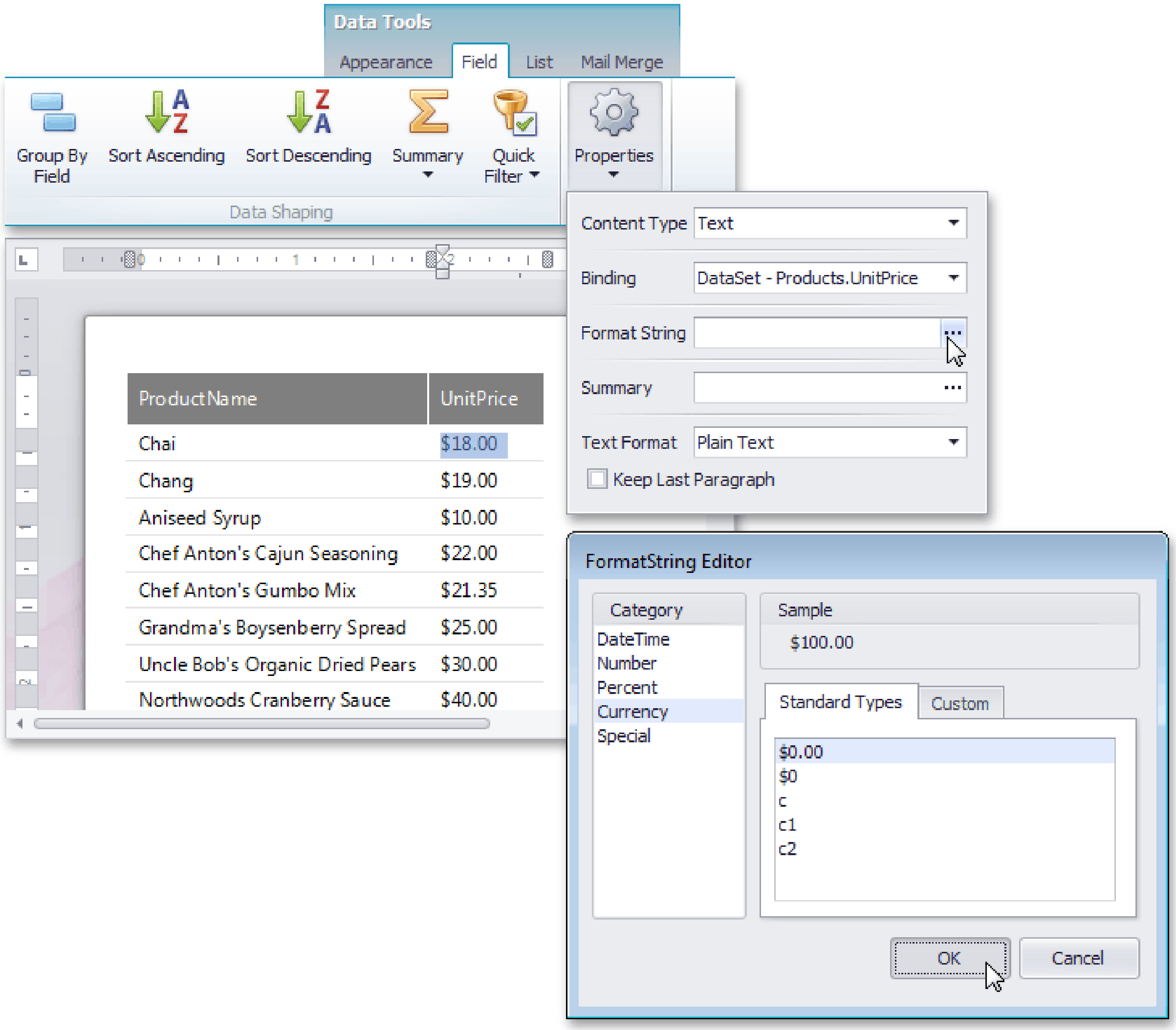


Format Data

This document describes how to format dynamic textual data in a **Snap** document.

To format report data, do the following.

1. Select the **Snap field** that you wish to format. It must be a field displaying textual information (e.g., a **Text** field or a **Row Index** field). This will activate the **Field** tab in the contextual **Data Tools** toolbar category.
2. In the **Field** tab, click the **Properties** button.
3. In the invoked drop-down menu, click the ellipsis button for the **Format String** property.
4. Specify the required formatting in the invoked **FormatString Editor**, and click **OK** to exit the dialog.

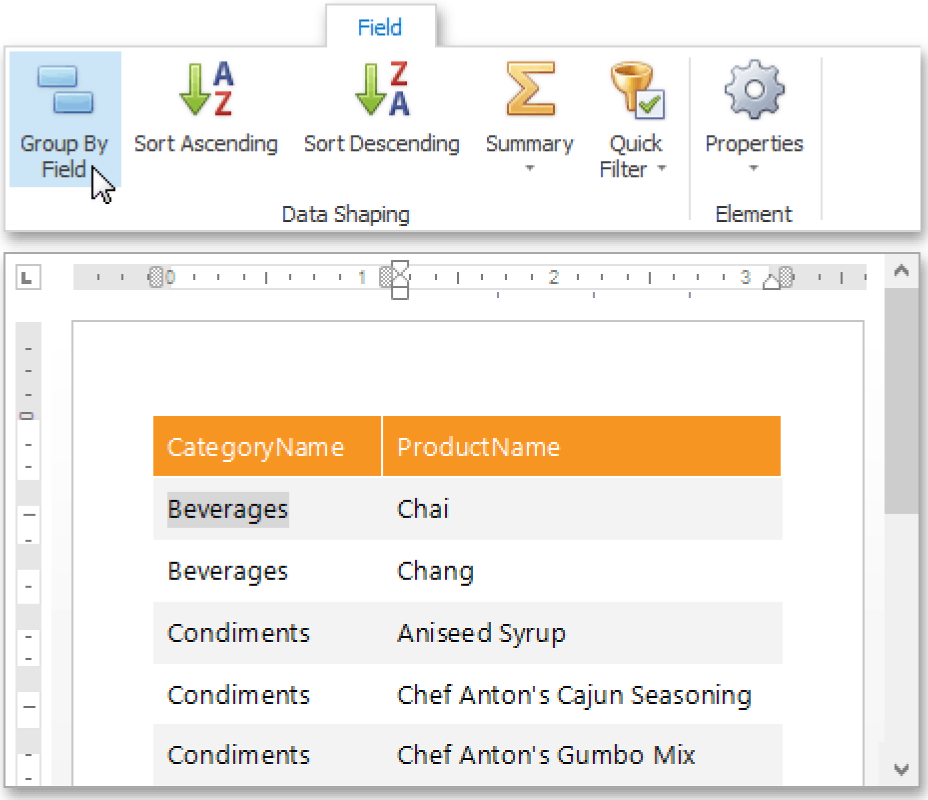


Snap supports both standard and custom .NET format strings.

Group Data

This document describes how to group data in a **Snap** document.

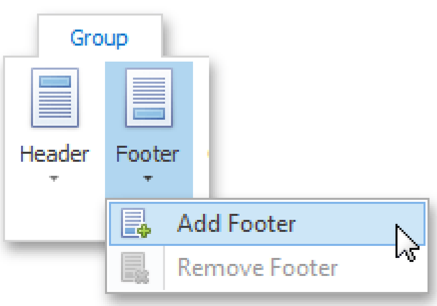
To group dynamic data within a **Snap list**, select the **field** that you wish to group. This automatically activates the contextual Data Tools: Field tab in the main toolbar. In this tab, click the **Group By Field** button.



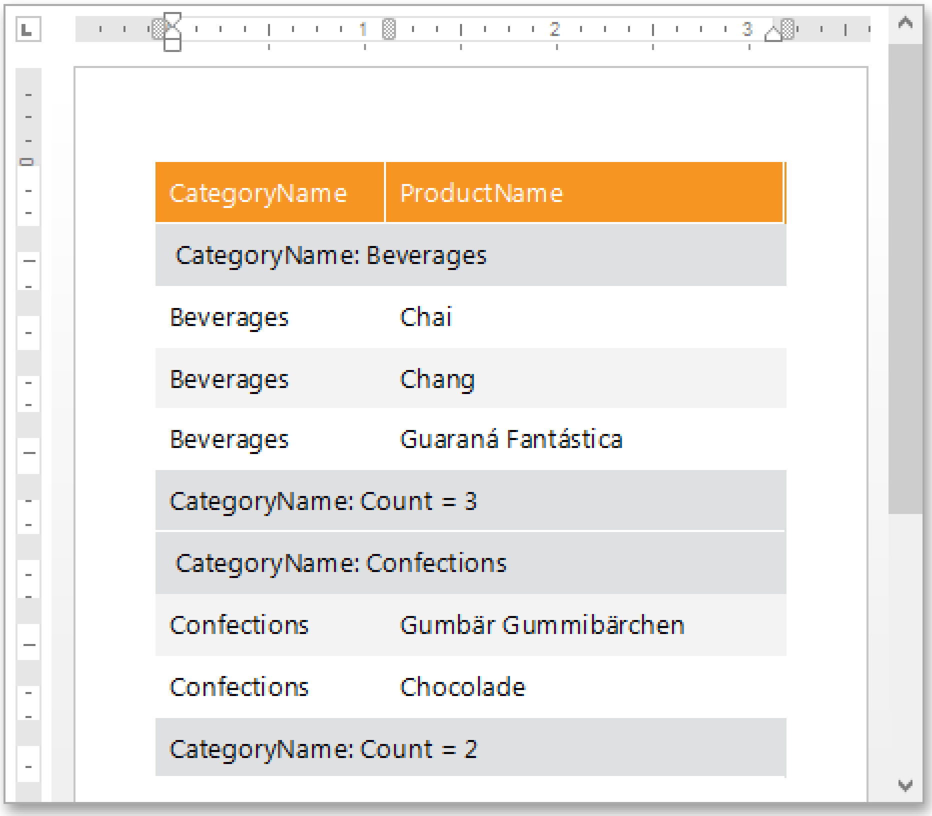
The Snap list will be updated to reflect the applied grouping.

A group header and a group footer are automatically created for the new grouping. By default, the group header displays the value of the field by which to group, and the group footer displays the total count of entries in the group (evaluated by the **Count summary function**).

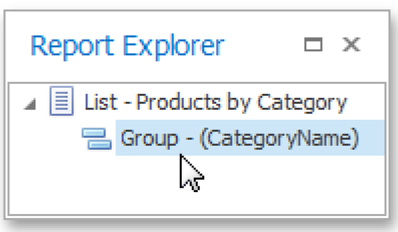
To add or remove group headers and footers, use the corresponding commands in the Group tab of the main toolbar.



The following image illustrates a Snap list with grouping applied.



All groupings added to a report are displayed in the Report Explorer as child nodes of the Snap list to which they are applied.



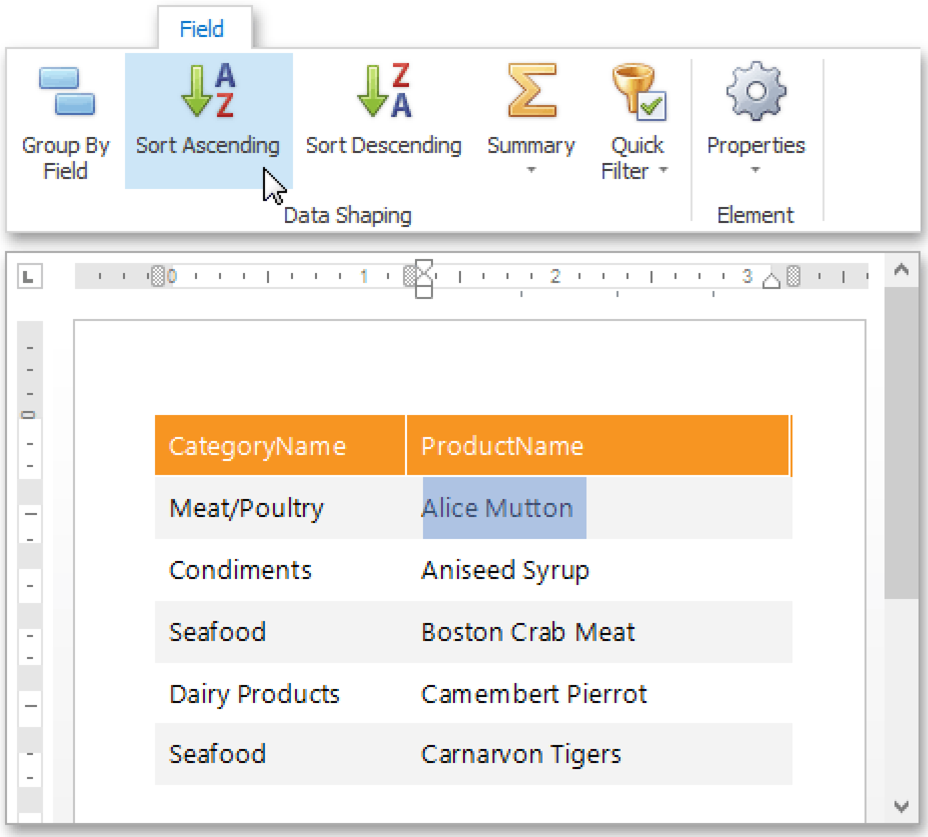
Sort Data

This document describes how to sort dynamic data within a **Snap** document.

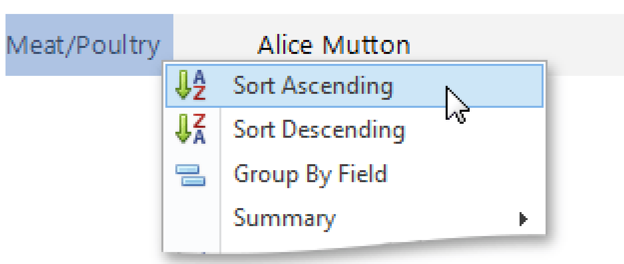
Sort Snap List Data

To apply sorting to a **Snap list**, do the following.

1. Select the **Snap field** that you wish to use as filter criteria. The field must be located inside a Snap list. This automatically activates the contextual **Field** tab in the main toolbar.
2. In the **Field** tab, click the **Sort Ascending** or **Sort Descending** button, depending on the required sort order. The Snap list will automatically be updated to reflect the sorting applied.



Sort commands are also available in the context menu.



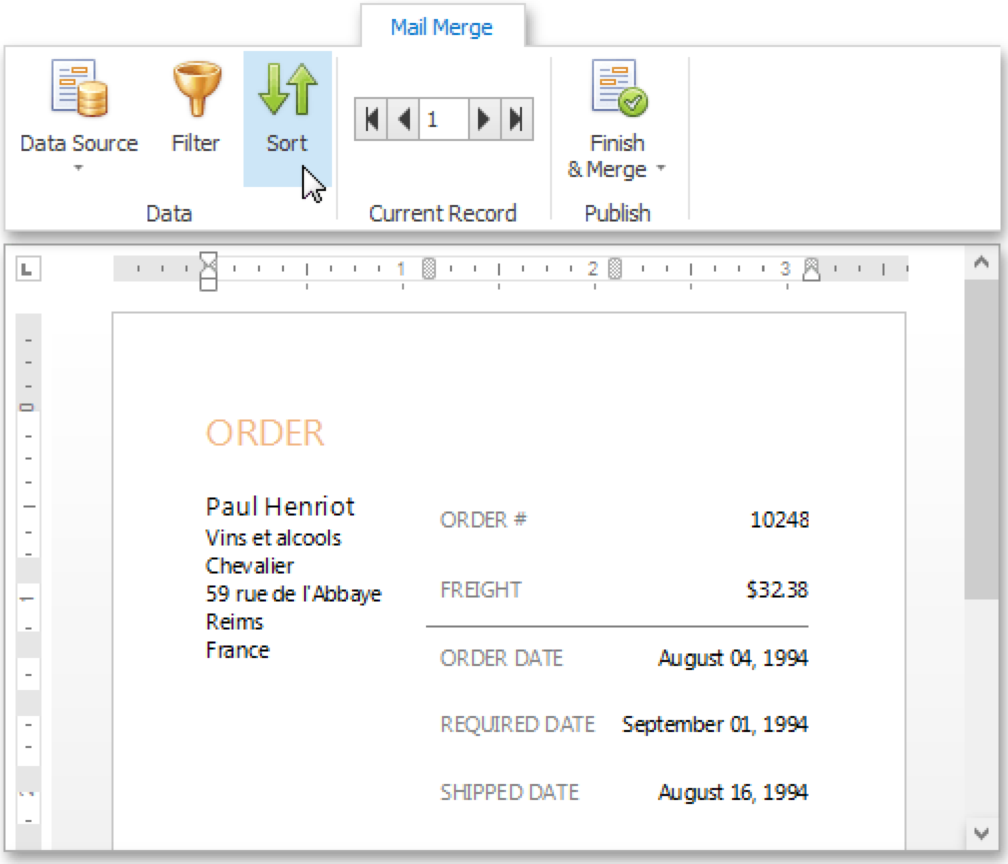
You can specify multiple sort criteria for a Snap list. In this case, sort levels are applied in the order that they are added.

Sort Mail Merge Document Data

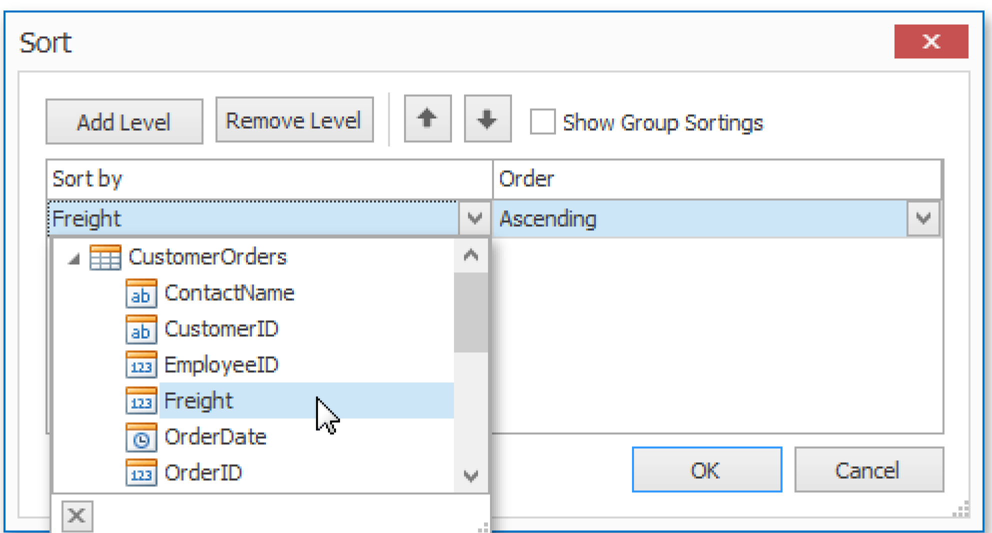
Sorting a **mail merge document** defines the order in which data entries will appear as pages of the final document.

To sort a mail merge document, do the following.

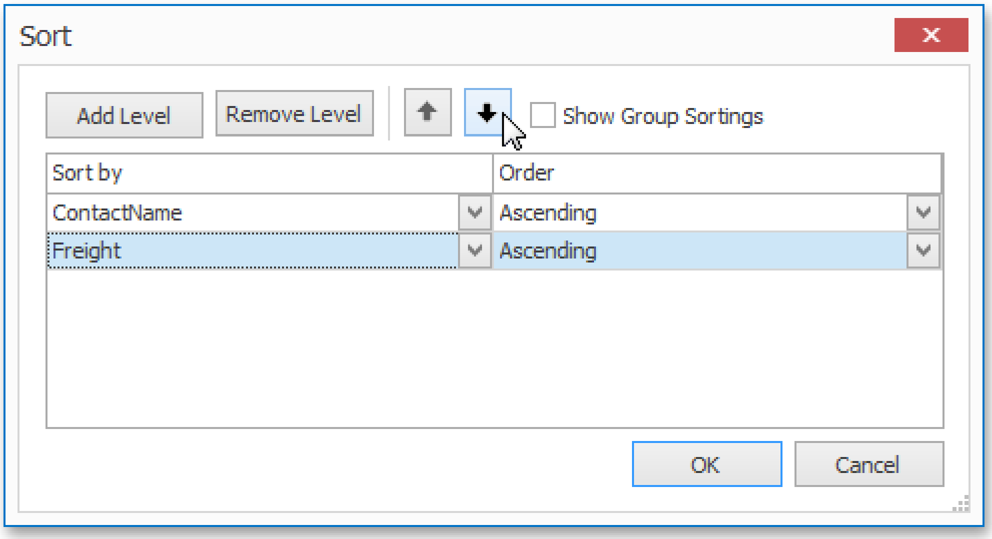
1. Switch to the Mail Merge tab of the main toolbar and click the **Sort** command.



2. Click the **Add Level** button in the invoked **Sort** dialog. Specify the sort criteria and sort order for the additional sort level.

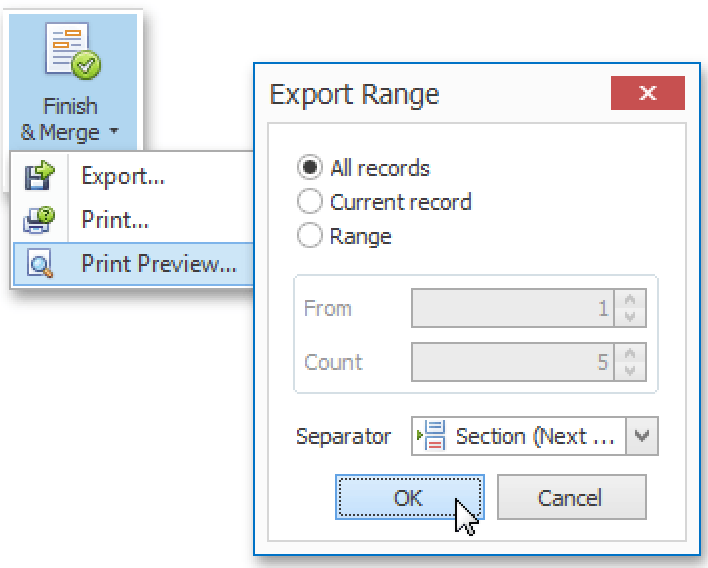


To change the order in which sort levels are applied to the document, use the arrow buttons.

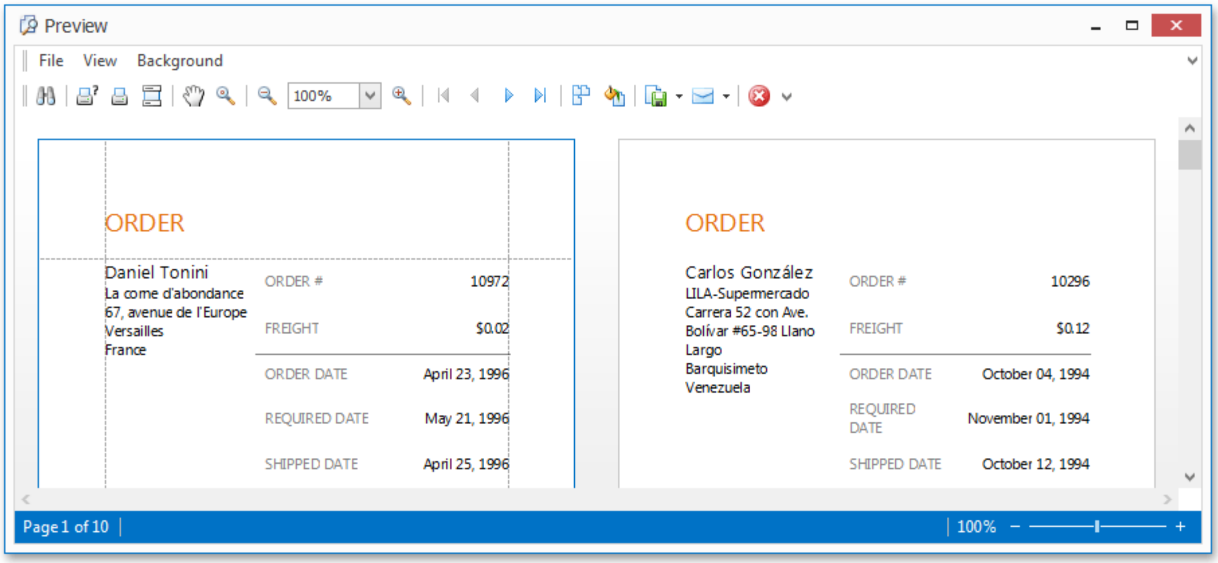


Click **OK** to exit the dialog.

3. To view the result, click the **Finish & Merge** button in the **Mail Merge** tab of the main toolbar, and select **Print Preview...** in the invoked drop-down menu. In the invoked **Export Range** dialog, select **All records** and click **OK**.



The following image demonstrates a print preview for a sorted mail merge document.



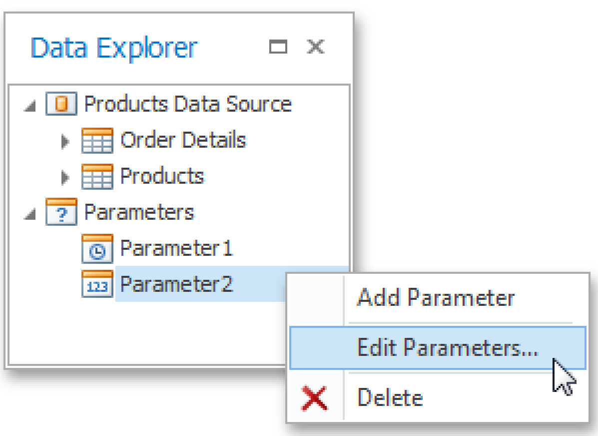
Pass Parameter Values

This document describes the main concepts for using parameters in **Snap**, and provides examples of their use in various tasks.

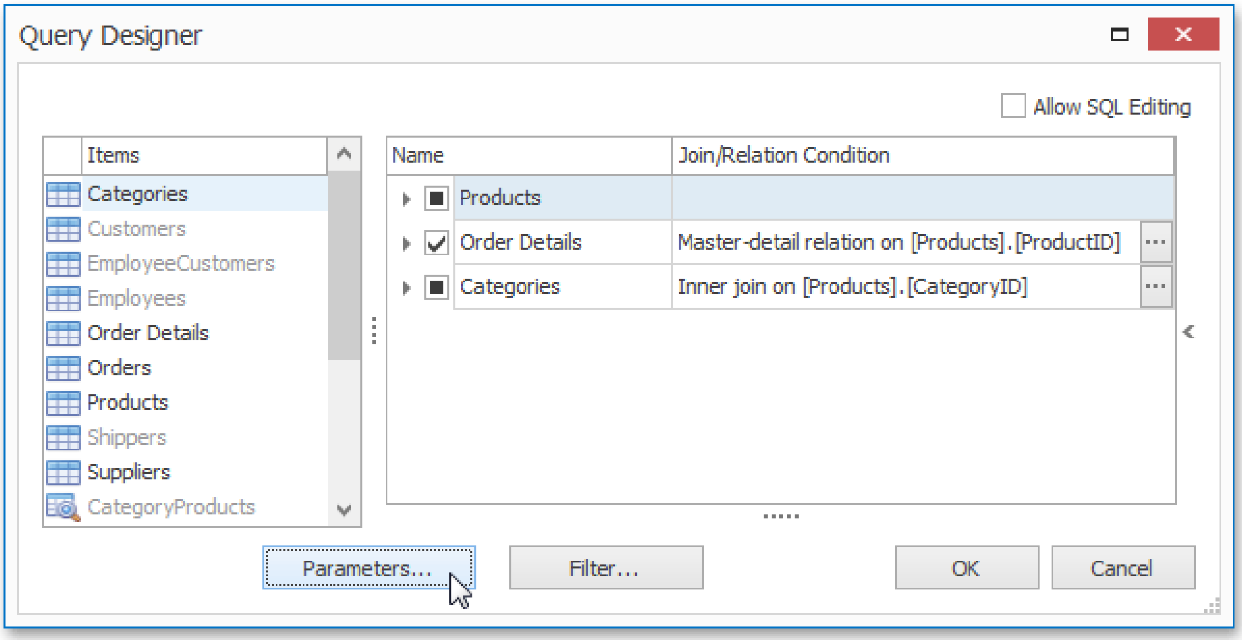
Create Parameters

You can manage the report parameters available for a Snap document using the **Parameters** dialog.

To invoke the **Parameters** dialog, right-click the **Parameters** node (or any of its sub-nodes) in the Data Explorer and select **EditParameters** in the invoked drop-down menu.

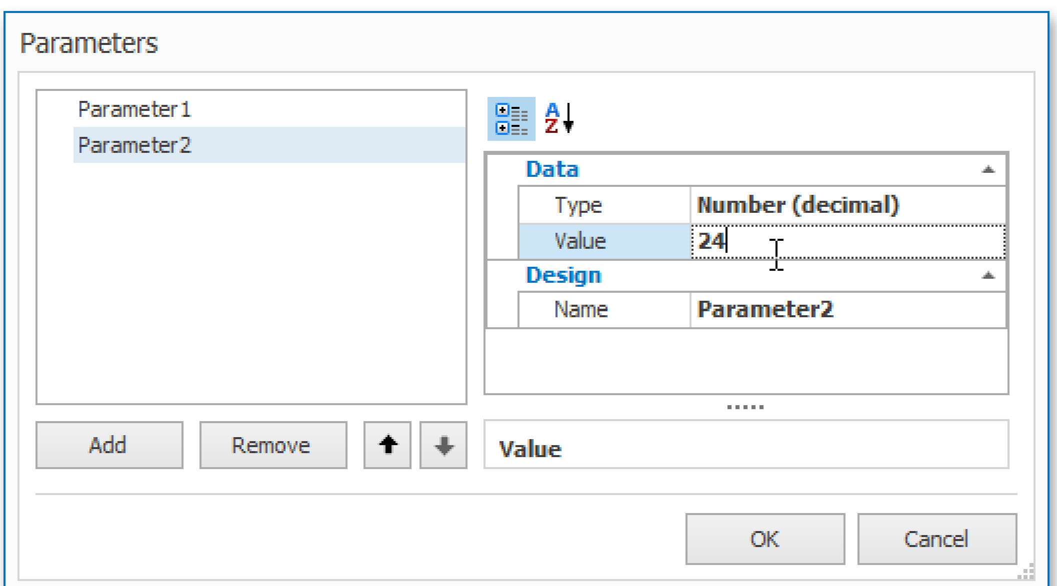


To invoke the **Parameters** dialog for a data source being edited with the Query Designer, click the **Parameters** button.



The **Parameters** dialog allows you to add and remove parameters using the corresponding buttons. Alternatively, you can add or remove a parameter by right-clicking the parameter in the **Data Explorer** and selecting the required action in the invoked drop-down menu.

Select the newly added parameter and specify its properties in the properties grid. Be sure to specify the proper parameter type based on the parameter's intended use.

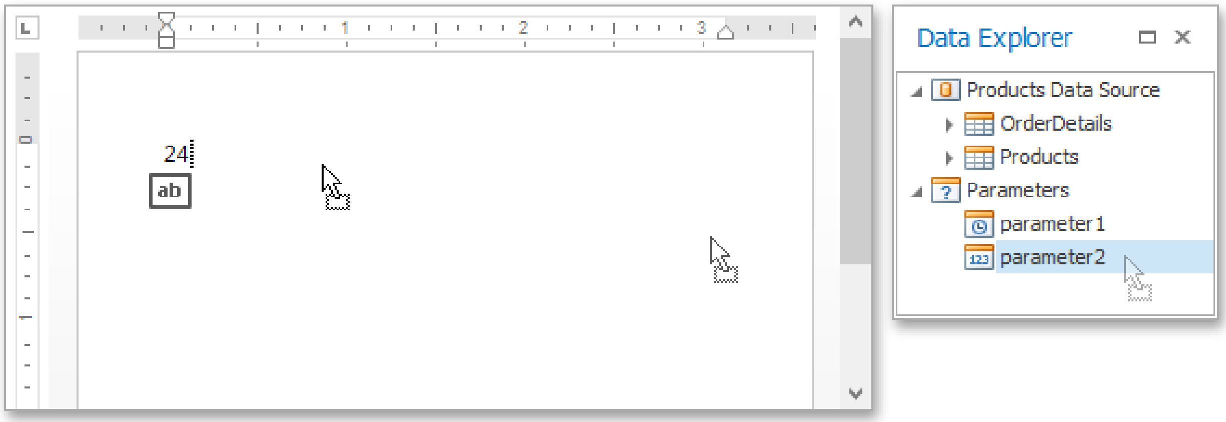


Pass Parameter Values

After a parameter is created, it can be used in different ways during report generation. Below is a list of tasks that can be accomplished using parameters.

- **Data Binding**

  To display a parameter's value in a report, drag the parameter from the Field List and drop it onto the Design Surface.

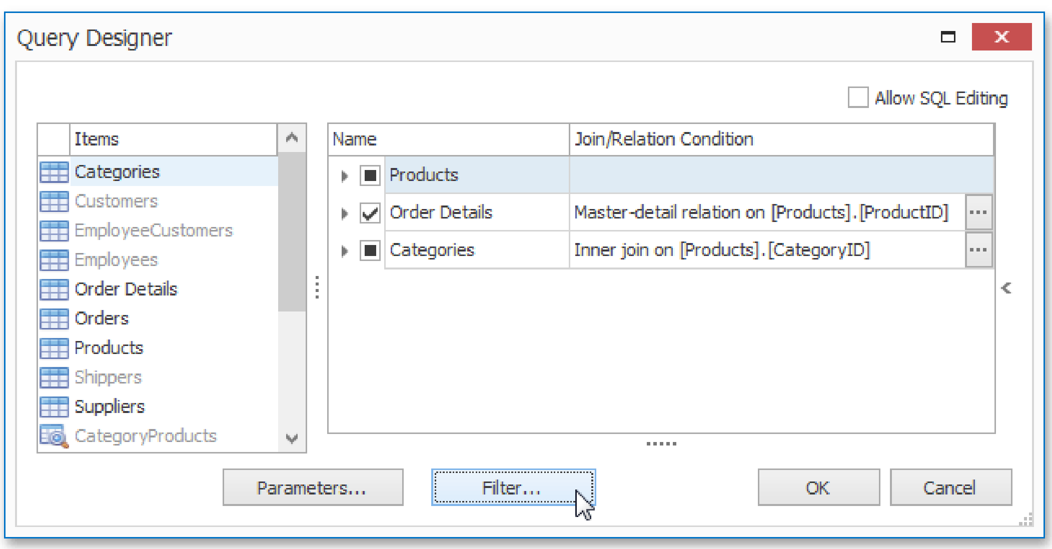


- **Filtering**

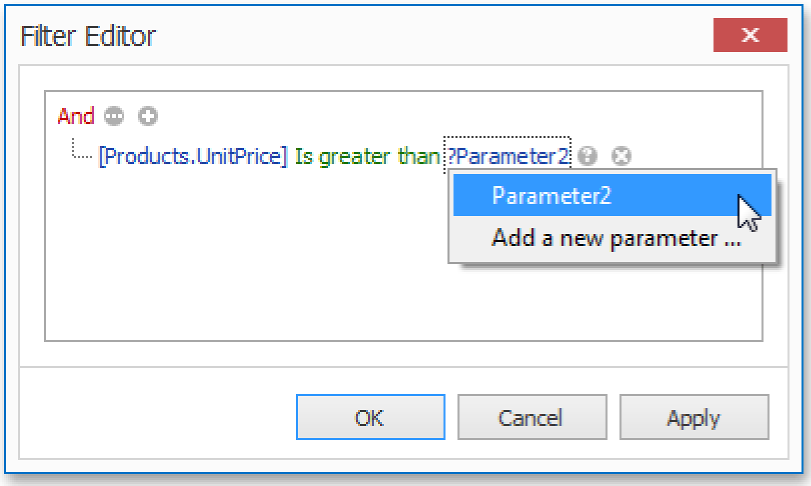
  You can use a report parameter as part of a filtering expression to filter the Snap document data at either the report level or the data source level.

  To filter the Snap document data at the data source level, do the following.

  1. Invoke the **Query Designer** for the data source that you wish to filter.
  2. In the **Query Designer**, click the **Filter** button to invoke the **Filter Editor**.

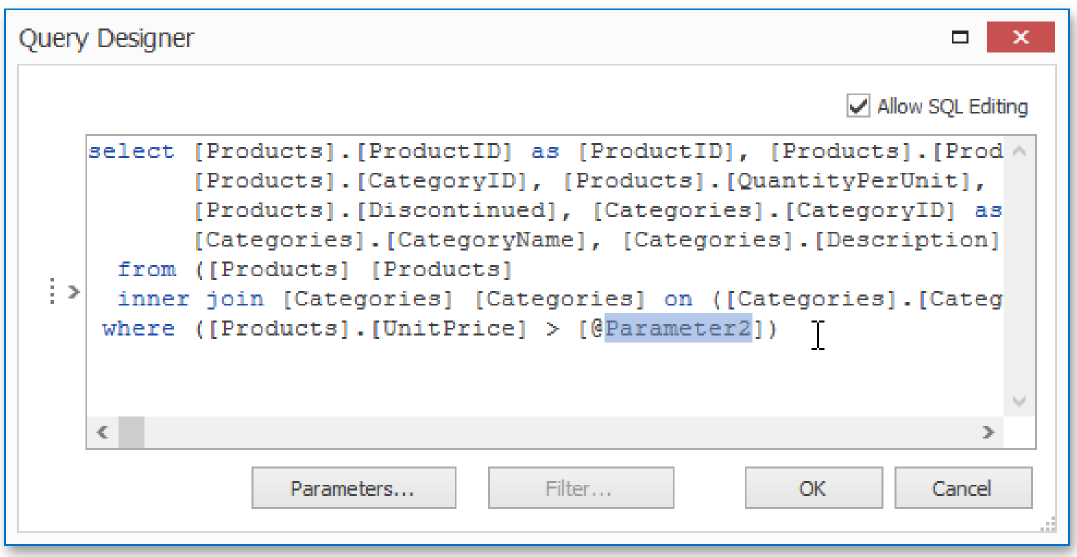


  3. In the **Filter Editor**, construct an expression where the parameter's value is used as a filtering criterion. To access the parameter, click the icon on the right. It will turn into a question mark.

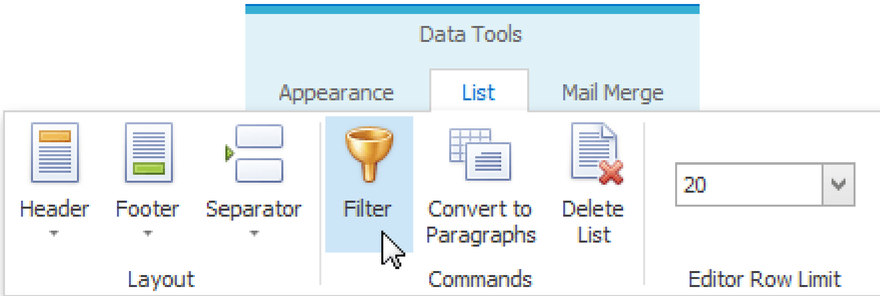


Click **OK** to exit the dialog.

The **SQL** query generated by the query designer will be updated to reflect the specified filtering.

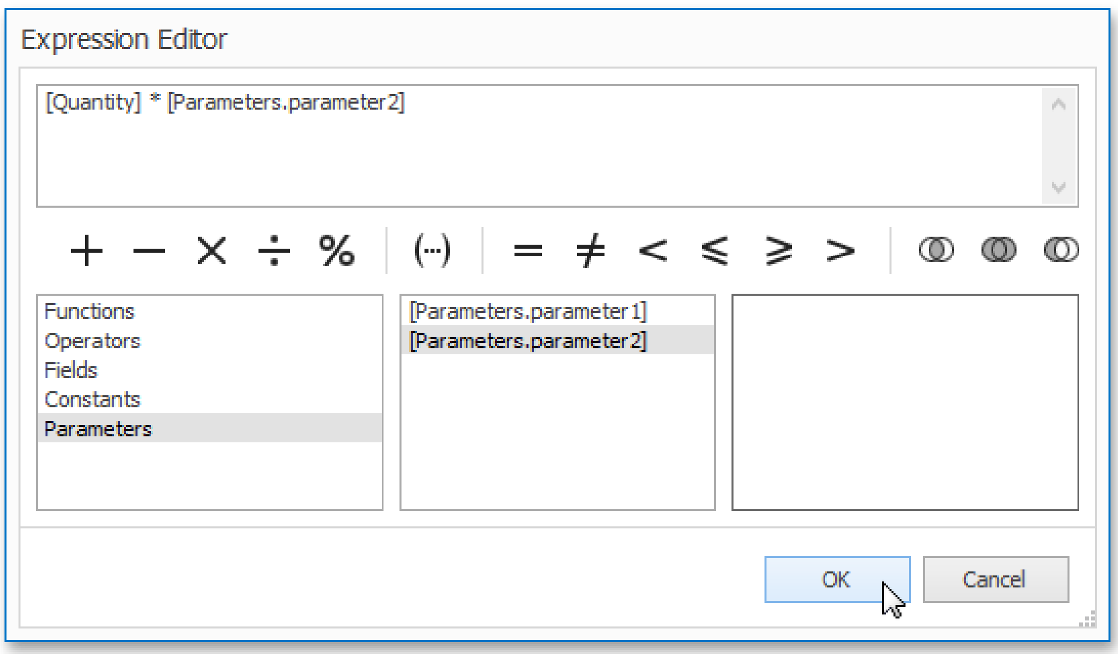


In a similar way, you can use the **Filter Editor** to filter the Snap document data at the report level. In this case, to invoke the **Filter Editor**, click the **Filter** button that resides on the List tab of the contextual **Data Tools** toolbar category.



- **Calculated Fields**

  In addition to standard data fields, parameters can be used in expressions for calculated fields. The only difference is that the data field is inserted into the expression's text using its name in [square brackets], while a parameter is inserted using the "**Parameters.**" prefix before its name.

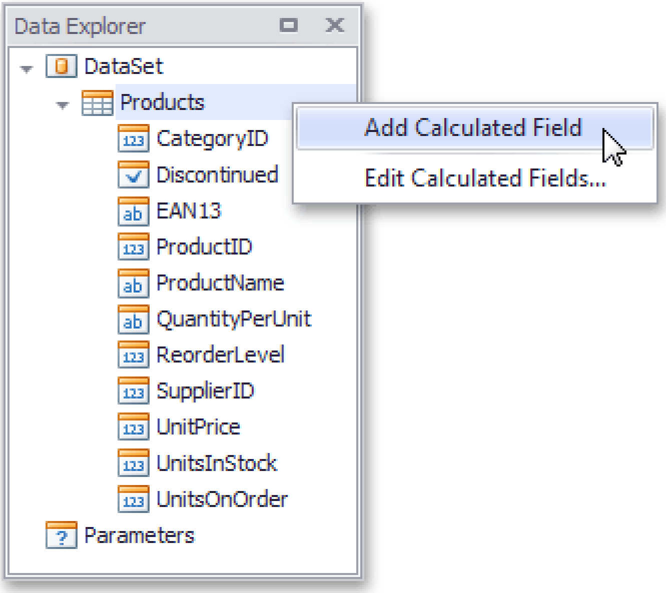


Use Calculated Fields

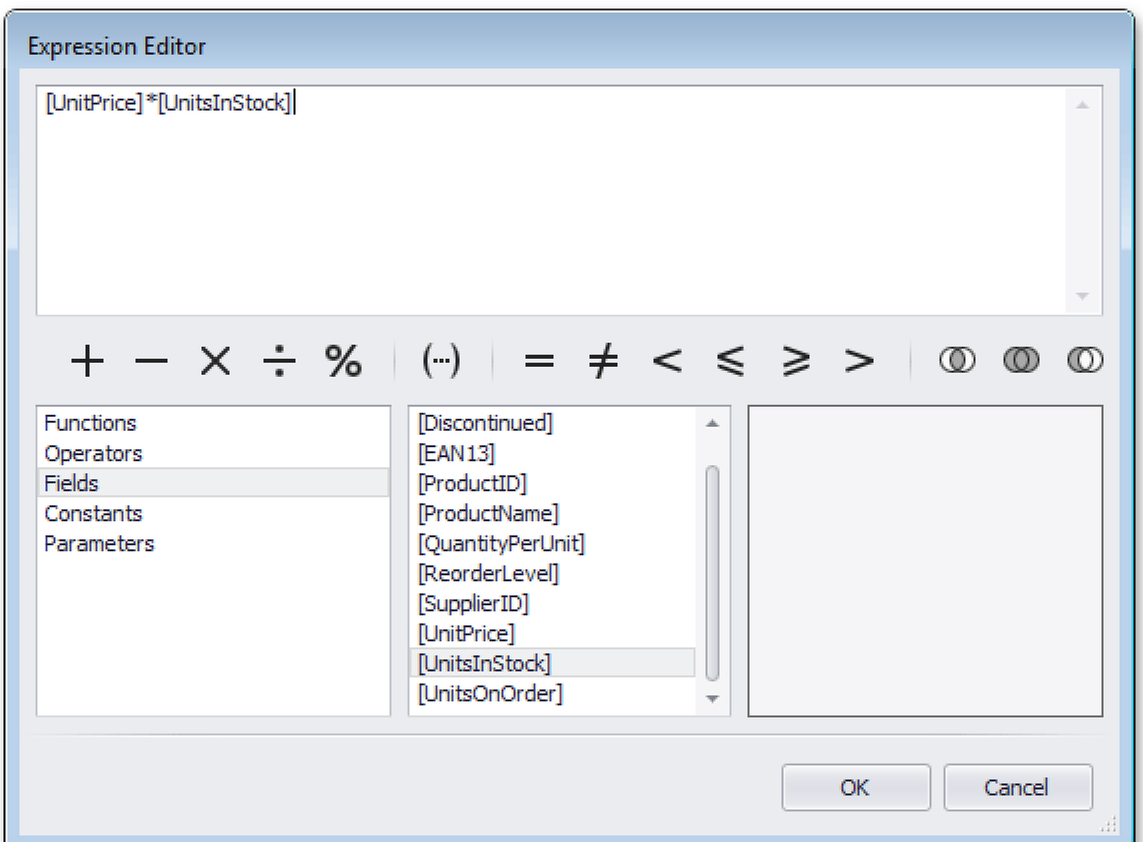
This document describes how to use **calculated fields** to evaluate custom expressions based on external data, and embed the results into a Snap document.

Use calculated fields to perform additional calculations on dynamic data and embed the results into a published document.

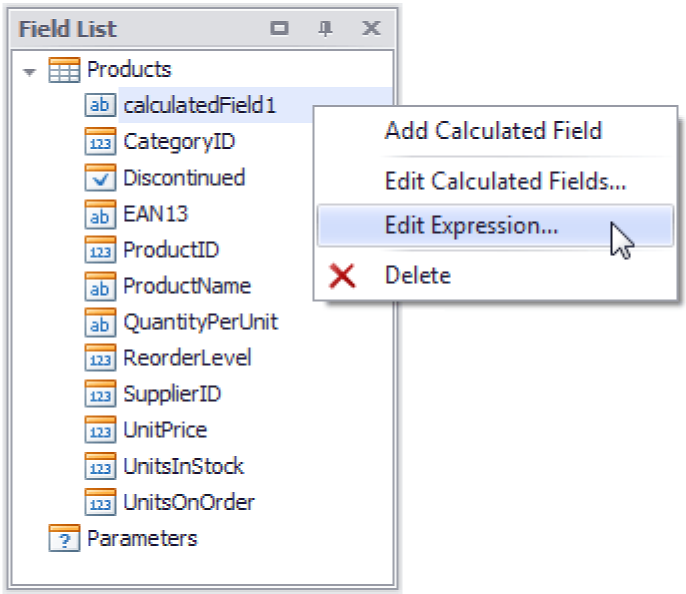
To create a calculated field and access its collection, invoke the context menu in the Data Explorer.



A calculated field's expression can include conditional, date-time, mathematical and other formulas. It can also evaluate the values of other calculated fields, data source fields and parameters.



The **Expression Editor** is invoked by right-clicking a calculated field and choosing the **Edit Expression…** item in the invoked popup menu.



After a calculated field is inserted into a document, its value is evaluated each time the document is set to be published.

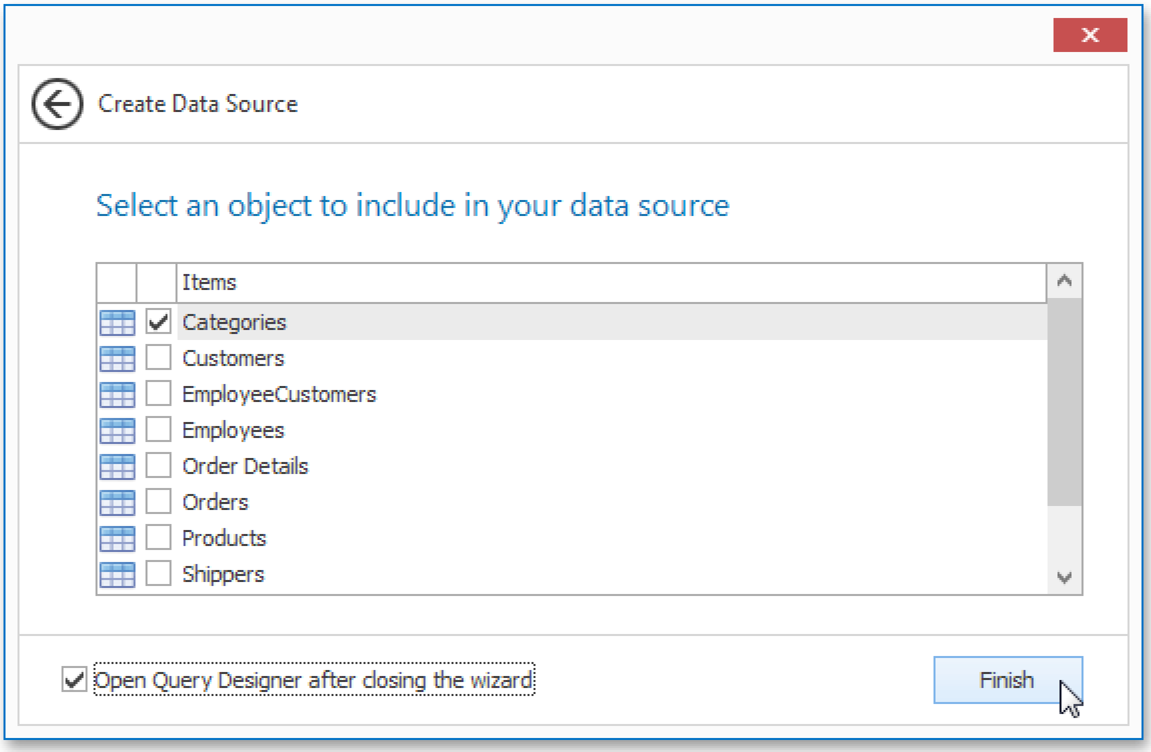
Use the Query Designer

This topic describes how to use the **Query Designer** to manage data tables and their relations in a Snap data model (e.g., to create master-detail data sources), filter incoming data and specify a custom SQL string.

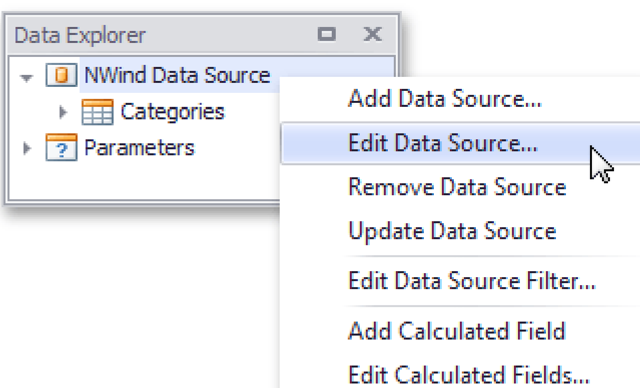
The Query Designer displays the structure of a connected data source along with its associated Snap data model. When designing a report, this data model is reflected in the Data Explorer.

Run the Query Designer

An option to invoke the Query Designer is provided on the last page of the **Create Data Source wizard**. The Create Data Source wizard is invoked at connecting a Snap document to a Data Source. Select the "**Open Query Designer after closing the wizard**" option before clicking **Finish**.



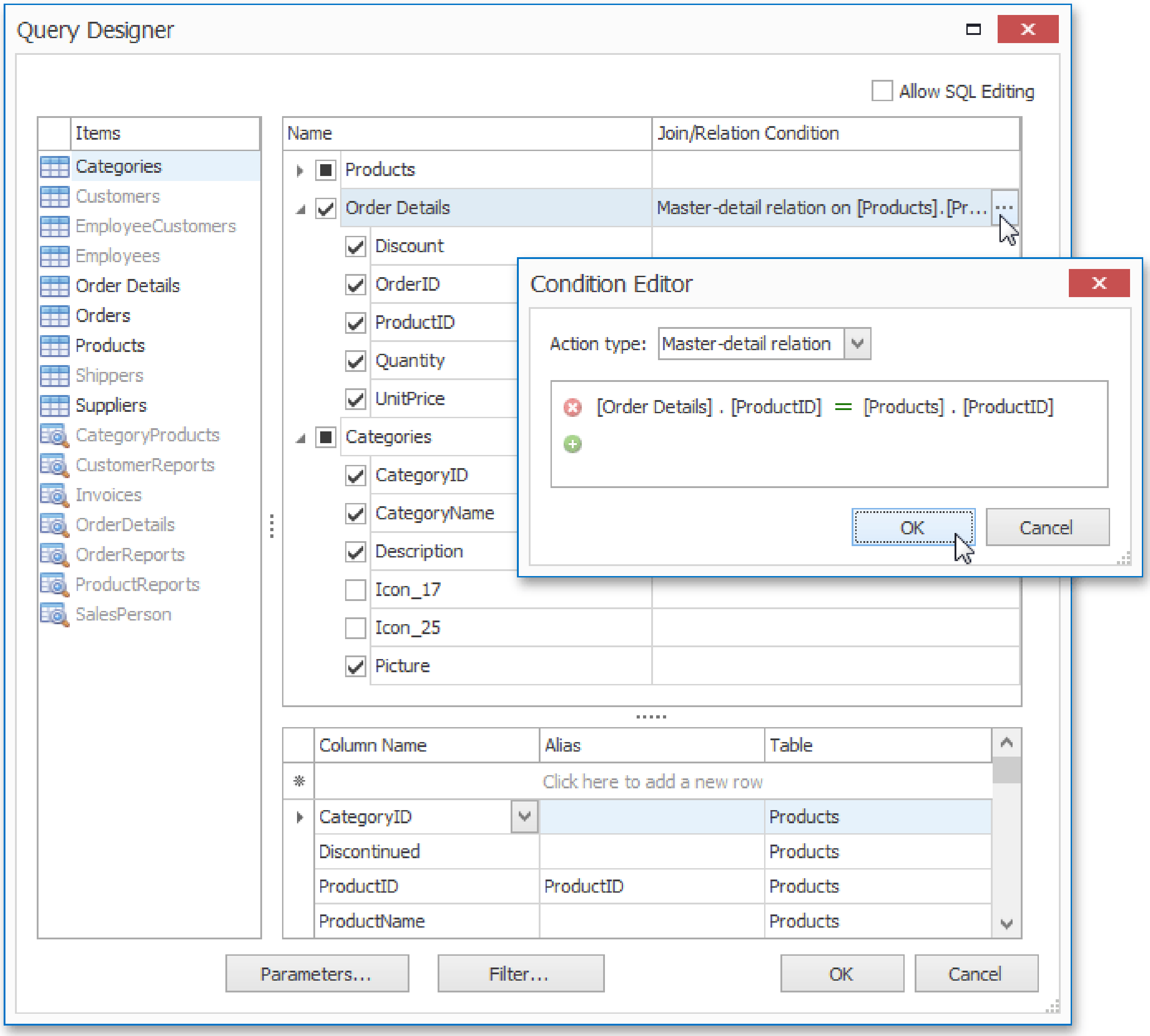
Alternatively, you can run the Query Designer by right-clicking a data source in the Data Explorer and clicking **Edit Data Source** in the invoked menu.



Manage Data Tables and their Relations

To modify a relation assigned to a specific table, click its corresponding ellipsis button in the Snap data source editor.

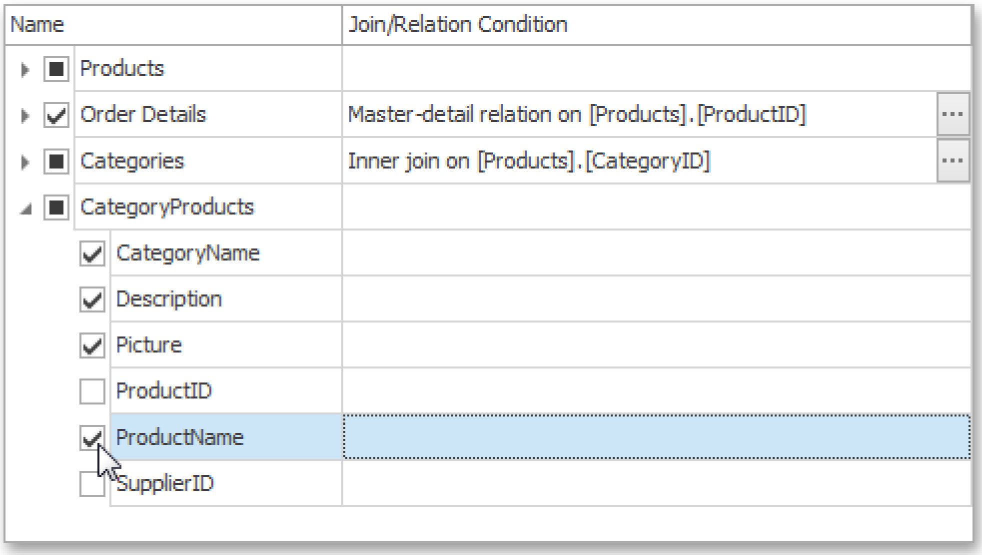
This invokes the **Condition Editor**, which allows you to include other tables in the new data relation and select the relation type (**Inner join**, **Left outer join** or **Master-detail relation**).



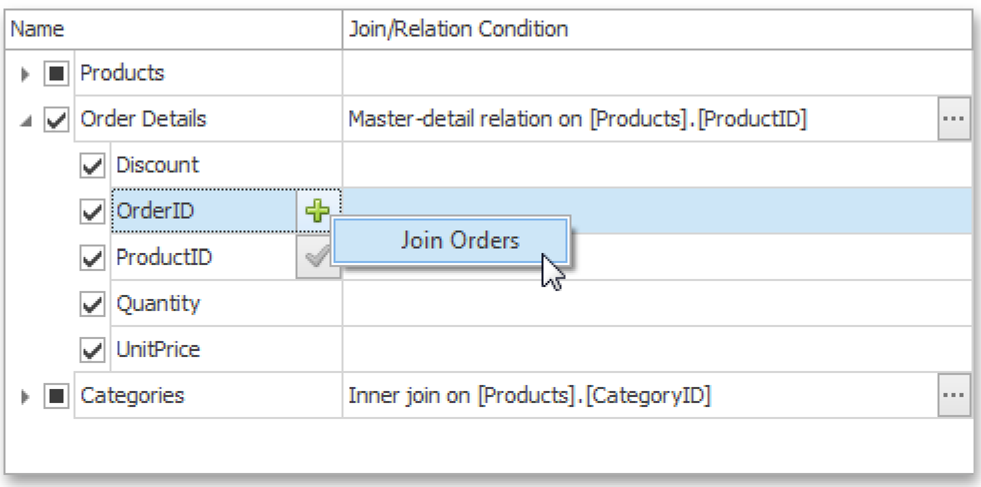
The **Condition Editor** is automatically invoked after adding a new table to a Snap data model.

The Query Designer highlights the tables of an external data source that is related to the tables of a Snap data model by one or more primary keys.

To maintain the visibility of data columns in the Data Explorer, use the corresponding check boxes in a specific table's column list.

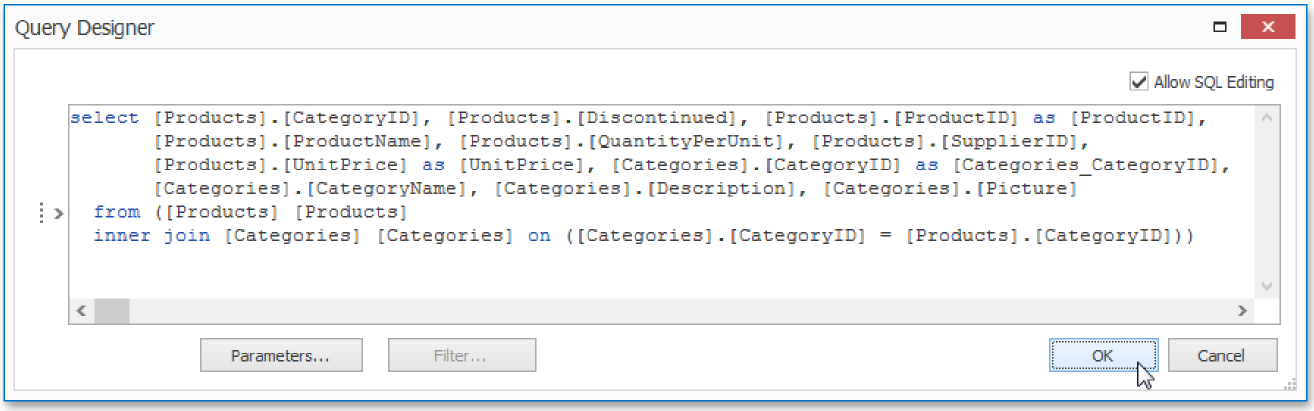


In this list, the primary key columns display a '**plus**' button, which invokes a list of related tables. Clicking a table in this list adds it to the Snap data source.



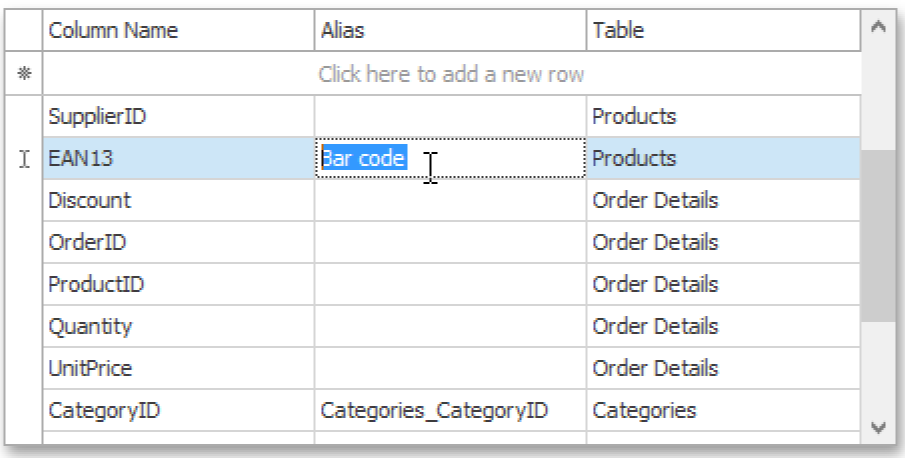
A Snap data source corresponds to an SQL query that is executed each time external data is supplied from a database.

To manually customize an SQL string, enable the **Allow SQL Editing** option. Switching to this mode disables the visual features of the Query Designer in favor of the specified SQL string value.

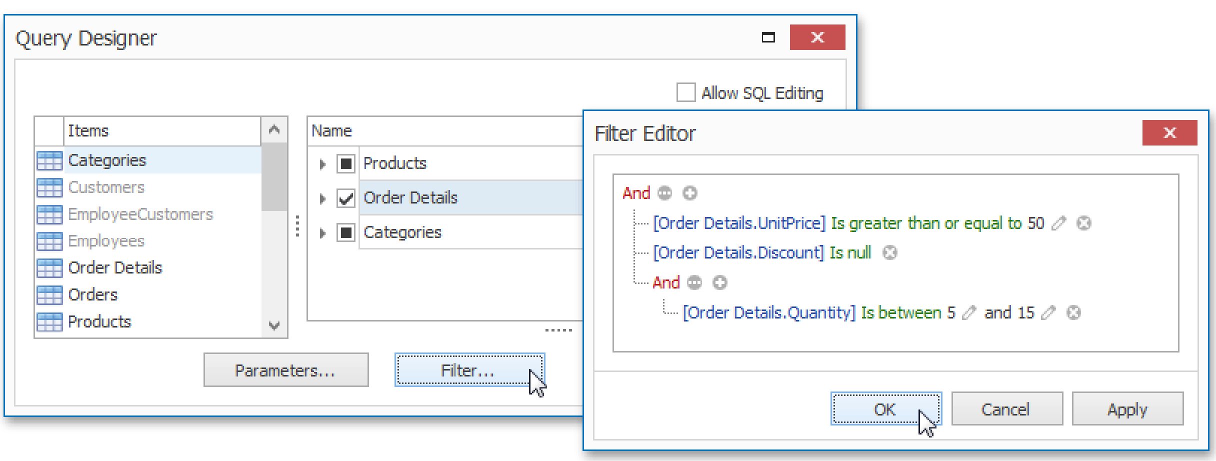


Shape Data

To assign a custom name to the selected data column, specify its **Alias** in the column list displayed under the Snap data source editor.



To specify the filter criteria that is applied to incoming data, click the **Filter** button, which invokes the **FilterString Editor**.



Create a Report Layout

Topics in this section provide information on creating reports with different layouts in Snap.

Create a Mail-Merge Report

This tutorial illustrates the steps required to create and publish a mail merge report with **Snap**.

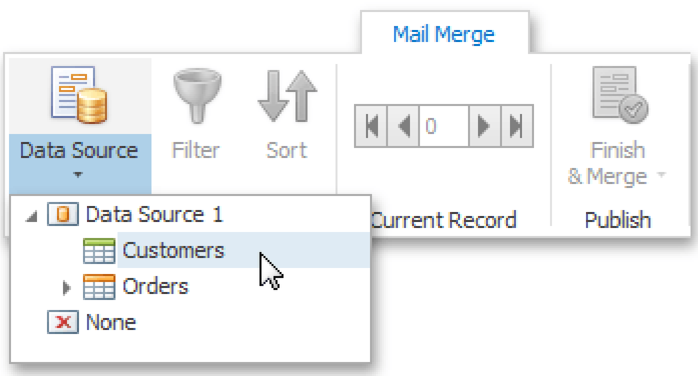
The tutorial contains following sections.

- Add Dynamic Content
- Preview and Publish the Document

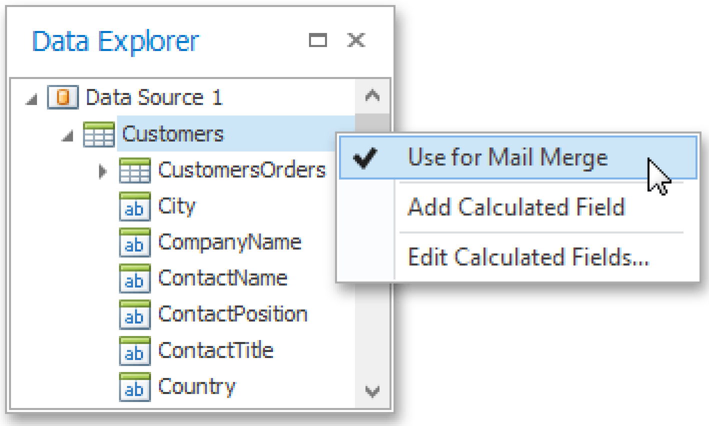
Add Dynamic Content

To create a Snap report using a document template, do the following.

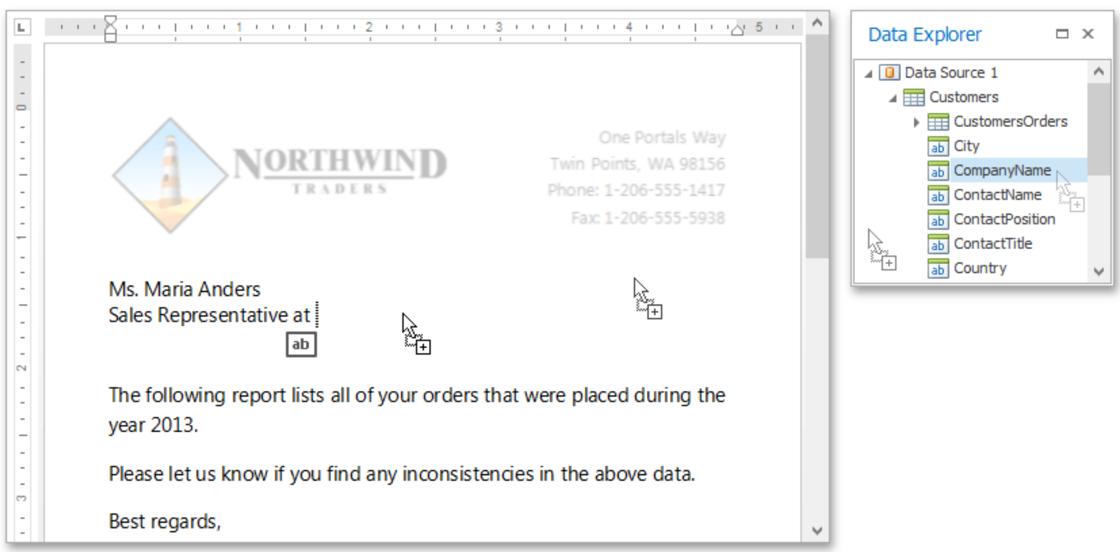
1. Add a new Snap document and provide it with a master-detail data connection.
2. Next, specify which data source will be used for mail merge. To do this, click the **Data Source** button on the Data Tools: Mail Merge tab and select the required data source in the invoked drop-down list.



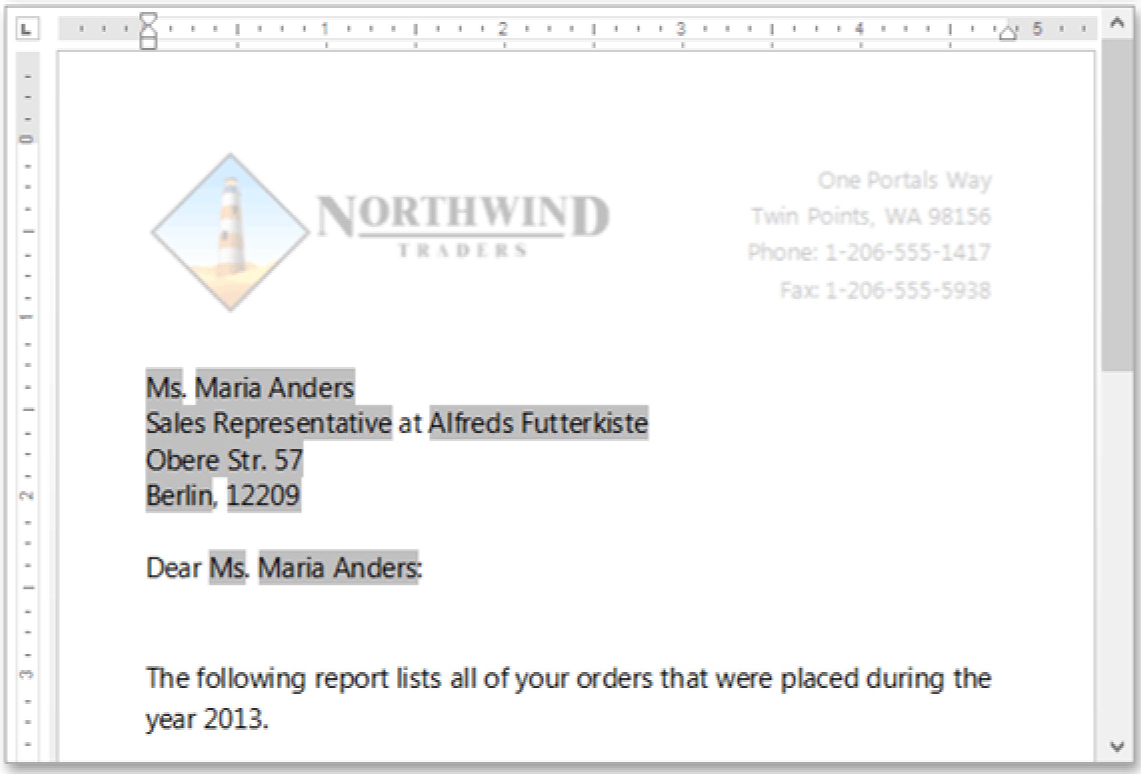
Alternatively, right-click the required data source in the Data Explorer and select **Use For Mail Merge** in the invoked drop-down menu.



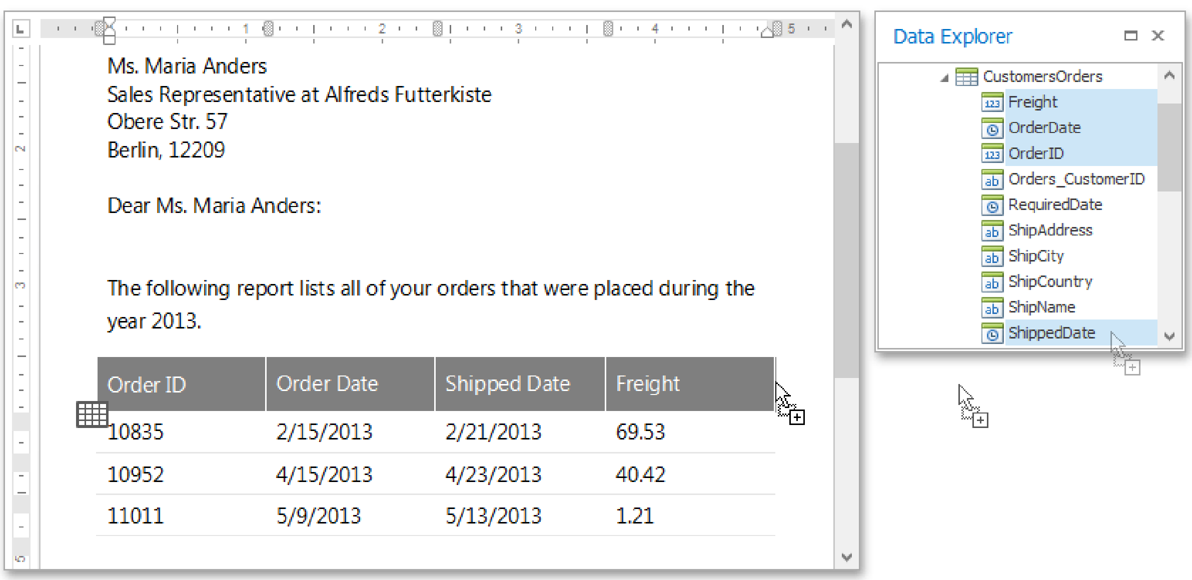
3. To insert data bound fields into the document, drag-and-drop data fields from the Data Explorer onto the Design Surface.



Activate the **Highlight Fields** option from the View tab of the main toolbar to highlight all mail merge fields in a document. This allows you to easily distinguish between dynamic and static content.

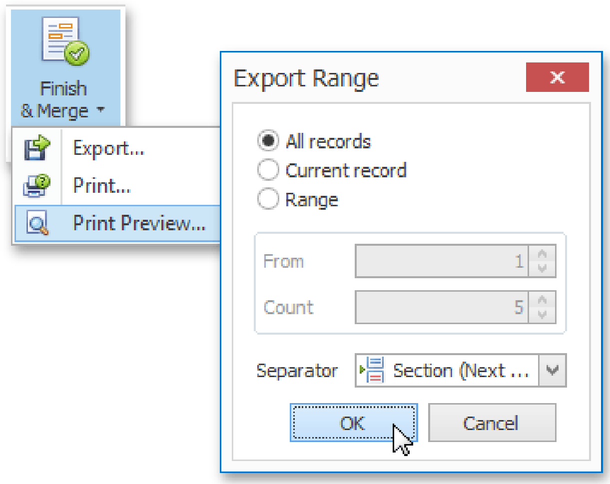


4. To insert a detail report section, drag-and-drop fields from a subordinate node of the data source. Fields of a nested level of a mail-merge data source are inserted into a template as columns of a table.

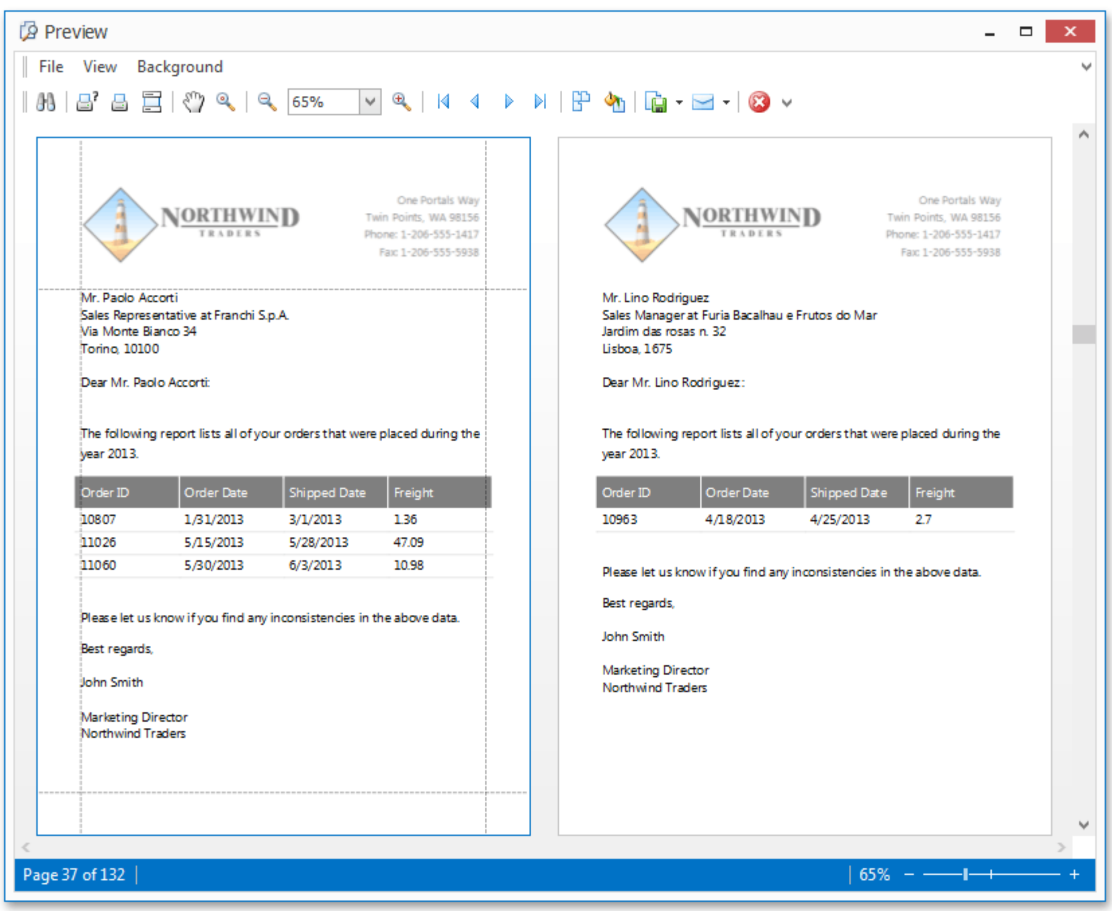


Preview and Publish the Document

The Snap mail merge document is now ready. To view the result, click the **Finish & Merge** button in the **Mail Merge** tab, and select **Print Preview...** in the invoked drop-down menu. In the invoked **Export Range** dialog, select **All records** and click **OK**.



The following image illustrates a print preview for the final document.



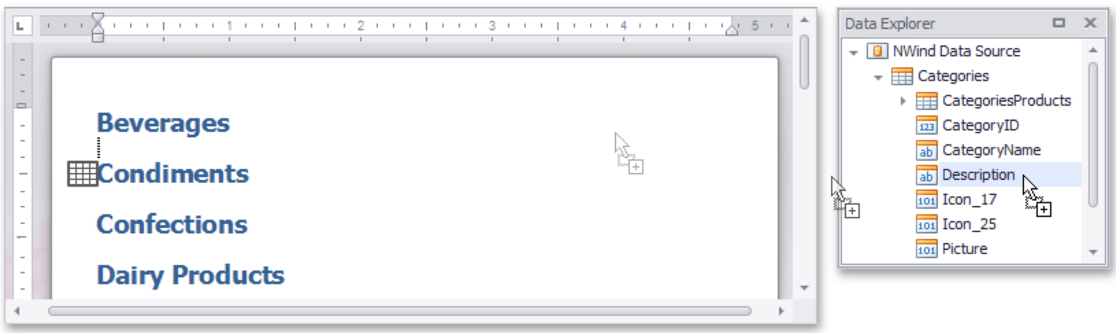
Create a Master-Detail Report

This document will guide you through the process of creating a master-detail report. Reports of this type are built upon hierarchical data sources, so to be able to create a master-detail report, you need to provide a report data source with a master-detail relation.

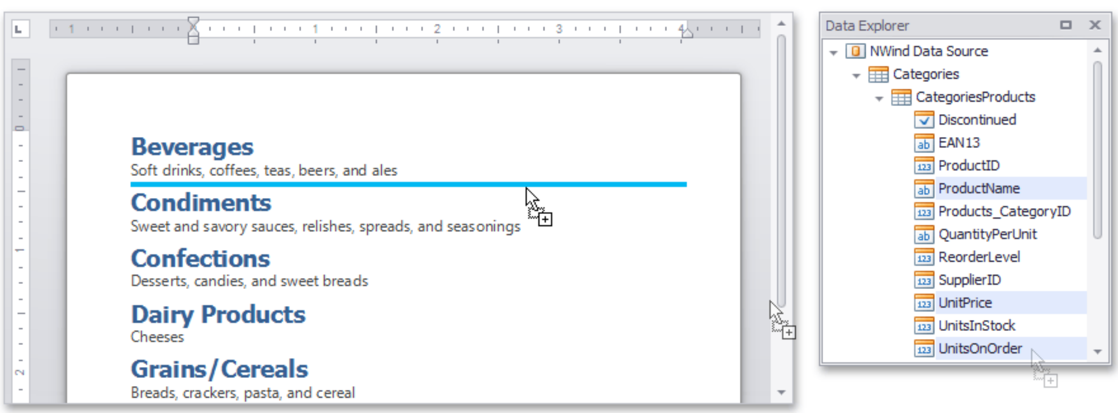
To get started with this tutorial, create a new Snap document and add a master-detail relation to it.

Perform the following steps to create a master-detail report.

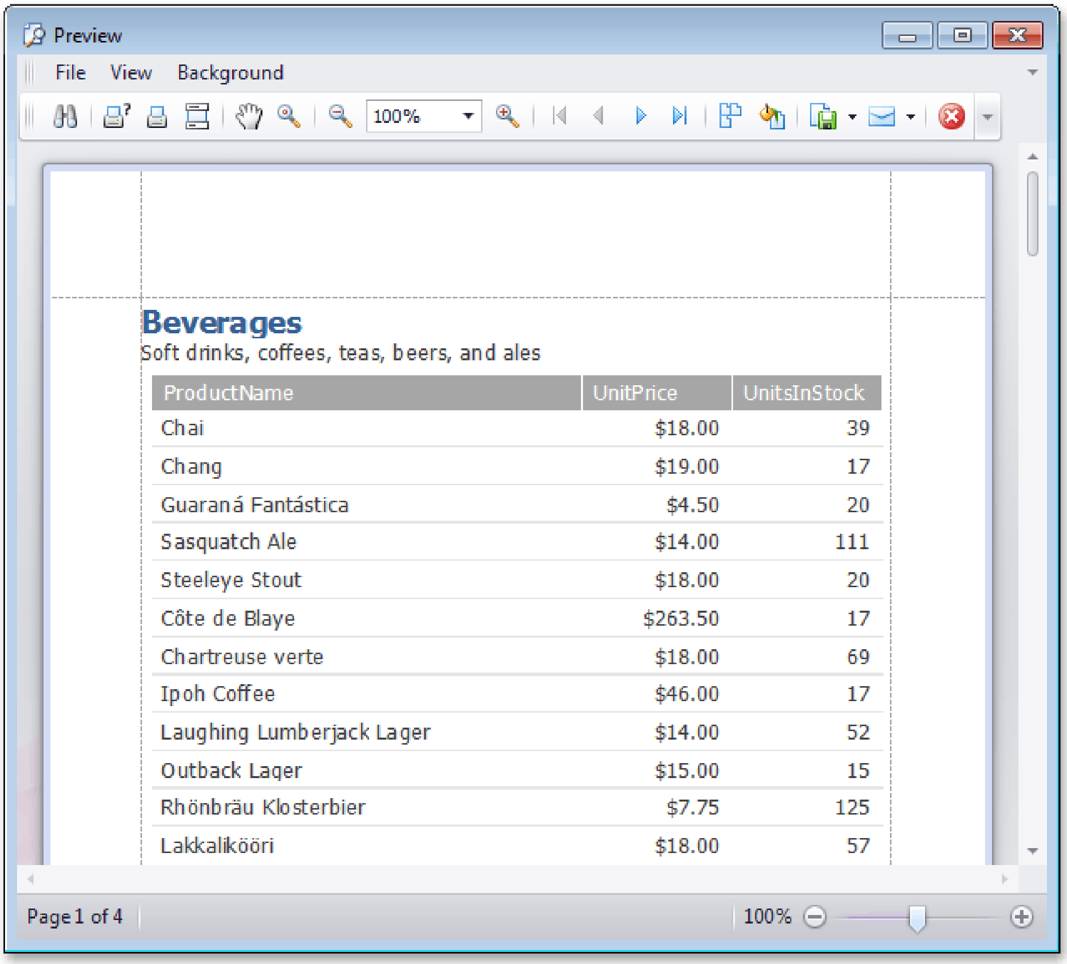
1. Create a master report. To do this, drag-and-drop data fields of the master data table from the Data Explorer to the design surface. You can use any type of layout.



2. To create a detail report, drag-and-drop data fields of the detail data table from the **Data Explorer** onto the lower border of the master report's data row, as shown in the image below.



3. The master-detail report is now ready. Click the **Print Preview** button in the General Tools: File tab of the main toolbar to view the preview.



Create a Table Report

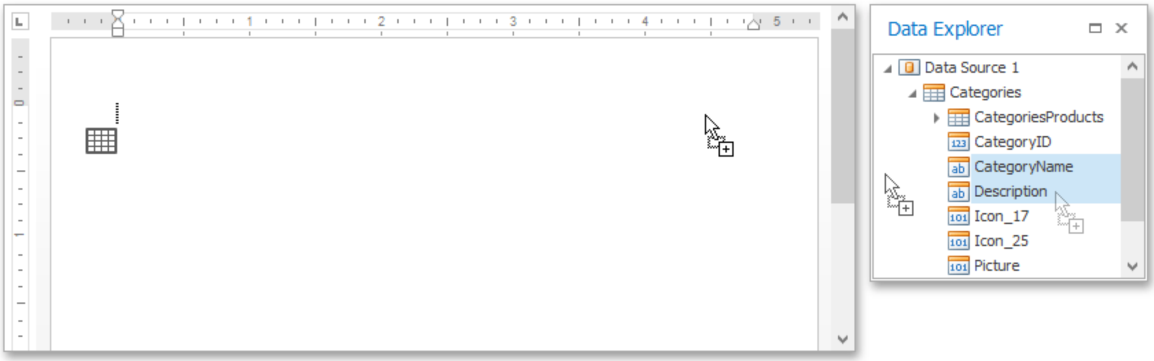
This tutorial will guide you through the process of creating a **Table Report**, and printing and saving it to your hard drive.

The table report is a data-aware **Snap** report with a tabular master-detail layout.

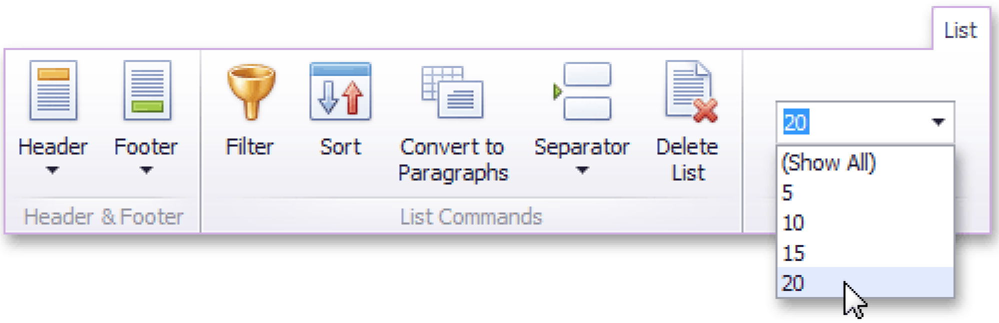
To get started with this tutorial, create a new Snap document and provide a hierarchical data source for it, as described in the Create a Master-Detail Data Source topic.

To create a master-detail Snap document layout, do the following.

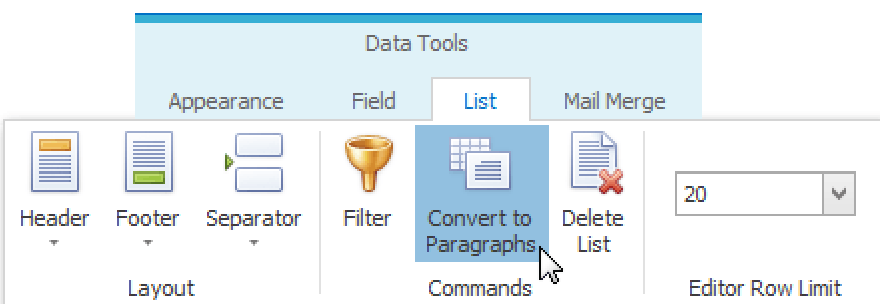
1. Create a simple tabular report by selecting the data fields that you wish to include in the report in the Data Explorer and dragging them to the Design Surface. When you drop data fields onto the empty space in the document body, they are added as columns of a table. You can select multiple data fields by pressing **CTRL** or **SHIFT**.



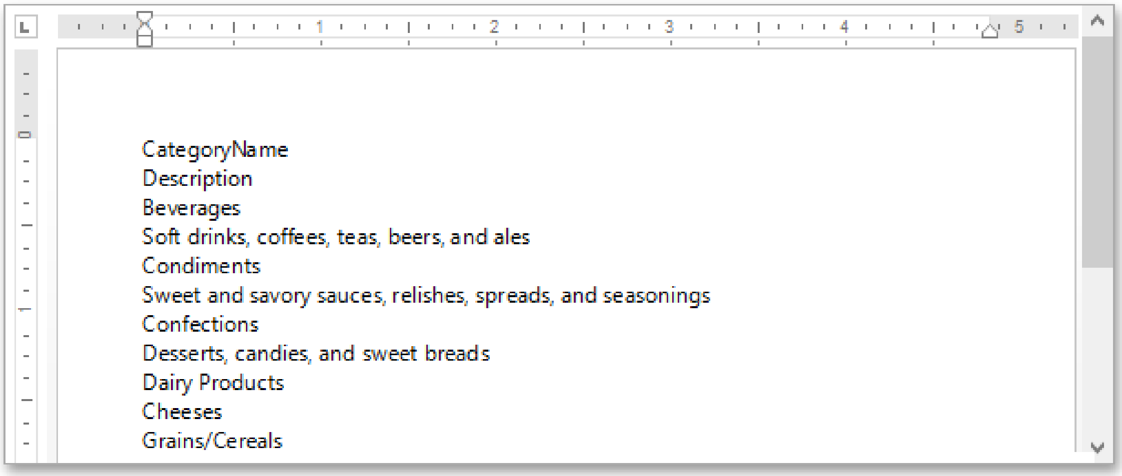
To improve performance, Snap shows only the first **20** data rows of a Snap list by default. To change this setting, use the **Editor Row Limit** option, which is located on the List tab of the main toolbar.



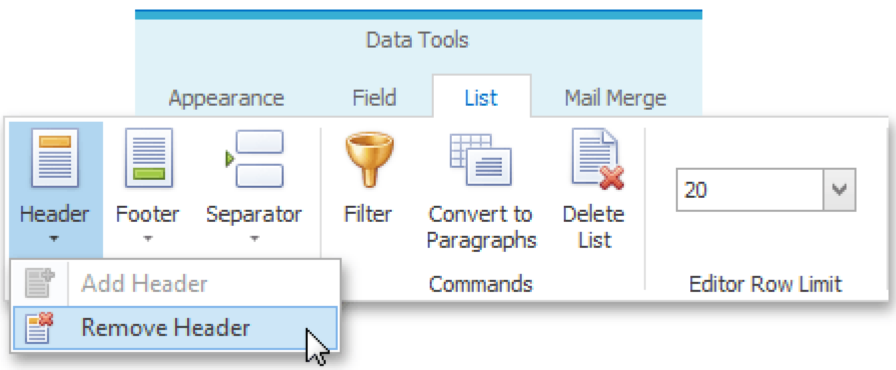
2. To convert the layout of a Snap list to a paragraph presentation, select the Snap list you wish to convert and click the **Convert to Paragraphs** command in the **List** tab of the contextual **Data Tools** toolbar category. Note that there is no reverse action allowing you to convert a Snap list back to the tabbed form.



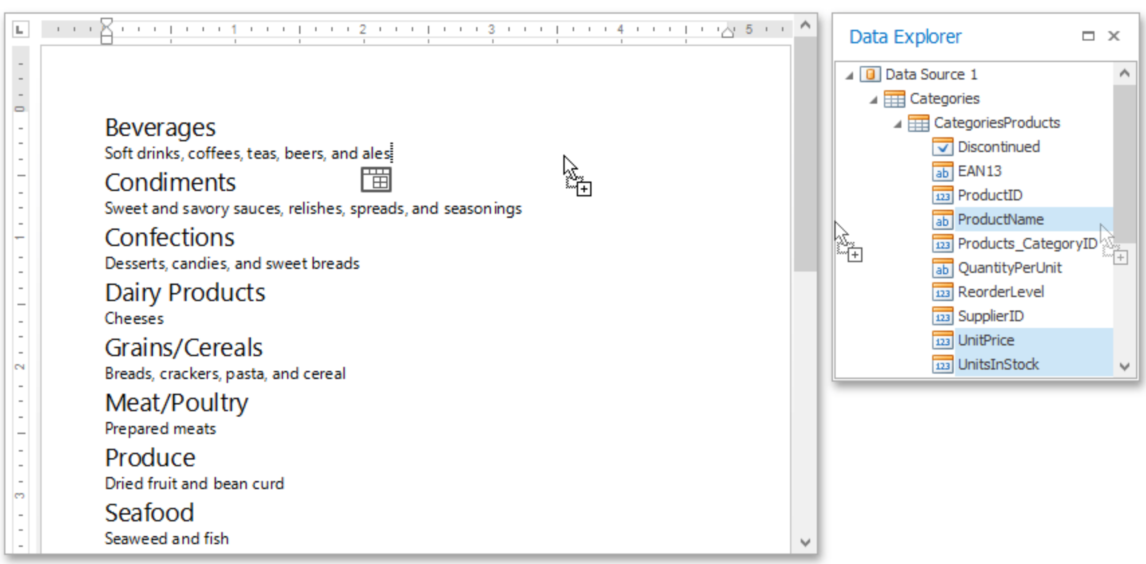
The report should now appear as shown in the following image.



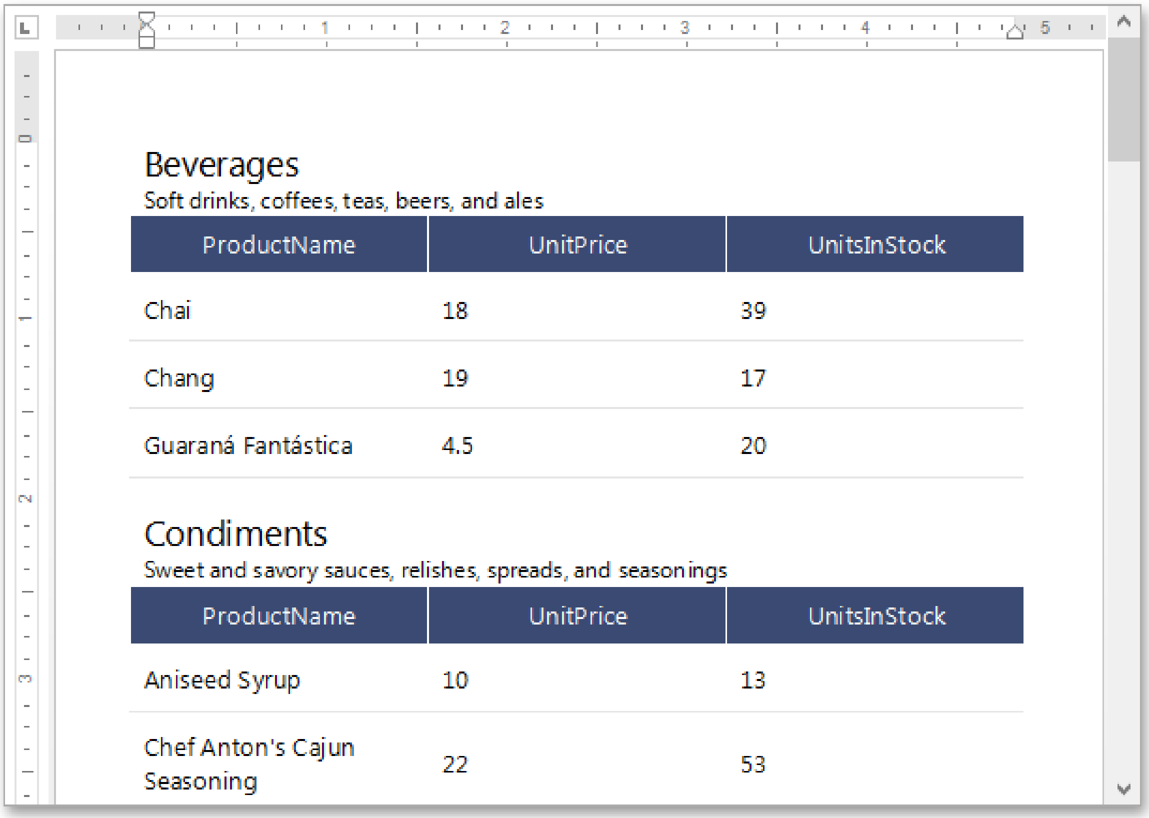
To remove a list header, select the Snap list, click the **Header** command in the **List** tab of the main toolbar, and select **Remove Header** in the invoked drop-down menu.



3. To create a detail report, drag data fields from the child data table in the **Data Explorer** onto the lower border of the master report's data row, as shown in the image below.



The added detail part will have a tabular form by default.



Beverages

Soft drinks, coffees, teas, beers, and ales

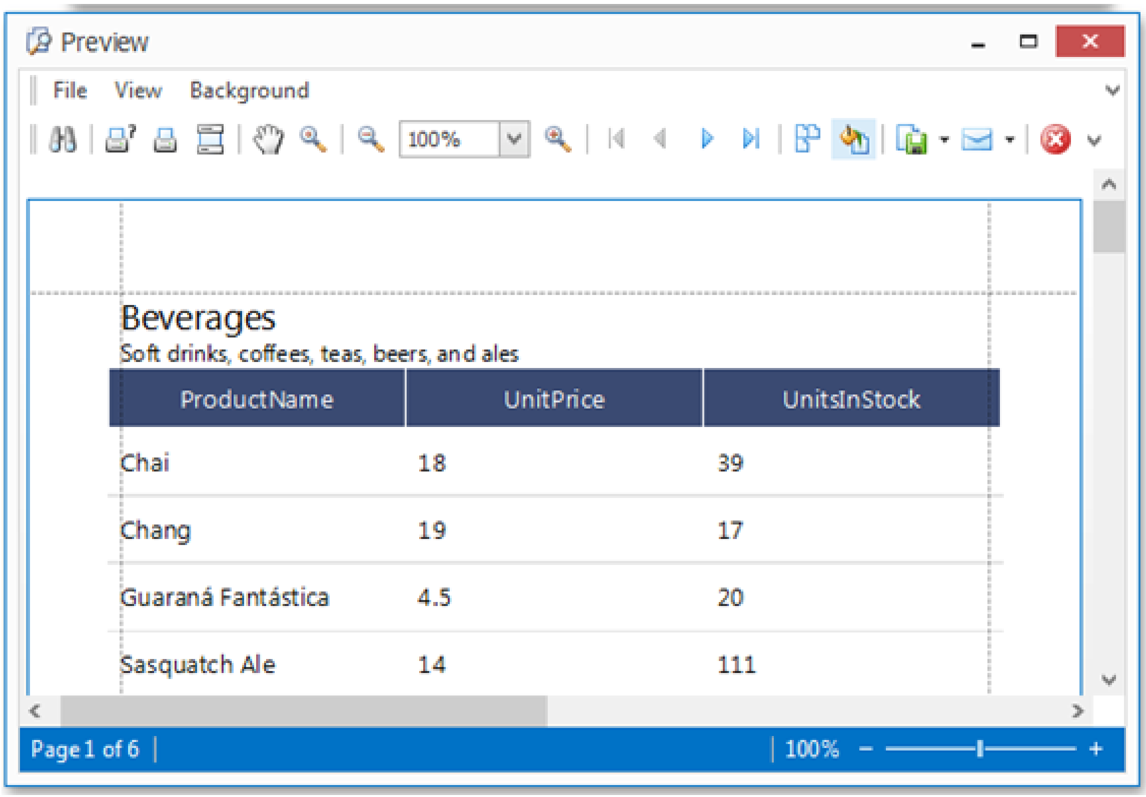
ProductName	UnitPrice	UnitsInStock
Chai	18	39
Chang	19	17
Guaraná Fantástica	4.5	20

Condiments

Sweet and savory sauces, relishes, spreads, and seasonings

ProductName	UnitPrice	UnitsInStock
Aniseed Syrup	10	13
Chef Anton's Cajun Seasoning	22	53

4. To preview your Snap document click the **Print Preview** button in the General Tools: File tab of the main toolbar.

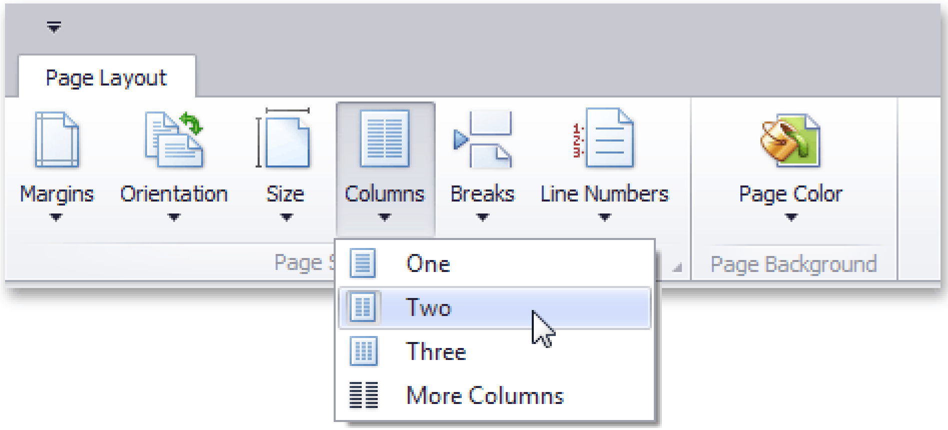


Create a Multi-Column Report

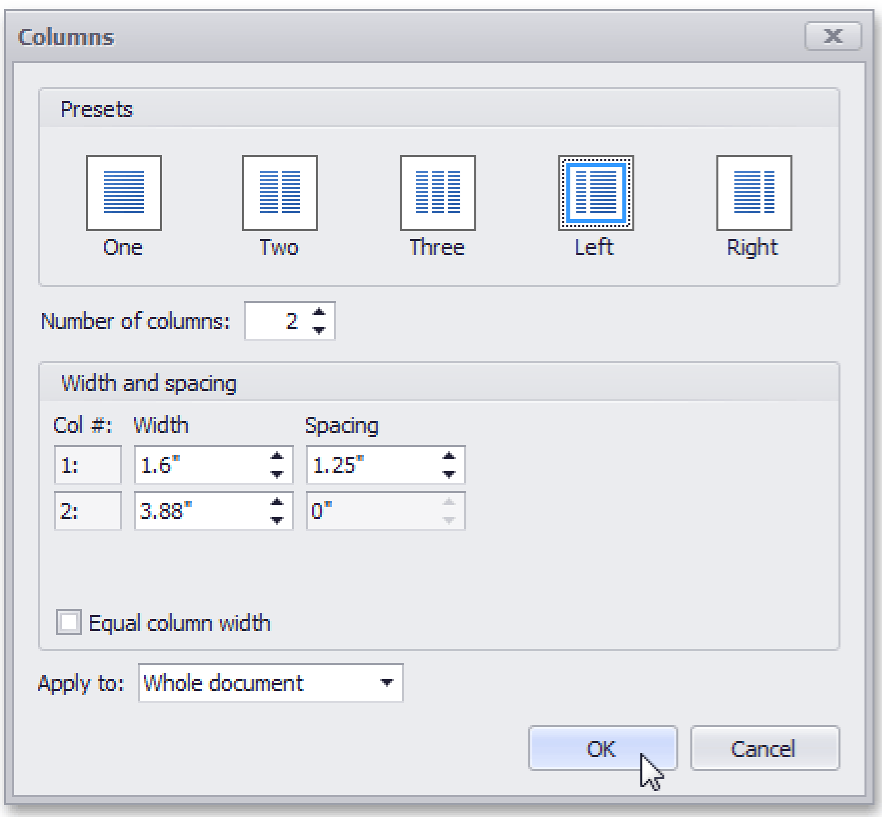
This tutorial guides you through the creation of a **Multi-Column Report**. A multi-column report is a report which represents its data in multiple columns or rows (depending upon the current multi-column settings).

To create a multi-column report, do the following.

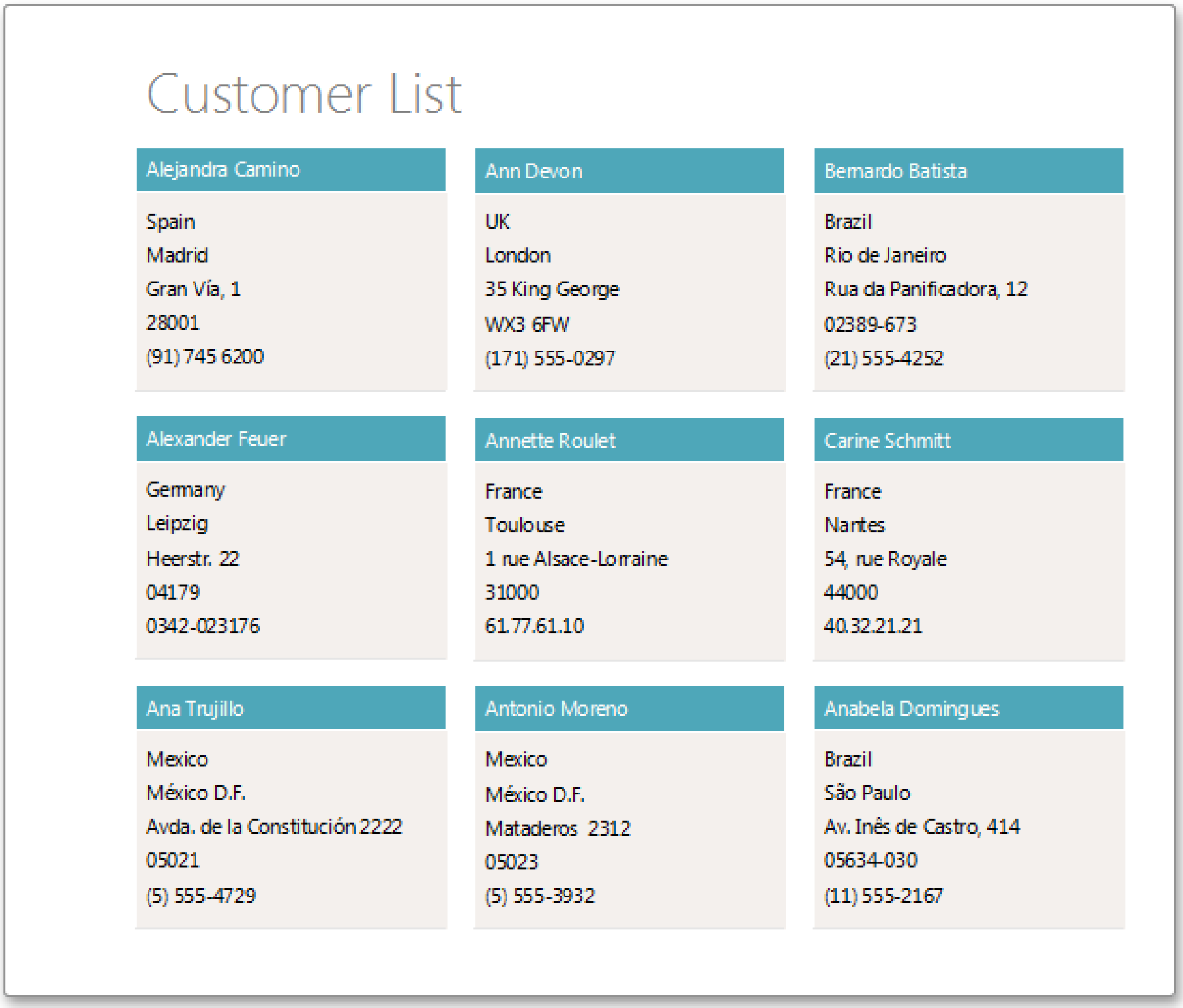
1. In a new Snap document, create a simple table report, as described in the Create a Table Report topic.
2. In the main toolbar, switch to the General Tools: Page Layout tab, click **Columns**, and select the required number of columns in the drop-down menu.



To define more than three columns, click **More Columns**. In the invoked **Columns** dialog, customize the report layout to meet your requirements.



The following image illustrates the result.

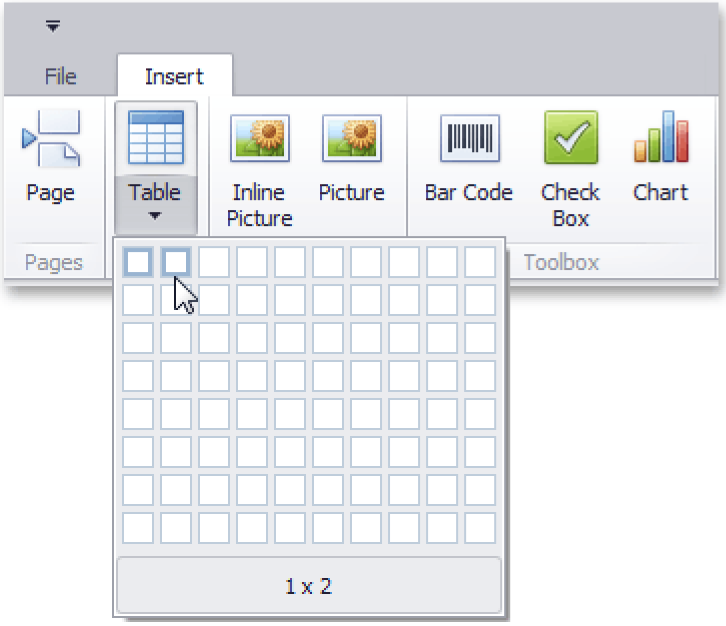


Create a Side-by-Side Report

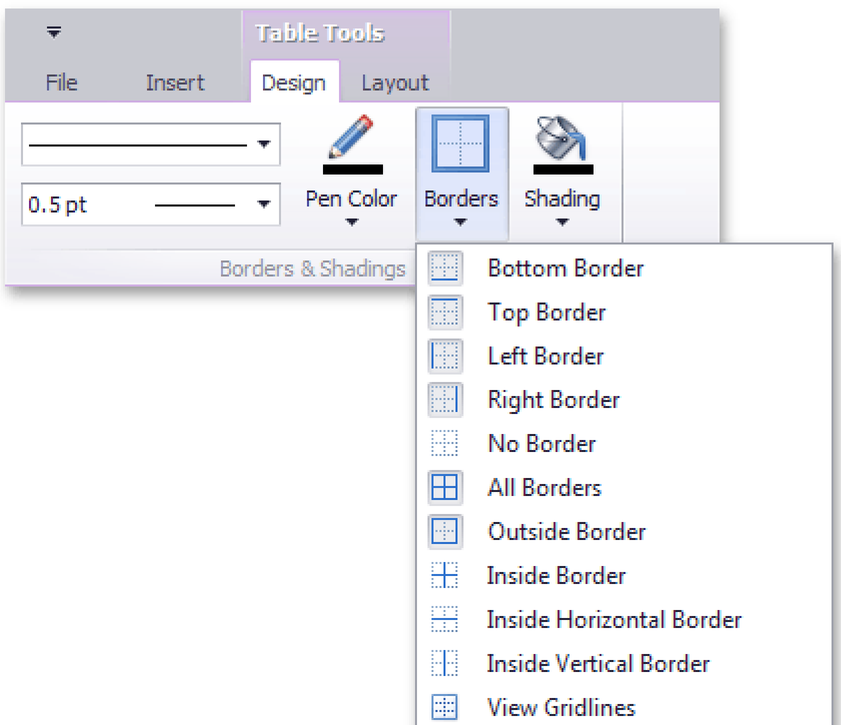
This tutorial describes the steps used to create a side-by-side report to compare different items within the report.

Follow these steps to create a side-by-side report.

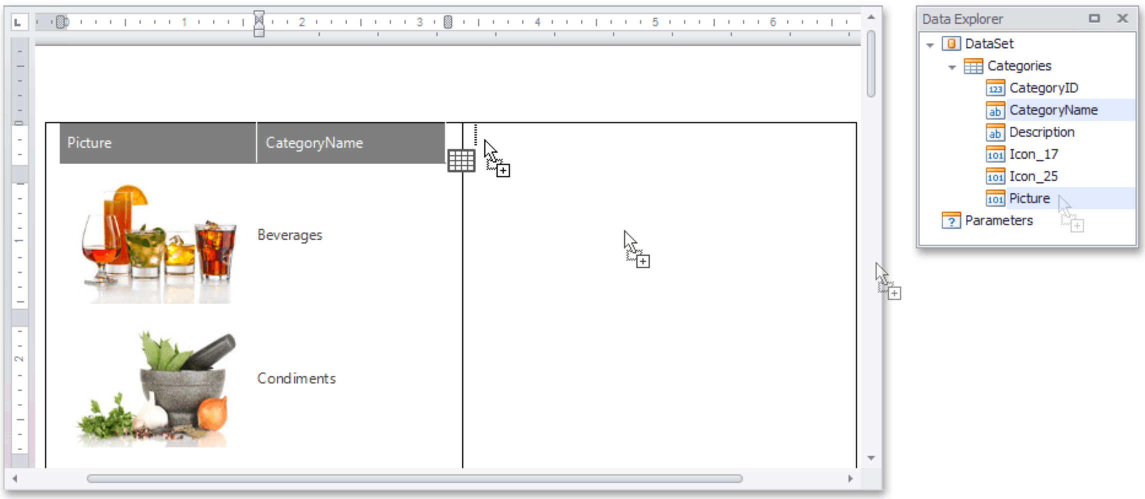
1. Create a new Snap document and bind it to the required table as described in the Connect a Document to a Data Source topic.
2. To add a new table to the report, switch to the Insert tab in the main toolbar and click **Table**. Then, move the cursor over the grid to select the required number of rows and columns.



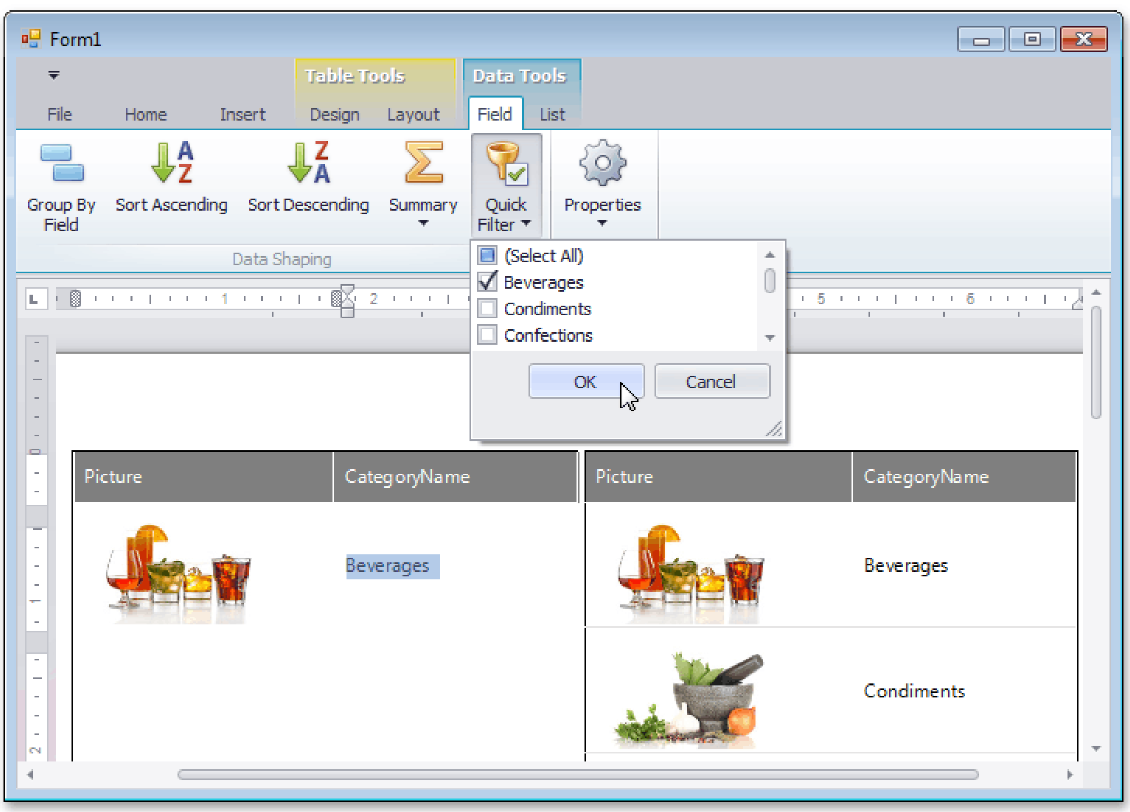
You can set table borders by clicking the **Borders** button on the Design tab.



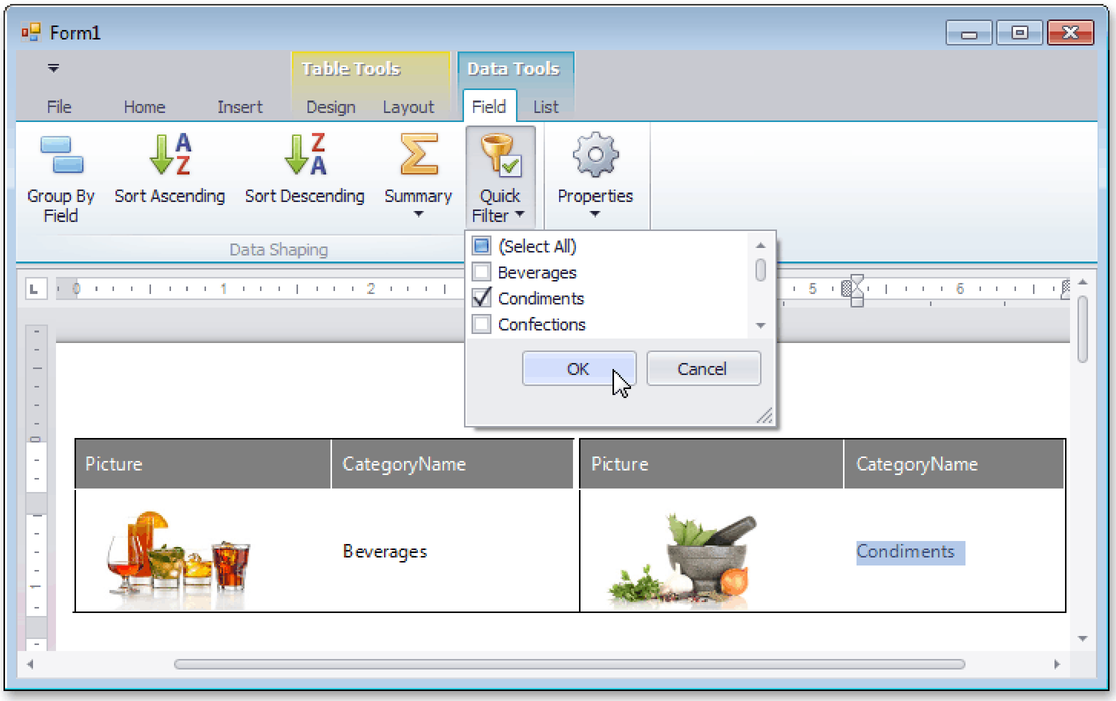
3. Then, drop the fields that will be compared from the Data Explorer on the table's corresponding columns.



4. To filter each table column so that it shows only a single record, select a field on the left column and in the activated Field tab in the main toolbar, click **Quick Filter**. In the invoked menu, select the required field and click **OK**.



Finally, repeat the same procedure for the right column, so that it displays a different field to compare it with.



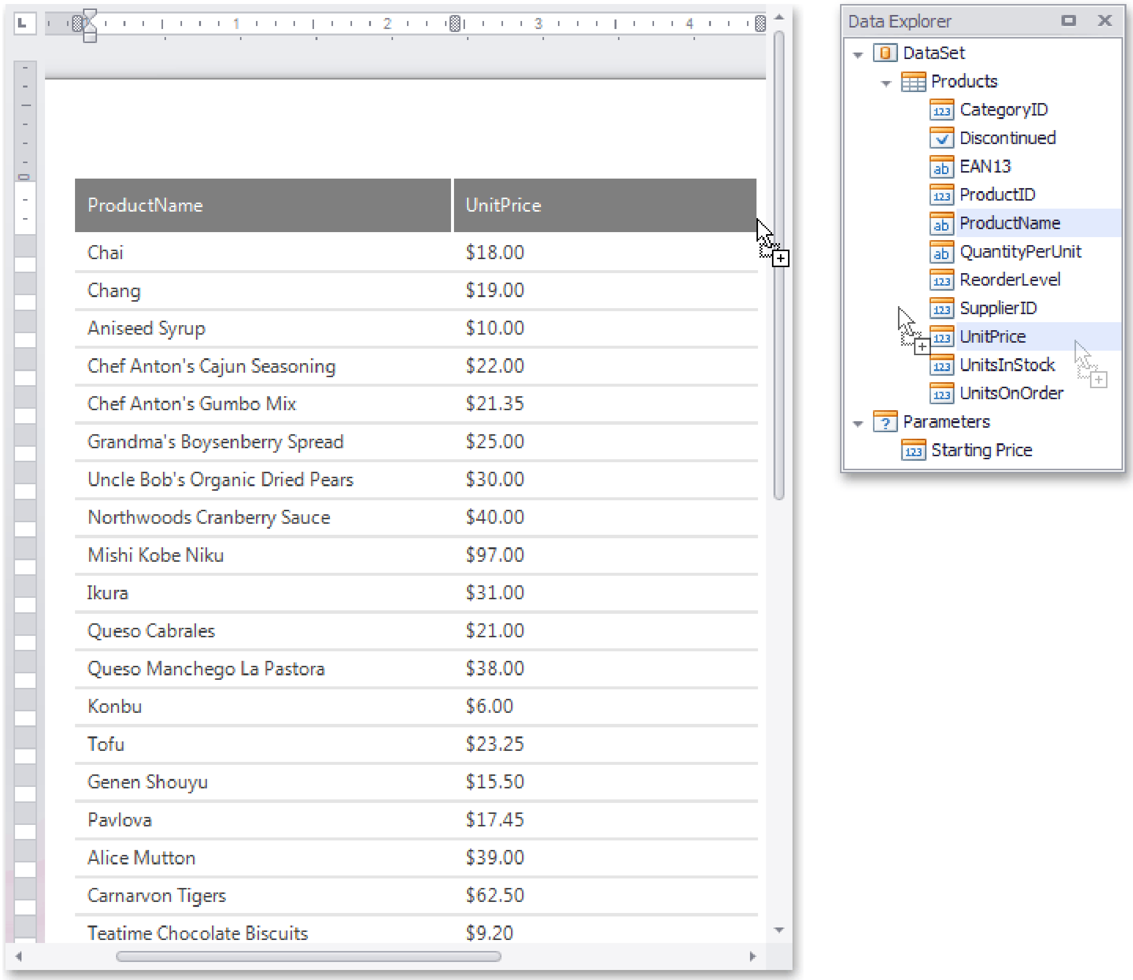
Create a Parameterized Report

This tutorial illustrates the steps required to create a parameterized report. In this tutorial, we will create a parameter and pass it to the report's filtering expression. You are not limited by the number of parameters you can create, or the data type (e.g., *string*, *date-time*, *Boolean*, *integer* and *double*). Parameters can be used in other ways such as **data binding** and **calculated fields**. Tasks that can be solved using parameters are described in the Pass Parameter Values topic.

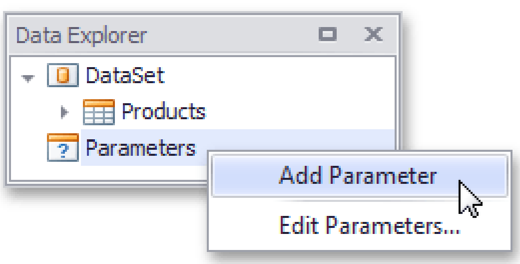
Follow these steps to create a report with parameters.

1. Create a new Snap document and bind it to the required table.

2. To create a layout for your report, drop the required data fields from the Data Explorer to the Design Surface.

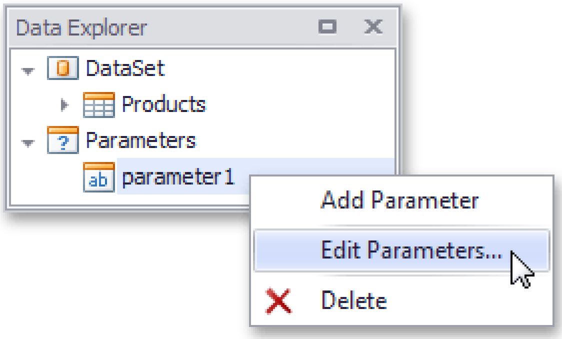


3. To create a parameter, switch to the Data Explorer window, right-click the **Parameters** section and choose **Add Parameter**.



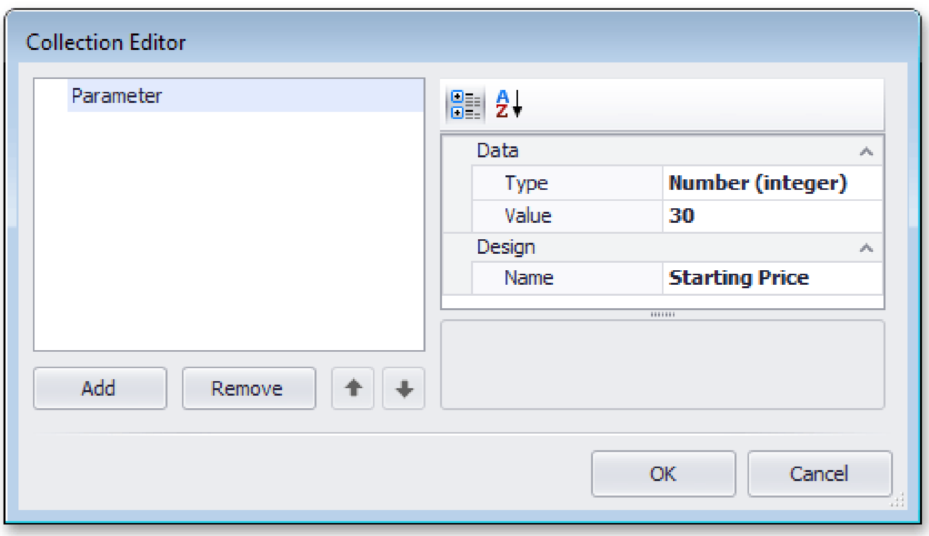
Alternatively, you can create report parameters when editing a data source using the Query Designer.

4. Right-click the created parameter and select the **Edit Parameters...** action in the invoked popup menu.



5. In the invoked editor, define the parameter name and assign an appropriate type to it. This type corresponds to the value that a parameter can receive (e.g., you cannot assign a string value to a numeric parameter).

   Next, assign a default static value to the parameter.

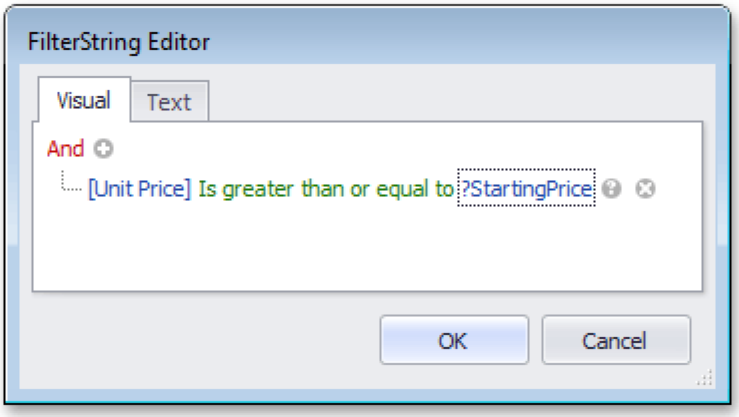


   If required, you can easily modify the parameter value in the same way described in steps 4 and 5.

6. Now, switch to the List tab in the main toolbar and click the **Filter** button.

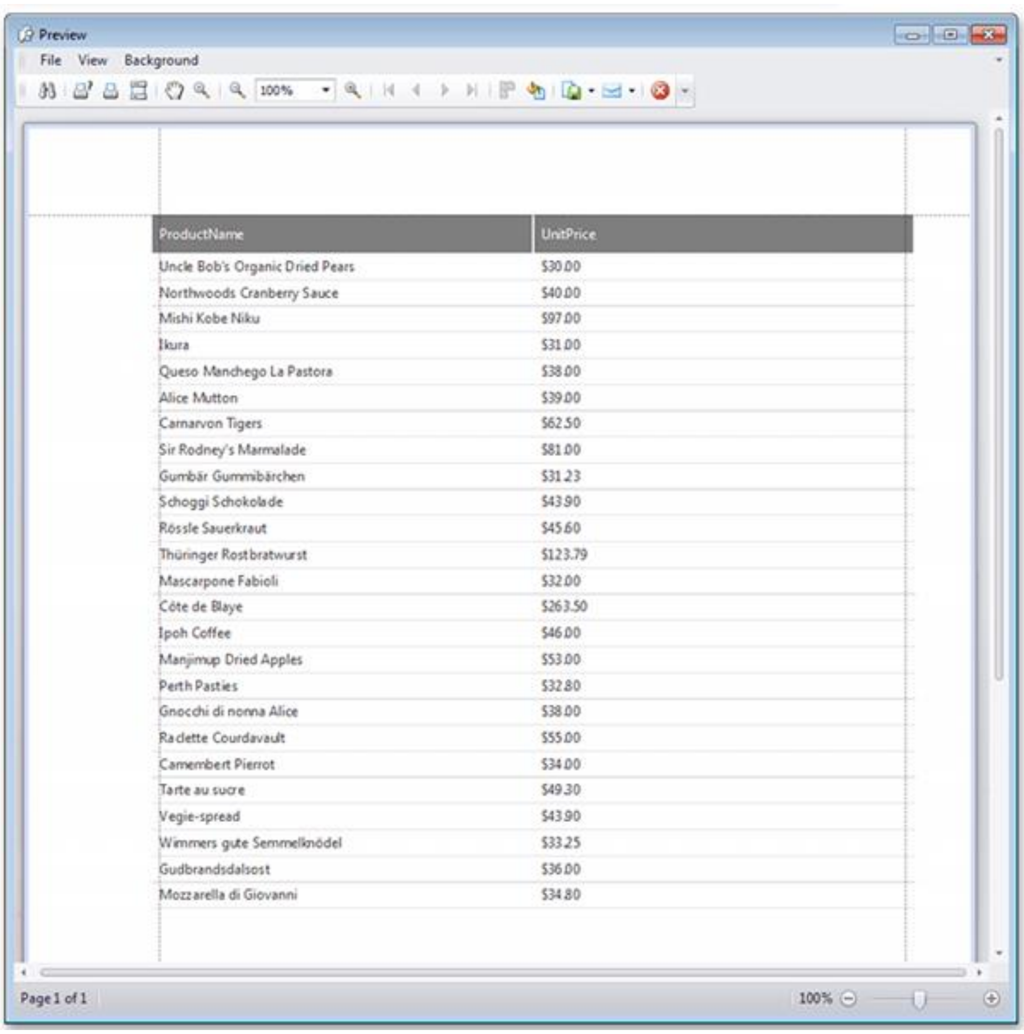
   In the invoked **FilterString** editor, define a filtering expression (e.g., **UnitPrice** data field is greater than or equal to the **Starting Price** parameter).

   To access the parameter, click the icon on the right until it turns into a question mark, and then select your parameter from the drop-down list.



The parameterized report is now ready, and its data is filtered based on the specified expression that uses the parameter value to shape the report's data.

To view how your report will look on paper, switch to the File tab in the main toolbar and click the **Print Preview** button.



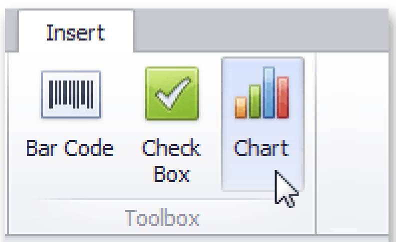
Create a Chart-Based Report

This tutorial describes the steps used to add a chart to your Snap report. Snap supports many chart types, as well as multiple visual appearance settings and chart palettes.

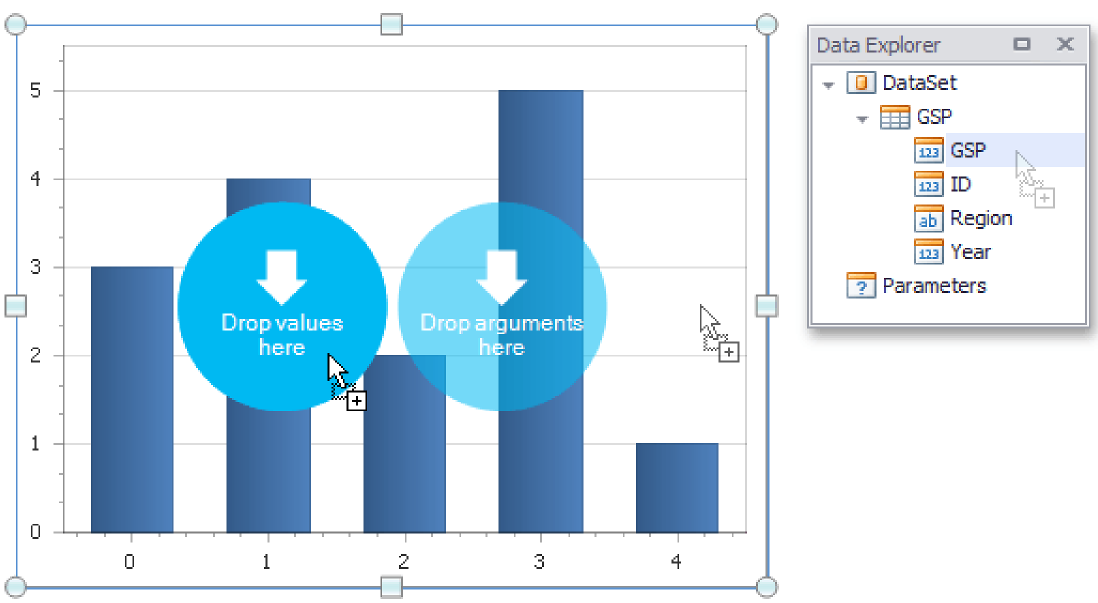
Snap also provides the Chart Wizard, which allows you to quickly create and customize complex charts. However, when advanced charting functionality is not required, Snap provides an even easier way to create and customize your charts.

Do the following steps to create a chart-based report.

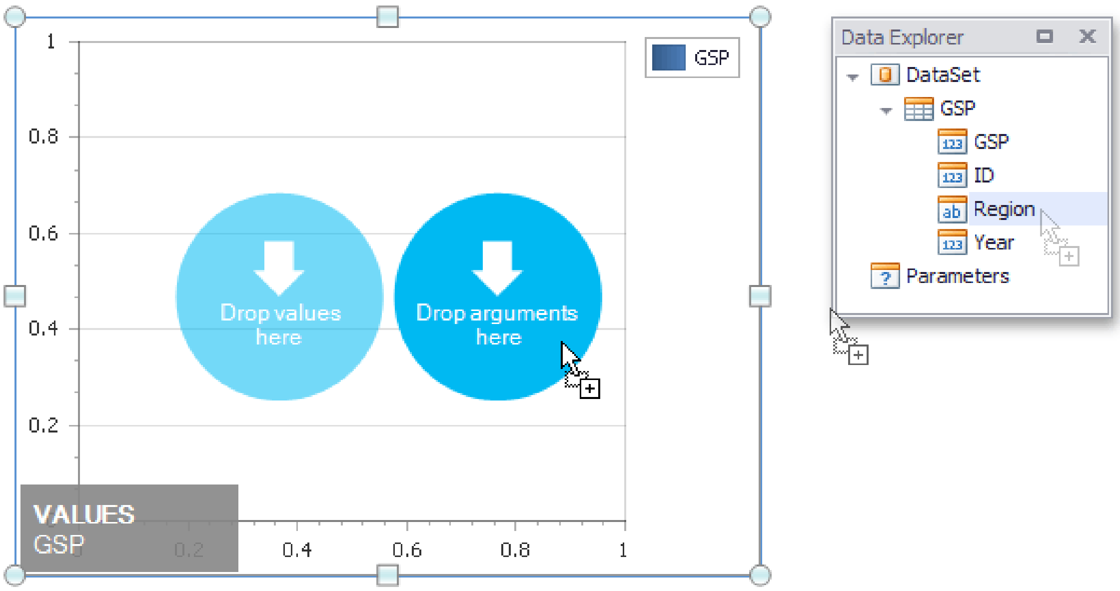
1. Create a new Snap document and bind it to the required table.
2. Click the **Chart** command in the Insert tab of the main toolbar.



3. In the created chart, the blue circles correspond to the values and arguments of the chart. Drop one field from the Data Explorer onto the "values" region in the chart...



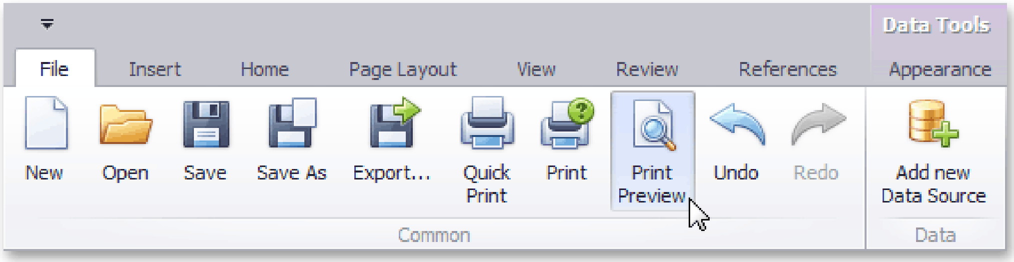
...and the other onto the "arguments" region.

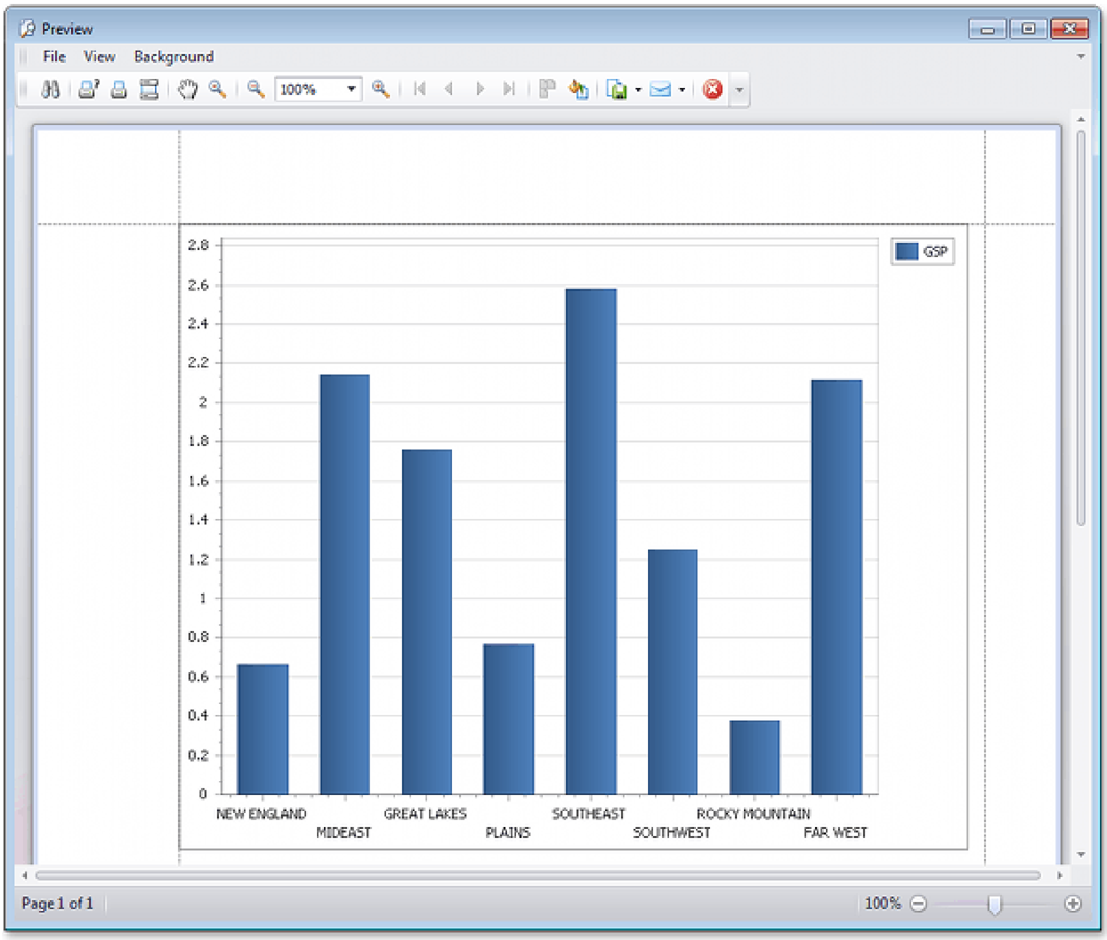


4. You can change the default chart type to one that best meets your requirements by selecting the chart and switching to the Design tab of the main toolbar.

   In the same tab, you can also run **Chart Wizard** and select the chart's palette and visual appearance.

5. The Snap report with a chart is now ready. To view the result, switch to the File menu of the main toolbar and click the **Print Preview** button.





Create a Combined Report Layout

Snap allows you to create a single combined report, incorporating features of different report layout types. There is no limits on how many reports you can combine.

In this tutorial, we will create a combined report that uses the features of mail-merge and chart-based reports.

The tutorial consists of the following sections.

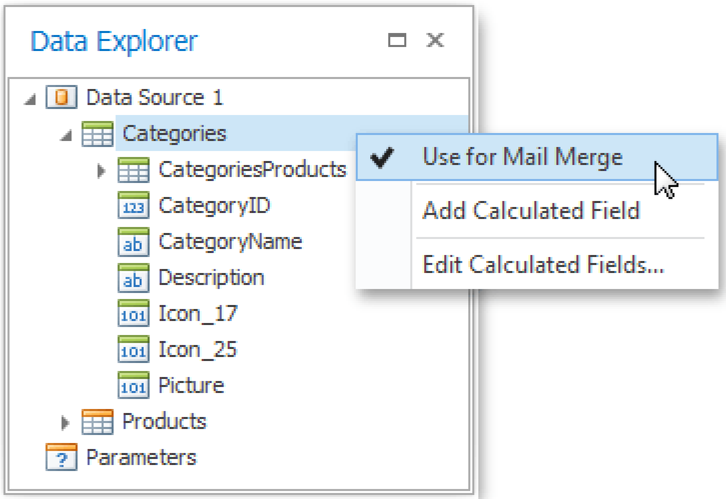
- Add Mail-Merge Report Functionality
- Add Chart-Based Report Functionality

- View the Result

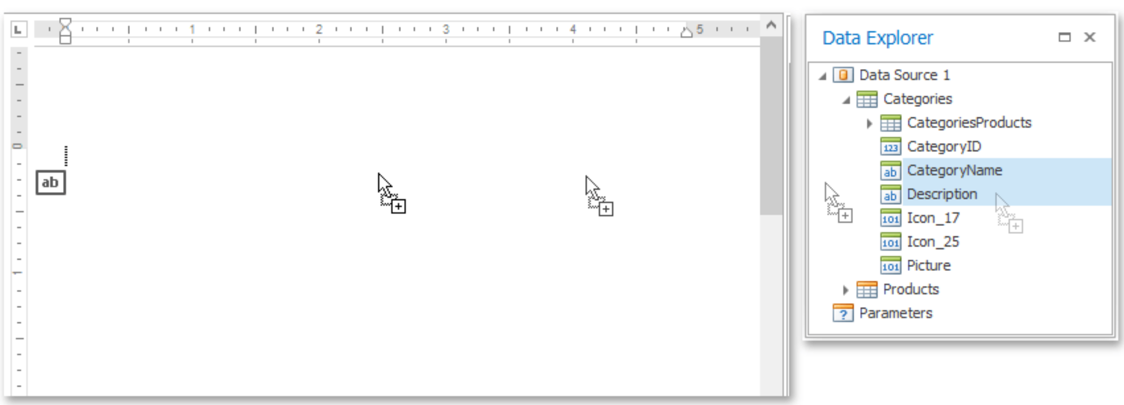
Add Mail-Merge Report Functionality

In this section, we will create a simple **Mail-Merge Report**.

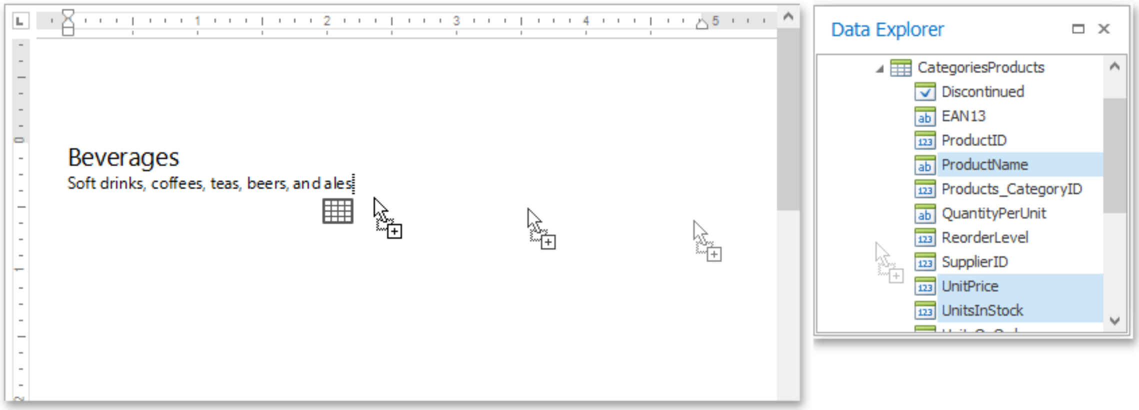
1. Create a new Snap document and provide it with a master-detail data connection.
2. Specify which data source will be used for mail merge by right-clicking the required data source in the Data Explorer and select **Use For Mail Merge** in the invoked drop-down menu.



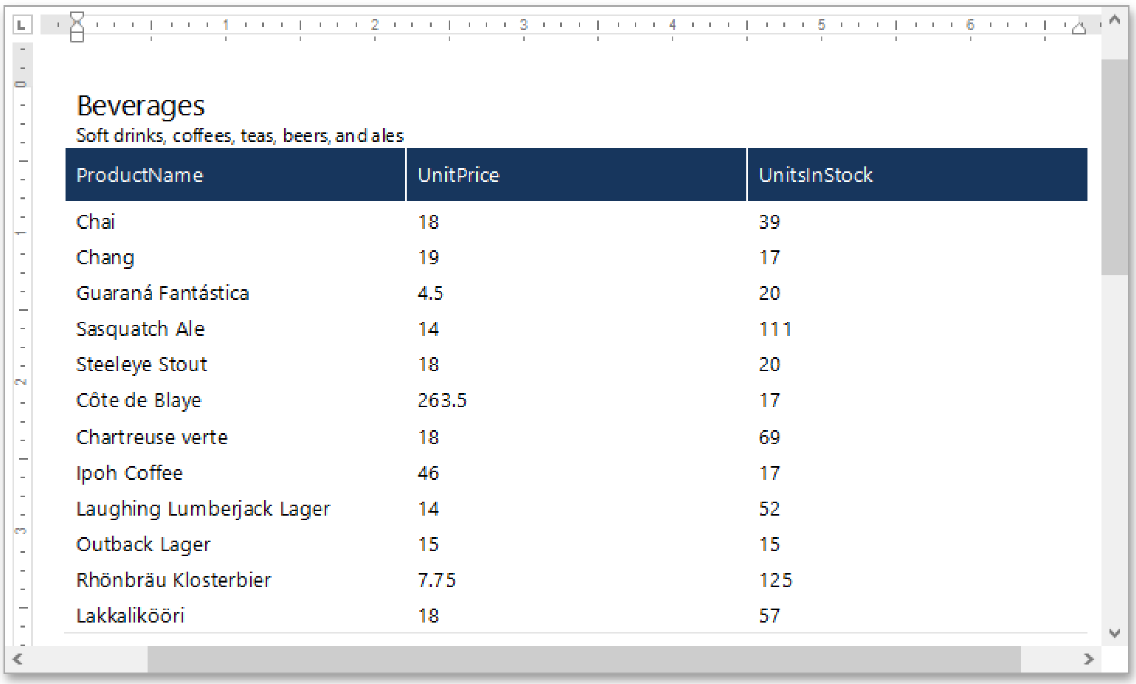
3. Insert a master report part. To do this, drag-and-drop data fields from the Data Explorer onto the Design Surface.



4. To insert a detail report part, drag-and-drop fields from a subordinate node of the data source.



The added detail part will have a tabular form by default.



Beverages
Soft drinks, coffees, teas, beers, and ales

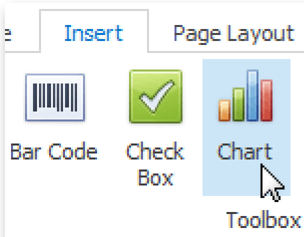
ProductName	UnitPrice	UnitsInStock
Chai	18	39
Chang	19	17
Guaraná Fantástica	4.5	20
Sasquatch Ale	14	111
Steeleye Stout	18	20
Côte de Blaye	263.5	17
Chartreuse verte	18	69
Ipoh Coffee	46	17
Laughing Lumberjack Lager	14	52
Outback Lager	15	15
Rhönbräu Klosterbier	7.75	125
Lakkalikööri	18	57

For more information on the creation mail-merge report, see the tutorial Create a Mail-Merge Report.

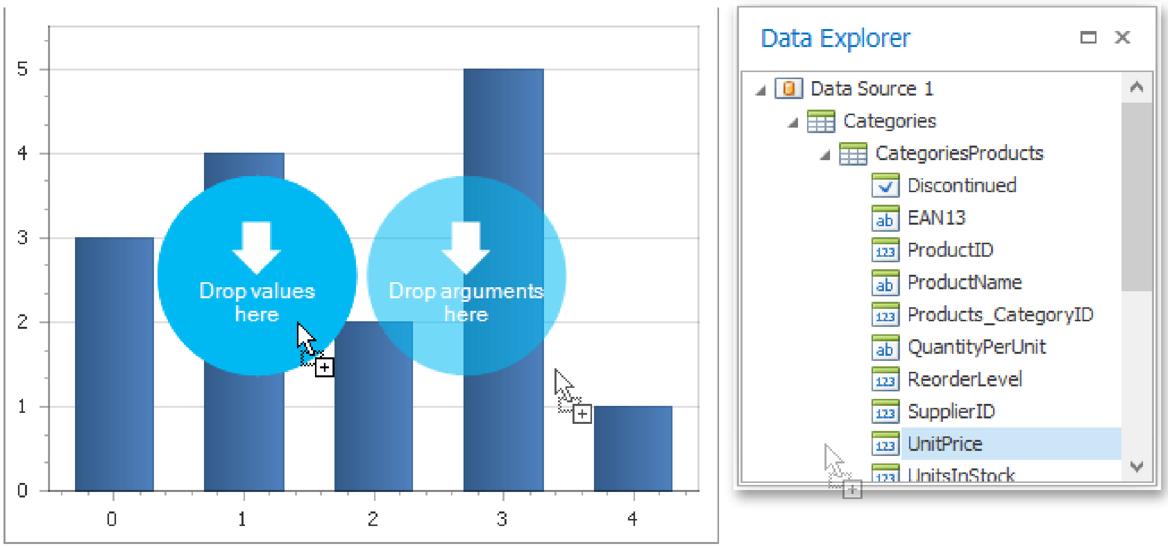
Add Chart-Based Report Functionality

In this section we will add a **Chart** to the Snap document.

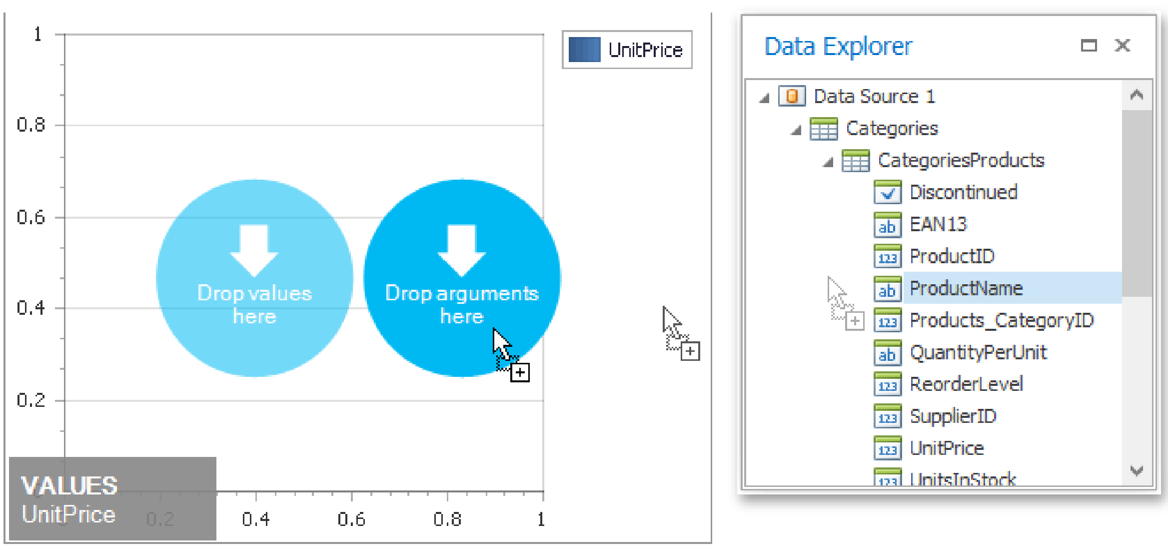
1. Click the **Chart** command in the Insert tab of the main toolbar.



2. In the created chart, the blue circles correspond to the values and arguments of the chart. Drop one field from a subordinate node of the data source onto the "values" region in the chart...



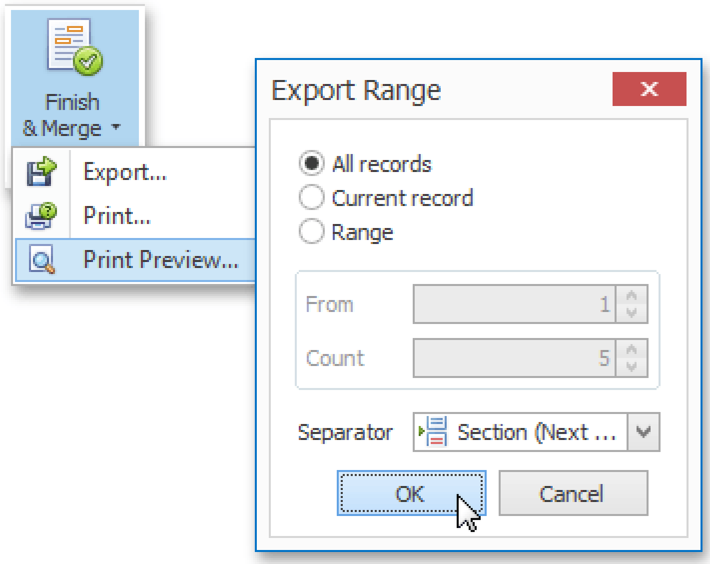
...and the other onto the "arguments" region.



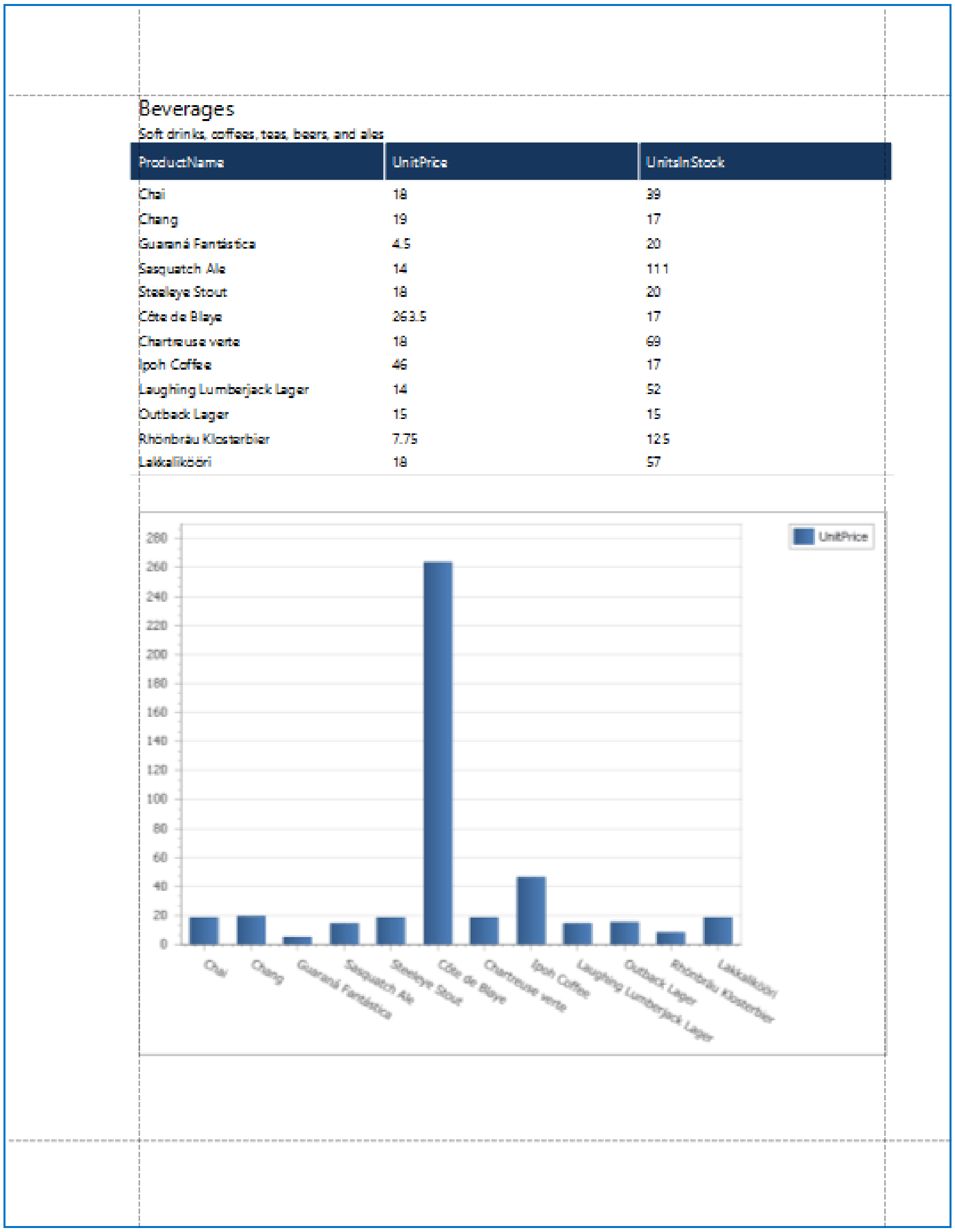
For more information on the creation of a chart-based report, see the tutorial Create a Chart-Based Report.

View the Result

The Snap mail merge document is now ready. To view the result, click the **Finish & Merge** button in the Mail Merge tab, and select **Print Preview...** in the invoked drop-down menu. In the invoked **Export Range** dialog, select **All records** and click **OK**.



The following image illustrates a print preview for the final document.



Beverages

Soft drinks, coffees, teas, beers, and ales

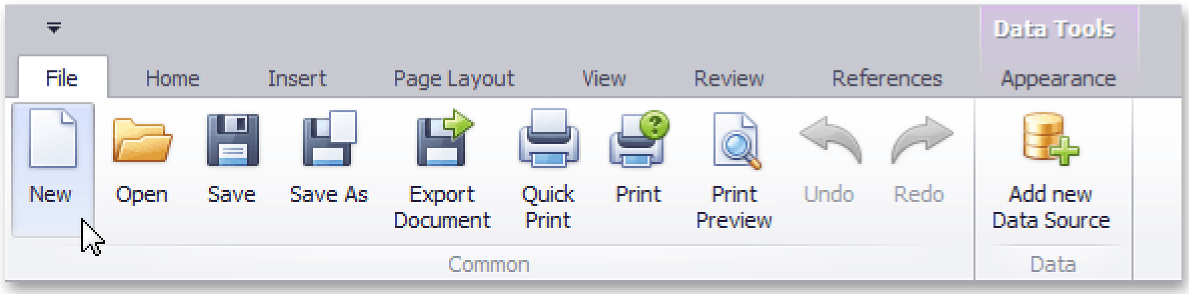
ProductName	UnitPrice	UnitsInStock
Chai	18	39
Chang	19	17
Guaraná Fantástica	4.5	20
Sasquatch Ale	14	111
Steeleye Stout	18	20
Côte de Blaye	263.5	17
Chartreuse verte	18	69
Ipoh Coffee	46	17
Laughing Lumberjack Lager	14	52
Outback Lager	15	15
Rhönbräu Klosterbier	7.75	125
Lakkalikööri	18	57

Manage Documents and Files

The tutorials in this section will assist you in solving the most elementary and essential tasks that relate to managing and storing Snap documents.

Create a New Report

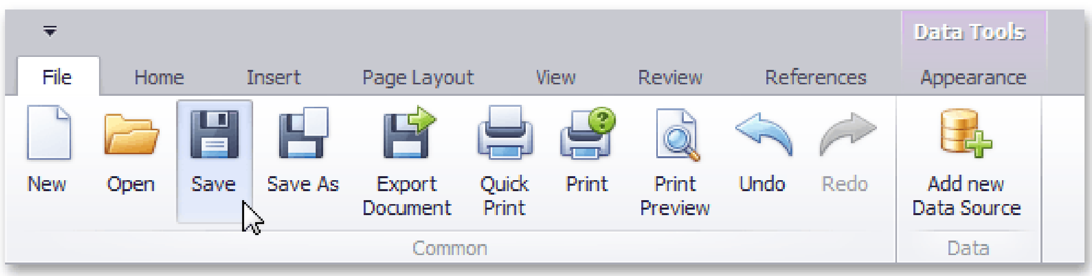
To create a new Snap report, click the **New** button in the **File** tab of the Snap application's ribbon toolbar.



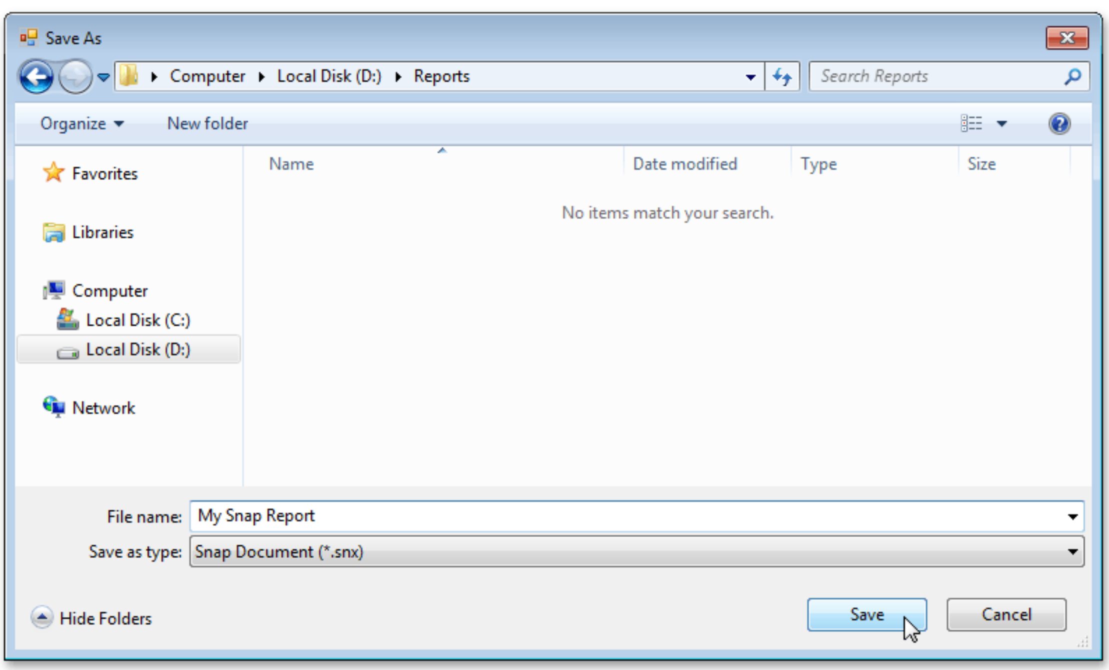
A new Snap report will be created and opened in the editor.

Save a Report

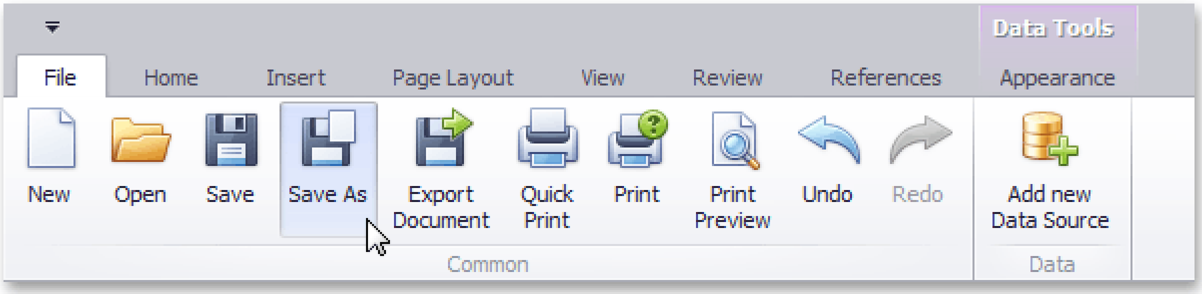
To save a report to a file, click the **Save** button in the **File** tab of the Snap application's ribbon toolbar.



If you are saving a new report, the **Save As** dialog will be invoked. In the invoked dialog, specify the name and directory for the new report file and click **Save**.



To save a changed copy of an existing report to a separate file, click the **Save As** button in the **File** tab of the ribbon toolbar.



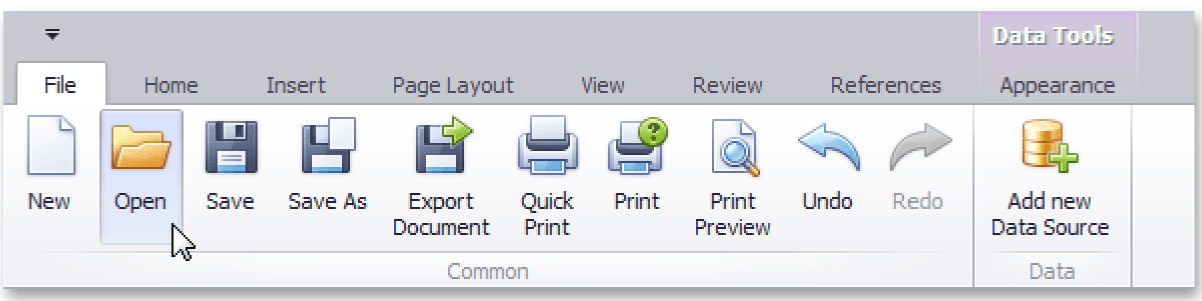
Storing Reports

This document explains the basic principles of storing report documents.

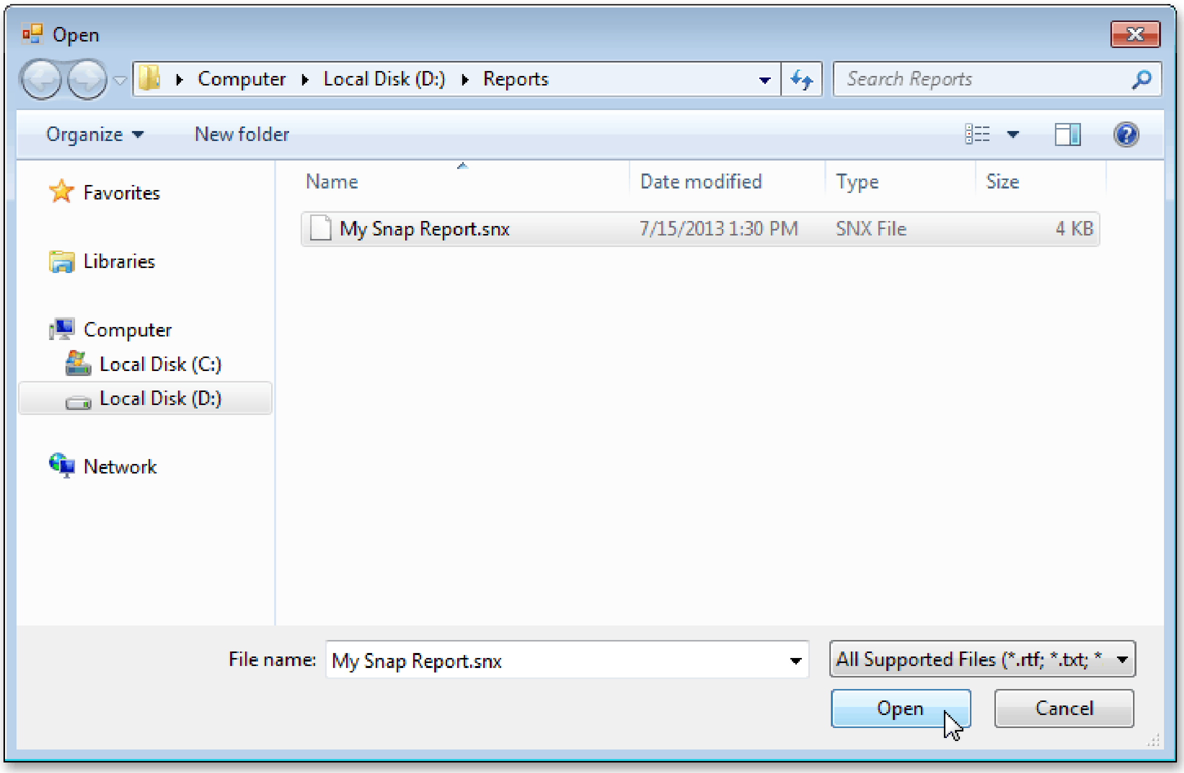
Snap provides the capability to store a report to a file and restore it. You can store the report in the following formats (**.epub**, **.snx**, **.doc**, **.docx**, **.xml**, **.odt**, **.mht**, **.htm**, **.html**, **.txt**, **.rtf**, **.pdf**). For more information about the methods that you can use for saving, loading, and exporting reports, see How to: Save, Load, or Export a Report.

Open an Existing Report

To open an existing report, click the **Open** button in the **File** tab of the Snap application's ribbon toolbar.



In the invoked **Open** dialog, select a file and click **Open**.

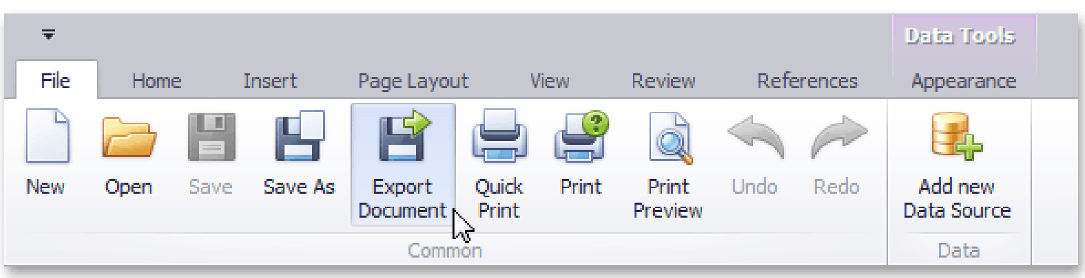


Export a Report

In addition to native .snx file format, Snap allows you to export reports into the one of the wide variety of third-party formats, (e.g., PDF, HTML or DOCX).

To export a Snap report in a third-party format, do the following.

1. Click the **Export Document** button in the **File** tab of the Snap application's ribbon toolbar.



2. In the invoked **Save As** dialog, select a directory in which you want to save, specify the name and format of the exported file, and click **Save** to export the report and exit the dialog.

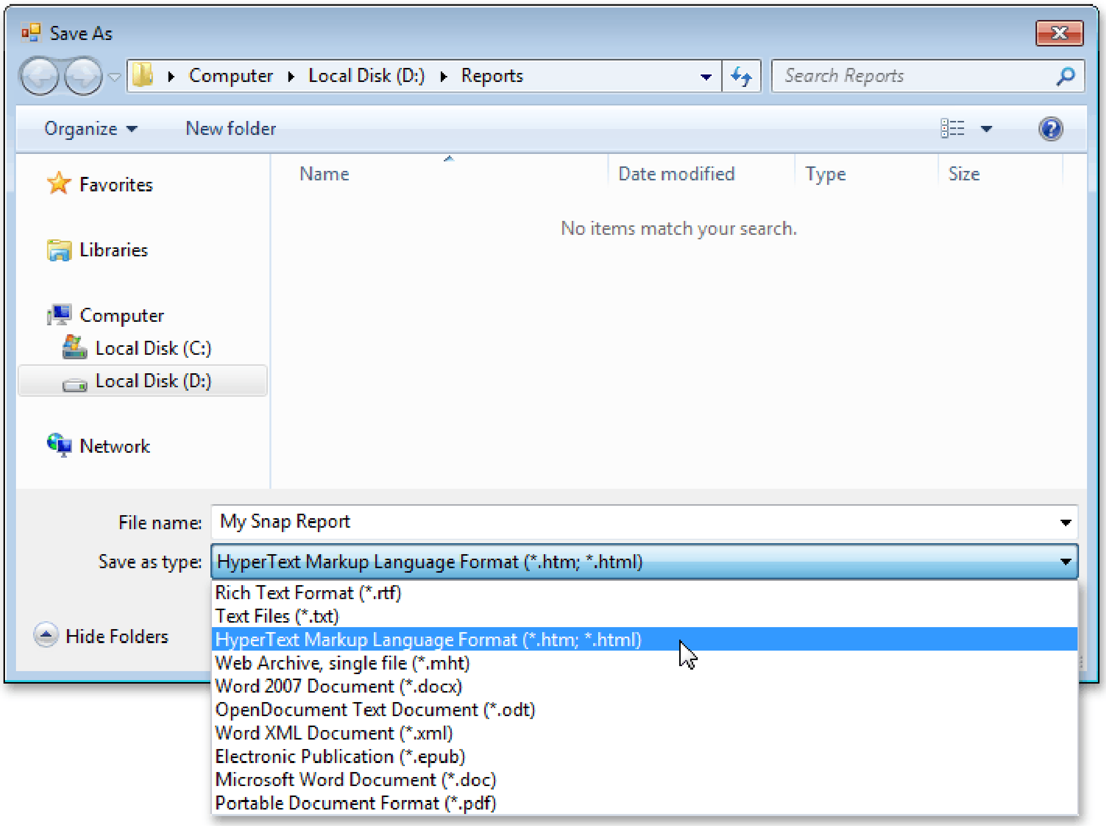

Save As
Computer ▸ Local Disk (D:) ▸ Reports
Search Reports
Organize
New folder
Favorites
Libraries
Computer
Local Disk (C:)
Local Disk (D:)
Network
Name
Date modified
Type
Size
No items match your search.
File name: My Snap Report
Save as type: HyperText Markup Language Format (*.htm; *.html)
Hide Folders
Rich Text Format (*.rtf)
Text Files (*.txt)
HyperText Markup Language Format (*.htm; *.html)
Web Archive, single file (*.mht)
Word 2007 Document (*.docx)
OpenDocument Text Document (*.odt)
Word XML Document (*.xml)
Electronic Publication (*.epub)
Microsoft Word Document (*.doc)
Portable Document Format (*.pdf)

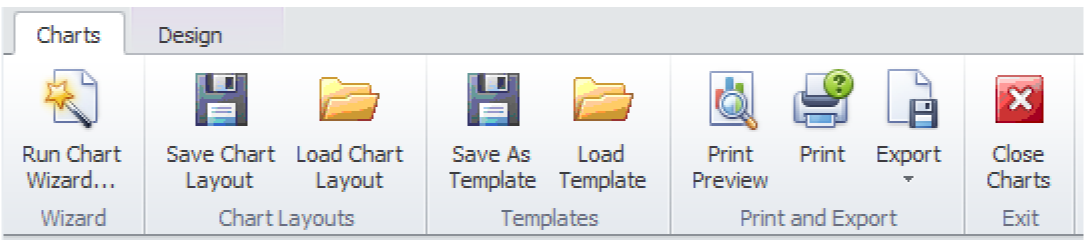
Chart Designer

The **Charts and Graphs Designer** is used throughout the program to help you present graphical data. This designer was purchased by us as an add-on control and is very feature rich. This designer employs a **Chart Wizard** that helps with the chart creation, data, chart appearance and more.

Ribbon Control

The functionality of the **Charts and Graphs Designer** is provided via a set of Ribbon tabbed pages. Ribbon pages are structurally and visually split into logical groups. Each of these groups includes commands that perform specific functions.

CHART TAB



The following are the elements on the **Chart** ribbon tab, reading left to right:

Wizard Group

- **Run Chart Wizard** – Invokes the Chart Wizard. Please see the Chart Wizard section to see more information on this very powerful tool.

Chart Layout Group

- **Save Chart Layout** – This option allows you to save the current chart layout to file.
- **Load Chart Layout** – This option allows you to load a chart layout that's been saved to file.

Templates Group

- **Save as Template** – This is used when binding the Chart to a database source and is not fully implemented in this release.
- **Load Template** – This is used when binding the Chart to a database source and is not fully implemented in this release.

Print and Export Group

- **Print Preview** – Provides a Print Preview of the current chart.
- **Print** – Allows you to select a printer and other options prior to print the chart.
- **Export** – Allows you to export the chart to various formats.

Exit Group

- **Close Charts** – Closes this screen

DESIGN TAB

The following are the elements on the **Design** ribbon tab, reading left to right:

Chart Type

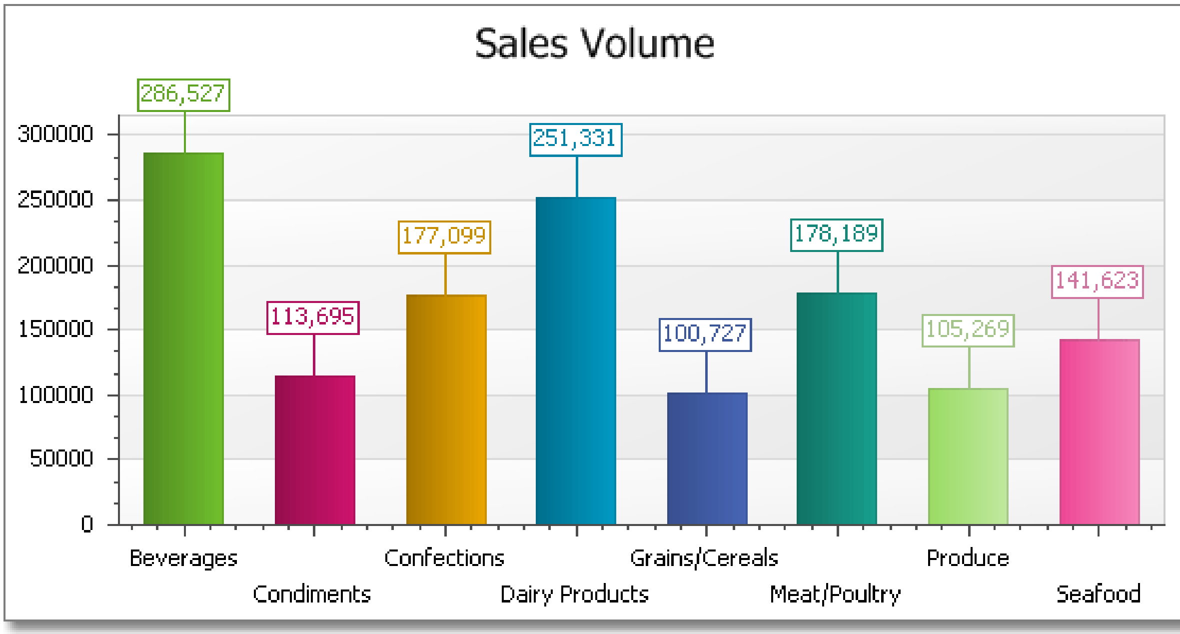
- **Column** - Changes the type of the selected chart to one of the available column chart types. Column charts are used to compare values across categories.
- **Line** - Changes the type of the selected chart to one of the available line chart types. Line charts are used to display trends over time.
- **Pie** - Changes the type of the selected chart to one of the available pie chart types. Pie charts display the contribution of each value to a total.
- **Bar** - Changes the type of the selected chart to one of the available bar chart types. Bar charts summarize and display categories of data, allowing you to compare the contribution of each value to the total across categories.
- **Area** - Changes the type of the selected chart to one of the available area chart types. Area charts are used to display trends over time.
- **Other Charts** - Changes the type of the selected chart to a point, funnel, financial, radar, polar, range, or Gantt chart.

Appearance Group

- **Palette** - Specifies the **color palette** for the selected chart.
- **Appearance** - Applies a specified appearance to the selected chart. The collection of style presets available for a chart depends on the chart's **palette**.

Charting

This section describes the capabilities provided by Charts.

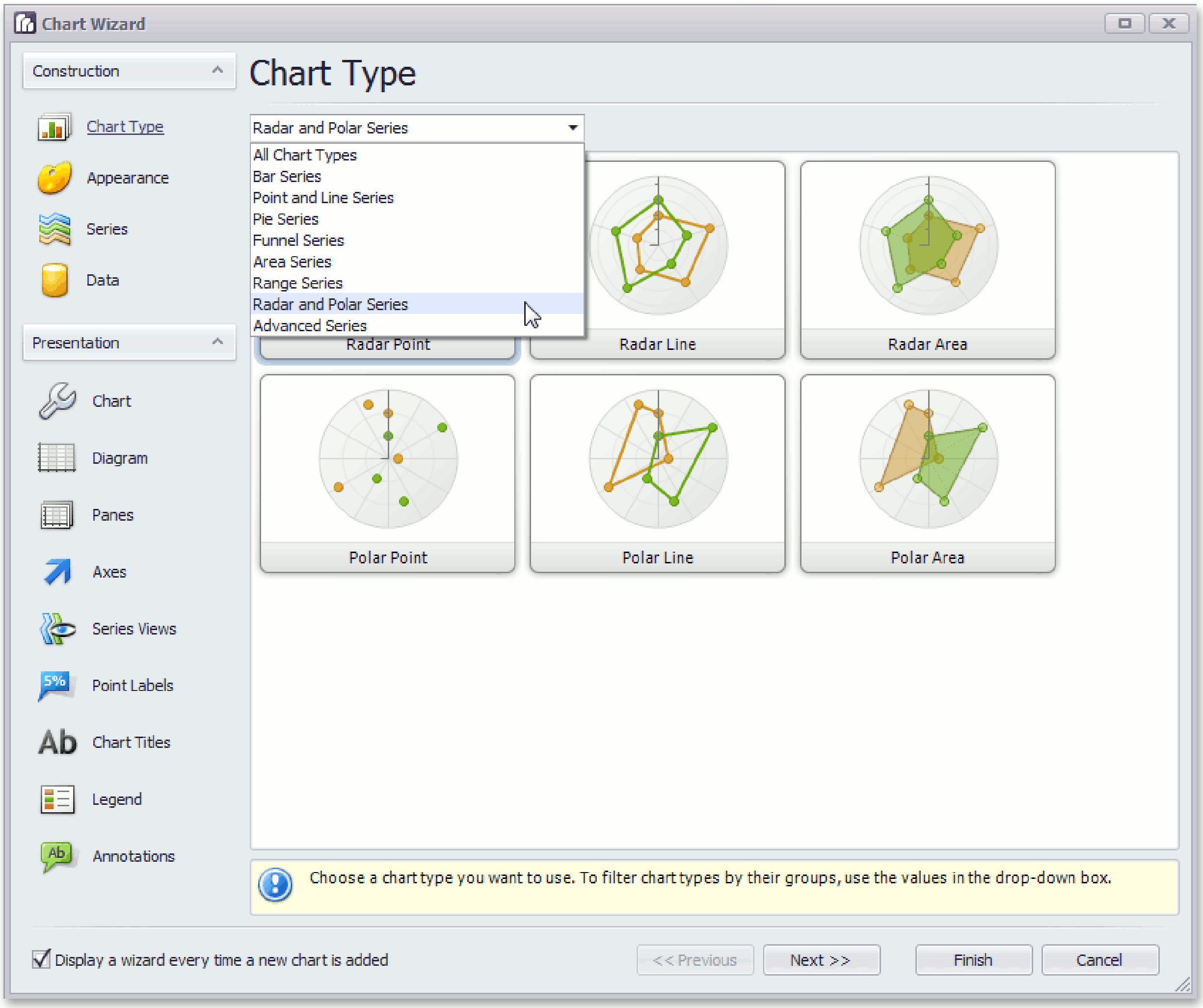


Topics in this section:

- Chart Wizard
- Highlighting and Selection Chart Elements
- Zoom a Chart
- Scroll a Chart
- Rotate a Chart

Chart Wizard

Use the chart wizard dialog to quickly and easily create a new chart, or modify an existing one.



The Chart Wizard contains the following pages.

Construction group

- Chart Type Page
- Appearance Page
- Series Page
- Data Page

Presentation group

- Chart Page
- Diagram Page
- Panes Page
- Axes Page
- Series Views Page
- Point Labels Page
- Chart Titles Page

- Legend Page
- Annotations Page

To navigate through the Chart Wizard's pages, use the navigation bar or the << Previous and Next >> buttons.

To complete the chart, use the Finish button, or the Cancel button, to cancel all changes.

Use the "Display a wizard every time a new chart is added" option to specify whether or not a chart wizard should appear when you add a new chart to the windows form.

Chart Type Page

Tasks

- Choose a chart type.

Page Elements

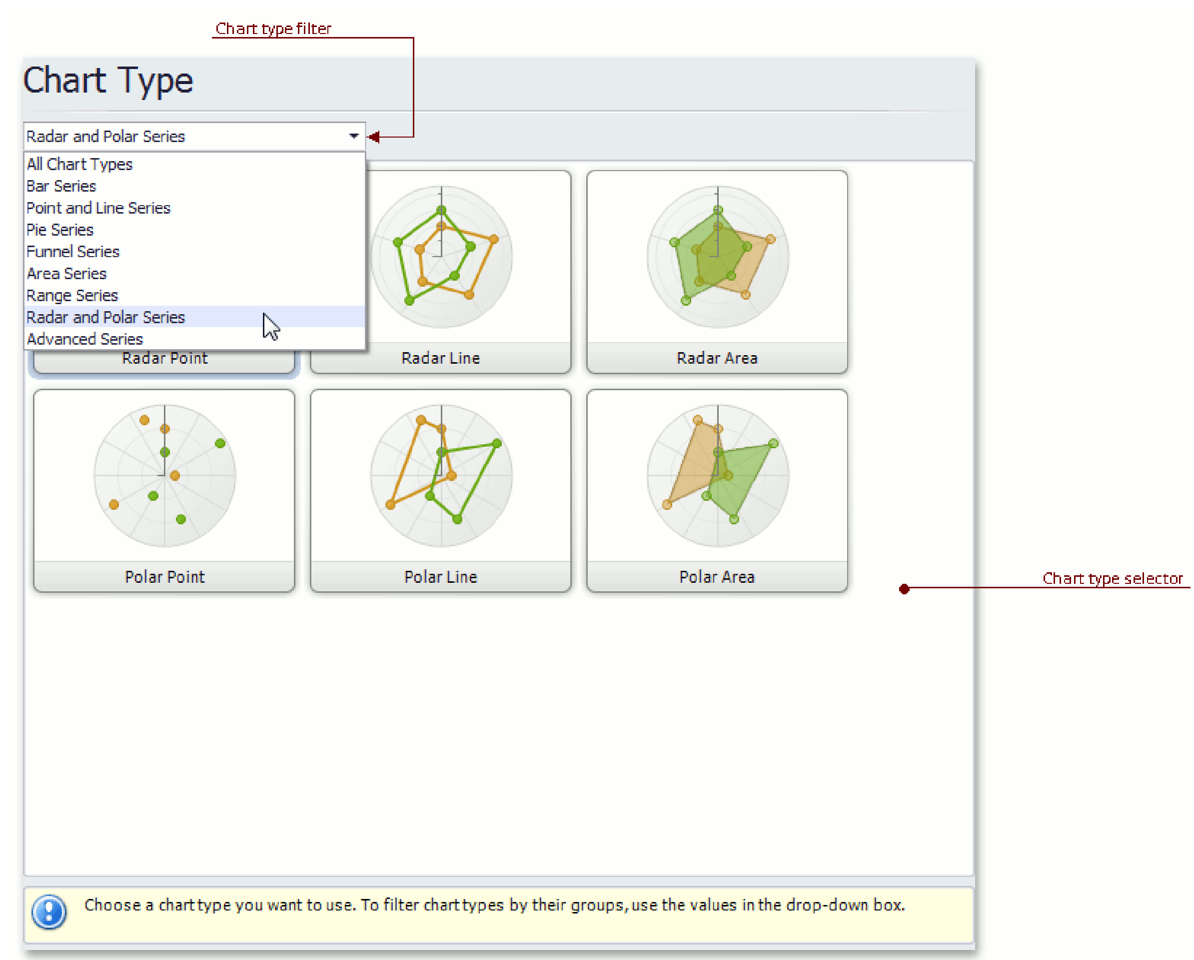


Chart type selector
Contains icons representing chart types. Click an icon to choose the appropriate chart type.

Chart type filter
Filters chart types available in the **Chart type selector**. The following chart filters are available:

- **All Chart Types**.
- **Bar Series** (Bar, Stacked Bar, 100% Stacked Bar, Side-By-Side Stacked Bar, 100% Side-By-Side Stacked Bar, 3D Bar, 3D Stacked Bar, 3D 100% Stacked Bar, 3D Side-By-Side Stacked Bar, 3D 100% Side-By-Side Stacked Bar and Manhattan Bar).
- **Point and Line Series** (Point, Bubble, Line, Stacked Line, 100% Stacked Line, Step Line, Spline, Scatter Line, Swift Plot, 3D Line, 3D Stacked Line, 3D 100% Stacked Line, 3D Step Line and 3D Spline).
- **Pie Series** (Pie, Doughnut, 3D Pie and 3D Doughnut).
- **Funnel Series** (Funnel and 3D Funnel).
- **Area Series** (Area, Stacked Area, 100% Stacked Area, Step Area, Spline Area, Spline Area Stacked, 100% Stacked Spline Area, 3D Area, 3D Stacked Area, 3D 100% Stacked Area, 3D Step Area, 3D Spline Area, 3D Spline Stacked Area and 3D 100% Stacked Spline Area).
- **Range Series** (Range Bar, Side-By-Side Range Bar, Range Area, 3D Range Area).
- **Radar and Polar Series** (Radar Point, Radar Line, Radar Area, Polar Point, Polar Line and Polar Area).
- **Advanced Series** (Stock, Candle Stick, Gantt, Side-By-Side Gantt).

Appearance Page

Tasks

- Choose a palette to color a series.
- Choose the style specifying the chart's appearance.

Page Elements

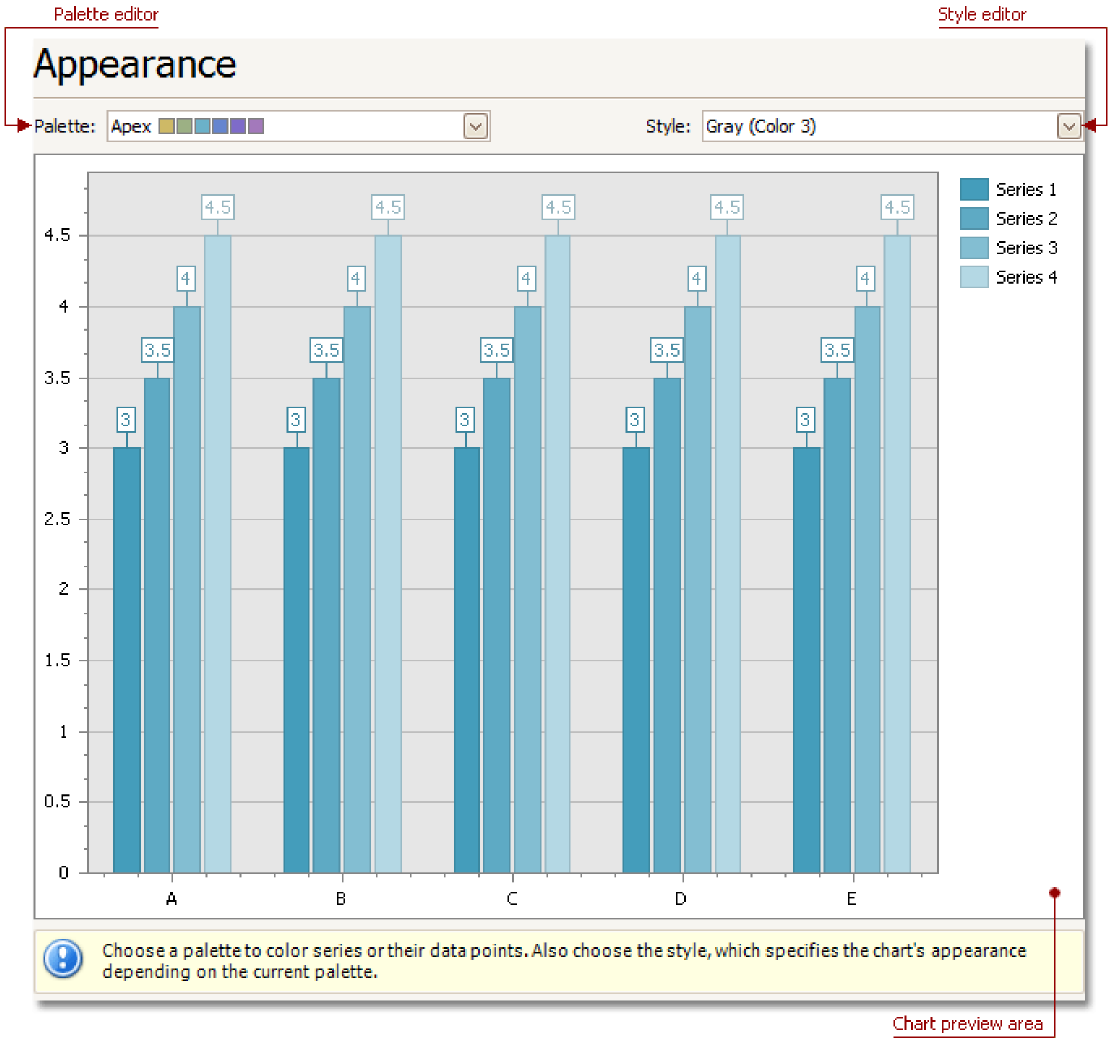
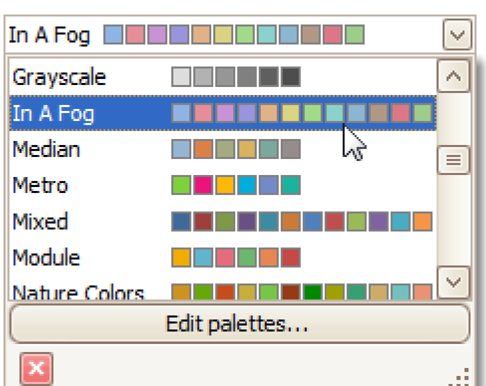


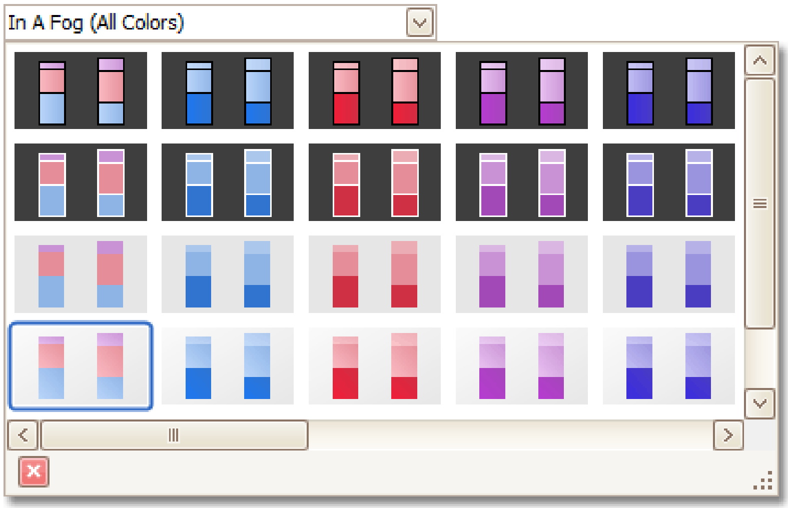
Chart preview area
Previews a chart's layout.

Palette Editor
Specifies a palette to color a series.



Style Editor

Specifies the style determining the chart's appearance, depending on the selected palette.

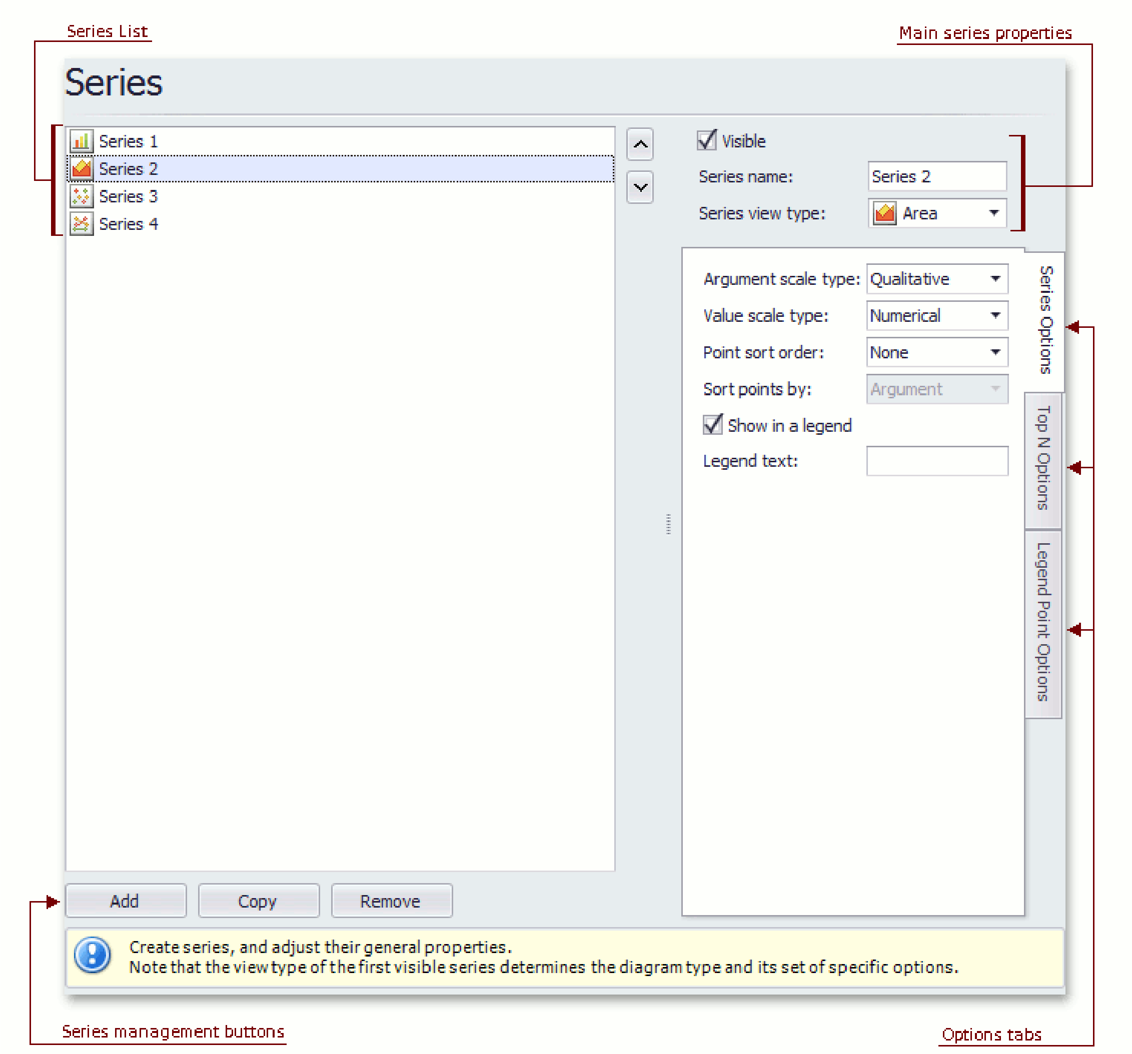


Series Page

Tasks

- Create or remove a series of points.
- Define the series name, visibility and view type.
- Customize additional series options and legend point options.
- Enable and customize the Top N Values feature.

Page Elements



Series list
This list displays all available series. You can click list entries to access properties of the corresponding series. To switch between series, use the **Λ** and **V** buttons.

Series management buttons
Use the **Add**, **Copy** and **Remove** buttons to manage the series collection.

Main series properties
Choose whether the selected series should be visible, define its name, and select a view type.

Options tabs
The following tabs are available on this page:

- Series Options
  Specifies argument and value scale types, point sort order, visibility in legend and legend text.

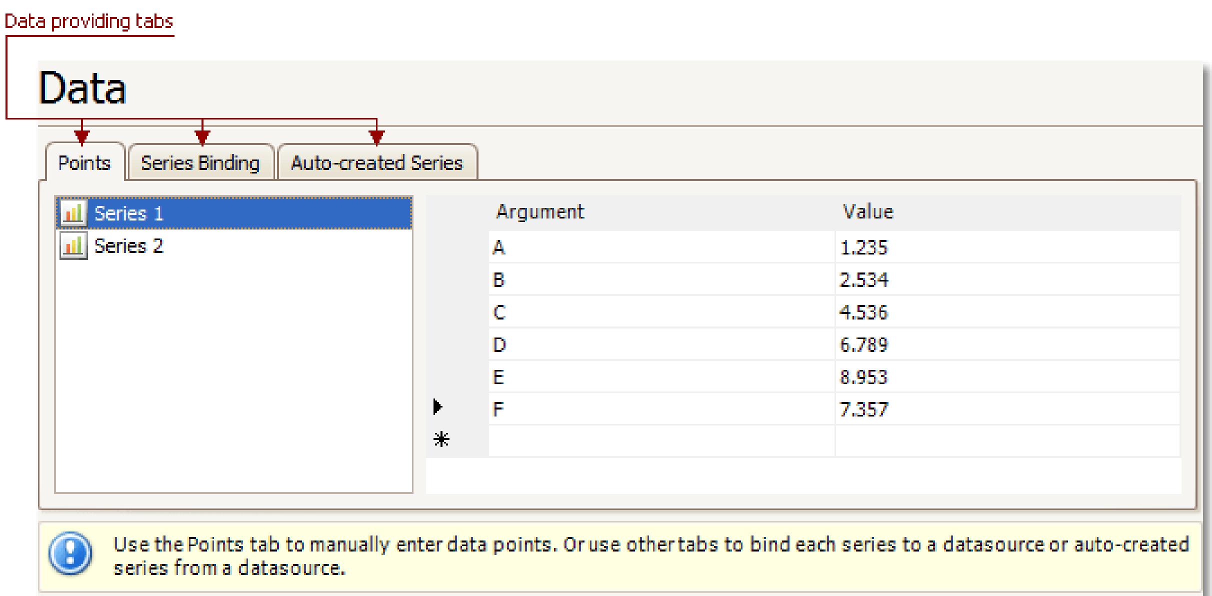
- Top N Options
  Specifies whether the Top N Values feature is enabled, and allows you to control this feature's options.
- Legend Point Options
  Specifies the format of values displayed in the chart legend.

Data Page

Tasks

- Provide data for a chart;
- Bind a chart or individual series to a data source;
- Customize an argument and a value scale type;
- Customize the view type of auto-generated series;
- Apply data filtering and sorting;
- Adjust the Pivot Chart settings.

Page Elements

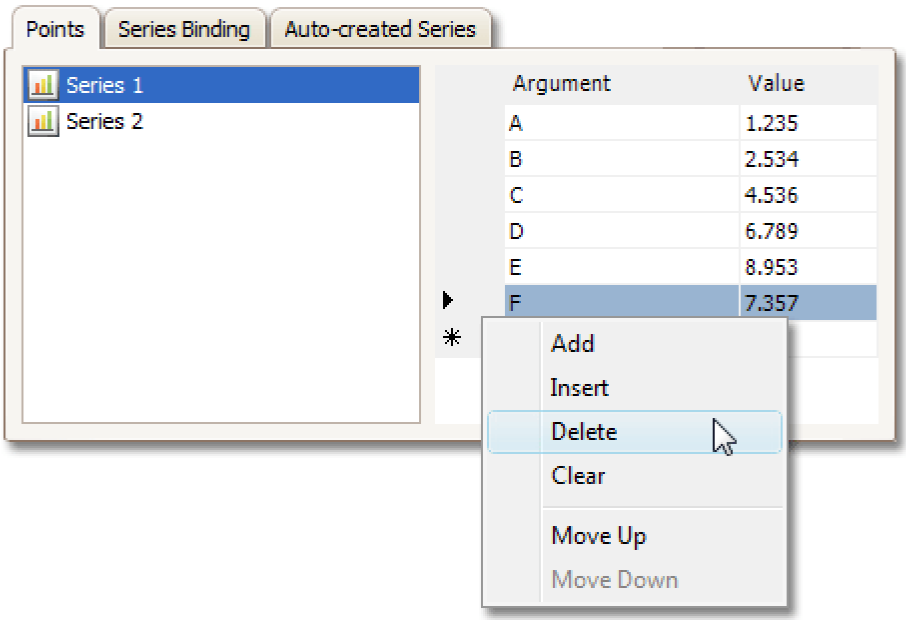


You can provide data for a chart using the following tabs.

- Points tab
- Series Binding tab
- Auto-created Series tab

Points Tab

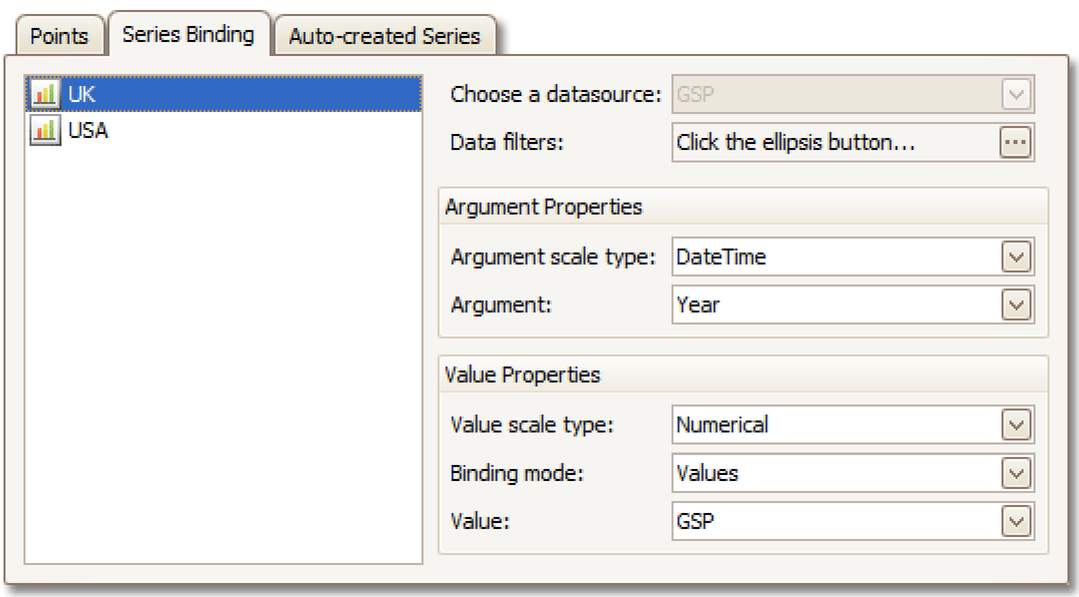
Use it to manually enter data points for series.



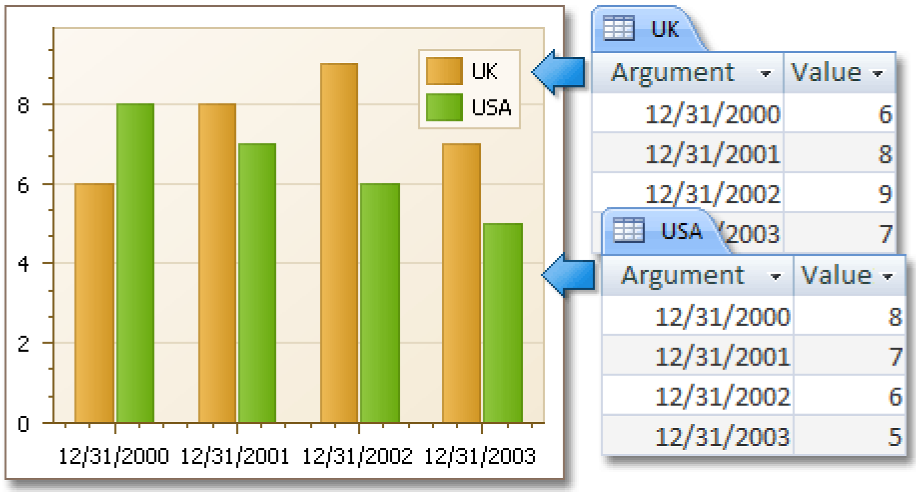
Note that valid **Argument** and **Value** entries must correspond to the **Argument scale type** and the **Value scale type** selected for the appropriate series on the Series Page. Otherwise, an error message will be invoked.

Series Binding Tab

Use it to provide specific data binding options for each series.

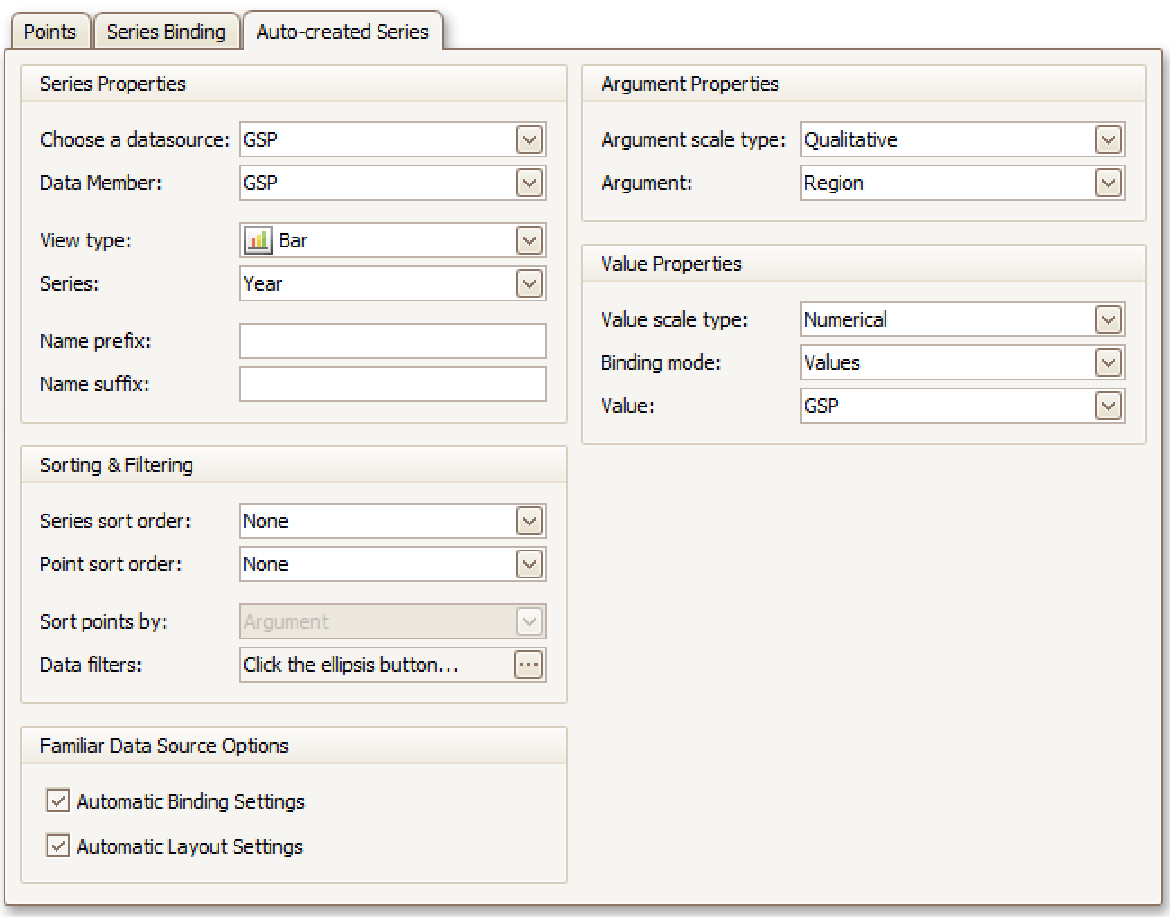


The following illustration demonstrates how it works.

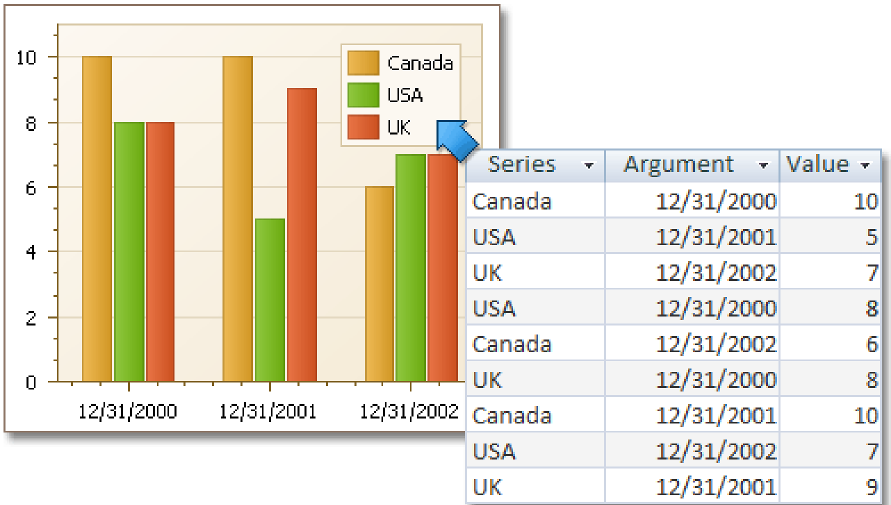


Auto-created Series Tab

Use it to specify data columns used to generate series, as well as the series view type and other options like sorting, filtering and name template.



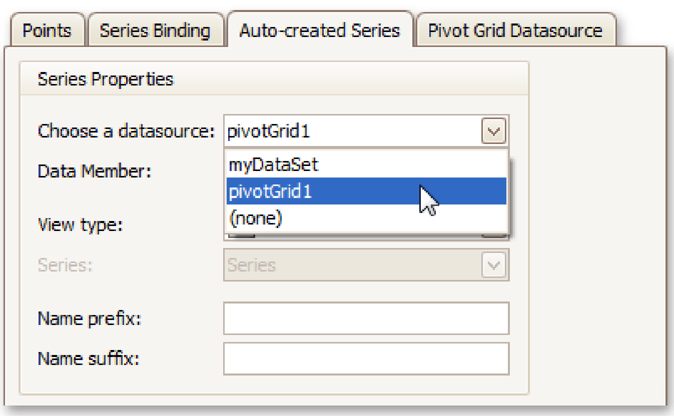
The following illustration demonstrates how it works.



Series	Argument	Value
Canada	12/31/2000	10
USA	12/31/2001	5
UK	12/31/2002	7
USA	12/31/2000	8
Canada	12/31/2002	6
UK	12/31/2000	8
Canada	12/31/2001	10
USA	12/31/2002	7
UK	12/31/2001	9

For familiar data sources (such as Pivot Grid), you can choose to automatically adjust the binding and layout settings of your Chart.

And when you set a Pivot Grid as a Chart's data source, the **Pivot Grid Data Source** tab becomes available.



On this tab you can adjust various Pivot Chart options.

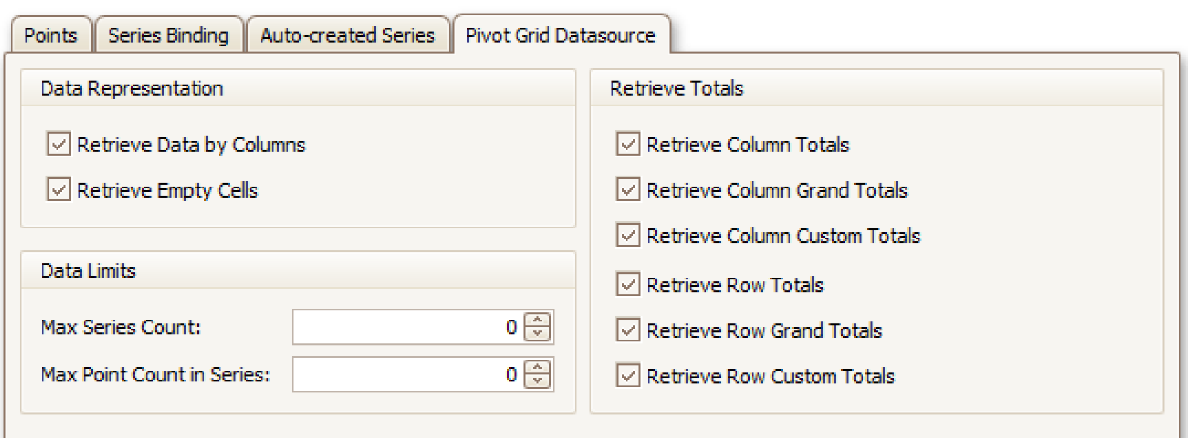


Chart Page

Tasks

- Define a chart's background color and background image.

Page Elements

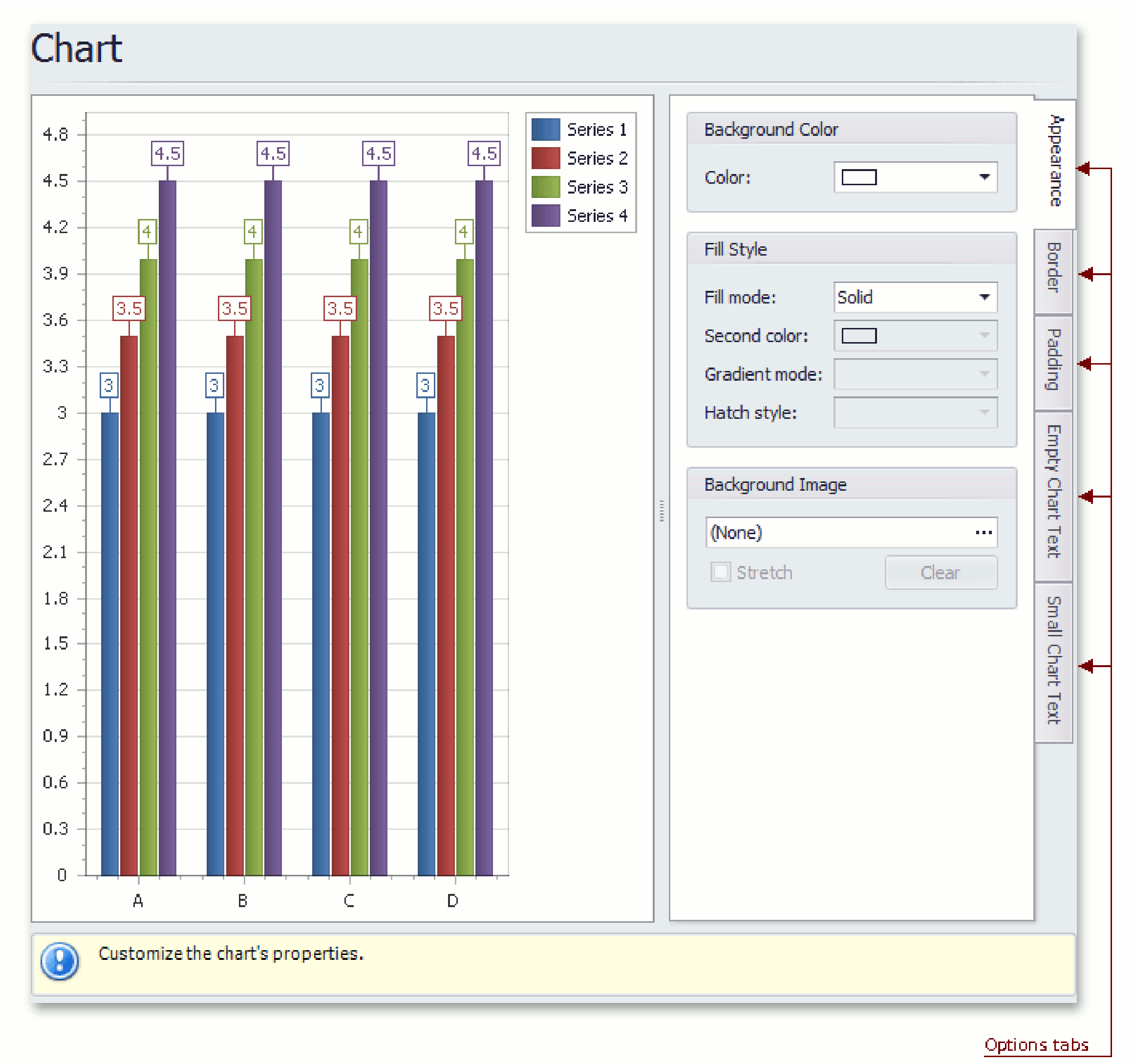


Chart preview area

Previews a chart's layout.

Options tabs

The following tabs are available on this page.

- **Appearance**
  Specifies a chart's background color, fill style and background image.

- **Border**
  Specifies a border's color, thickness and visibility.
- **Padding**
  Specifies the diagram's inner indents.
- **Empty Chart Text**
  Specifies the message displayed in the chart when there's no data to display.
- **Small Chart Text**
  Specifies the message displayed in the chart, when the chart size is too small to fit the diagram.

Diagram Page

Tasks

- Rotate a diagram;
- Define a diagram's padding;
- Add or remove secondary axes;
- Add or remove panes;
- Define panes' layout direction;
- Enable or disable a diagram's scrolling and zooming.

Page Elements

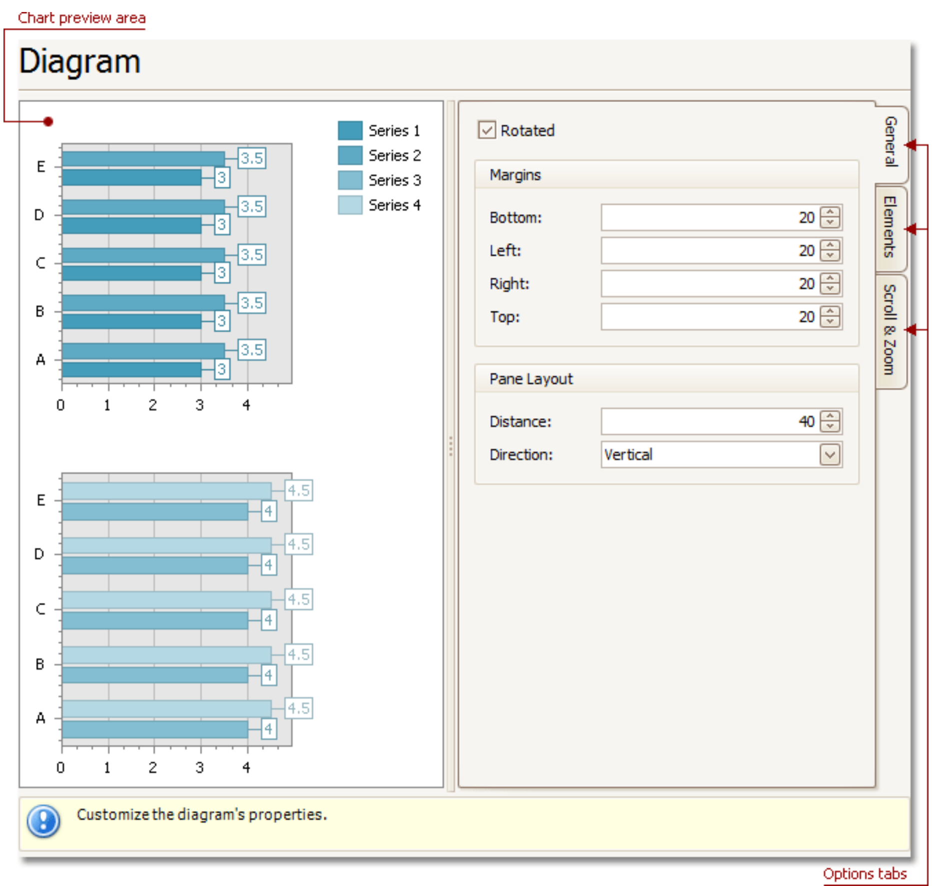


Chart preview area
Previews a chart's layout.

Options tabs
The following tabs are available on this page.

- **General**
  Choose whether a diagram should be rotated, set its padding values, and (if it contains several panes) define the panes' layout direction.
- **Elements**
  Add or remove secondary axes and panes.
- **Scroll & Zoom**
  Enable or disable a diagram's scrolling and zooming, and specify the scrolling and zooming options.

Panes Page

Tasks

- Customize panes properties.

Page Elements

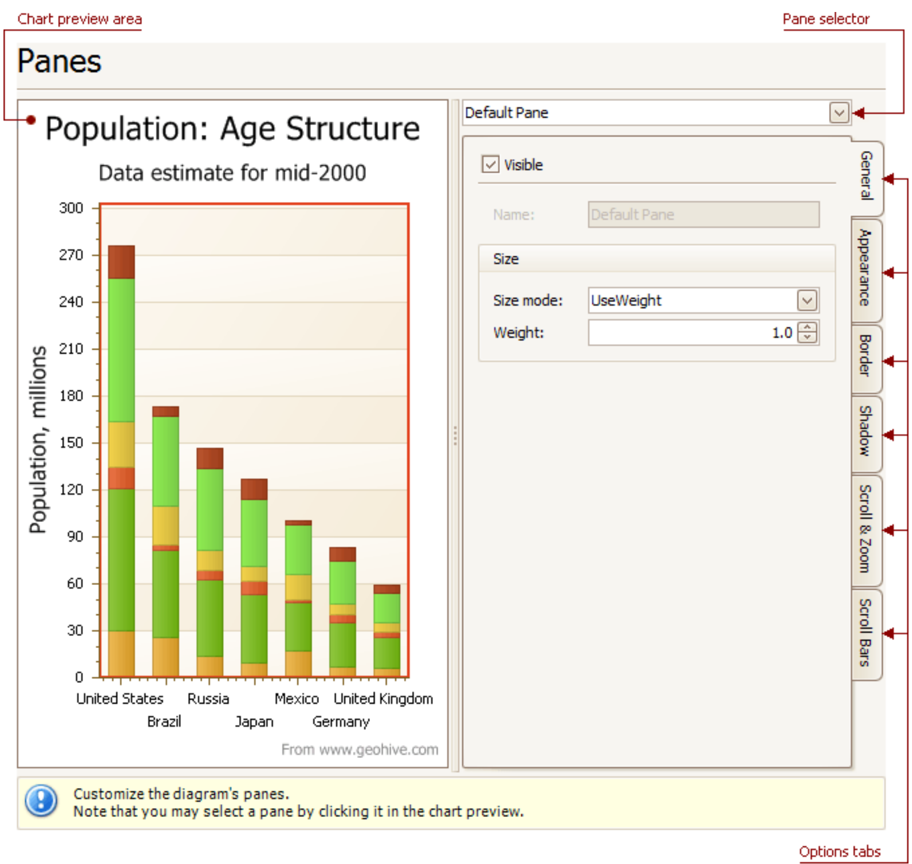


Chart preview area
Previews a chart's layout.

Pane selector
Specifies a pane to be customized.

Options tabs
The following tabs are available on this page.

- **General**
  Determines whether the selected pane should be visible, specifies its name, size mode and size value.
- **Appearance**
  Specifies a pane's background color and fill style, and its background image.
- **Border**
  Determines whether a pane's border should be visible, and defines its color.
- **Shadow**
  Determines whether a pane's shadow should be visible, and defines its color and size.
- **Scroll & Zoom**
  Enable or disable a pane's scrolling and zooming for specific axes.
- **Scroll Bars**
  If scrolling and/or zooming is enabled for an axis, adjust the scroll bars visibility, position and appearance.

Axes Page

Tasks

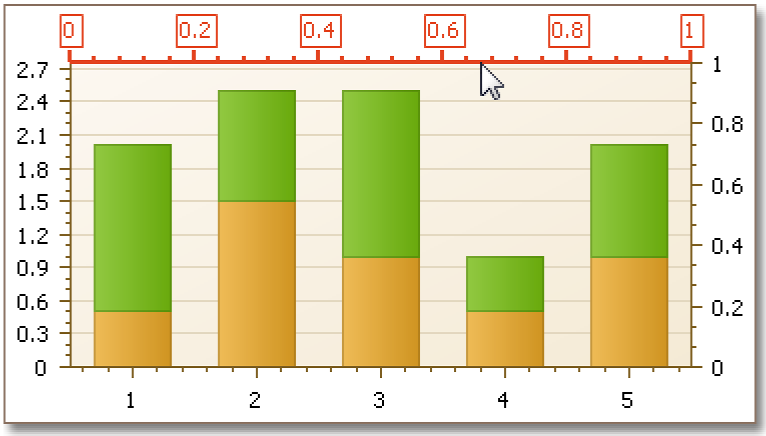
- Customize axes properties;
- Customize the appearance of axis labels;
- Add a constant line and a strip to an axis;
- Enable automatic and manual scale breaks.

Page Elements

Chart preview area

Previews a chart's layout.

Note that you can select an axis to be modified on the chart preview area directly.



Axis selector

Specifies an axis to be customized.

Options tabs

The following tabs are available on this page.

- **General**
  Specifies visibility, position, range and format properties.
- **Appearance**
  Defines color, thickness and interlacing options.
- **Elements**
  Customizes title, tick marks and grid line properties.
- **Labels**
  Specifies position and text for automatically created labels, or allows custom labels to be defined.
- **Strips**
  Allows you to create strips, define their visibility, name, limits, appearance, etc.
- **Constant Lines**
  Allows you to create constant lines, define their visibility, name, value, legend text, appearance, title, etc.
- **Scale Breaks**
  Allows you to enable automatic and / or create custom scale breaks, and define their appearance.

Series Views Page

Tasks

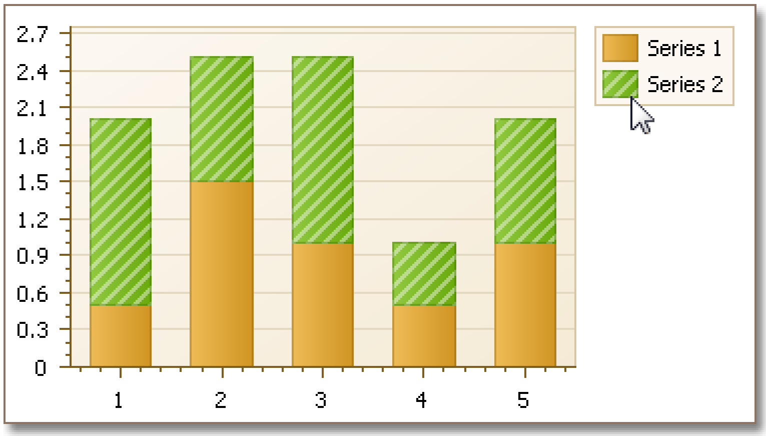
- Customize the view-type-specific properties of series;
- Customize the appearance and border settings of series;
- Add or remove financial indicators (Fibonacci indicators, trend lines and regression lines).

Page Elements

Chart preview area

Previews a chart's layout.

Note that you can select a series to be modified directly in the chart preview area.



Series selector
Specifies a series to be customized.

Options tabs
The following tabs are available on this page.

- **General**
  Specifies a series bar's width, distance, color, transparency, etc.
- **Appearance**
  Specifies a series color, transparency and fill style. Additionally, determines whether series points should be painted individually.
- **Border**
  Determines whether a series border should be visible, and defines its color and thickness.
- **Shadow**
  Specifies whether a series' shadow should be visible, determines its color and size.
- **Indicators**
  Allows you to add or remove indicators of a required kind (Regression Line, Trend Line, Fibonacci Arcs, Fibonacci Fans, Fibonacci Retracement and many others).

Point Labels Page

Tasks

- Resolve overlapping of point labels;
- Customize the appearance of point labels.

Page Elements

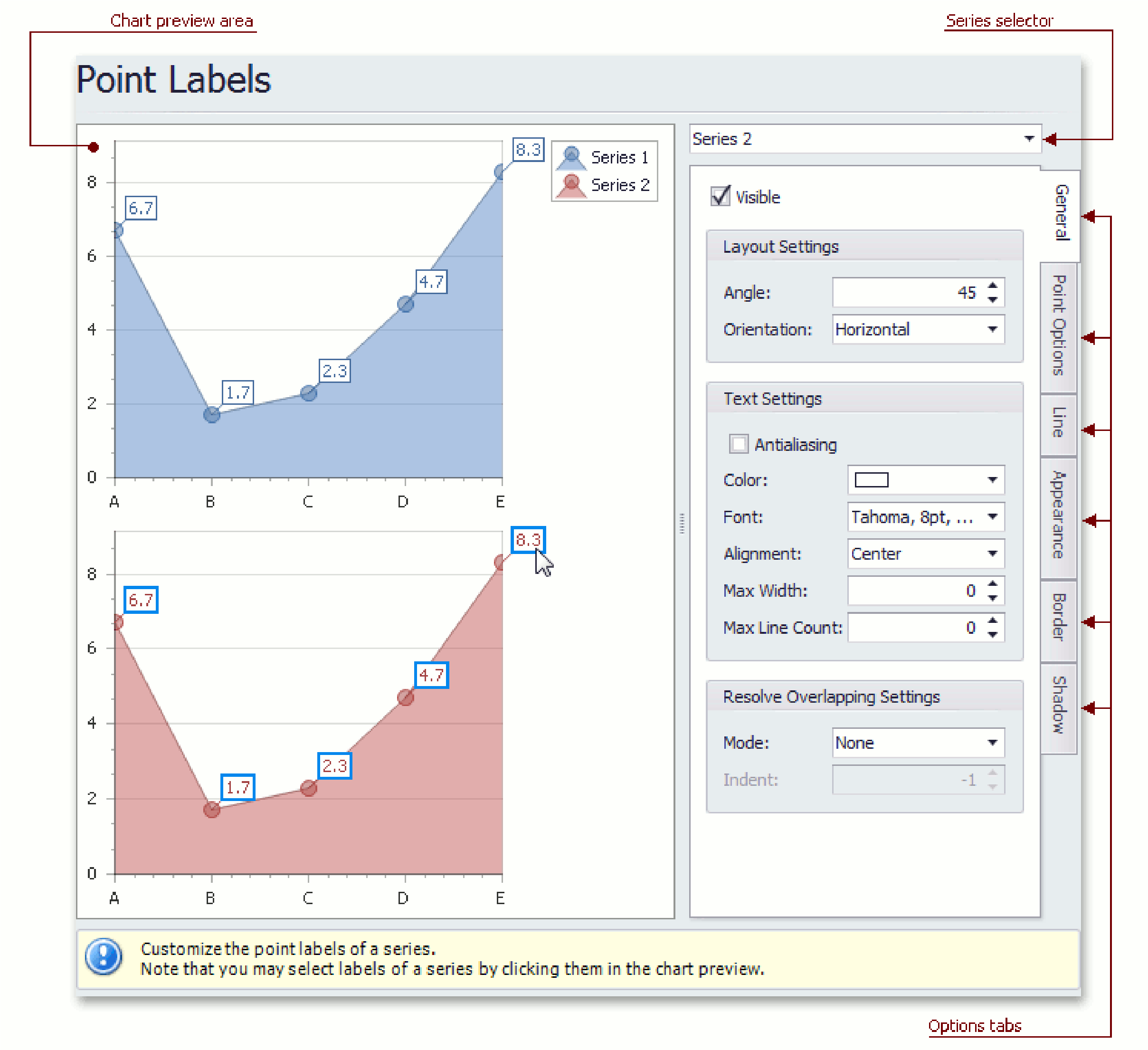
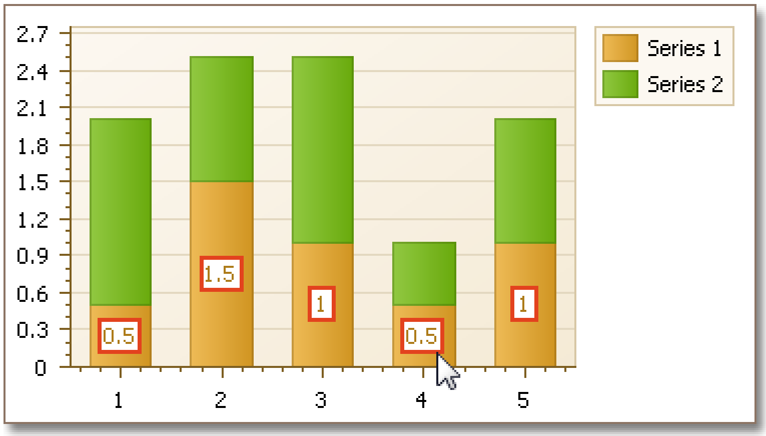


Chart preview area

Previews a chart's layout.

Note that you can select point labels to be modified directly in the chart preview area.



Series selector
Specifies a series to be customized.

Options tabs
The following tabs are available on this page.

- **General**
  Specifies whether labels should be visible and shown for zero values, determines their text and resolves overlapping settings.
- **Point Options**
  Specifies point view, pattern and value format.
- **Line**
  Determines whether label lines should be visible, and specifies their appearance.
- **Appearance**
  Specifies the background color and fill style of labels.
- **Border**
  Determines whether label borders should be visible, and defines their color and thickness.
- **Shadow**
  Specifies whether a label's shadow should be visible, and defines its color and size.

Chart Titles Page

Tasks

- Create chart titles;
- Enable the word-wrapping for lengthy chart titles;
- Customize the appearance and position of chart titles.

Page Elements

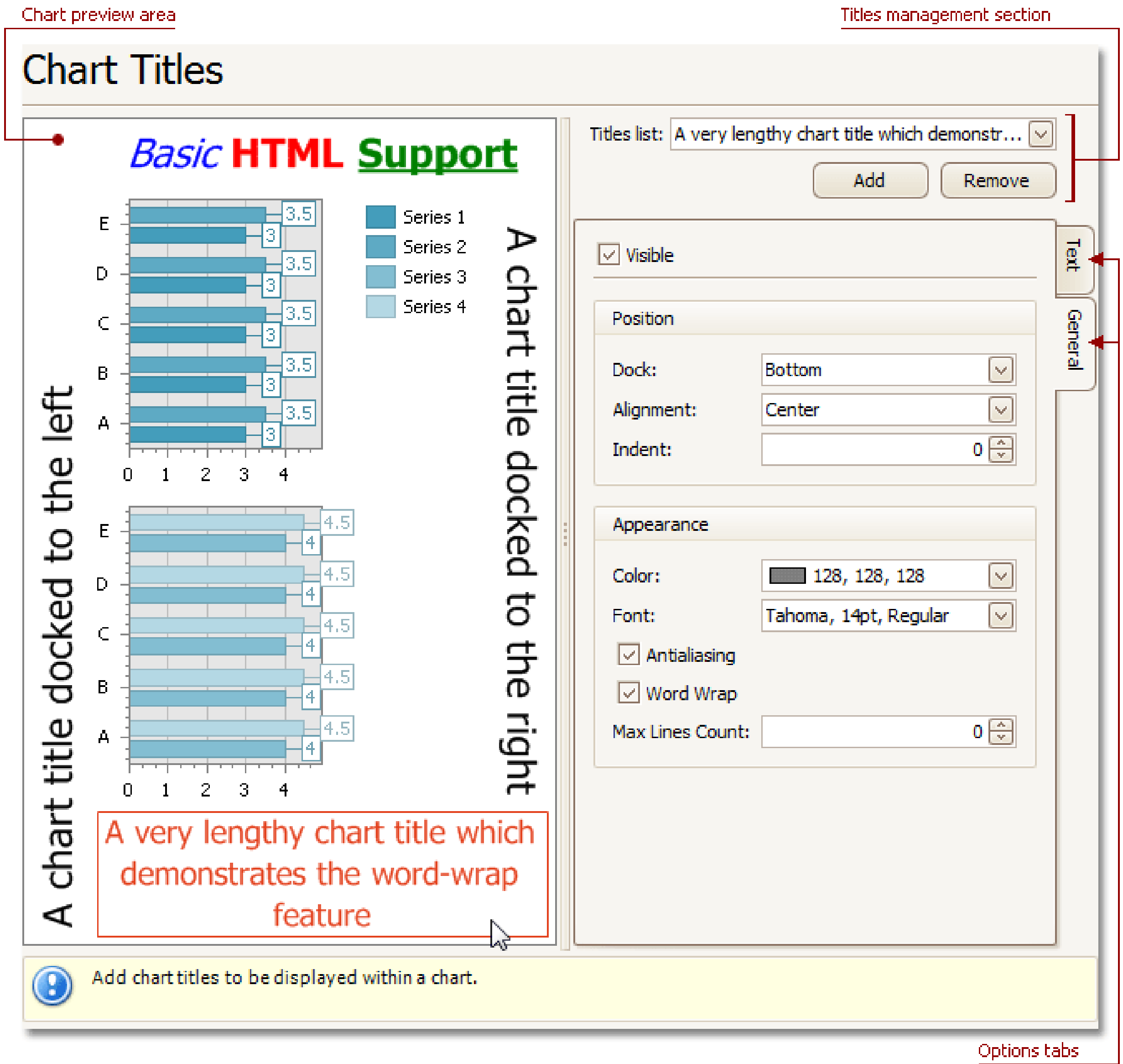
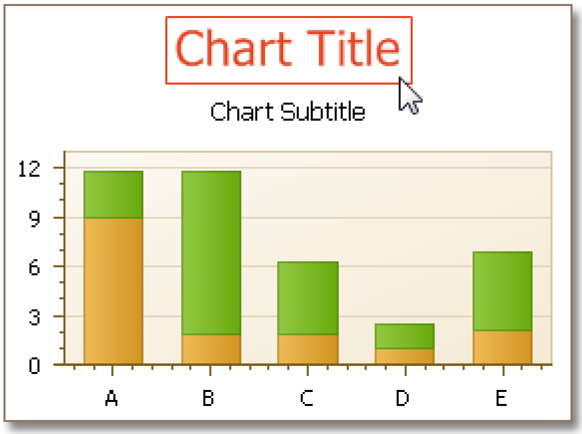


Chart preview area

Previews a chart's layout.

Note that you can select chart titles to be modified in the chart preview area directly.



Titles management section
Allows you to add or remove titles from the titles list, and choose a title to be customized.

Options tabs
The following tabs are available on this page.

- **Text**
  Sets a text for the selected chart title. Note that the basic HTML formatting is supported for chart titles.
- **General**
  Specifies a title's visibility, alignment and font options, and determines whether the word-wrapping is enabled for a title.

Legend Page

Tasks

- Customize chart legend's properties.

Page Elements

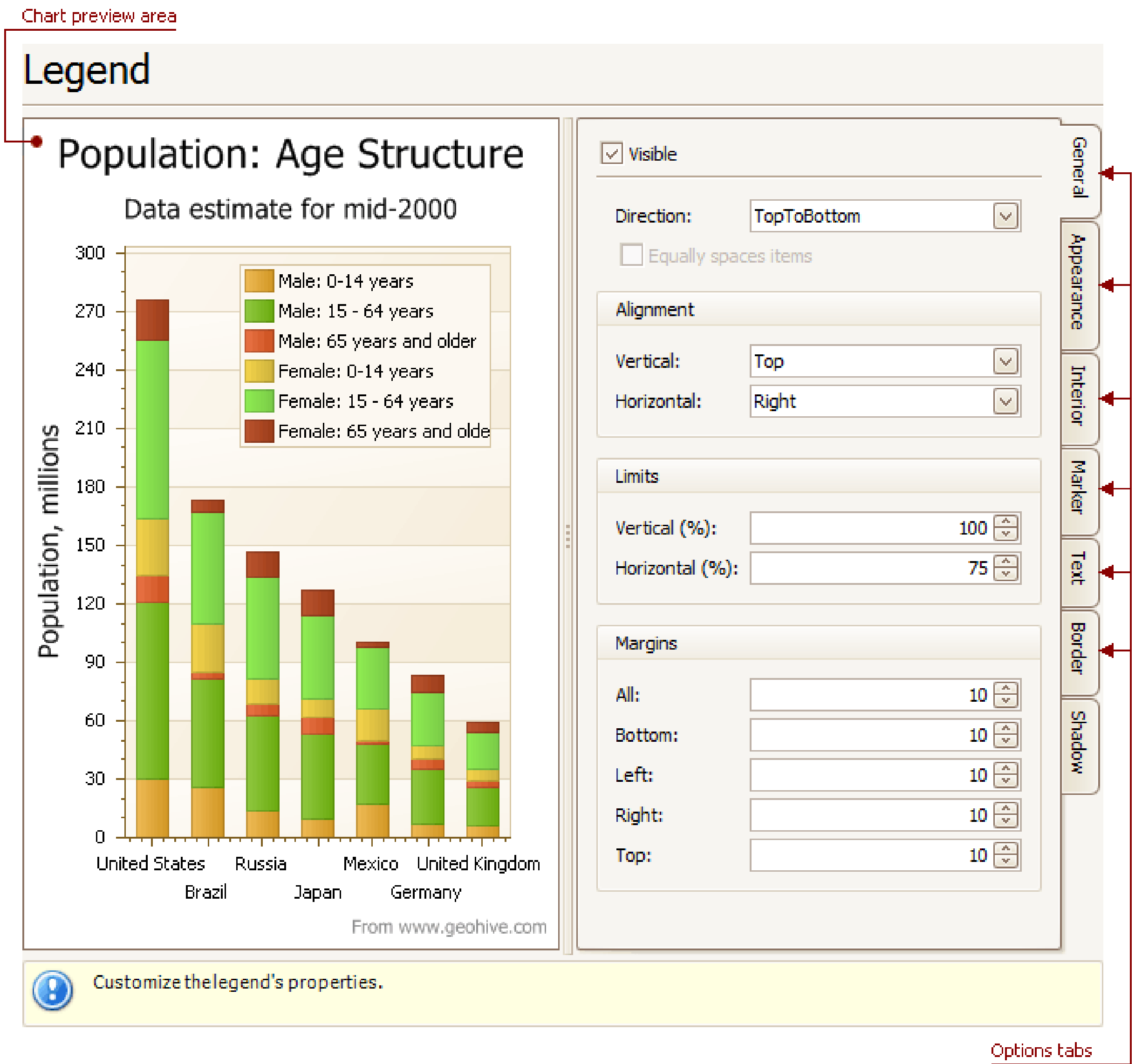
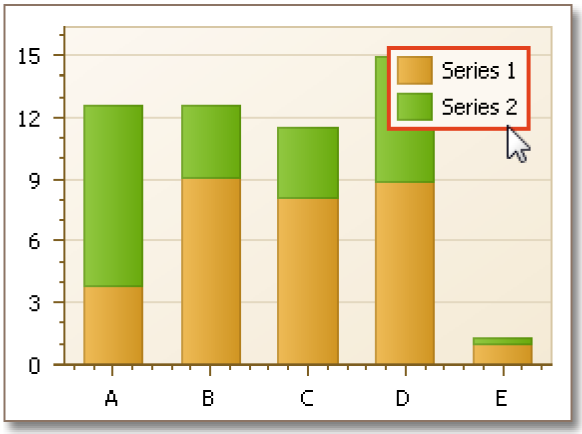


Chart preview area

Previews a chart's layout.

Note that you can select the legend directly on the chart preview area.



Options tabs

The following tabs are available on this page.

- **General**
  Specifies legend visibility, direction, alignment, spacing, limits and margins.
- **Appearance**
  Specifies legend background color and background image.
- **Marker**
  Specifies visibility and dimensions of legend markers.
- **Text**
  Specifies legend text antialiasing, color and font.
- **Border**
  Specifies visibility, color and thickness of legend borders.
- **Shadow**
  Specifies visibility, color and size of the legend shadow.

Annotations Page

Tasks

- Create and customize image and text annotations.

Page Elements

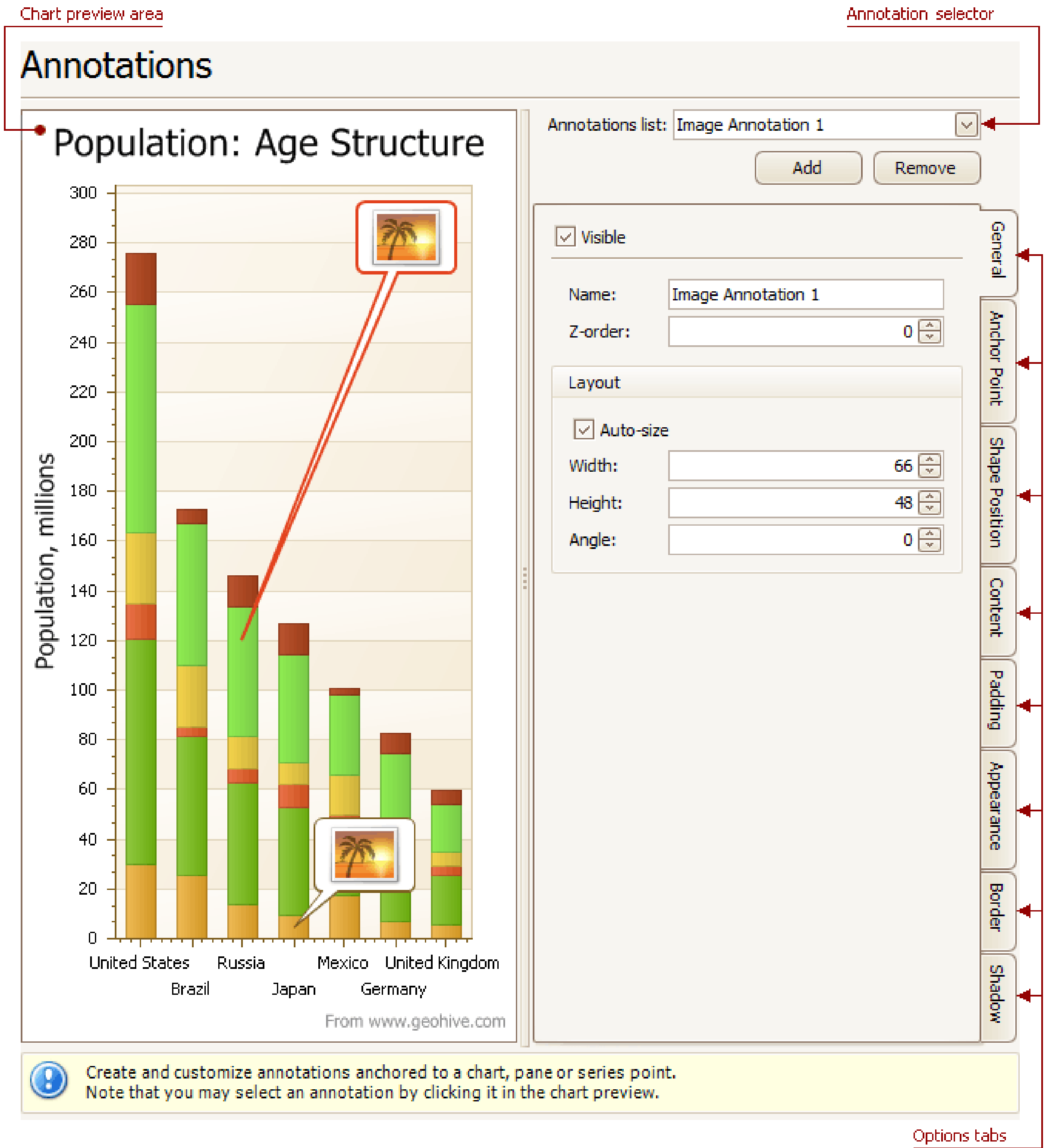


Chart preview area

Previews a chart's layout.

Annotation selector

Specifies an annotation to be created and/or customized.

Note that you can select an annotation directly on the chart preview area.

Options tabs

The following tabs are available on this page.

- **General**
  Specify an annotation's name, adjust its visibility, z-order and layout.
- **Anchor Point**
  Choose an element to anchor to (chart, pane, or series point), and adjust the corresponding options.
- **Shape Position**
  Choose an annotation's shape position type (free or relative), and adjust the corresponding options.
- **Content**
  Depending on an annotation's type (text or image), specify its content.
- **Padding**
  Specify an annotation's inner indents.
- **Appearance**
  Adjust an annotation's background color, fill style, shape and connector options.
- **Border**
  Specify visibility, color and thickness of an annotation's borders.
- **Shadow**
  Specifies visibility, color and size of an annotation's shadow.

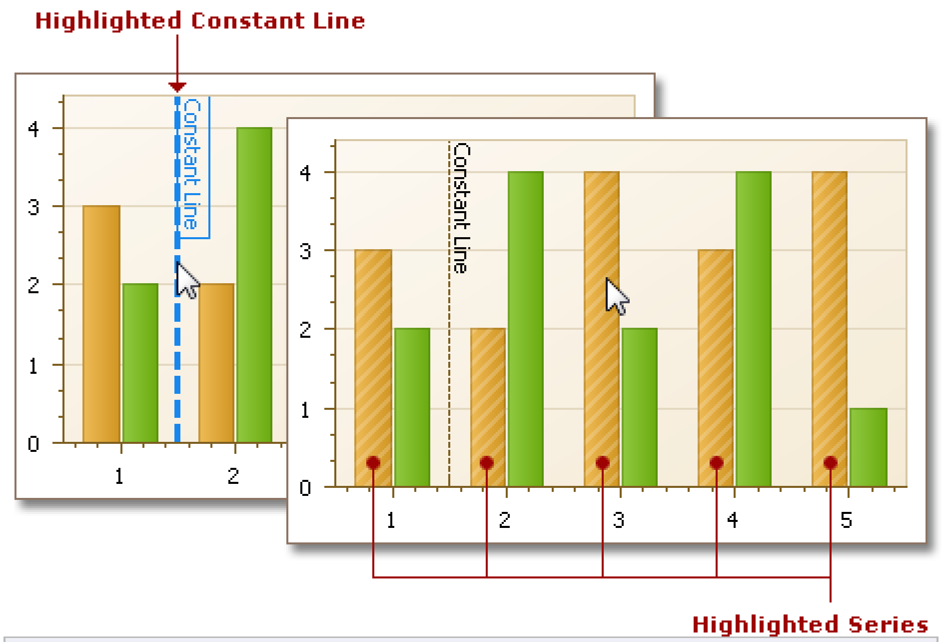
Highlighting and Selection Chart Elements

If you are working with 2D charts, you can highlight and select different chart elements via the mouse or using different gestures on your touchscreen device.

Highlighting

Any chart element that can be selected supports highlighting.

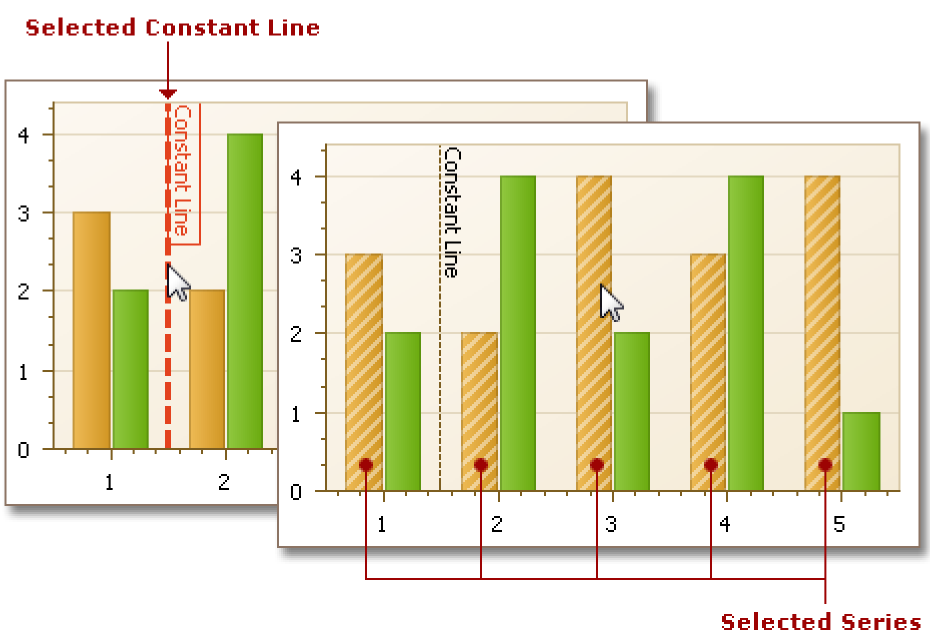
An end user can highlight a chart's area using either the drag gesture on your touchscreen device or via the mouse pointer by hovering over a particular chart element, as shown in the image below.



📝Note
Chart element highlighting and selection is available only for 2D Chart Types.

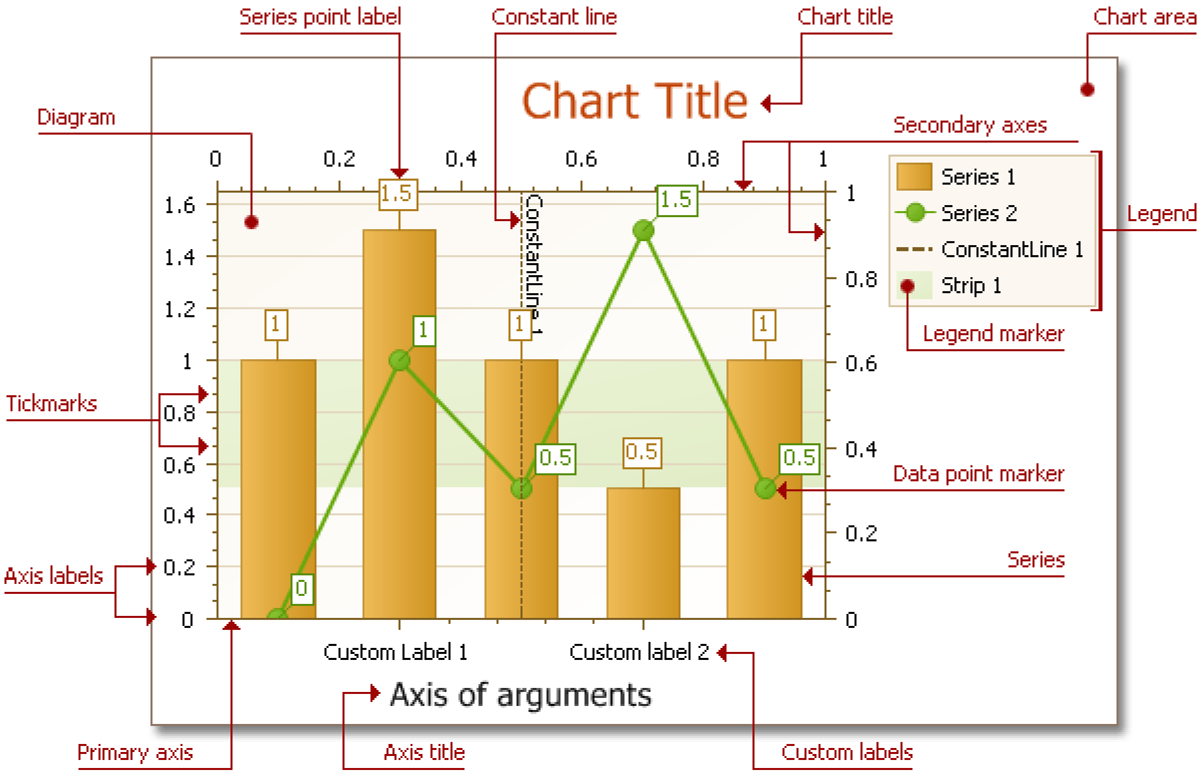
Selection

To select a particular chart element, an end user should tap it on a device supporting touchscreen or click this element using the left mouse button. The following image demonstrates how a constant line and a single series are painted if selected by an end user with the mouse pointer.



Selectable Elements

Chart elements which can be highlighted or selected are shown in the following illustration.



Zoom a Chart

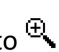
If you are working with 2D XY-charts (Bar, Line, Point, etc.) or 3D charts, you can zoom in or out of a chart. This allows you to see some of the chart's data in greater detail, or get a more general picture of your data.

Note that zooming is unavailable for 2D Pie, 2D Doughnut, Radar, and Polar charts.

Zoom In a Chart

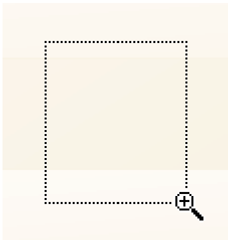
To zoom in a chart, do one of the following.

- **Hold down SHIFT and click.**

  After you press SHIFT, the mouse pointer is changed to . Then, move the mouse pointer to the chart region to be zoomed into, and click (while holding SHIFT). The magnification factor is 300%.

- **Press SHIFT and select a region on a diagram.**

After you press SHIFT, the mouse pointer is changed to . Then, select a zoomed region by dragging the mouse pointer.



After releasing the left mouse button, a chart is zoomed into the bounds of the selected region on a diagram.

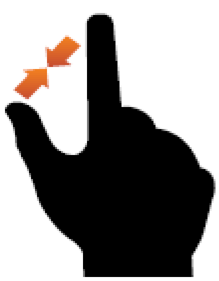
Note
This feature is available for 2D charts only. if you press SHIFT and can't zoom in anymore (the mouse pointer is changed to), then a chart is already zoomed in by **100** times (10000%). This is the maximum possible zoom factor allowed.

- **Use CTRL+PLUS SIGN.**

  In this case, the magnification factor is 120%.

- **Use the spread gestures on a touchscreen device**.

  An end-user can zoom in a chart's diagram performing spread gestures on any device supporting touchscreen.



- **Use the mouse wheel.**

  In this case, the magnification factor is 120%.

Zoom Out of a Chart

To zoom out of a chart, do one of the following.

- **Hold down ALT and click.**

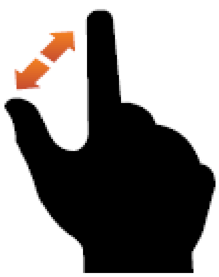
  After you press ALT, the mouse pointer is changed to . Then, move the mouse pointer to the region to be zoomed out, and click (while holding ALT). The magnification factor is 300%.

- **Use CTRL+MINUS SIGN.**

  In this case, the magnification factor is 120%.

- **Use the pinch gestures on a touchscreen device**.

  A chart's diagram can be zoomed out by performing pinch gestures on any device supporting touchscreen.



- **Use the mouse wheel.**

  In this case, the magnification factor is 120%.

Undo Zooming

Press CTRL+Z to return to the state before the first zoom operation in a series.

Scroll a Chart

You can scroll a chart if either the axis visible range is reduced or a chart is already zoomed in (its zoom factor is more than 100%). Since the entire chart is not visible at one time, it's possible to scroll a chart.

Scroll a 2D Chart

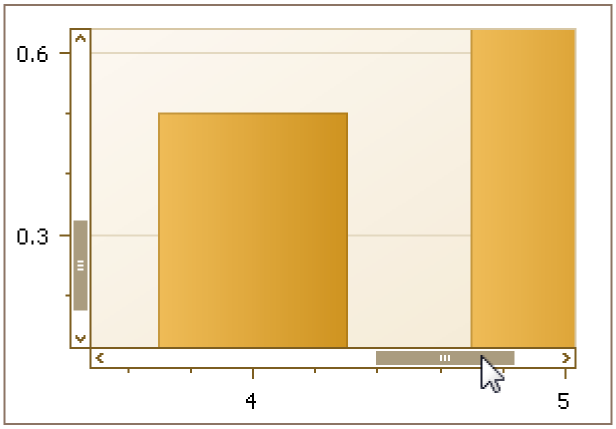
To scroll a 2D chart, do one of the following:

- **Hold down the left mouse button, and drag it**.

  After you hold down the left mouse button, the mouse pointer is changed from to . Then drag the mouse pointer to scroll the diagram.

- **Use scrollbars**.

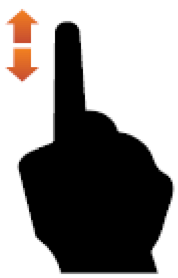
  An end-user is able to click a scrollbar arrow, click the scrollbar near the thumb, or drag the thumb and move it.



In this instance, a chart's diagram is scrolled in the same way as controls in used Windows applications.

- **Use flick gestures on a touchscreen device**.

  An end-user can scroll a diagram using flick gestures on a touchscreen device.



- **Use CTRL+ARROW combinations**.

  When an end-user presses CTRL + LEFT, a chart's diagram is moved to the left.
  When an end-user presses CTRL + UP, a chart's diagram is moved to the top.
  When an end-user presses CTRL + RIGHT, a chart's diagram is moved to the right.
  When an end-user presses CTRL + DOWN, a chart's diagram is moved to the bottom.

Scroll a 3D Chart

An end-user can perform chart scrolling doing one of the following:

- **Hold down the mouse wheel button on a chart and drag it**.

  After you hold down the mouse wheel, the mouse pointer is changed from  to . Then drag the mouse pointer to scroll a chart's diagram.

- **Use CTRL+ARROW combinations**.

- **Use flick gestures on a touchscreen device.**

  An end-user can scroll a diagram using flick gestures.

Rotate a Chart

If you are working with 3D charts, you can rotate a chart's diagram. This may be required if a chart displays multiple series or data points, and it's required to change the current rotation angle to view the chart data in detail.

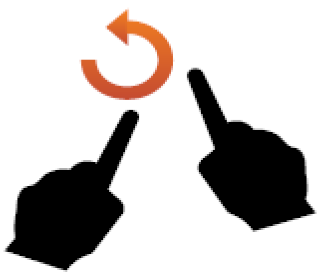
To rotate a chart control, do one of the following:

- **Hold down the left mouse button on the diagram and drag the mouse pointer.**

  After holding down the left mouse button, the mouse pointer is changed from  to . Then, drag the mouse pointer to rotate the chart.

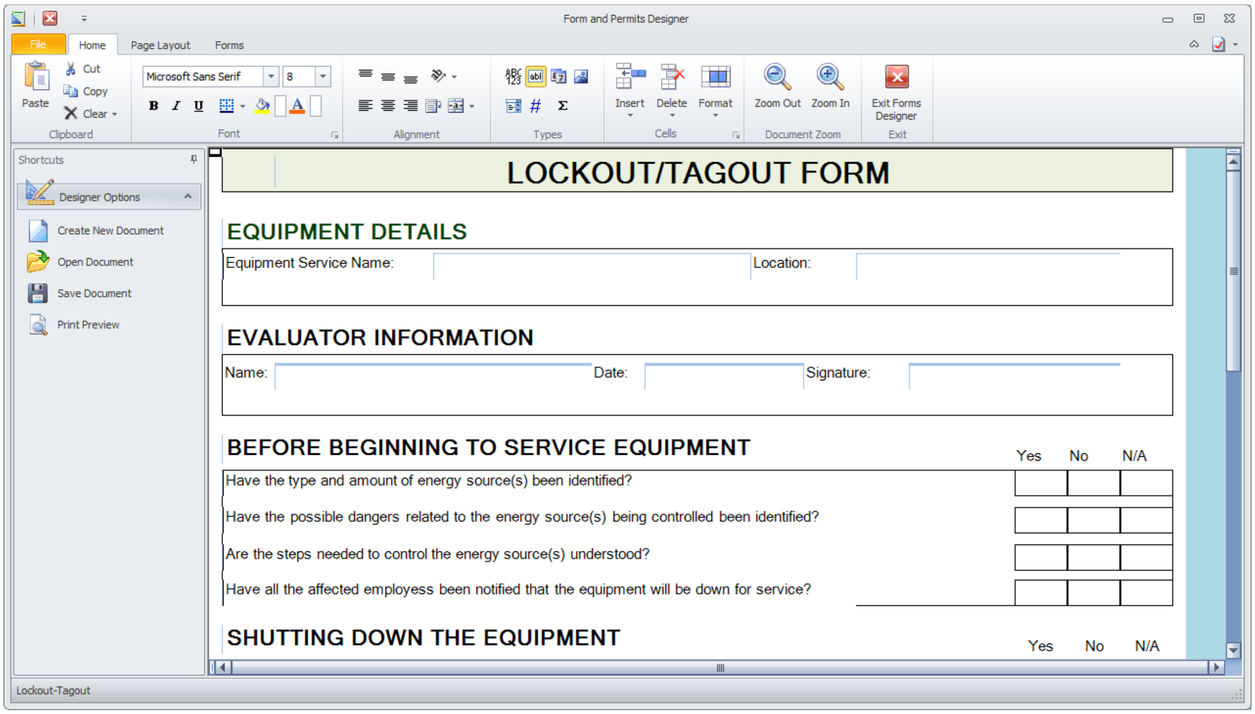
- **Use rotation gestures on a touchscreen device.**

  Touch a 3D chart's area with two fingers and move them in a clockwise or counterclockwise direction.



Forms and Permits Designer

We are aware that many organizations require certain Forms and Permits to be used in their day-to-day operations. We have included what we would consider the most popular of these documents with this module. We also know that many of you may have other requirements, and for this reason we give you the ability to create your own Forms and Permits.



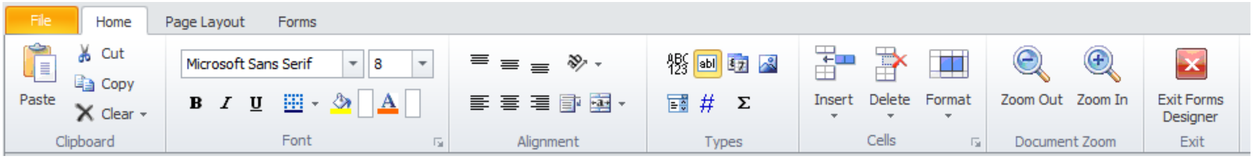
The forms included with this module were created using this module, and should give you a pretty good idea of what can be done. This module uses a spreadsheet type control as its base. The cells of this control can be setup to use different cell types, which makes it ideal for creating forms. Cells can be set as normal text or edit cells, date cells with popup calendars, combo box cells where you can setup choices, and picture cells where you can use various image formats.

Besides the ability of setting up and using different cell types, you also have many formatting options at the cell level. You can specify the fonts, fore and back ground colors, text overflow, and more. So if your organization can use a form tool, we are happy to be able to supply this to you with this simple to use, yet powerful tool.

Ribbon Control

The comprehensive functionality of the ***Forms and Permits*** module is provided via a set of Ribbon tabbed pages. Ribbon pages are structurally and visually split into logical groups. Each of these groups includes commands that perform specific functions.

HOME TAB



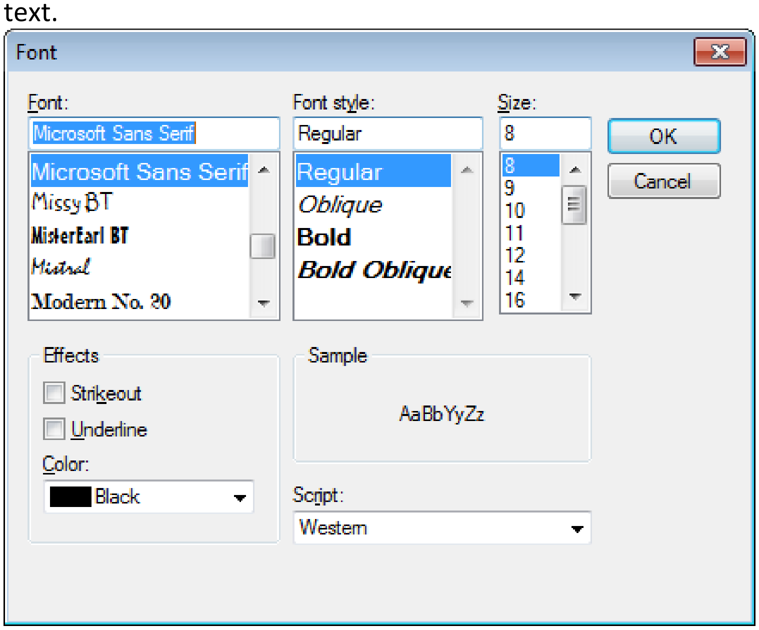
The following are the elements on the **Home** ribbon tab, reading left to right:

Clipboard Group

- **Paste** - Pastes the content of the clipboard into a carriage position.
- **Cut** - Cuts the selected content and places it in the clipboard.
- **Copy** - Copies the selected content and places it in the clipboard.
- **Clear** – Clears the contents of the selected cells. Options include:
  - **Clear Data Only** – Clear the cells data or text
  - **Clear All** – Clears both data and formatting

Font Group

- **Font** - Specifies a font for the selected text.
- **Font Size** - Specifies a font size for the selected text.
- **Bold** - Makes the selected text bold.
- **Italic** - Italicizes the selected text.
- **Underline** - Draws a line under the selected text.
- **Borders** – Allows drawing borders and other attributes around selected cells.
- **Text Highlight Color** - Specifies a highlight color for the selected text.
- **Font Color** - Specifies a color for the selected text.
- **Font** - Invokes the **Font** dialog, allowing you to adjust different font options for the selected text.



Alignment Group

- **Top** – Aligns text in the selected cell at the top of the cell.

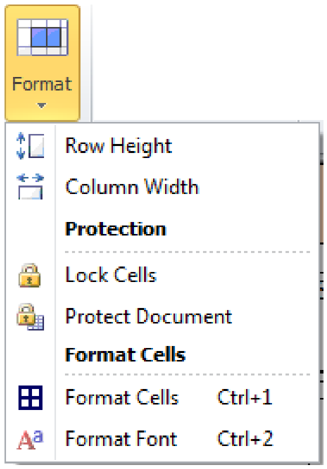
- **Center** – Vertically aligns text in the selected cells at the center of the cell.
- **Bottom** – Vertically aligns text in the selected cells at the bottom of the cell.
- **Angle** – Set the rotation or angle of select cells. Options include:
    - **Angle Counterclockwise**
    - **Angle Clockwise**
    - **Rotate Text Up**
    - **Rotate Text Down**
- **Left** – Horizontally aligns select cell contents to the left side of the cell.
- **Horizontal Center** - Horizontally aligns select cell contents to the center of the cell.
- **Right** - Horizontally aligns select cell contents to the right side of the cell.
- **Word Wrap** – Allows the contents of selected cell to word wrap.
- **Merge Cells** – Allows cells to overflow in to adjacent cells, or merge the cells together. Options include:
    - **Merge Across** – Allows cells to overflow into adjacent cells.
    - **Merge Cells** – Merge selected cells, where the merge cells will act as a single cell.
    - **Unmerge Cells** – Unmerges the cells in the selection.

Types Group

- **General Cell** – Converts the selected cells in to the general cell type.
- **Edit Cell** - Converts the selected cells in to the text or edit cell type.
- **Date Cell** - Converts the selected cells in to the date cell type and allows using the built in calendar.
- **Picture Cell** – Converts the selected cell in to a picture type and invokes a File open dialog that allows the cell's image. Supported formats include**: png, bmp, jpg** and **gif** formats.
  It sometimes best to merge cells that contain picture for better results.
- **Combo Box** – Set the selected cell as a combo box cell type. Also invokes the **Combo box Items** dialog that allows you to edit the contents of the combo box.
- **Numbers Cells -** Converts the selected cells in to the numbers type.
- **Sum** – Allows you to add the contents of selected cells, and put the sum in the last cell of the selected range.

Cells Group

- **Insert** – Allows the insertion of columns and rows. Options include:
    - **Insert Column to the left** – Inserts a column to the left of the selection.
    - **Insert Row Above** – Insert a row above the selection
- **Delete** – Allows for the removal of columns and rows. Options include:
    - **Remove Column** – Removes the selected column.
    - **Remove Row** – Removes the selected row.
- **Format** – Provides various formatting options as it applies to the entire document, or selected cells.



- **Row Height** – Allows you to specify the row height of selected cells.
- **Column Width** – Allows you to specify the column width of selected cells.
- **Lock Cells** – Allows you to lock selected cells to prevent editing.
- **Protect Documents** – Protects the entire document from editing.
- **Format Cells** – Invokes the **Format Cells** dialog screen that allows various cells selection formatting options.
- **Format Font** – Invokes the **Font** dialog screen that allows formatting the font characteristics of the selected text or cells.

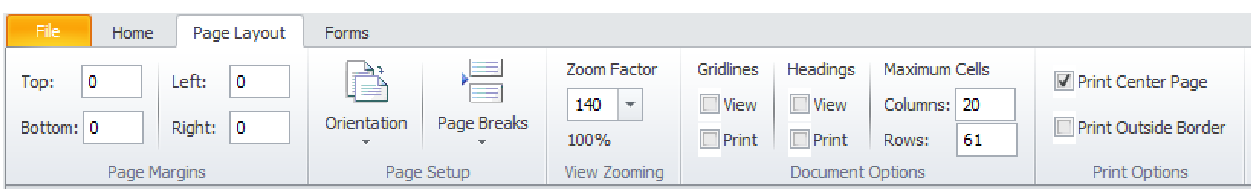
Document Zoom Group

- **Zoom In** – Zooms in on the document.
- **Zoom Out** – Zooms out on the document.

Exit Group

- **Exit Form Designer** – Close and exit this module.

PAGE LAYOUT TAB



The following are the elements on the **Home** ribbon tab, reading left to right:

Page Margins Group

- **Top** – Allows you specify the top margin for the document.
- **Left** – Allows you specify the left margin for the document.
- **Bottom** – Allows you specify the bottom margin for the document.
- **Right** – Allows you specify the bottom margin for the document.

Page Setup Group

- **Orientation** – Allows you to specify the print orientation of the document. Options include:

  - **Portrait**
  - **Landscape**
- **Page Breaks** - Inserts and clears document page breaks. Options include:
  - **Insert a Row Break** – Inserts a page break in the currently selected row.
  - **Insert a Column Break** – Inserts a page break in the currently selected column.
  - **Clear Selected page Break** – Clears the currently selected page break.

View Zooming

- **Zoom Factor** – Selecting a value in the drop down will change the zoom factor of the current document. Clicking on **100%** will change the view factor to 100 percent.

Document Options

- **Gridlines View** – Checking this option will show the gridlines in the current document. Unchecking will hide them.
- **Gridlines Print** – Checking this option will print gridline from the current document. Unchecking will prevent the printing of gridlines.
- **Gridlines**
- **Headings View** – Checking this option will show the row and column headers in the current document. Unchecking will hide them.
- **Heading Print** – Checking this option will print row and column headers from the current document. Unchecking will prevent the printing of headers.

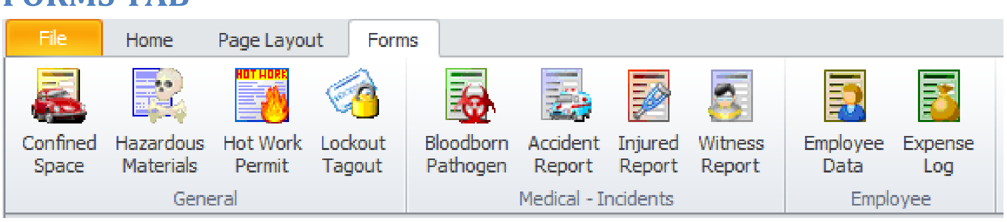
Maximum Cells

- **Columns** – This value will set the maximum number of columns for the current document.
- **Rows** – This value will set the maximum number of rows for the current document.

Print Options

- **Print Center Page** – Checking this option will center the document on the printed page.
- **Print Outside Border** – Checking this option will include an outside border on the printed document.

FORMS TAB



This tab contains all the predefined forms we have included with this module. To open one of these forms the user just needs to click on it from within the ribbon.

Saving a Document to File

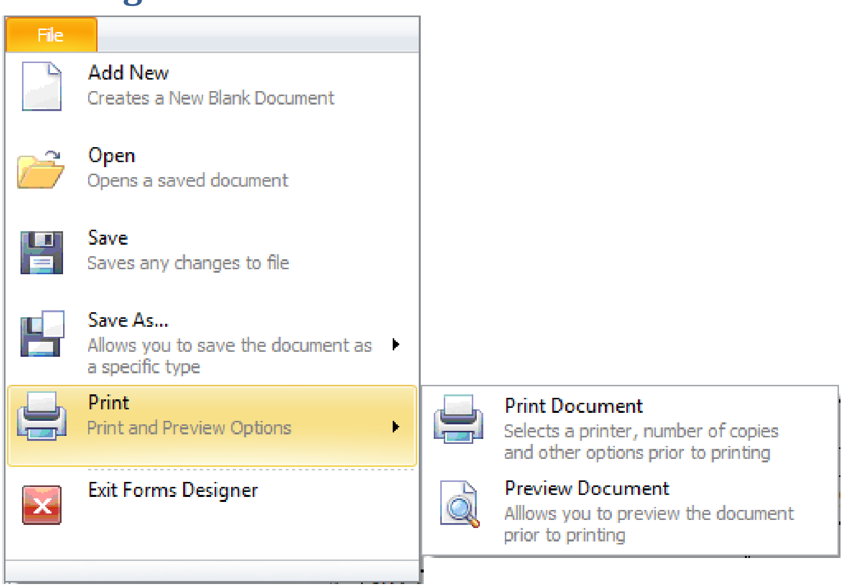
You can save a finished document file for viewing later or for sharing with others.

- Click on the **File** menu.
- Select the **Save As** option to expand the pop out me.
- From the pop out menu, select the option of your choice. Options include:
    - **Save as Form** – Saves the current document in the native format.
    - **Save as Excel** – Saves the current document in the format.
    - **Save as HTML Table** – Saves the current in the HTML document format.
    - **Save as PDF File** – Saves and exports the document to the PDF format.
- From the invoked **Save Report** dialog, browse to and select folder you wish to save the file in.
- Move to the **Save as type** drop down and select the file type you want to save the file as. Supported format include: frml (native format), xls , xml and html
- Move to the **File name** text box and type in a name for the file.
- Click on the **Save** button.

Opening a Saved Document

- Click on the **File** menu.
- Select the **Open** option.
- From the invoked **Open Setup** dialog, browse to and open the folder you have the saved file stored in.
- Click on the file to select it, or type its name in the **File Name** text box. Supported formats: frml (native), xls, xml and our older format of ss.
- Click on the **Open** button.

Printing the Form Document



To print the document:

- Open the **File** menu and click on the **Print** option to expand the pop out menu.

- Click on the print option of your choice.
  - **Print Document** – Select a printer, number of copies, and other options prior to printing.
  - **Print Preview** – Allows you to preview the document prior to printing.

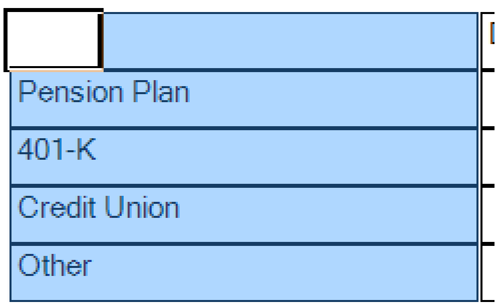
Creating a New Blank Document

To create a new blank form:

- Open the **File** menu.
- Click the **Add New** option.

Copy Cells

This application does not copy cells into the clipboard, but rather marks cells to be copied. When a paste operation is used, a copy of the marked cells is copied into the new cells.



To copy cells:

- Select the cells that will be affected or copied.
- Click on the **Copy** option in the ribbon. These cells will then be set for a paste operation, and will remain set until a new range has been selected

Pasting Cells

To paste cells that has been marked as copy.

- Select the cell or cells you want to paste to.
- Click on the **Paste** option in the ribbon.

Clearing Cells

To clear a cell or range of cells of all contents and formatting:

- Select the cell or cells to be affected.
- Click on the **Clear** option in the ribbon.
- Next click on:

- **Clear Data Only** – Clear all data within the selected cells.
- **Clear All** – Clear all data and formatting of the selected cells.

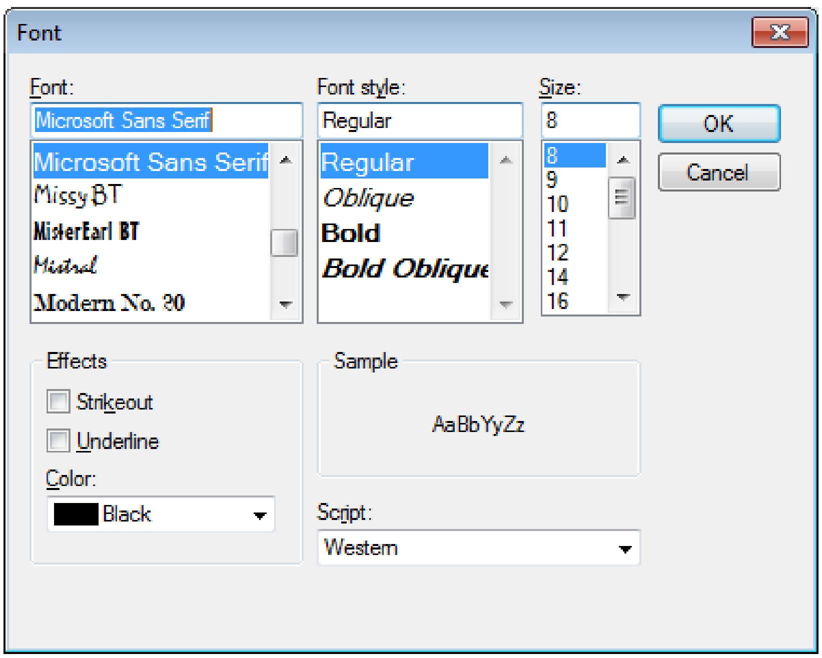
Font Characteristics

To setup the Font characteristics:

- Select the cell or cells you want the formatting to effect.
- Click on the **Home** tab in the ribbon.
- Move to the **Font** group in the ribbon and select the formatting options of your choice.

Format Font Dialog

There is a **Font** Dialog screen that can be used to format fonts or selected text. To use this option:



- Select the cell or cells you want the formatting to effect.
- Click on the **Home** tab in the ribbon.
- Move to the **Font** group in the ribbon and click on the down arrow button in the group's title section, or.
- Click on the **Format** button in the ribbon to invoke the drop down.
- Click on the **Format Font** option.
- Move through the various option of the **Font** dialog, and set up the characteristics you want to apply.
- Click on the **OK** button when done.

Cells Alignment

You can set the alignment of a cell's contents by:

- Select the cell or cells you want the formatting to effect.
- Click on the **Home** tab in the ribbon.
- Move to the **Alignment** group in the ribbon and select the alignment options of your choice.
    - **Top** – Aligns text in the selected cell at the top of the cell.
    - **Center** – Vertically aligns text in the selected cells at the center of the cell.
    - **Bottom** – Vertically aligns text in the selected cells at the bottom of the cell.
    - **Angle** – Set the rotation or angle of select cells. Options include:
        - **Angle Counterclockwise**
        - **Angle Clockwise**
        - **Rotate Text Up**
        - **Rotate Text Down**
    - **Left** – Horizontally aligns select cell contents to the left side of the cell.
    - **Horizontal Center** - Horizontally aligns select cell contents to the center of the cell.
    - **Right** - Horizontally aligns select cell contents to the right side of the cell.
    - **Word Wrap** – Allows the contents of selected cell to word wrap.
    - **Merge Cells** – Allows cells to overflow in to adjacent cells, or merge the cells together. Options include:
        - **Merge Across** – Allows cells to overflow into adjacent cells.
        - **Merge Cells** – Merge selected cells, where the merge cells will act as a single cell.
        - **Unmerge Cells** – Unmerges the cells in the selection.

Insert a New Blank Column into your Document

To insert a new blank column into your document:

- Select a column in the document just after the insertion point of the new column.
- Move to the **Home** tab in the ribbon and click on the **Insert** option.
- From the drop down, select the **Insert Column to the Left** option.

Insert a New Blank Row into your Document

To insert a new blank row into your document:

- Select a row in the document just below the insertion point of the new row.
- Move to the **Home** tab in the ribbon and click on the **Insert** option.
- From the drop down, select the **Insert Row Above** option.

Delete a Column in your Document

To remove a column in your document:

- Select or click within the column you want to remove.
- Move to the **Home** tab in the ribbon and click on the **Delete** option.

- From the drop down, select the **Remove Column** option.

Delete a Row in your Document

To remove a row in your document:

- Select or click within the row you want to remove.
- Move to the **Home** tab in the ribbon and click on the **Delete** option.
- From the drop down, select the **Remove Row** option.

Assigning Cells as General Type

General Type cells can contain normal, general type of information such as numbers or text. To assign cells of this type:

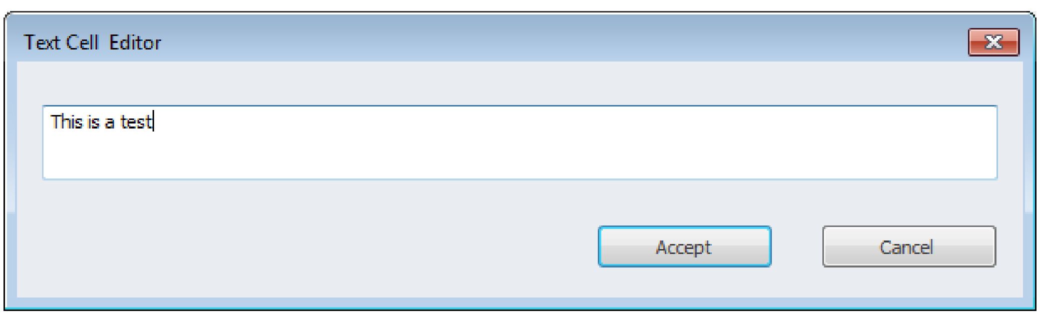
- Select the cell or cells you want the assignment to effect.
- Click on the **Home** tab of the ribbon, locate the **Types** group.
- Click on the **General Type** option. ABC 123

Assigning Cells as the Edit (text) Type

Edit cells are used to display and accept text. To assign cells of this type:

- Select the cell or cells you want the assignment to effect.
- Click on the **Home** tab of the ribbon, locate the **Types** group.
- Click on the **Edit Type** option. abl

Edit Cell Editor



When assigning a cell as a **Edit Cell**, it will invoke a **Text Cell Editor** dialog. This editor can also be called up by:

- Clicking in a cell that has been assigned as an Edit Cell.
- Click on the **Home** tab of the ribbon, locate the **Types** group.

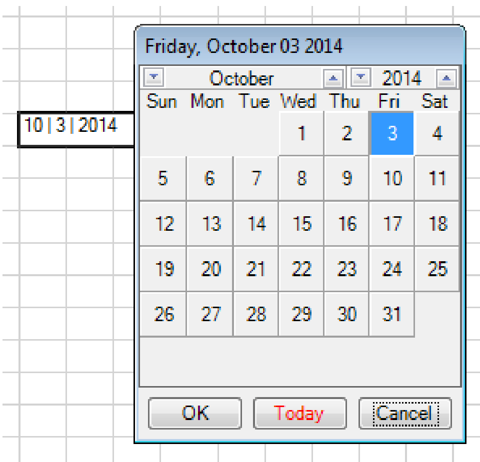
- Click on the **Edit Type** option.
  You can also use the shortcut key assignment of **Ctrl+Shift+T** to both invoke the editor and assign the cell as the Edit Type.

With the Editor you can:

- Move to the text box located here and type in or edit your text.
- Click on the **Accept** button when done.

Assigning Cells as the Date Type

Date cells are used to display date values and also have an attached calendar. To assign cells of this type:



- Select the cell or cells you want the assignment to effect.
- Click on the **Home** tab of the ribbon, locate the **Types** group.
- Click on the **Date Type** option.
  You can invoke the build-in calendar by double mouse clicking the date cell.

Assigning Cells as the Picture Type

Picture cells are used to display images. To assign cells of this type:

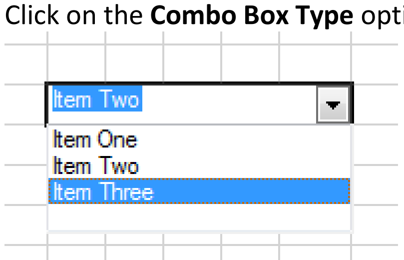
- Select the cell or cells you want the assignment to effect.
- Click on the **Home** tab of the ribbon, locate the **Types** group.
- Click on the **Picture Type** option.

- From the invoked **Open Setup** dialog, browse to and open the folder you have the saved file stored in.
- Click on the file to select it, or type its name in the **File Name** text box. Supported formats include**: png, bmp, jpg** and **gif** formats.
  It sometimes best to merge cells that contain pictures to obtain better results.
- Click on the **Open** button.

Assigning Cells as the Combo Box Type

Combo Box cells are used to assign lists of data in which a user can select from. To assign cells of this type:

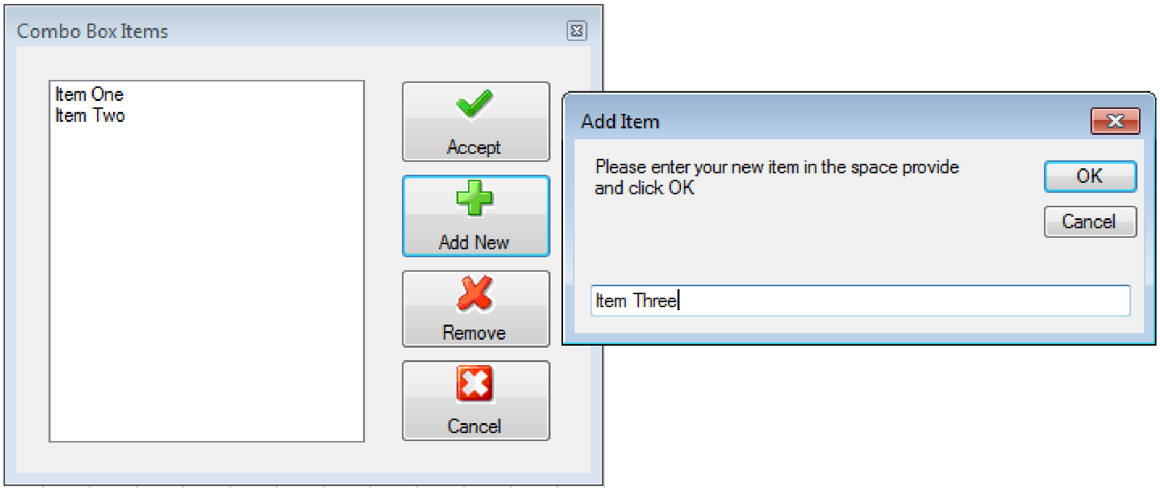
- Select the cell or cells you want the assignment to effect.
- Click on the **Home** tab of the ribbon, locate the **Types** group.
- Click on the **Combo Box Type** option. 



- At the time a cell is assigned as a combo box type, the **Combo Box Items** dialog box will be invoked allowing you to add items to the list.

Adding Items to a Combo Box Cell

Once setup, you can add list item to the combo box by:



- Click on the **Combo Box** type cell in the document.
- Move to the **Home** tab in the ribbon and click on the **Combo Box Type** option.

ADD ITEMS

- From the invoked **Combo box Items** dialog box, click on the **Add New.**
- From the invoked **Add Item** Type in the new item in the space provided and click **OK.**
- Repeat the above two steps for each item you want to add.

REMOVE ITEMS

- To remove items from the list, click on the item from within the list to select it.
- Move to and click on the **Remove** button.

WHEN DONE

- When you're done editing the items list, click on the **Accept** button.

Assigning Cells as the Number Type

Number cells are used to hold numeric data. To assign cells of this type:

- Select the cell or cells you want the assignment to effect.
- Click on the **Home** tab of the ribbon, locate the **Types** group.
- Click on the **Number Type** option. #

Auto Sum Cells

If you have numeric information within your document, and you would like to add this information together and provide a total, please follow these steps.

- Select all the cells in the document that you want to add together, either by row or column.

- Continue the cells selection stopping at an empty cell just beyond the ones you want added together.
- Move to the **Home** tab and locate the Types ribbon group.
- Click on the **Auto Sum** option. Σ
- The total of the selected cells with be inserted into the last cell of the selection range.

Setting Row Height

You can set the height of multiple rows at once by:

- Select the rows that you want to adjust the height on.
- Move to the **Home** tab in the ribbon and click on the **Format** option.
- Click on the **Row Height** option.
- From the invoked input screen, enter the new value in the space provided and click **OK**.

Setting Column Width

You can set the width of multiple columns at once by:

- Select the columns that you want to adjust the width on.
- Move to the **Home** tab in the ribbon and click on the **Format** option.
- Click on the **Column Width** option.
- From the invoked input screen, enter the new value in the space provided and click **OK**.

Lock Cells from Editing

You can lock selected cells from being edited. To lock cells:

- Select the cells you want to lock.
- Move to the **Home** tab in the ribbon and click on the **Format** option.
- Click on the **Lock Cells** option.

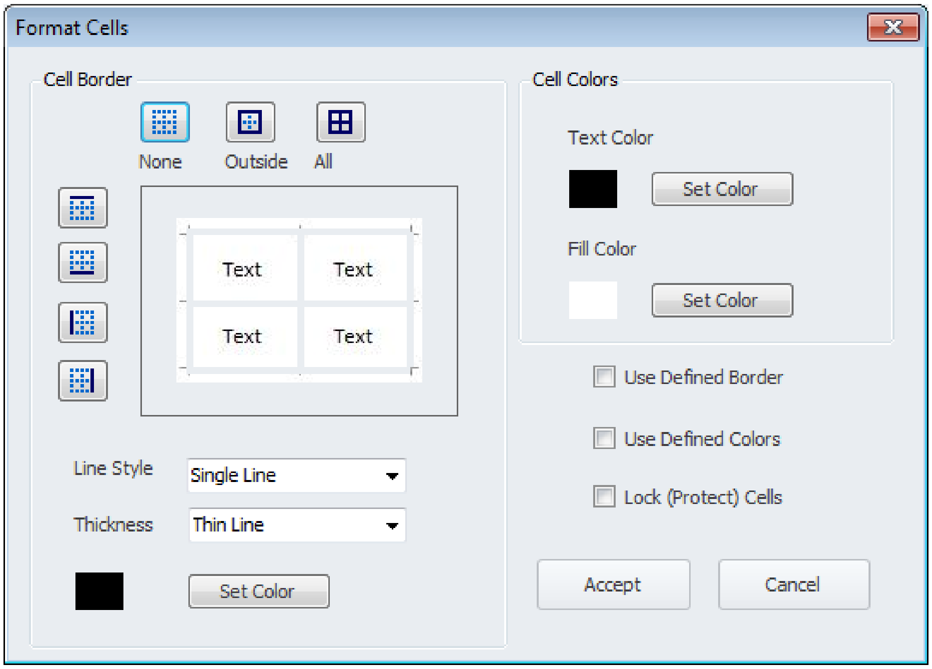
Protect Document from Editing

You can lock form document from being edited. To lock the document:

- Move to the **Home** tab in the ribbon and click on the **Format** option.
- Click on the **Lock Cells** option.

Format Cells

There is a **Format Cells** Dialog screen that can be used to format properties of selected cells. To use this option:



- Select the cell or cells you want the formatting to effect.
- Click on the **Design** tab in the ribbon.
- Move to the **Cells** group in the ribbon and click on the down arrow button in the group's title section, or.
- Click on the **Format** button in the ribbon to invoke the drop down.
- Click on the **Format Cells** option.

Cell Borders

The options in this group allow you to setup the border to be applied to the select cells. You can set the borders to be applied by clicking on the icons that surround the center illustration. You can also click in the center illustration to set or remove cell borders.

Line Style

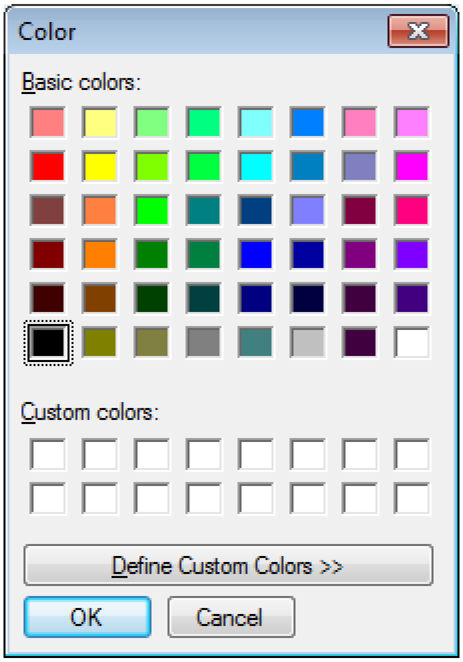
To set the Line Style to be applied by the cell borders, click on an option from the **Line Style** combo box.

Line Thickness

To set the Border Thickness to be applied by the cell borders, click on an option from the **Thickness** combo box.

Border Color

To set the color to be applied to the cells borders:



- Click on the **Set Color** button found in the **Cell Borders** group.
- Click on the color you want to apply from those shown.
- Click on the **OK** button.

Cell Colors

Options found in this group allow you to specify the Text and Fill Colors for the selected cells. To set these values:

- Click on the **Set Color** button found near the color you want to set.
- Click on the color you want to apply from those shown.
- Click on the **OK** button.

Applying Your Settings

To have the settings you've made with dialog applied to the selected cell or cells:

- To use your border settings, check the **Use Defined Border** check box.
- To use your cell color settings, check the **Use Defined Colors** check box.
- To lock the cells to prevent cell editing, check the **Lock (Protect) Cells** checkbox.
- Click on the **Accept** button.

Setting Up Your Printed Page Margins

You can define the page margins of your document by:

- Move to the **Page Layout** page in the ribbon and locate the **Margins** group.
- Move to the various text boxes in the group and type in the values you want to assign. Options include:

- **Top** – Allows you specify the top margin for the document.
- **Left** – Allows you specify the left margin for the document.
- **Bottom** – Allows you specify the bottom margin for the document.
- **Right** – Allows you specify the bottom margin for the document.

Print Orientation

You can specify the page print orientation of your document by:

- Move to the **Page Layout** page in the ribbon and locate the **Page Setup** group.
- Click on the **Orientation** option to expand the drop down. Click one of the following options:
    - **Portrait**
    - **Landscape**

Insert Page Breaks

Page breaks can be used to force the start of a new page in the printed document to set a page break:

- Select an area in your document where your want the page break to be applied at.
- Move to the **Page Layout** page in the ribbon and locate the **Page Setup** group
- Click on the **Page Breaks** option to expand the drop down. Click on the option of your choice:
    - **Insert a Row Break** – Inserts a page break in the currently selected row.
    - **Insert a Column Break** – Inserts a page break in the currently selected column.

Clearing a Page Break

To remove a manually applied page break:

- Select the area in your document that contains a manual page break.
- Move to the **Page Layout** page in the ribbon and locate the **Page Setup** group.
- Click on the **Page Breaks** option to expand the drop down.
- Click on the **Clear Selected page Break** option.

Printing and Viewing Grid Lines

You have the ability to toggle the display and printing of grid lines in your document. To either hide or display this element in your document:

- Move to the **Page Layout** page in the ribbon and locate the **Document Options** group.
- Under the **Gridlines** heading you have two options:
    - **View** – When checked gridlines are visible on the current document.
    - **Print** – When checked gridlines are printed.

Printing and Viewing Headings

You have the ability to toggle the display and printing of row and column headers in your document. To either hide or display this element in your document:

- Move to the **Page Layout** page in the ribbon and locate the **Document Options** group.
- Under the **Headings** title you have two options:
  - **View** – When checked headers are visible on the current document.
  - **Print** – When checked headers are printed.

Maximum Cells

You can adjust the document size or design surface by specifying the number of columns and rows to include in your document. To specify these values:

- Move to the **Page Layout** page in the ribbon and locate the **Maximum Cells** group.
- Type in the values you want to assign by typing in the available fields. Options include:
  - **Columns** – Adjusts the number of columns in your document.
  - **Rows** – Adjusts the number of rows in your document.

Center Your Printed Document

You can specify that your printed document be centered on the printed page. To set this value:

- Move to the **Page Layout** page in the ribbon and locate the **Print Options** group.
- Check the **Print Center Page** checkbox.

Include an Outside Border on the Printed Document

If you would like to include an Outside Border around your printed document:

- Move to the **Page Layout** page in the ribbon and locate the **Print Options** group.
- Check the **Print Outside Border** checkbox.

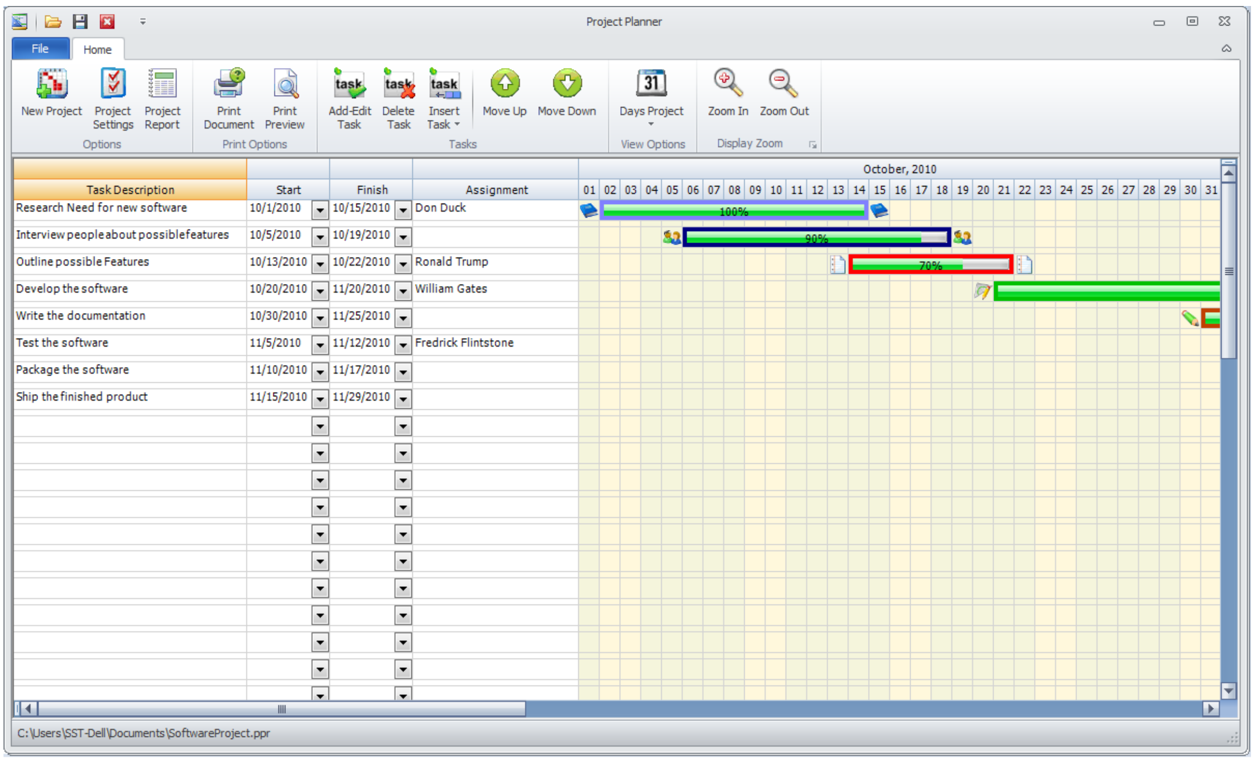
Accessing the Built-in Forms

To access and open the included built-in forms:

- Move to the **Forms** tab in the ribbon.
- Click on the option that best describes the form you want to open.

Project Planner

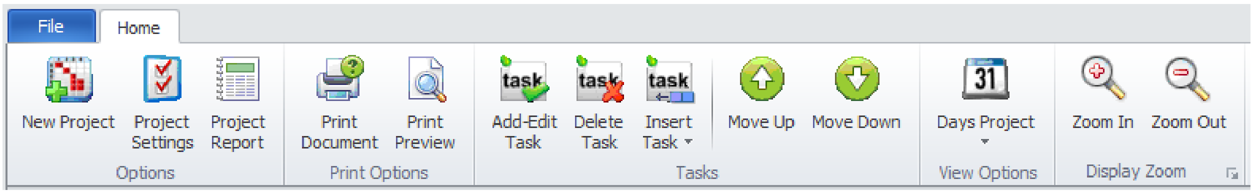
The **Project Planner** module was included with the **Maintenance Coordinator** program to provide you manager types out there with a means of managing your occasional projects. If your normal duties require a great deal of project administration, this module will more than likely be too limited for your use. But if you only have occasional projects to manage, such as those a maintenance supervisor might encounter, you may find this module of value, and save you from having to purchase a more costly and more complicated system.



With this module you can create a single day, divided by half-hour intervals projects, or ones lasting months. An example of a single day project could be something like laying out duties for a single day plant shutdown. Allowing you to assign tasks to different individuals and making start and end time assignments. Where the other maybe to planning a new production line, where you would plan when each phase would commence and end.

Ribbon Control

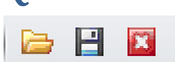
The functionality of the ***Forms and Permits*** module is provided the Ribbon control. Ribbon pages are structurally and visually split into logical groups. Each of these groups includes commands that perform specific functions.



The following are the elements on the **Home** ribbon tab, reading left to right:

- **New Project** – Creates a new project and invokes the **Project Properties** dialog where you can specify the setup for the new project.
- **Project Setting** – Invokes the **Project Properties** where you modify the settings used by the current project.
- **Project Report** – Creates a report based on the current project.
- **Print Document** – Allows you to print the current project.
- **Print Preview** – Provides a Print Preview of the current project.
- **Add-Edit Task** – Invokes the **Task Editor** where you can specify the specifics of a task.
- **Delete Task** – Allows you to remove a task.
- **Insert Task** – Allows you to insert a task between existing tasks.
- **Move Up** – Moves the selected task up one position per click.
- **Move Down** – Moves the selected task down one position per click.
- **Day Project** – Toggles the Display of task scheduling.
- **Zoom In** – Zooms in on the current document.
- **Zoom Out** – Zooms out on the current document.

Quick Access Toolbar

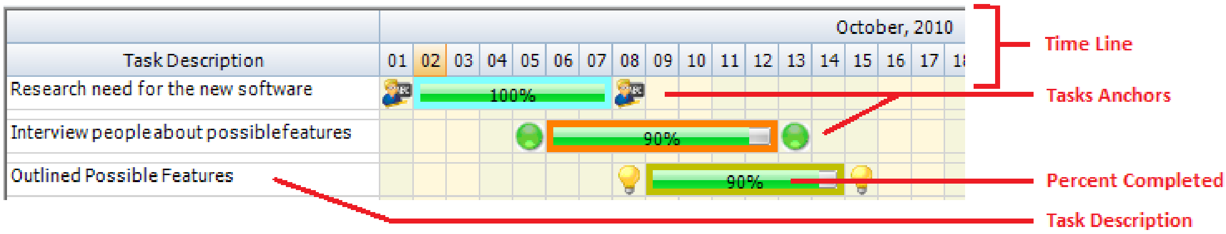


The following are the elements of **the Quick Access Toolbar** located above the ribbon.

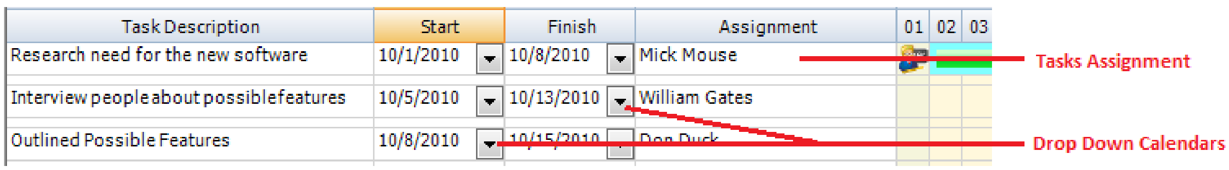
- **File Open** – Invokes the file open routines.
- **Save As** – Invokes the Save routines.
- **Exit** – Allows you to close and exit the **Project Planner**.

Main Designer Elements

The following illustration shows the main elements of the Project Planner's main design surface.

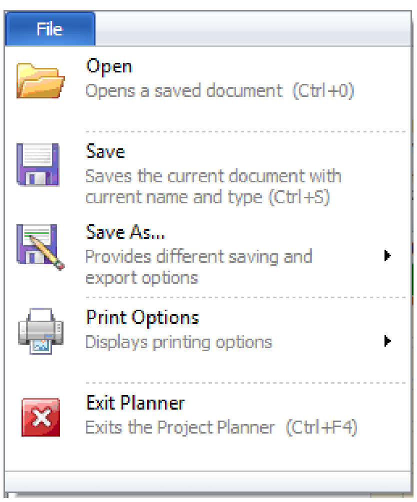


The following illustration shows the added items displayed when using the **View Date/Assignment (Days Project)** option.



Project Planner File Menu

The following is an outline of the elements of the Project Planner's **File** menu:

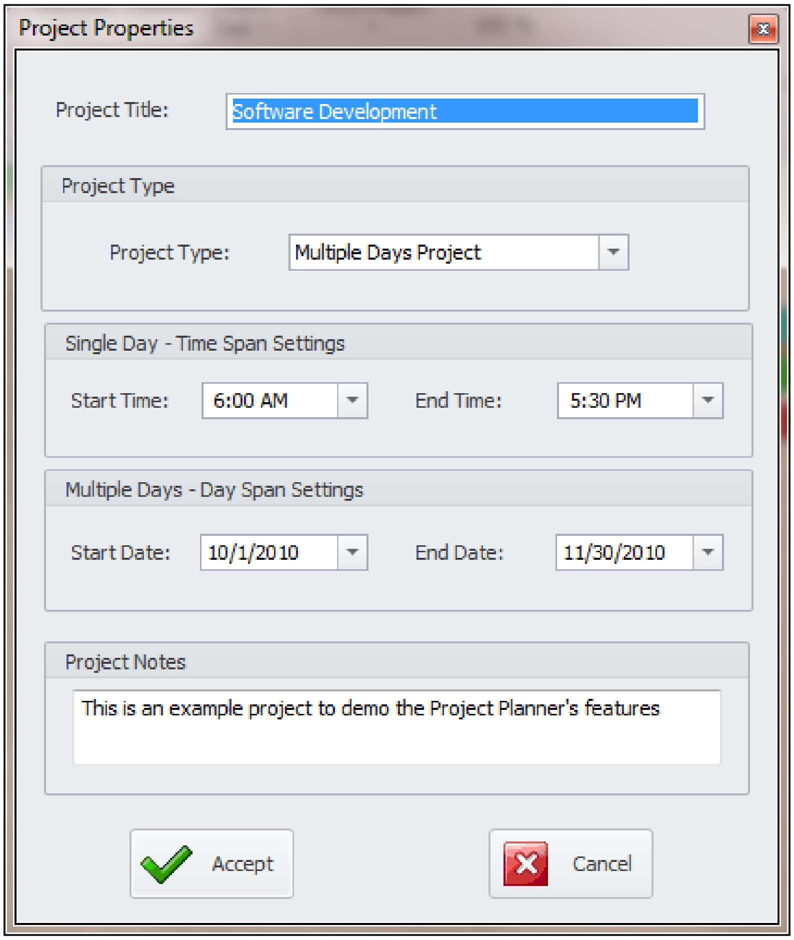


- **Open** – Opens a project saved to file.
- **Save** – Saves the project with the current file attributes.
- **Save As** – Allows you to specify different fil name, path and export options. Options include:
  - **Save as Project File**
  - **Save as Excel File**
  - **Save as HTML**
  - **Save as PDF File.**
- **Print Options** – Provides the following print options:
  - **Print Document**
  - **Print Preview**
- **Exit Planner** – Close and exit the Project Planner

Creating a New Project

The first task you'll be required to perform in the use of this module will be the process of creating a new project. The steps to perform this task will be outlined next.

- Click on the **New Project** option in the ribbon.



- Move to the **Project Title** text box and type a brief description of the project you are planning.
- Move to the **Project Type** area and select the project type option that best fits the project you are creating. The following options are available:
    - **Single Day / Timed Project** – This option allows for a project that will be completed in a single day, and broken into half-hour intervals.
    - **Multiple Days Project** – This option allows for the creation of a multiple days or even a project lasting months. The project intervals are broken into days.
    - **Multiple Days / Hide Weekends** – This option is the same as the above option, except weekends are hidden.

Single Day / Timed Project

- If you choose a **Single Day** type project, move to the **Single Day – Time Span** group and setup the **Start Time** and **End Time** of the project. Setup these times by clicking on them from within the drop down list boxes.

Multiple Days Project

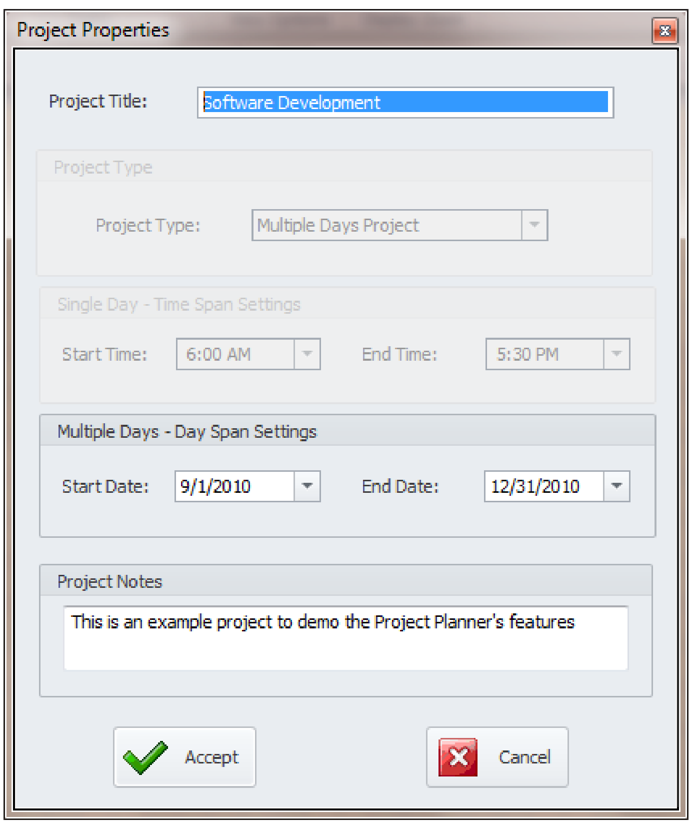
- If you choose one of the **Multiple Days** projects you need to move to the **Multiple Days – Day Span** group and setup the **Start Date** and **End Date** of your project. Select these dates by using the attached drop down calendars.

Finish the Setup

- **Project Notes** - Move to the **Project Notes** section and record any notes you wish to record about the current project.
- **Accept** - Once everything is setup on this dialog to your preferences, click on the **Accept** button to create your new blank project.

Edit Project Settings

Once a project has been setup you are limited as to how much of this setup you can change. For **Single Day** projects, all you're allowed to change is the **Project Title** and the **Project Notes**. For either of the **Multiple Days Projects**, you can also edit the **Day Span** (date range) of the project.



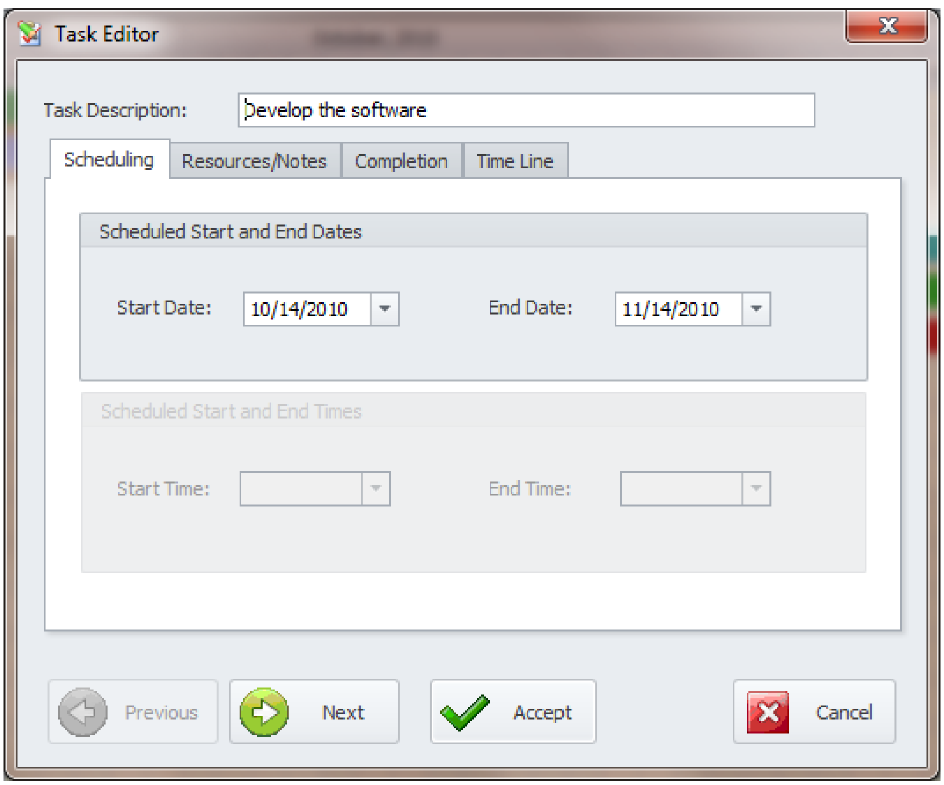
To edit a project's settings please follow these steps:

- Click on the **Project Settings** option in the ribbon.
- Move to the **Project Title** and **Project Notes** sections and edit these fields to your preference.
- If this is a **Multiple Days Projects,** you can also edit the **Start Date** and **End Date** fields.
  Note: Changing either date in the range will required the project to reload.
- Click on the **Accept** button to accept and apply your changes.

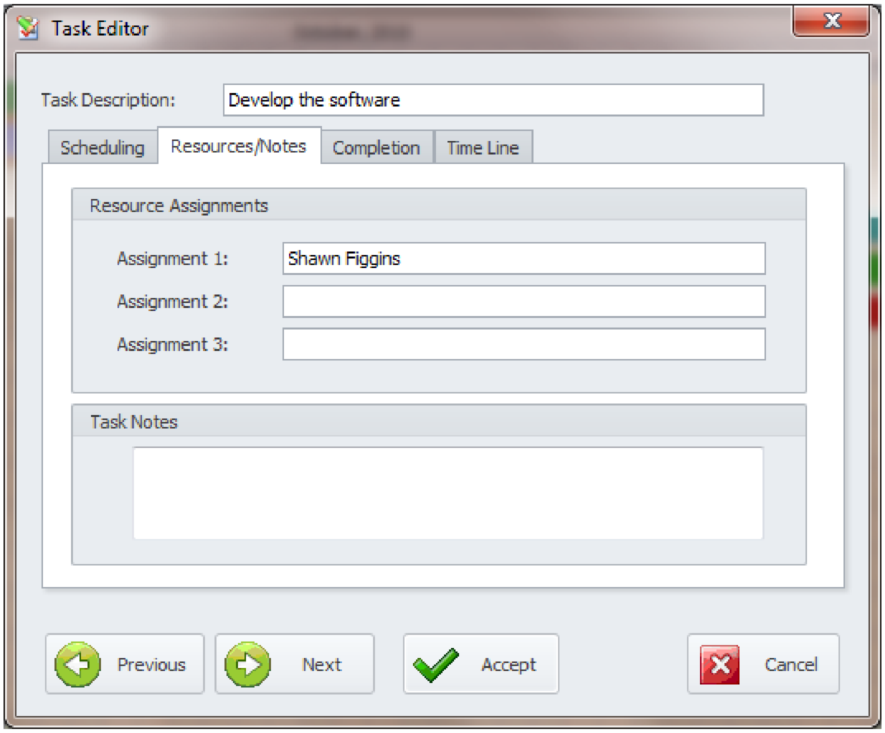
Sorry, but the time range settings or project type settings cannot be changed for pre-existing projects.

Entering and Editing Tasks

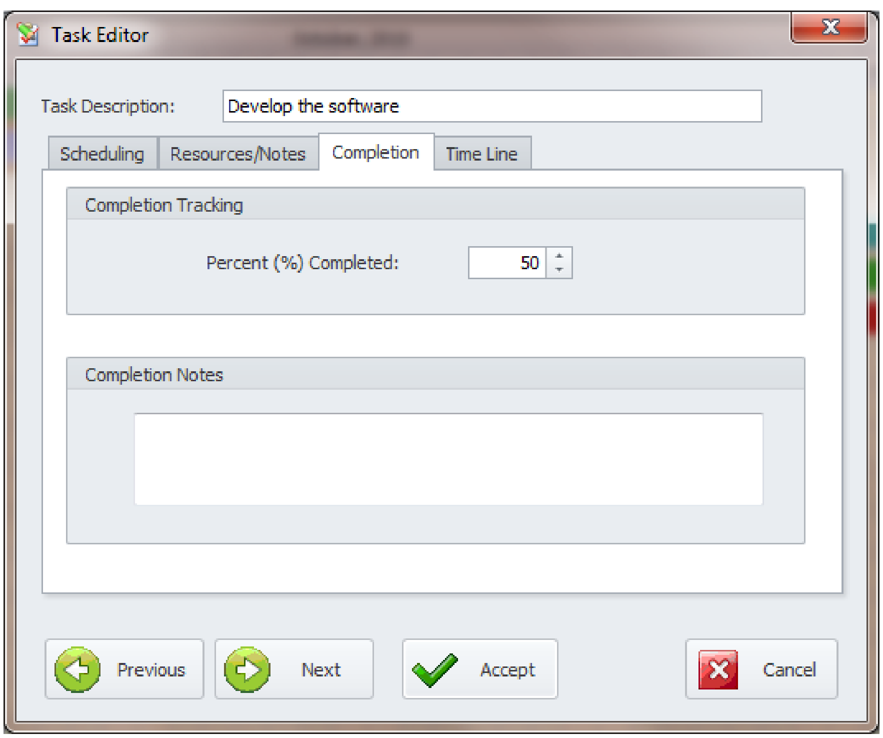
Once a project has been created, you can then add or edit the tasks within that project. To edit tasks please follow these steps:



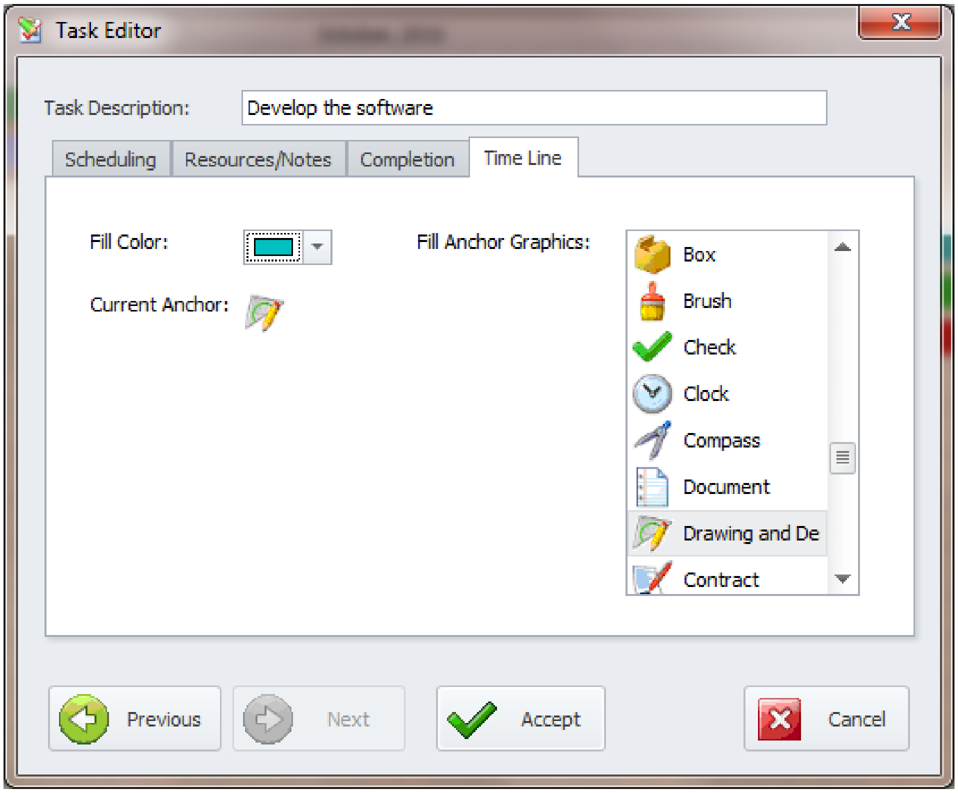
- Move to the row in the designer's grid that you want to add or edit a task, and double mouse click in the left most column of that row. You can also choose the **Add-Edit Task** option in the ribbon. This action will bring up the **Task Editor** screen.
- Move to the **Task Description** field and type in a brief description of the task. You can enter a somewhat more descriptive description in the **Notes** section on the **Resources / Notes** tab.
- Move to the **Schedule Start and End Dates** or **Schedule Start and End Times** sections, depending on your project type, and setup the appropriate criteria for the current task.
- Either click on the **Next** button, or click on the **Resources/Notes** tab.



- Move to the **Resource Assignments** section and type in the names that you are assigning to the task. You can do this for up to three assignments.
- Move to the **Task Notes** section and type whatever information here you wish to record about the current task.
- Either click on the **Next** button, or click on the **Completion** tab.



- Move to the **Completion Tracking** group, and using the spin type editor here, record how much you estimate the task has been completed.
- Move to the **Completion Notes** group, and record any completion notes you want to maintain.
- Either click on the **Next** button, or click on the **Time Line** tab.



- Move the **Fill Color**, and use the color picker control to assign the fill color of the task. This is accessible by clicking on the down arrow attached to it.
- Move to the **Fill Anchor Graphics** list box.
- Scroll through the available images and click on the image you want to assign as the task anchor.
- Click on the **Accept** button when done.
- The task should now show up on the main design screen filling the time slot range that you have just setup.

Inserting a New Task between Existing Tasks

To insert a New Task just above an existing task:

- Move to the row in the designer's grid just below where you want to insert the new task.
- Move to the ribbon and click on the **Insert Task** option to expand its drop down.
- Click on the **Insert Task Above** option. This action will bring up the **Task Editor** screen as previously outlined.

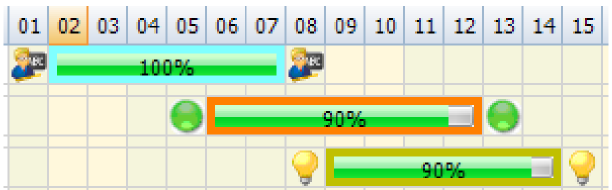
Delete a Task

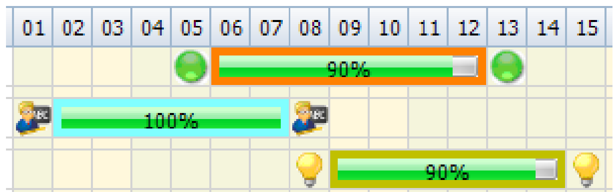
To remove an existing task in your project:

- Click in the row that contains the task you want to delete.
- Click on the **Delete Task** option in the ribbon.
- When prompted about the deletion, click the **Yes** button

Change a Tasks Position in the Designer

You can change a tasks position as it is displayed in the Project Planner Designer. You have the ability to either move the task up one position at a time or move it down one position at a time.



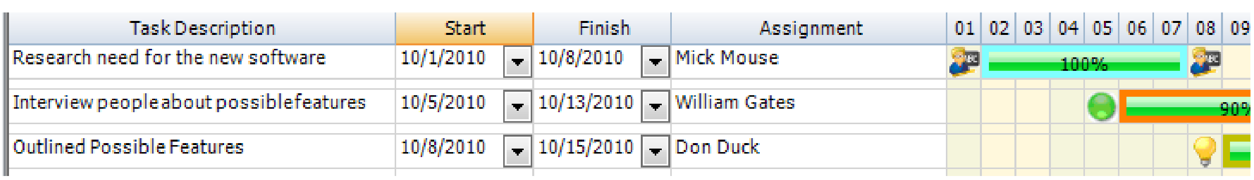


To move a task:

- Move to the Tasks Designer and click in the row that contains the task you want to move.
- Move to the ribbon and select either the **Move Up** or **Move Down** options.

Viewing Date/Assignment Information in the Designer

For multiple day types of projects, you can view assignment information within the designer. This includes the first resource assignment and scheduled start and end dates.



To display the assignment information in the designer:

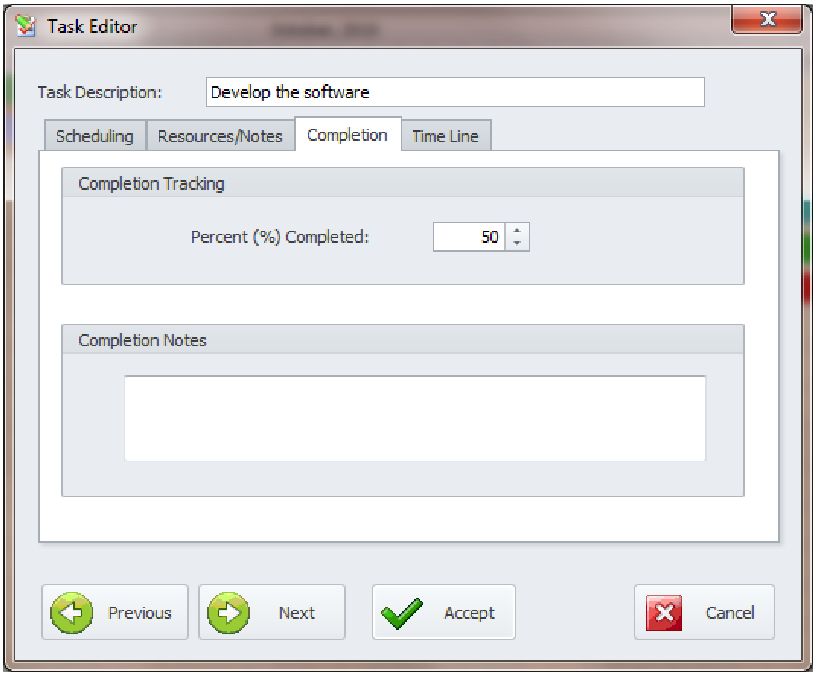
- Click on the **Days Project** option in the ribbon to expand the dropdown.
- Click on the **View Date/Assignment** option

To hide the assignment information in the designer:

- Click on the **Days Project** option in the ribbon to expand the dropdown.
- Click on the **View Date/Assignment** option

Tracking a Task Completion

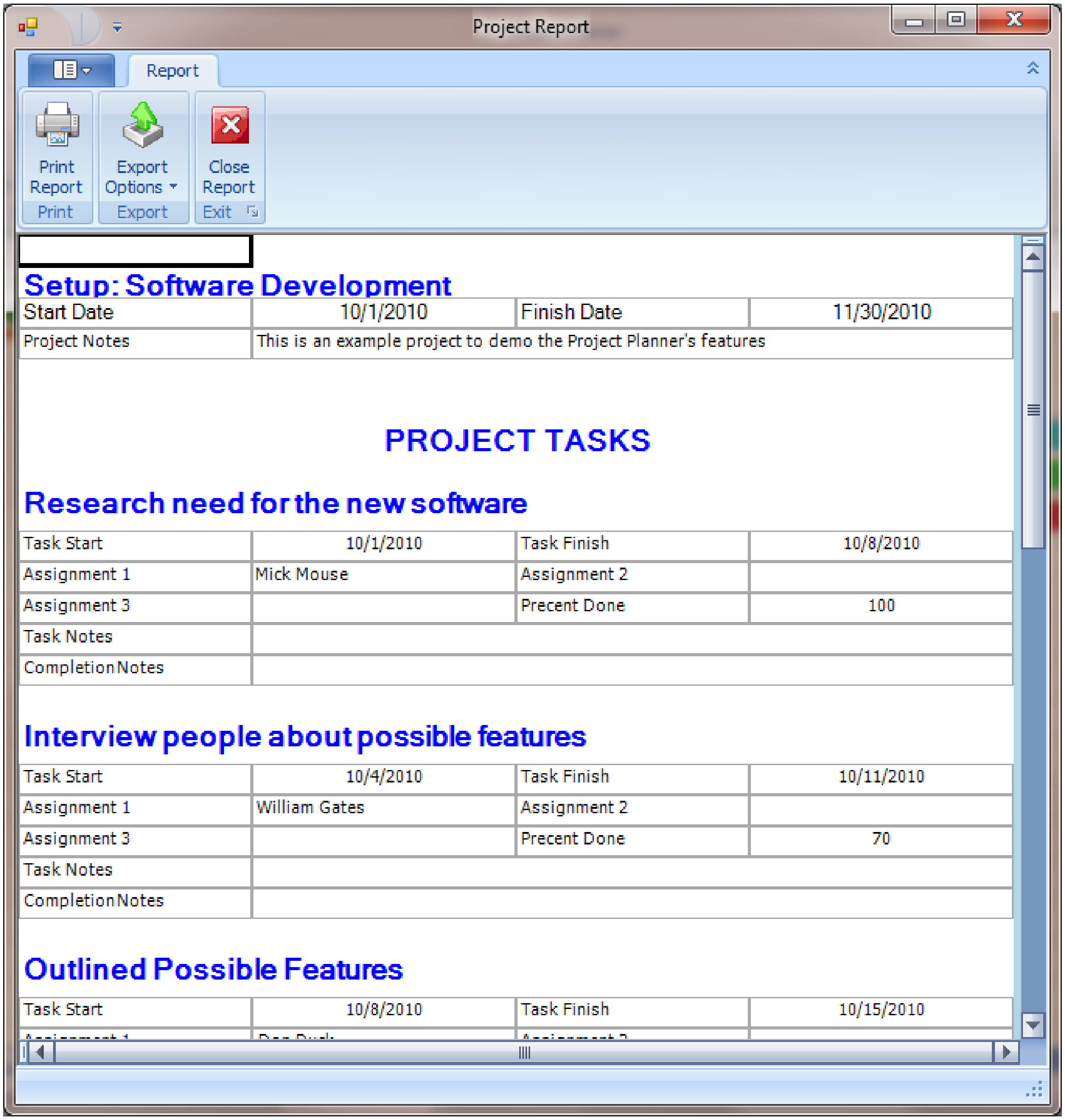
To track the completion of a given task:



- Move to the row in the grid that contains the task you want to work with and double mouse click in the left most column of that row. This action will bring up the **Task Editor** dialog screen.
- Move to and click on the **Completion** tab.
- Move to the **Completion Tracking** group, and using the spin type editor here, record how much you estimate the task has been completed.
- Click on the **Accept** button when done.

Project Report

The **Project Report** will supply you with a summary of the project's setup, along with a summary of each of its tasks.



To generate a Project Report:

- Click on the **Project Report** option in the ribbon.

Print Preview

To receive a print preview of your project:

- Click on the **File** menu.
- Expand the **Print Options** menu and select the **Print Preview** option.

Printing Your Project

To send a copy of your project to your printer:

- Click on the **File** menu.
- Expand the **Print Options** menu and select the **Print Document** option.

Saving a Project File

You can save a finished document file for viewing later or for sharing with others.

- Click on the **File** menu.
- Select the **Save As** option to expand the pop out menu.
- From the pop out menu, select the option of your choice. Options include:
    - **Save as Project File** – Saves the current document in the native format.
    - **Save as Excel** – Saves the current document in the Excel format.
    - **Save as HTML Table** – Saves the current document in the HTML document format.
    - **Save as PDF File** – Saves and exports the document to the PDF format.
- From the invoked **Save Project** dialog, browse to and select the folder you wish to save the file in.
- Move to the **Save as type** drop down and select the file type you want to save the file as. Supported format include: ppr (native format), xls , xml and html
- Move to the **File name** text box and type in a name for the file.
- Click on the **Save** button.

Opening a Saved Document

- Click on the **File** menu.
- Select the **Open** option.
- From the invoked **Open Setup** dialog, browse to and open the folder you have the saved file stored in.
- Click on the file to select it, or type its name in the **File Name** text box. Supported formats: ppr (native format).
- Click on the **Open** button.

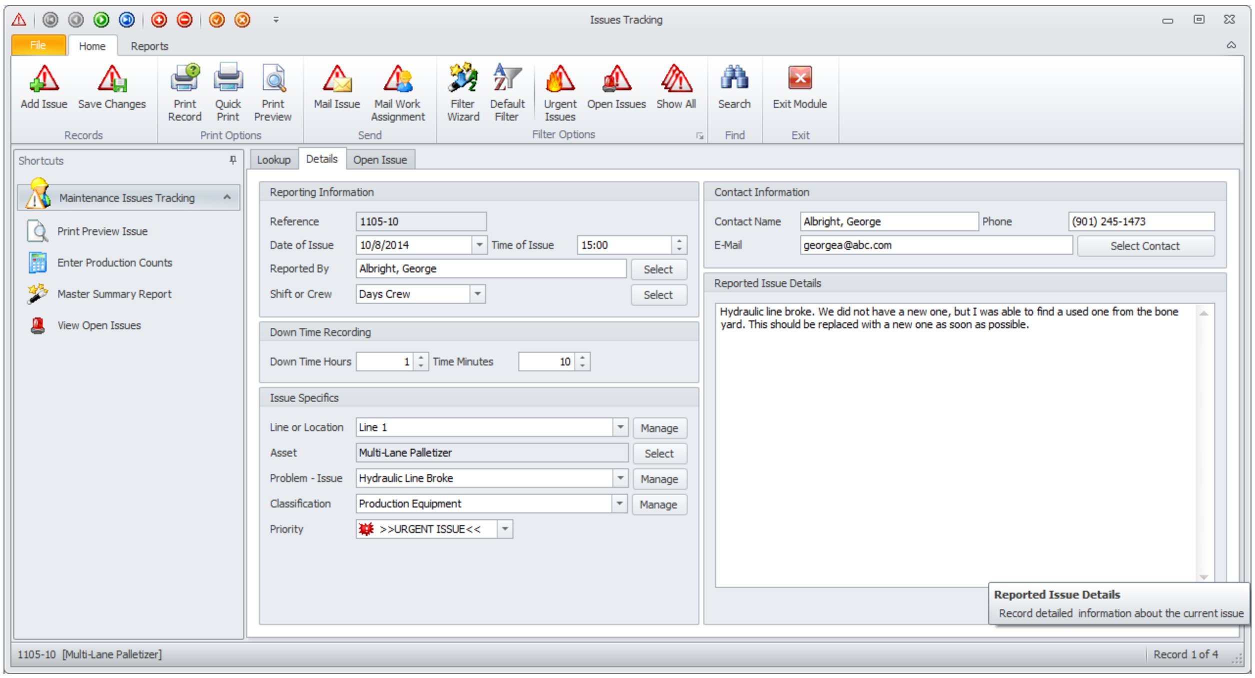
View Zooming

You can change the zoom of the currently loaded document by:

- Move to the ribbon and click the **Zoom In** option to zoom in on your document.
- Move to the ribbon and click the **Zoom Out** option to zoom in on your document.

Issue Tracking Modules

With the **Issues Tracking** feature you can keep a complete record of what all your production and maintenance people are doing. The way this system was planned is to make a computer available for your employees. As they encounter issues, they come to this computer and log in whatever they may have encountered. In this fashion, other personnel, on perhaps other shifts, can review reports and gain insight on how things have been going. A person that has knowledge of what was done before they became involved with a specific issue will be much better prepared to resolve that issue.

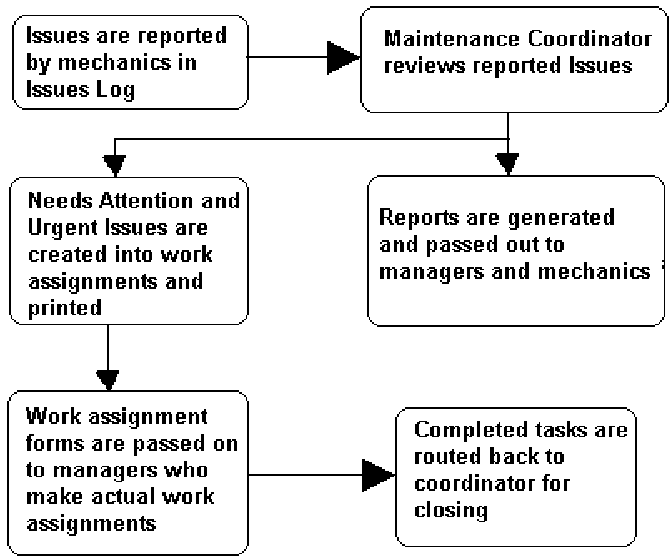


If used right and in a consistent manner, this module can be proven to be an outstanding maintenance tool. After just a few weeks of data entry, you will be able to pin point problem areas, and recurring issues. This will help guide you into the proper direction, allowing you to place resources where they are most needed, making the work that is performed return greater results.

You may be saying to yourself right now that your employees don't have the time to be sitting in front of a computer all day. Well, this program doesn't require them to. If they go and log in their issues as they are encountered, they should only need a couple of minutes per issue, and this time shouldn't even be noticed, but the benefits gained will surely be noticed. We have also made it so these employees can reuse the same data over and over by providing quick entry routines, decreasing the time needed for data entry.

The following flow chart illustrates one way the Issues log can be used to benefit your company.

ISSUES PROCESSING



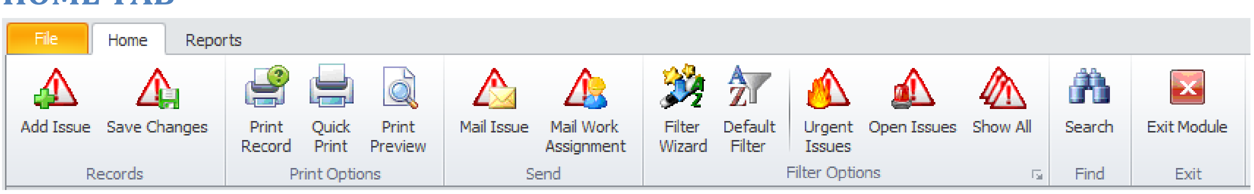
Differences between Maintenance and General Issues

The procedures outlined in this chapter work equally well for both Maintenance and General Issues. In fact these two modules are actually the same module, just filtered differently. It would be perfectly acceptable to have all your employees use just one type of reporting. But many have found it useful to keep the two separate for a variety of reasons. The choice is totally yours and your organization.

Ribbon Control

The comprehensive functionality of the **Issues Tracker** is provided via a set of Ribbon tabbed pages. Ribbon pages are structurally and visually split into logical groups. Each of these groups includes commands that perform specific functions.

HOME TAB

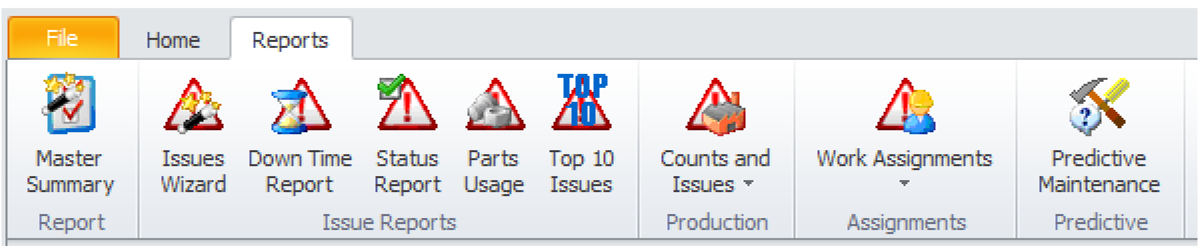


The following are the elements on the **Home** ribbon tab, reading left to right:

- **Add New** – Creates a new issue record through the use of a wizard, or directly on screen.
- **Save Changes** – Saves all current changes from all elements of a record (master save).
- **Print Record** – Allows you to select a printer and other options prior to printing the record.

- **Quick Print** – Sends a copy of the printed record directly to the default printer.
- **Print Preview** – Allows you preview the current record prior to printing it.
- **Mail Issue** – Opens the Email Composer with the current issue as an attachment.
- **Mail Work Assignmeny** – Opens the Email Composer with the current issue as an attachment and in the form of a Work Assignment.
- **Filter Wizard** – Launches the Custom Filter Wizard dialog that allows specific criteria to be setup to filter the database by. See the section on the ***Issues Wizard*** for more information.
- **Default Filter** – Reapplies the default filtering for the issues database.
- **Urgent Issues** – Filters the database by open issues, and a priority of Urgent.
- **Open Issues** – Filters the database by all open issues, regardless of priority.
- **Show All** – Shows all issues regardless or priority or status.
- **Search** - **Search** – Invokes the search routine on the Lookup Grid as explained in the ***Common Features*** chapter
- **Exit Module** – Exits and closes this module.

REPORTS TAB



The following are the elements on the **Reports** ribbon tab, reading left to right:

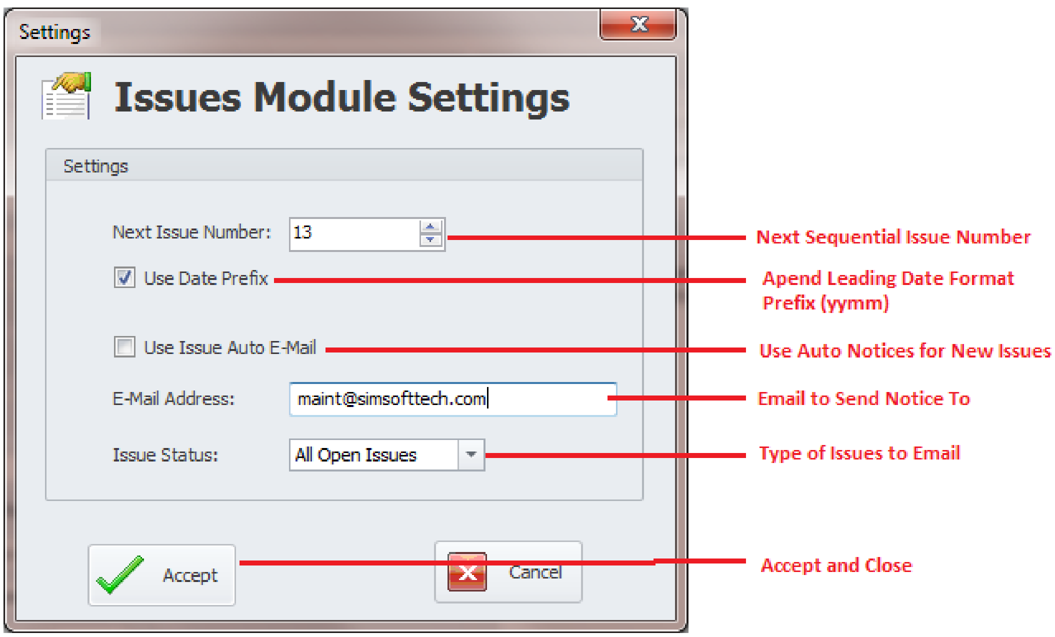
- **Master Summary** – Invokes the **Master Summary Report** wizard that steps you through the reports creation.
- **Issues Wizard** – Invokes the **Issues Report Wizard** that steps you through the creation of an Issues report.
- **Down Time Report -** Invokes the **Issues Report Wizard** that steps through the creation of a Down Time Report.
- **Status Report** – Invokes a **Status Report** wizard that allows the generation of a report and on a single issues type, or all types.
- **Parts Usage Report** – Allows you to report on Issues Parts usage for a date range.
- **Top Ten Issues** – Invokes the **Issues Wizard** that allows you to find the Top 10 issues with specific criteria.
- **Counts and Issues** – Creates reports that show issues within a date range, along with production counts. Options include:
    - **7 Days**
    - **14 Days**
    - **Month**

- **Work Assignments** – Allows you to create and print work assignment, which are a lot like work orders. Options include:
  - **Print Current Issue** – Creates and print a work assignment for the currently selected issue.
  - **Date Ranges** – Creates and prints work assignments for a date range of issues.
- **Predictive Maintenance** – Creates a predictive Maintenance Report based on past issues.

Issues Module Setup

This module has a few Settings that apply only to **Issues Tracking**. These settings will be outlined next:

- To access the Issues Module Setup: Open the **File** menu and select the **Module Settings** options.



- **Next Issue Number** - The number here specifies the next sequential number to used when a new issue is added. You can reset this number by typing in a new value in the space provided.
- **Use the Date Prefix** – Checking this checkbox will have the application add a date prefix to the issue number. These numbers use the following format: *yymm – xx*. Where *yy* equals the year of the issue creation, mm equals the month of issue creation, and *xx* is a sequential number.
- **Use Issue Auto Email** – When checked, the program will email a notice that a new issue was added to the database.
- **E-Mail Address** – This is the email address that a new notice will be sent to.
- **Issue Status** – This setting tells the program which types of issue to send notices out for. Options include:
  - **All Open Issues**
  - **Urgent Issues Only**
- When done editing the settings with your preferences, move to and click on the **Accept** button.

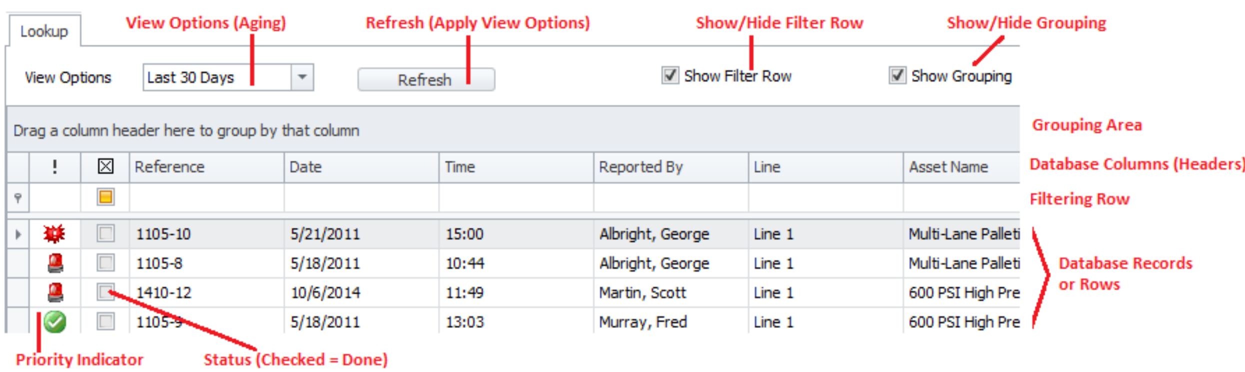
Features of the Issue Tracking Module

There are many features of the Issue Tracking module, with the majority of these features found on either the tabbed pages found here, or within the tabbed ribbon control. We are going start by explaining the use of these features as we move through the tabbed pages.

Lookup Tab

This tab helps in locating issues by grouping, filtering and sorting them. All the issues in the current filter are located in the grid found here. To select an issue and make it the active record, the user needs only to click on the issue from within the grid. Once selected the user can click on the other tabs to view or edit the issue itself. Also note that double clicking on an issue will move you to the **Details** tab showing the selected record.

The following image illustrates the features available on the Lookup tab:



The functions of the **Lookup** tabs are used through-out the system and are fairly common regardless of the modules that use them. Please review the chapter on ***Common Features*** to read about the functionality of the controls located on this tab. Give special attention to the following:

- Using the Lookup Grids
- Searching

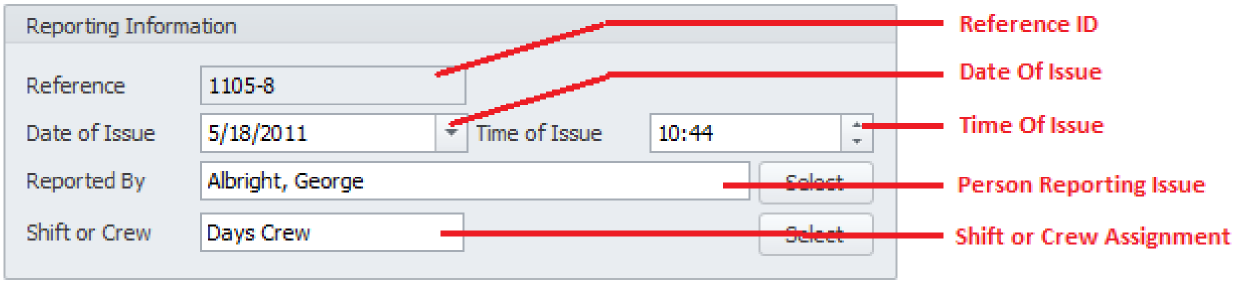
Details Tab

The **Details Tab** is used to report specifics about the issue being tracked.

Reporting Information

This section allows you to maintain general information as it applies to the issue. This includes identification information, date and time of the issue, and who reported the issue.

The following image illustrates the elements of the section:



Reference

This field is generation for you by the application and is used to help identify the issue record. These numbers use the following format: *yymm – xx*. Where *yy* equals the year of the issue creation, mm equals the month of issue creation and *xx* is a sequential number.

Date of Issue

This is a date only field and is used to indicate the date the issue occurred. To set this value:

- Click on the down arrows attached to the field.
- Click the value you want to use from the drop down calendar.

Time of Issue

This is a time only field and is used to indicate the time the issue occurred. To set this value:

- Click in the field and either type in the value, or use the attached arrows to increase or decrease the values displayed.

Reported By

This alpha/numeric field will accept up to 40 characters and represents the person reporting the issue. You can either type in this information or click on the adjacent **Select** button to invoke the **Employee Database** dialog. Once the lookup dialog is invoked, select the employee record and click **Select**.

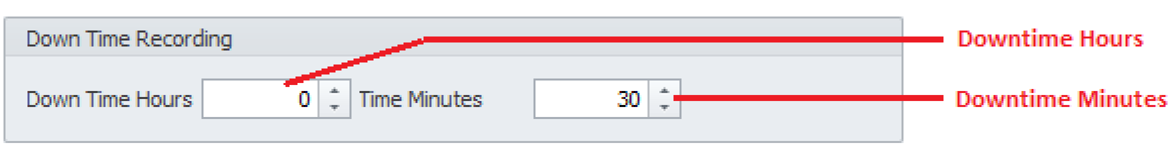
Shift or Crew

This alpha/numeric field will accept up to 25 characters and represents the crew the person reporting the issue belongs to.

Down Time Recording

This section allows you to maintain downtime information on the current issue.

The following image illustrates the elements of the section:



Down Time Hours

This numeric only field is used to record the downtime hours as it related to the current issue. You can either type in this information or use the spin buttons attached to it.

Down Time Minutes

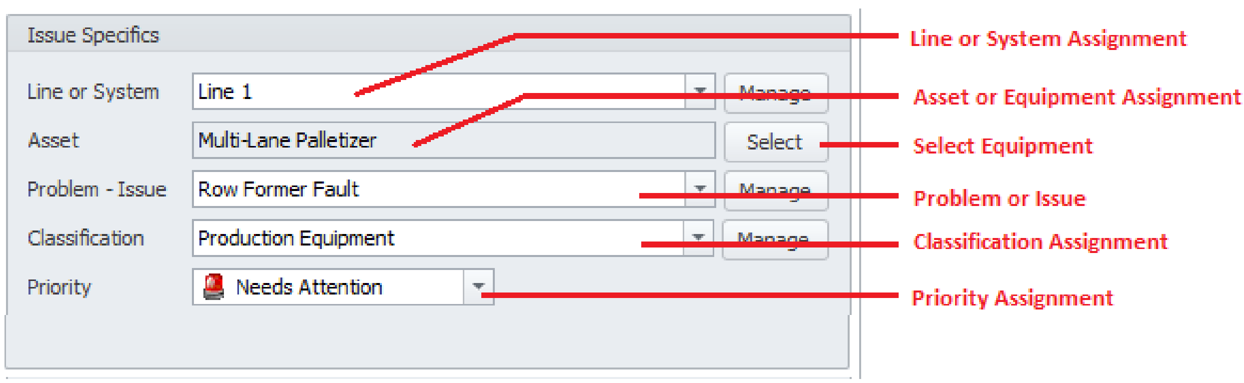
This numeric only field is used to record the downtime minutes as it related to the current issue. You can either type in this information or use the spin buttons attached to it.

Issue Specifics

This section is used to maintain specifics as it relates to the issue being recorded. ***Important note about this section***: The **Problem – Issue** lists are based on the assigned asset. This is to say that as the assets are changed, the contents of the drop down and pop-up lists will also change. The reason for this is that an item like 'Transmission leaking" does not apply when the assigned asset is a conveyor.

Also you should reuse the same **Problem – Issue** assignment as often as possible. This will help in pin pointing problem areas when used with reporting. You will be able to record more specific details in the **Reported Issues Details** section.

The following image illustrates the elements of the section:



Line or System

This alpha/numeric field with accept up to 40 characters and is used to specify the system this issue relates to. You can either type in this information or select an item from the drop down list.

Asset

This field can only be set by selecting an Asset or Equipment record from **Equipment and Assets** list. To set this field:

- Click on the **Select** button adjacent to the field.
- Select the asset record you want to assign from those listed, and click on the **Select** button.

Problem – Issue

This field is used to specify a General type issue assignment. When assigning issues you want them to be rather general in nature (for reporting purposes). You'll have a chance to be more descriptive in the **Reported Issues Details** section.

The following are examples of possible (recommended) types of issues: Transmission Problem, Chain Issues, Gearbox Issue, Motor Problems, and so on.

- To set the value of this field, select the value from the drop down list. Directly typing in this field is not supported.

Classification

This field allows you to add a **Classification** assignment to the reported issue, and can be used much line the P**roblem – Issue** field just outlined. This list does not change however with the assigned asset.

- To set the value of this field, select the value from the drop down list. Directly typing in this field is not supported.

Priority

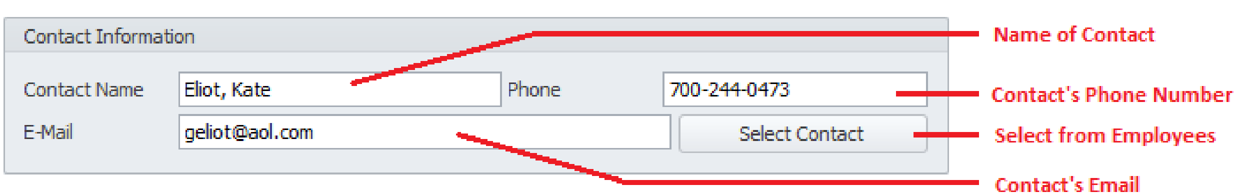
This field allows you to assigns a priority or importance indicator to the issue. To set this value just select the assignment from the drop down list. Options include:

- **Issue Resolved**
- **Information Only**
- **Needs Attention**
- **Urgent Issue**

Contact Information

This section allows you to record contact information as it relates to the issue. The information is important when you need more information about the issue, or you want to provide the contact with updated information.

The following image illustrates the elements of this section:



Contact Name

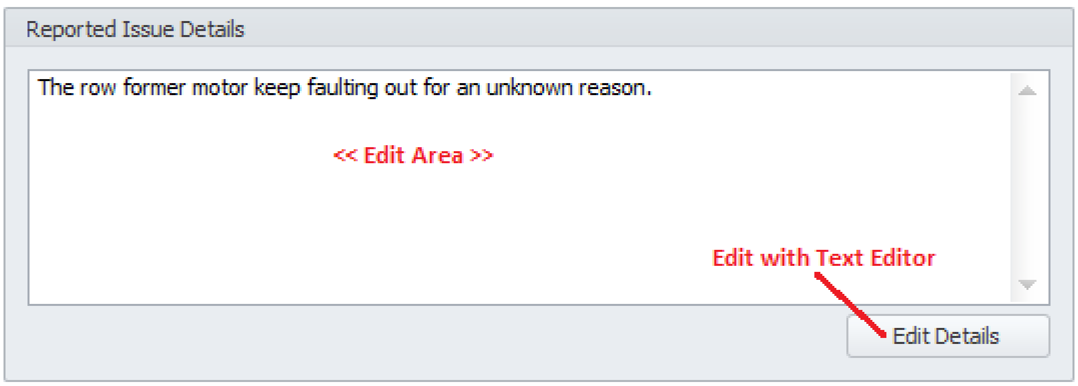
This alpha/numeric field with accept up to 40 characters and represents the name of the contact.

Phone
This alpha/numeric field with accept up to 20 characters and represents the contact's phone number.

E-Mail
This alpha/numeric field has no size limitation and represents the contact's email address.

Select Contact
Clicking this button will invoke the **Employees Database** dialog, where you can select and assign an employee to the **Contact Information** area.

Reported Issue Details
This section allows you to record details about the issue. The following image illustrates the elements of the section:

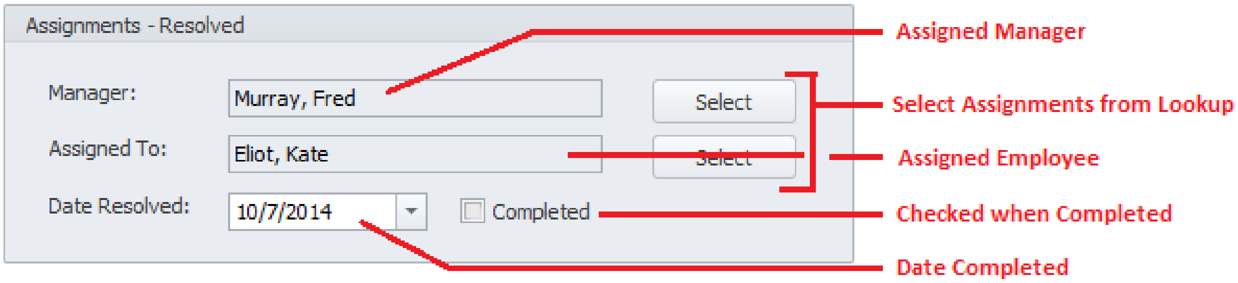


Edit Area
There is no size limitation to the field and is used to provide details about the issue. This information can also be edited using the build text editor. This editor is invoked by clicking on the **Edit Details** button.

Open Issue Tab
This tab deals with the handling of open issues. When an issue's status has been marked as either ***Needs Attention*** or ***<<URGENT ISSUE>>*,** and the **Completed** flag has not been set, the program treats these issues as being open.

Assignments – Resolved
This section allows for the assignments of open issues, and also the recording of issue completion information.

The following image illustrates the elements of the section:



Manager

This field represents the Manger assigned to oversee the completion of the issue. To set this field:

- Click on the **Select** button adjacent to the field.
- Select the employee record you want to assign from those listed, and click on the **Select** button.

Assigned To

This field represent the employee or mechanic assigned to resolve the current issue. To set this field:

- Click on the **Select** button adjacent to the field.
- Select the employee record you want to assign from those listed, and click on the **Select** button.

Date Resolved

This field represent the date the issue is resolved. To set this value:

- Click on the down arrows attached to the field.
- Click the value you want to use from the attached calendar.

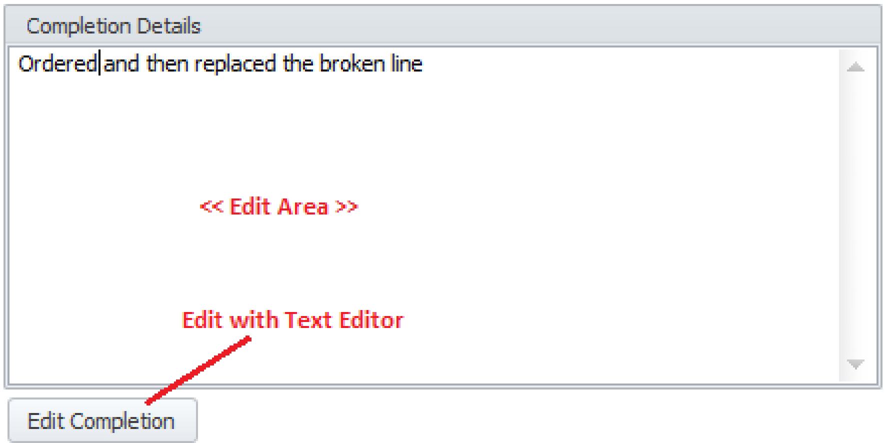
Completed

Placing a checkmark in this field will mark the current issue as completed.

Completion Details

This section allow you to record details about the completion of an issue.

The following image illustrates the elements of the section:

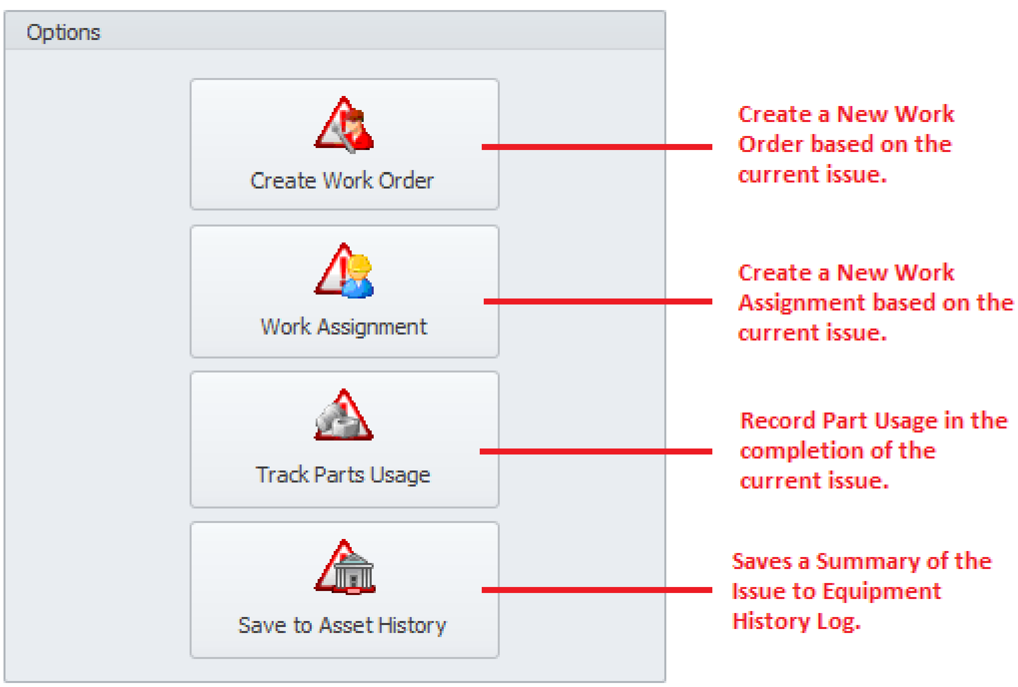


Edit Area

There is no size limitation to this field and is used to provide completion details about the issue. This information can also be edited using the build text editor. This editor is invoked by clicking on the **Edit Completion** button.

Options

This section provides various options as it related to open issues.



Creating a New Work Order

You can create a work order based on an issue by:

- Locate and make active the Issue you want to create a work order for.
- Move to **Open Issue** tab.
- Locate the **Options** group and click on the **Create Work Order** button.
- Refer to the ***Common Features*** chapter and the ***Work Order Wizard*** section to find how to use this wizard.

Create and Print Work Assignments

Work Assignments are a lot like work orders, but they are not included in the work orders database. Instead they are managed in the Issues modules only. The following image shows a typical work assignment:

OPEN ISSUE - WORK ASSIGNMENT

Reference: **1105-10** Type: Maintenance Reporting

Reporting Information

Reported By	Albright, George	Date	5/21/2011
Line-System	Line 1	Asset	Multi-Lane Palletizer
Issue-Problem	Hydraulic Line Broke	Status	>>URGENT ISSUE<<

Assignment Information

Assigned To		Manager	

Contact Information

Contact Name	Albright, George	Contact Phone	(901) 245-1473

Issue Details

Hydraulic line broke. We did not have a new one, but I was able to find a used one from the bone yard. This should be replaced with a new one as soon as possible.

Printing a Single Work Assignment

To create and print a **Work Assignment** from the current issue:

- Locate and make active the Issue you want to create a Work Assignment for.
- Move to **Open Issue** tab.
- Locate the **Options** group and click on the **Work Assignment** button.

  OR

- Locate and make active the Issue you want to create a Work Assignment for.
- Move to the **Reports** tab in the ribbon control, and select the **Work Assignments** option to expand the drop down.

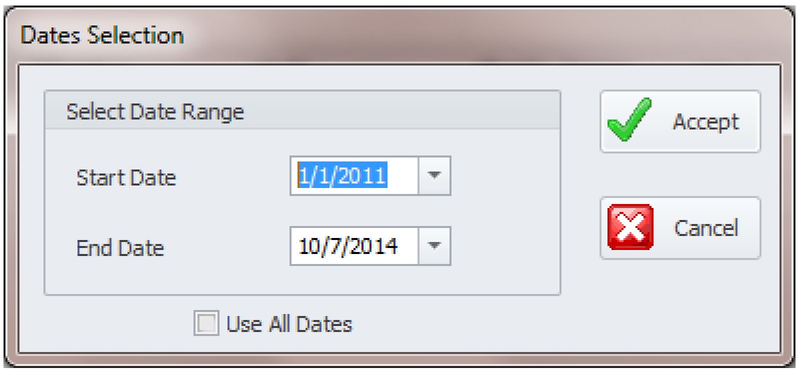
- Click on the **Print Current Issue** option.

Printing a Date Range of Work Assignments

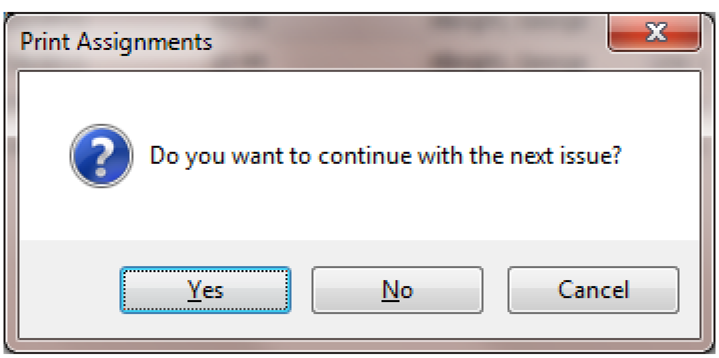
There is a method to print a date range of work assignments for all open issues that fall within a provided date range.

To print a date range of Work Assignments:

- Move to the **Report** tab in the ribbon control and select the **Work Assignments** option to expand the drop down.
- Click on the **Date Range** option.



- From the **Date Selection** dialog, move to the **Start Date** and **End Date** fields and setup the date range you want to print for.
- Click on the **Accept** button.
- Next a **Print Preview** screen will open displaying the first **Work Assignment** found. Either print this Assignment or cancel out of the screen.



- Next you'll be prompted if you want to continue the operation. Click **Yes** to continue, or click one of the other buttons to cancel out.
- Continue the operation until no more **Work Assignment** are displayed.

Issues Parts Usage

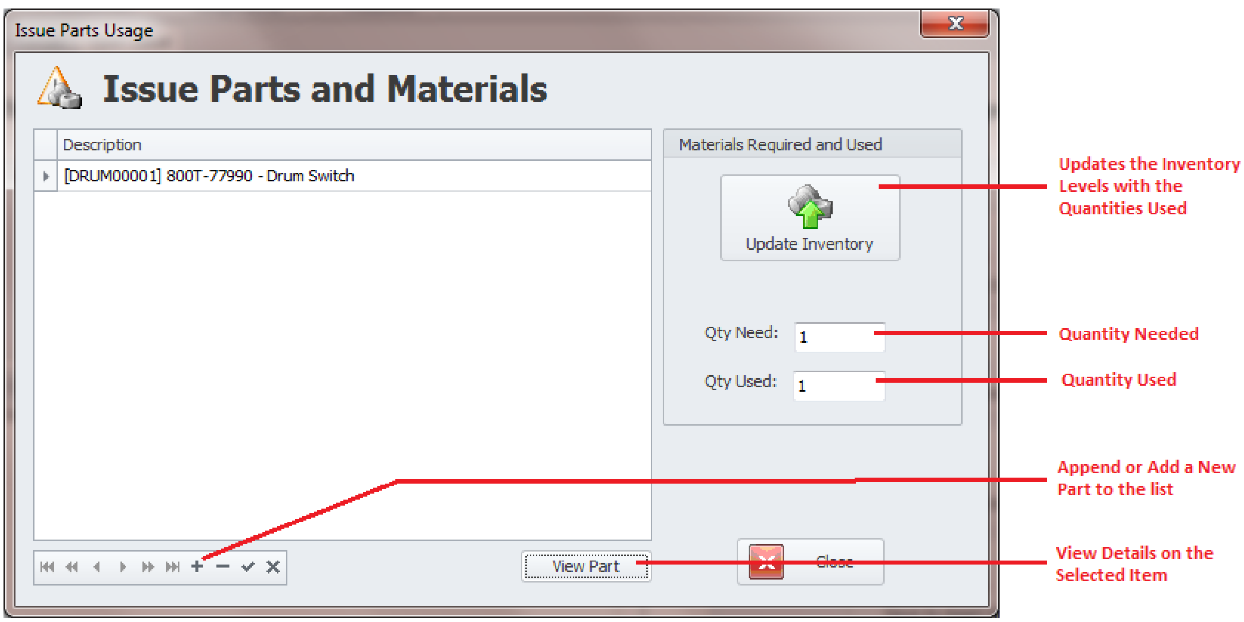
You can record and deduct from inventory the parts or inventory that are used in the completion of issues.

WARNING: If a work orders was created from the current issue, and this work order is recording part usage, do not use the feature here. If used in both environments, inventory levels could be adjusted lower that they should be.

To record an issue's part usage:

- Locate and make active the Issue you want to record part usage on.
- Move to **Open Issue** tab.
- Locate the **Options** group and click on the **Track Parts Usage** button.
- This will invoke the **Issue Parts Usage** dialog.

The following illustration shows the elements of the **Issue Parts Usage** dialog:



- Move to and click on the **Append (+)** button in the data control.
- From the invoked ***Parts and Inventory*** lookup dialog, select the item you want to add from those listed in the grid.
- Click on the **Select** button
- Move to the **Qty Need** and **Qty Used** fields. Both of these fields only accept numeric information. Enter the appropriate information for these fields.
- Repeat the above step for each inventory item you want to add.
- Click on the **Post/Save** (checkmark) button in the data control to save your changes.

To update inventory levels with the quantities used

- Move to and click on the **Update Inventory** button.

Save a Summary of the Issue to Asset's History

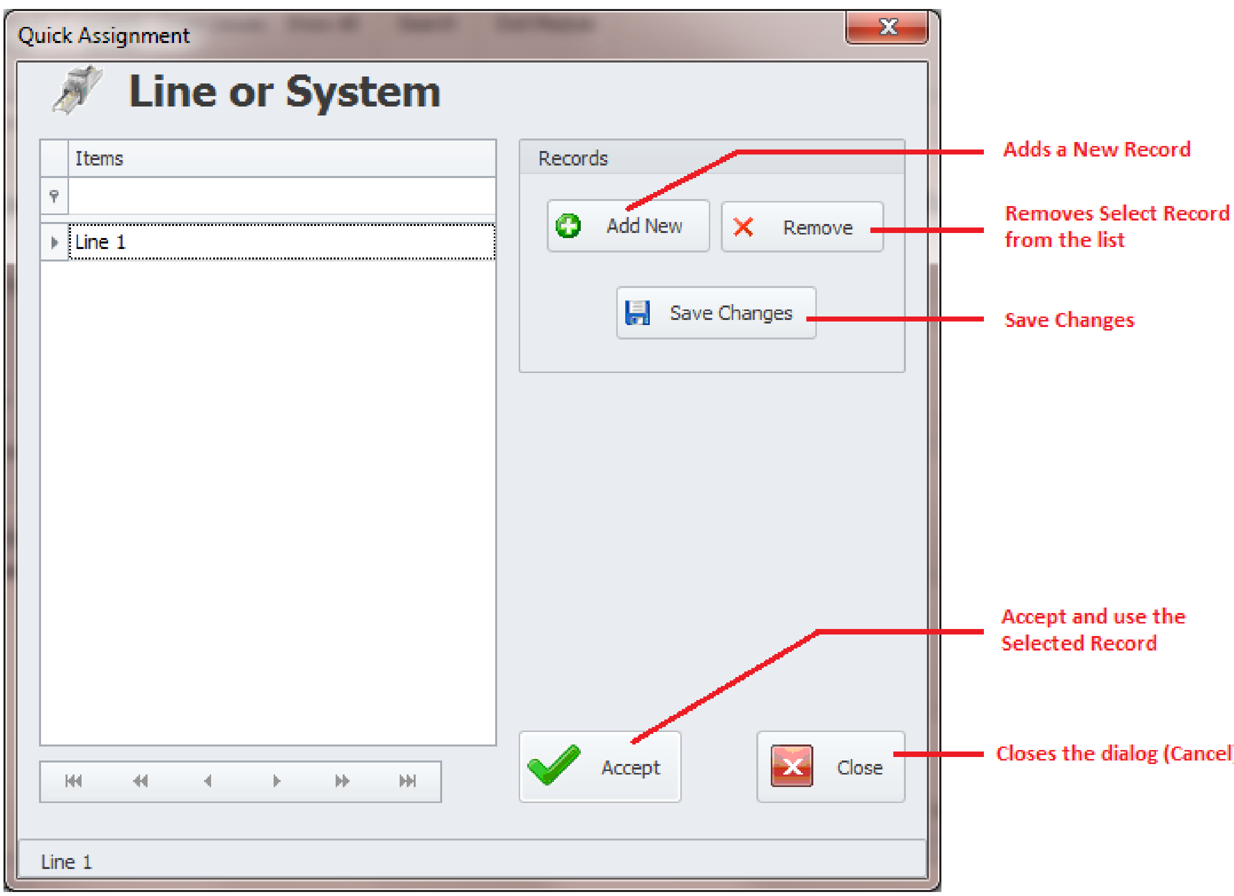
To save a summary of the current issue to the currently assigned asset's history log:

- Locate and make active the Issue you want to save to history.
- Insure that the issue has an asset assigned to it.
- Move to the **Open Issue** tab.
- Locate the **Options** group and click on the **Save to Asset History** button.

Edit Lines and Systems

Both Issues recording and Production Count recording use **Lines and Systems**. To edit this list:

- Open the **File** menu and select the **Edit Lines/Systems List** option. This will invoke the **Line or System Quick Assignment** dialog.



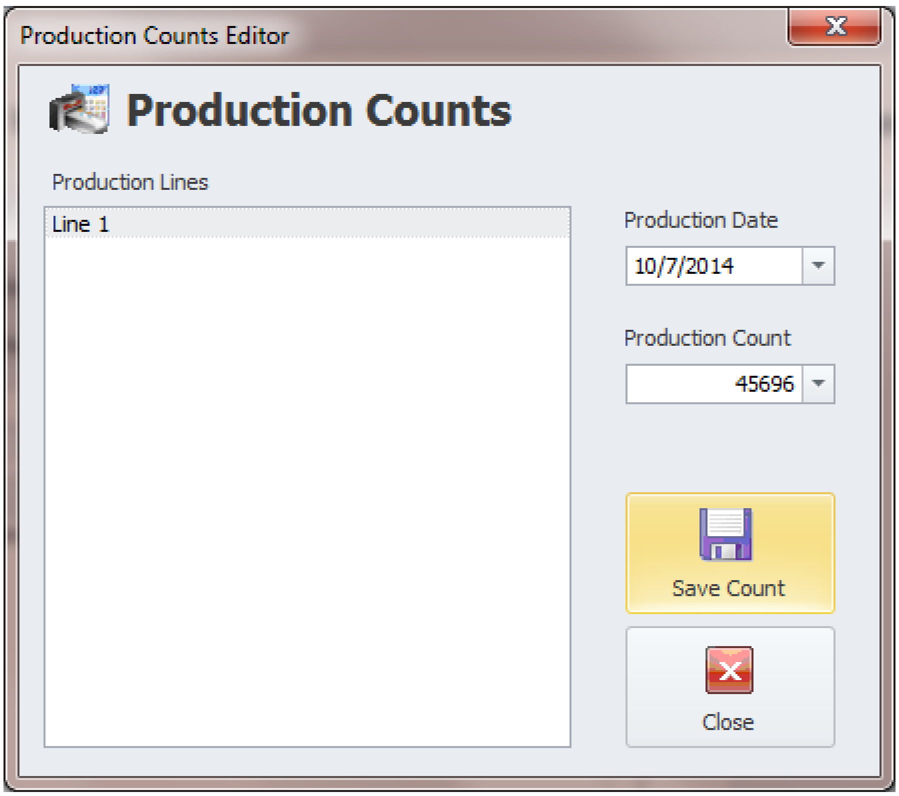
The procedures for using this dialog is the same as using the **Data Quick Entry** routines. You can learn more about this feature by reading about ***Data Quick Entry*** in the ***Common Features*** chapter.

Enter Production Counts

This module supports both Issues tracking, and to some degree, Production tracking. Many of the reports used by this module are based on both issues and actual production counts. For this reason we have provided a way of entering production numbers from within this module.

To record production counts:

- Open the **File** menu and select the **Enter Production Counts** option. This will invoke the **Production Count Editor** dialog.



- To add or edit production counts, move to the **Production Lines** list and select a production line to work with.
- Move to the **Production Date** field, and using the attached calendar, select the production date of the record you are adding or editing.
- Move to the **Production Count** field and enter this numeric value representing the product count for the selected date and line.
- Click on the **Save Count** button before entering or editing another production record.
- Click on the **Close** button when done.

Printing an Issue Record

The following example shows a printed issues record:

1105-10
Multi-Lane Palletizer - Hydraulic Line Broke

Reporting Information

Reference	**1105-10**
Reported Date	**5/21/2011**
Reported Time	**3:00:00 PM**
Reported By	**Albright, George**
Shift or Crew	**Days Crew**

Issue Down Time

Down Time	**1 hrs 10 mins**

Issue Specifics

Line or System	**Line 1**
Asset	**Multi-Lane Palletizer**
Problem - Issue	**Hydraulic Line Broke**
Classification	**Production Equipment**
Issue Status	**>>URGENT ISSUE<<**

Contact Information

Contact Name	**Albright, George**
Contact Phone	**(901) 245-1473**
Contact E-Mail	**georgea@abc.com**

Issue Details

Issue Details	**Hydraulic line broke. We did not have a new one, but I was able to find a used one from the bone yard. This should be replaced with a new one as soon as possible.**

Assignment - Resolved

Manager	**Murray, Fred**
Assigned To	**Eliot, Kate**
Date Resolved	**10/7/2014**

Completion Details

Completion Details	**Ordered and then replaced the broken line**

Page 1 of 1

To print an issue record:

- Locate and make active the Issue you want to print.
- Move to the **Home** tab in the ribbon and locate the **Print Options** group.
- Click on one of the available options found in this group. Options include:
    - **Print Record** - Allows printer selection and other options before printing.
    - **Quick Print** - Sends the document directly to the default printer.
    - **Print Preview** - Provides a print preview of the current record.

OR

- Locate and select the item you want to print.
- Open the **File** menu and expand the **Print Options** menu by clicking on it.

- Click on the Print Option of your choice:
  - **Print Record** - Allows printer selection and other options before printing.
  - **Quick Print** - Sends the document directly to the default printer.
  - **Print Preview** - Provides a print preview of the current record.

Saving Changes

Whenever you edit an issue record on either the **Details** or **Open Issues** tabs, you must save your changes to retain these edits.

To Save Changes:

- Move to the **Home** tab in the ribbon and click on the **Save Changes** option.
  OR
- Move to the data control in the Quick Access toolbar and click on the **Post/Save Changes** button. 

Creating a New Issue

To create a new issue record:

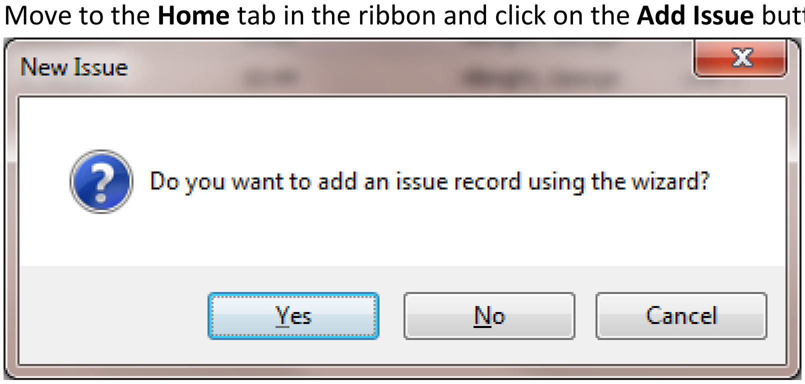
- Move to the **Home** tab in the ribbon and click on the **Add Issue** button.
- When prompted about using the wizard, click on the **No** button.
- Move through the fields of the **Details** tab and edit the information found there.
- Move to the **Home** tab in the ribbon and click on the **Save Changes** option.

Creating a New Issue with the Wizard

In this tutorial we will try to accomplish two things. The first will be to outline the steps in creating an issue using the **Issues Creation Wizard**, and while we're at it, show the features of this wizard.

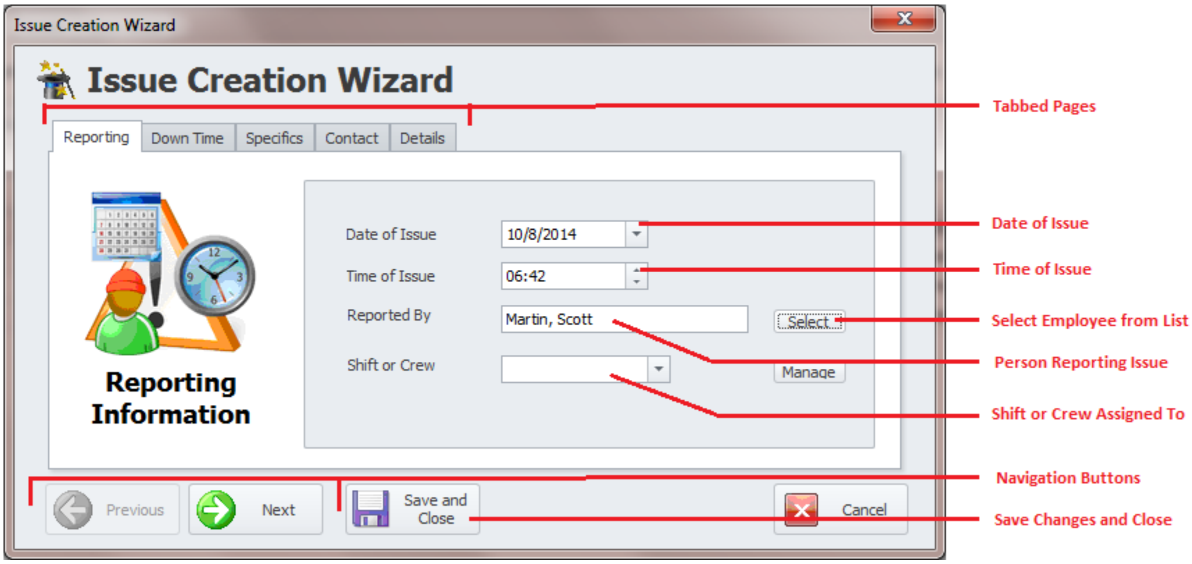
The **Issues Creation Wizard** is used to create a new issue tracking record. The wizard style of this dialog was designed to help ease the creation process by guiding you through the steps.

1. Move to the **Home** tab in the ribbon and click on the **Add Issue** button.

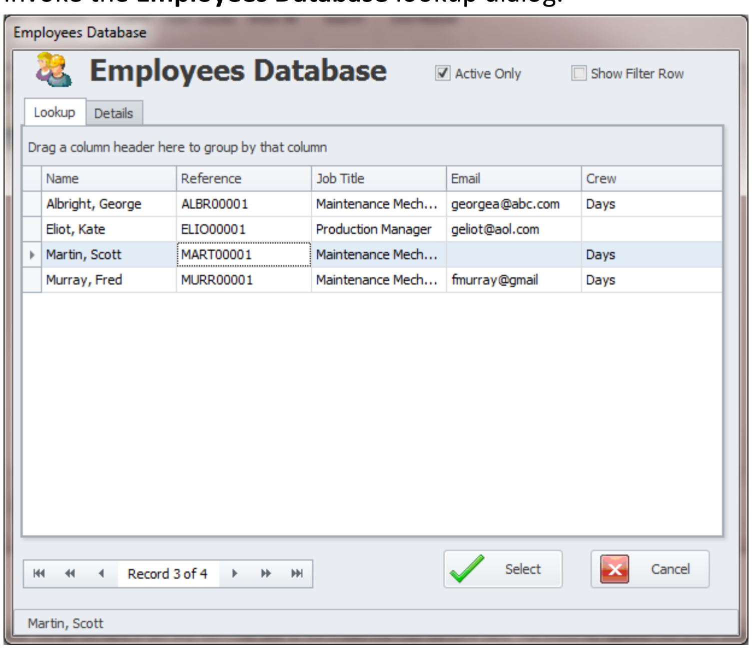


2. When prompted about using the wizard, click on the **Yes** button. This will invoke the **Issues Creation Wizard**.

   The following illustrates the element of the **Reporting Tab** of the wizard.

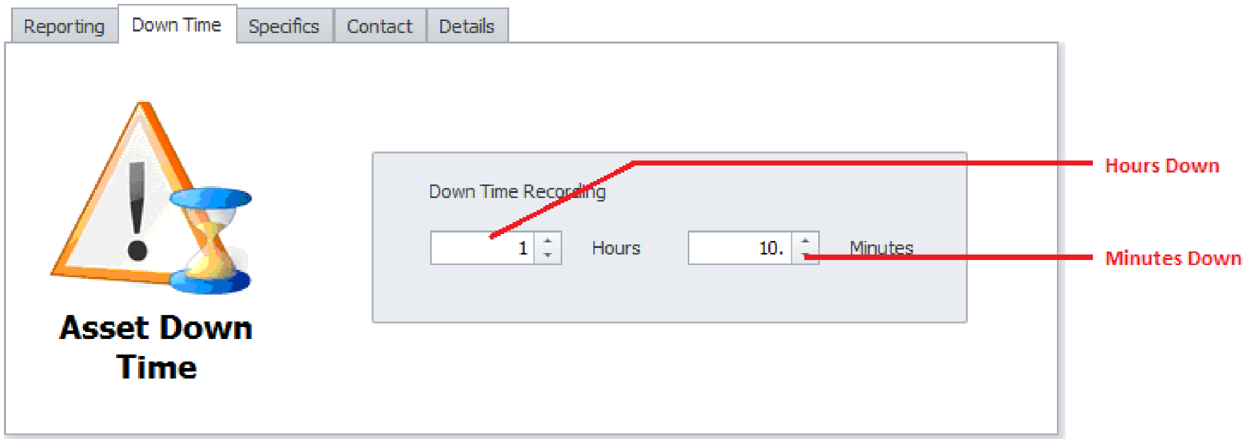


3. Move to the **Date of Issue** field and using the attached calendar set the date in which the issue occurred.
4. Move to the **Time of Issue** field and edit this value.
5. Move to the **Reported By** field and click on the **Select** button adjacent to this field. This will invoke the **Employees Database** lookup dialog.

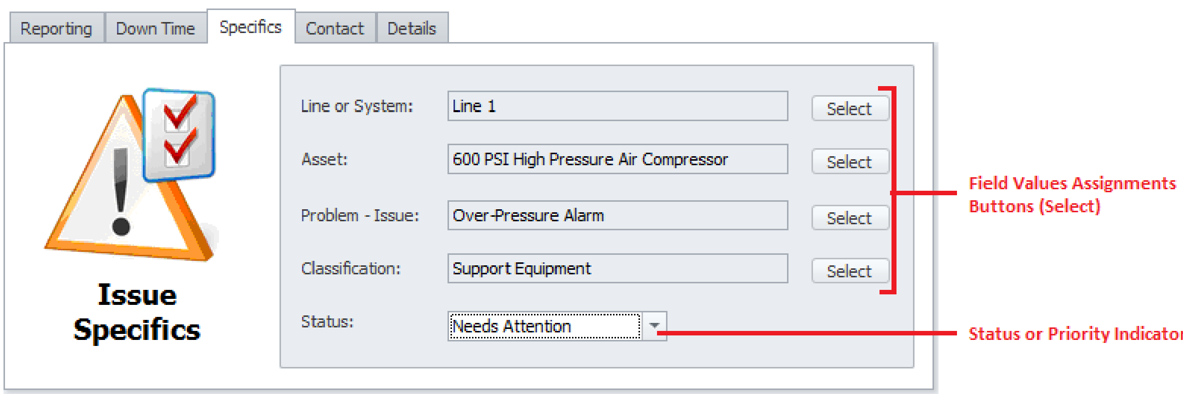


6. Select the employee record you want to assign from those listed in the grid.
7. Click on the **Select** button.
8. Move the **Shift or Crew** field and select this information from the drop down list.

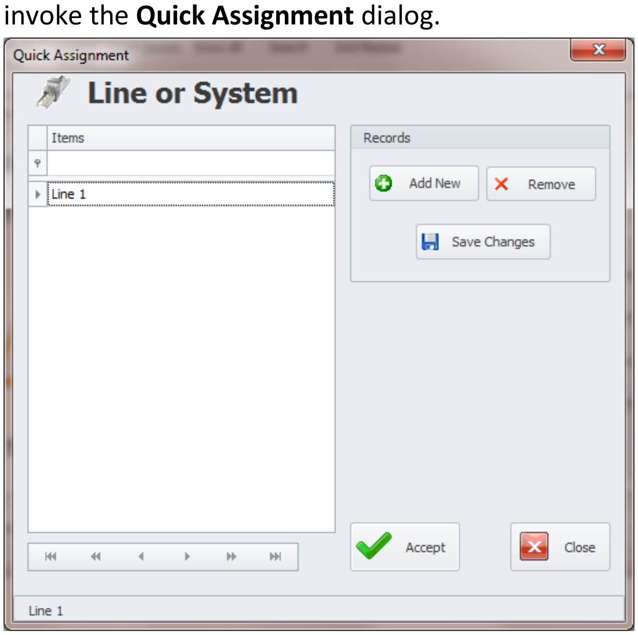
9. Move to the **Down Time** tab by either clicking on the tab or clicking the **Next** button.



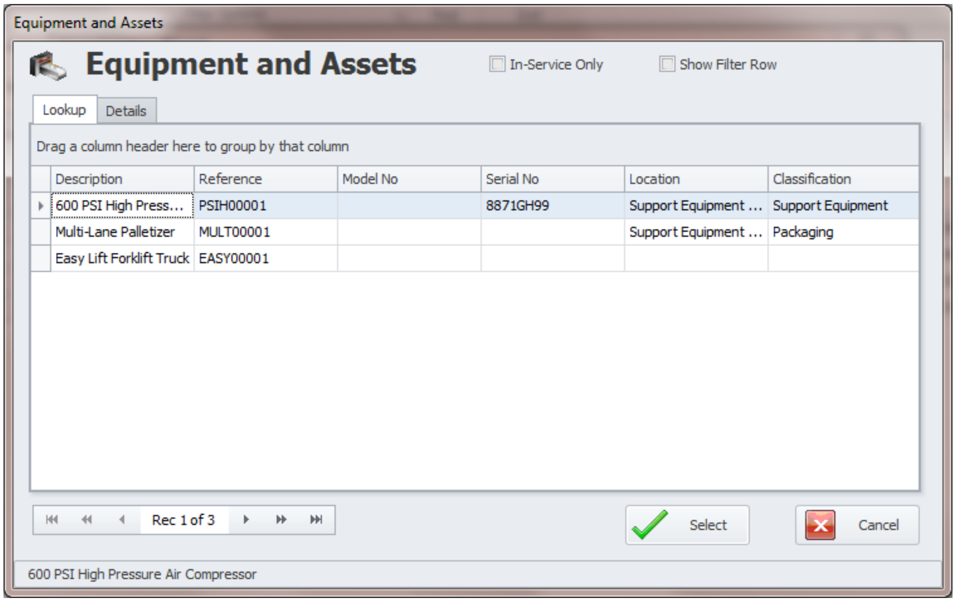
10. Move to the **Hours** field, and using the attached spin control, set the hours the item was down.
11. Move to the **Minutes** field, and using the attached spin control, set the minutes the item was down.
12. Move to the **Specifics** tab by either clicking on the tab or clicking the **Next** button.



13. Move to the **Line or System** field and click on the **Select** button adjacent to this field. This will invoke the **Quick Assignment** dialog.

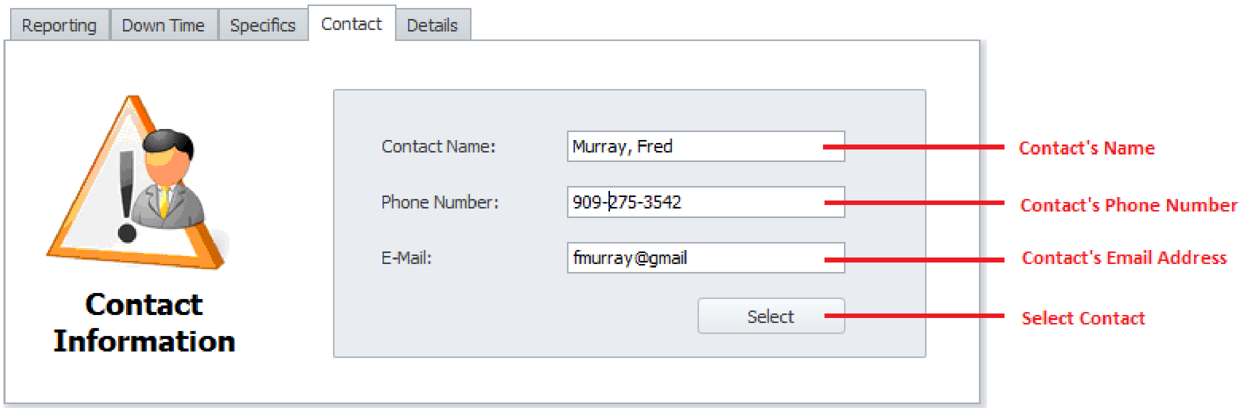


14. Move to the **Items** grid and select the item you want to use for this assignment.
15. Click on the **Accept** button.
16. Move to the **Asset** field and click on the **Select** button adjacent to this field. This action will invoke the **Equipment and Assets** lookup dialog.

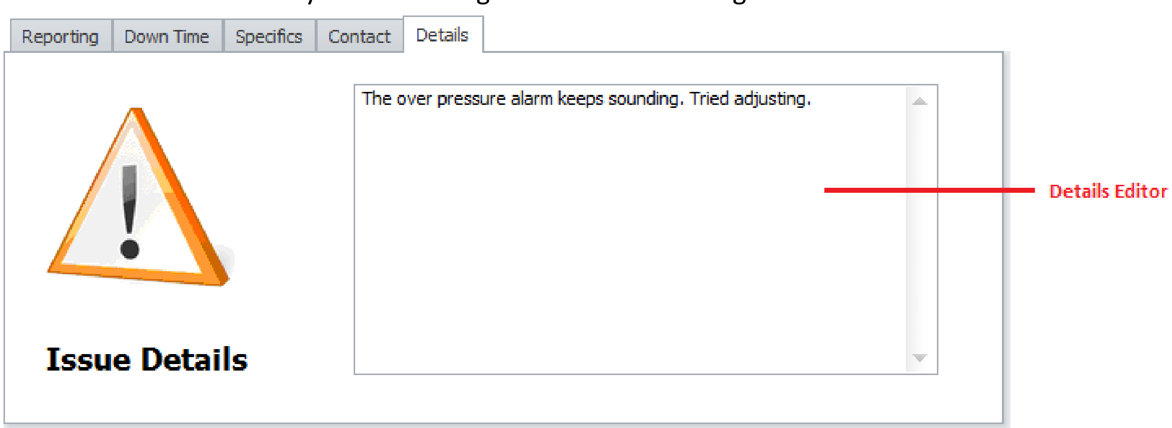


17. Select the equipment record you want to assign from those listed in the grid.
18. Click on the **Select** button.
19. Move to the **Problem-Issue** field and click on the **Select** button adjacent to this field. This will invoke the **Quick Assignment** dialog.
20. Move to the **Items** grid and select the item you want to use for this assignment.
21. Click on the **Accept** button.
22. Move to the **Classification** field and click on the **Select** button adjacent to this field. This will invoke the **Quick Assignment** dialog.
23. Move to the **Items** grid and select the item you want to use for this assignment.
24. Click on the **Accept** button.
25. Move to the **Status** drop down, and using this drop down list, select the status or priority indicator you want to assign to the issue. Options include: **Issue Resolved**, **Information Only**, **Needs Attention** and **Urgent Issue**.

26. Move to the **Contact** tab by either clicking on the tab or clicking the **Next** button.



27. Move to the **Contact Name** field and type in this information.
28. Move to the **Phone Number** field and type in this information.
29. Move to the **E-Mail** field and type in this information.
30. To save typing in Contact Information, you can select an employee from lookup. To do this move and click on the **Select** button found on this tab. This will invoke the **Employees Database** lookup dialog.
31. Select the employee record you want to assign from those listed in the grid.
32. Click on the **Select** button.
33. Move to the **Details** tab by either clicking on the tab or clicking the **Next** button.

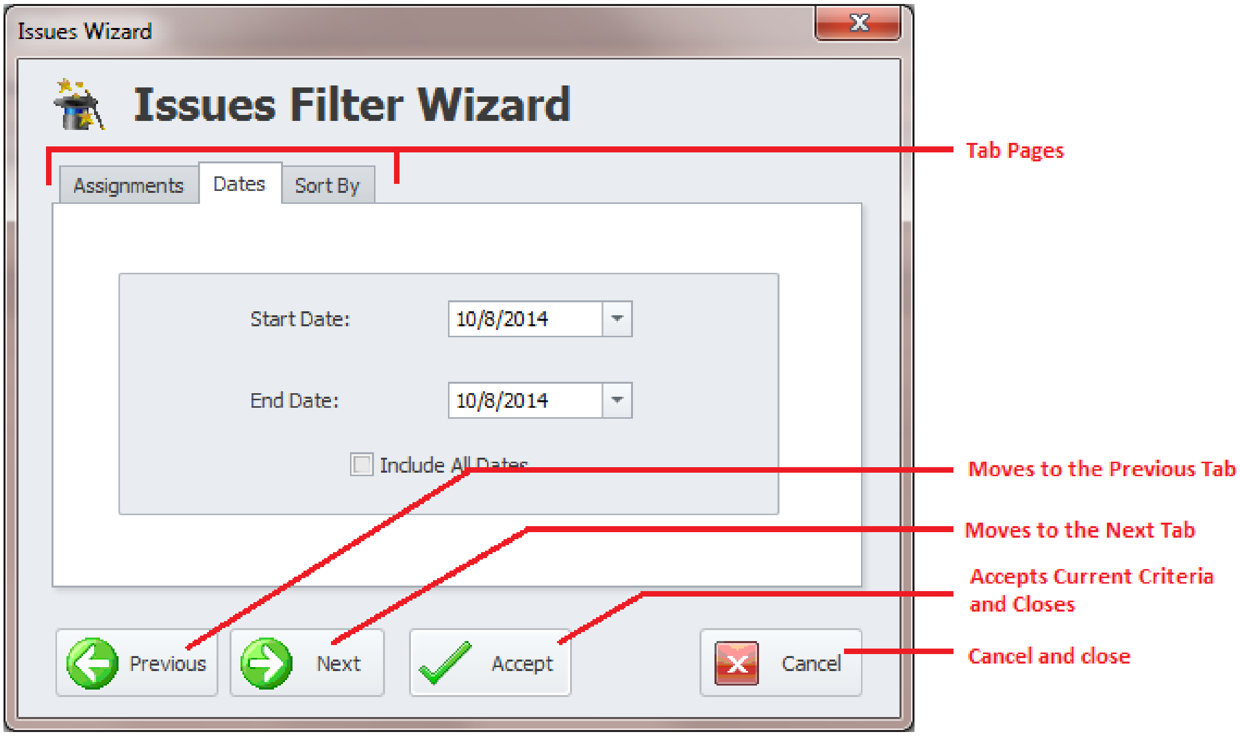


34. Move to the **Details Editor** text box and enter the details as it related to the issue.
35. Click on the **Save and Close** button to save and create the finished Issue record.

Issues Wizard

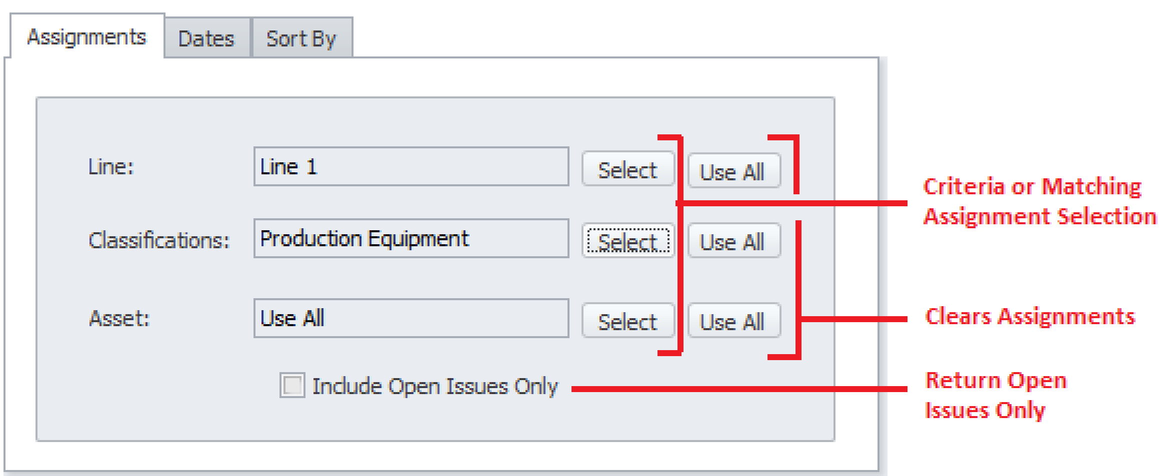
The **Issues Wizard** is used for filtering the database and for some of the built in reports.

The following illustration shows the general or shared features of the Wizard:



Issues Wizard – Assignments Tab

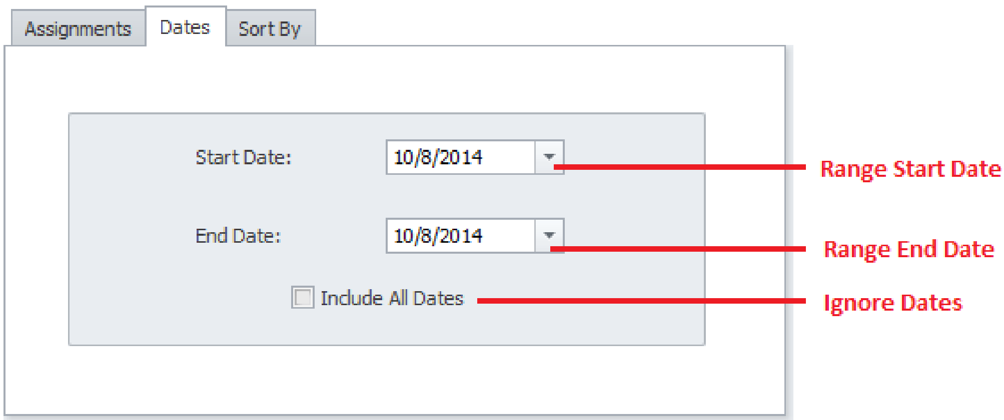
The following image illustrates the elements of this section:



- To assign values to these fields:
  - Move to the appropriate fields and click on the **Select** button adjacent to them.
  - From the invoked dialogs, move to the display grid and click on the record of your choice.
  - Click on the **Select** button.
- To clear the assignments:
  - Move to the appropriate field and click on the **Use All** button adjacent to them.

Issues Wizard – Dates Tab

The following image illustrates the elements of this section:

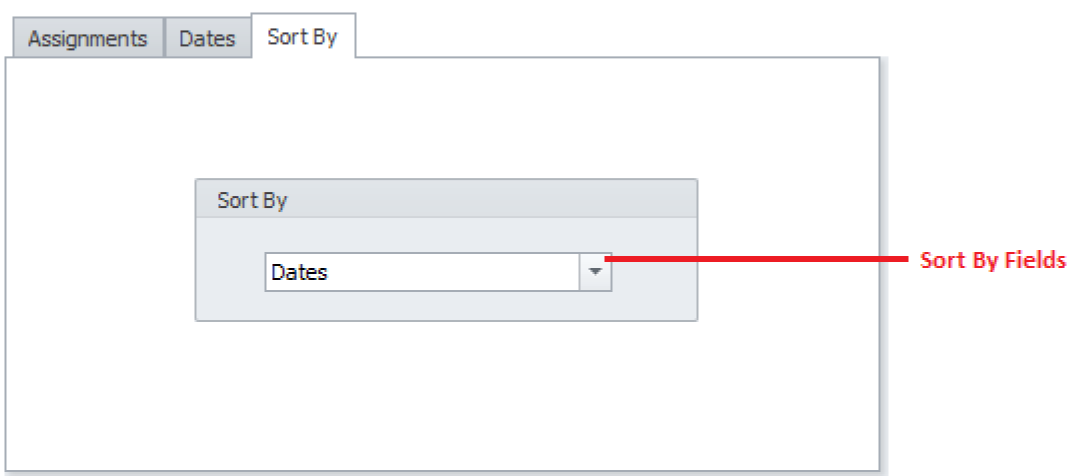


To assign date values:

- Move to the **Start Date** field and using the drop down calendar, select the starting date of your filtering criteria.
- Move to the **End Date** field and using the drop down calendar, select the ending date of your filtering criteria.
- To ignore or use all available dates, check the **Use All Dates** checkbox.

Issues Wizard – Sort By Tab

The following image illustrates the elements of this section:



- To setup the field to sort by:
    - Move to **Sort By** drop down list, and select one of the available fields.

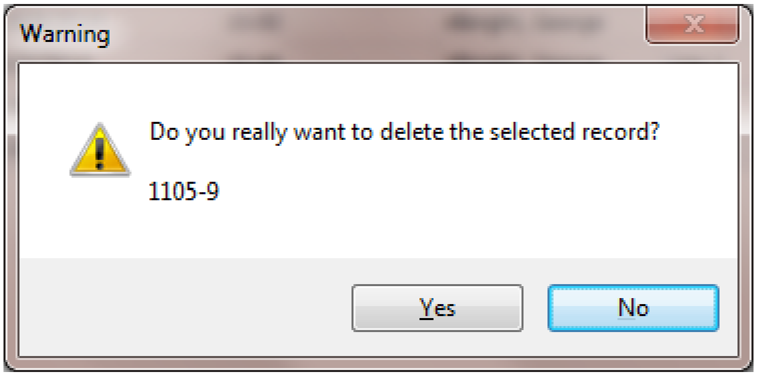
Issues Wizard – Finish

- Click on the **Accept** button when done setting up the criteria.

Deleting an Issue Record

To delete or remove an Issue Record from the database:

- Locate and make active the Issue you want to remove.
- Move to the Quick Access toolbar and click on the **Delete Record** option.



- When prompted about the deletion, click on the **Yes** button.

Reports Overview

One of the main things that make the **Issues Tracking** so valuable is the reporting features. With the built in reports it should be an easy task for you to find problem areas and trends that can then be addressed.

One suggestion on the use of these reports is to generate them the day before a PM. This will help you find areas that need attention, which then can be addressed while the items are down. Another outstanding use of some of these reports is the sharing of information with others. This feature will facilitates the communications of actions that were done by one team member, while another team member was away. Knowing what has previously been done or tried will help the next person know where to precede in the process of issue resolution.

Master Summary Report

The **Master Summary Report** returns information on a wide variety of a facilities operation. This report allow you to include information on:

- **Scheduled Maintenance.**
- **Maintenance and General Issues reported.**
- **Resolved Issues.**
- **Part Replacement Usage.**
- **Production Counts**.

The following image shows an example of a **Master Summary Report**:

Master Summary Report
1/1/2010 - 10/8/2014

Scheduled Maintenance for: Tuesday, July 01, 2014

1101--2 - Air Compressor Monthly Checks

Maintenance Issues

REPORTED	IDENTIFICATION	ISSUE DETAILS	STATUS
5/18/2011 13:03 Murray, Fred Days Crew	1105-9 Line 1 600 PSI High Pressure Air Compressor Over-Pressure Alarm	The compressor keeps shutting down from a High Presure alarm state. Adjusted the pressure regulator and it appears to have resolved the issue.	Issue Resolved (Open Issue) 1 hrs 15 mins
5/21/2011 15:00 Albright, George Days Crew	1105-10 Line 1 Multi-Lane Palletizer Hydraulic Line Broke	Hydraulic line broke. We did not have a new one, but I was able to find a used one from the bone yard. This should be replaced with a new one as soon as possible.	URGENT ISSUE (Open Issue) 1 hrs 10 mins

Total Down Time: 2 hrs 25 mins

Production Issues

REPORTED	IDENTIFICATION	ISSUE DETAILS	STATUS
5/18/2011 10:44 Albright, George Days Crew	1105-8 Line 1 Multi-Lane Palletizer Row Former Fault	The row former motor keep faulting out for an unknown reason.	Needs Attention (Open Issue) 0 hrs 30 mins

Total Down Time: 0 hrs 30 mins

Resolved Issues

No Records Found.

Inventory Usage

Qty Used	Description
1.00	[DRUM00001] 800T-77990 - Drum Switch

Production Counts for: Thursday, May 19, 2011

Line 1 - 3,000.00

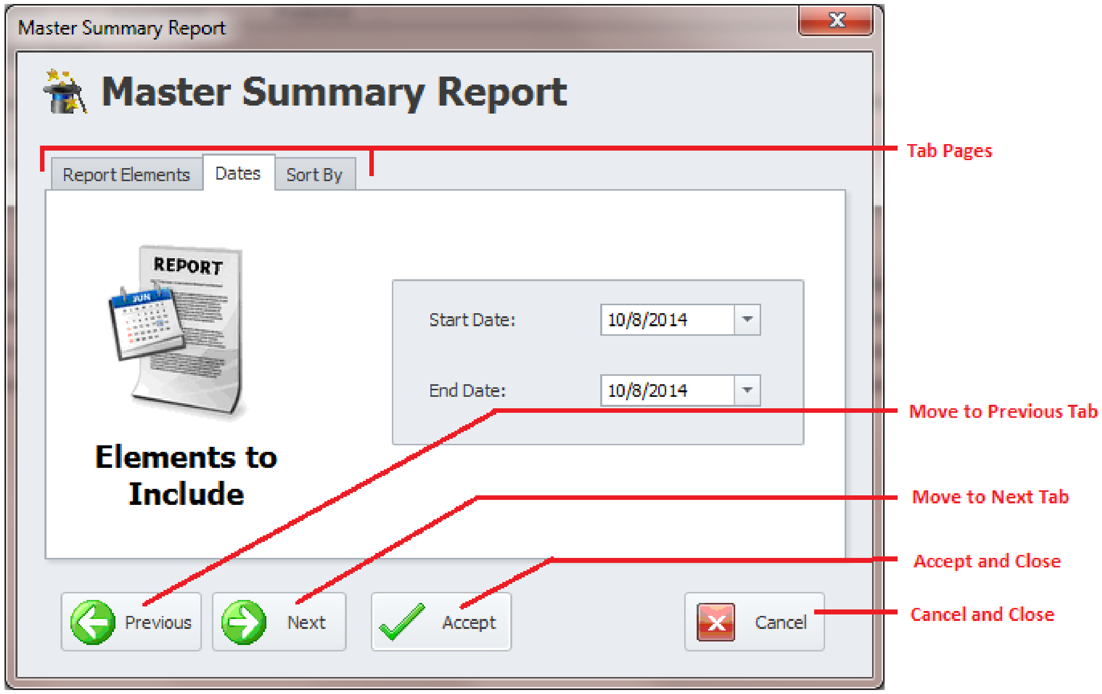
Production Counts for: Friday, May 20, 2011

Line 1 - 3,489.00

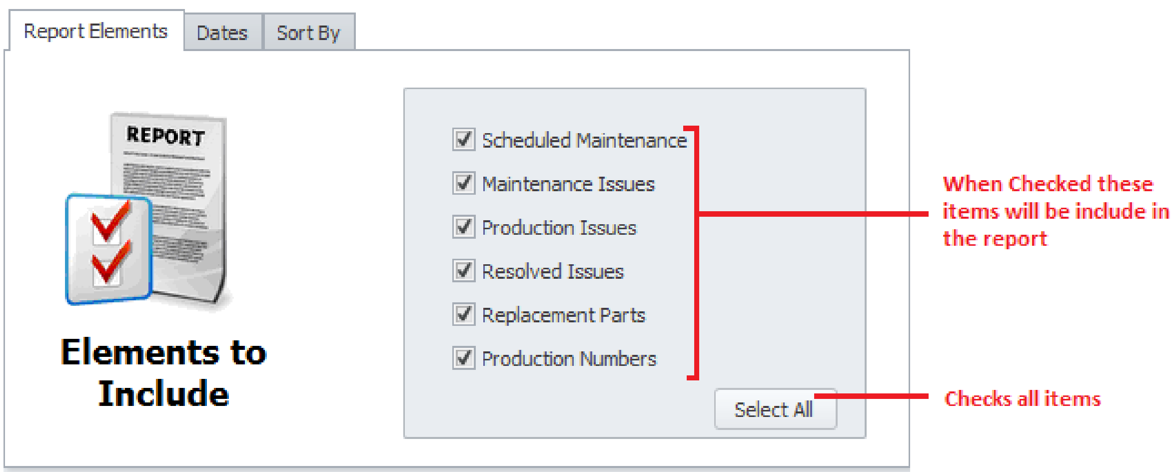
To create a Master Summary Report:

- Move the **Reports** tab in the ribbon and click on the **Master Summary** option. This action will invoke the **Master Summary Report Wizard**.

The following illustration outlines the common features of the wizard and should assist you in navigating the wizard's features.

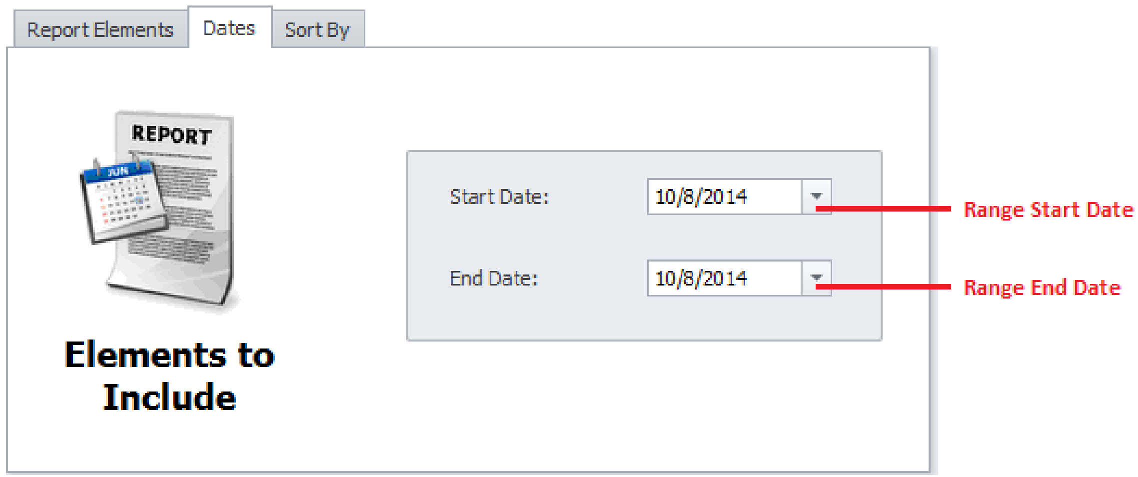


- If not already there, navigate or move to the **Report Elements** tab as illustrated below.

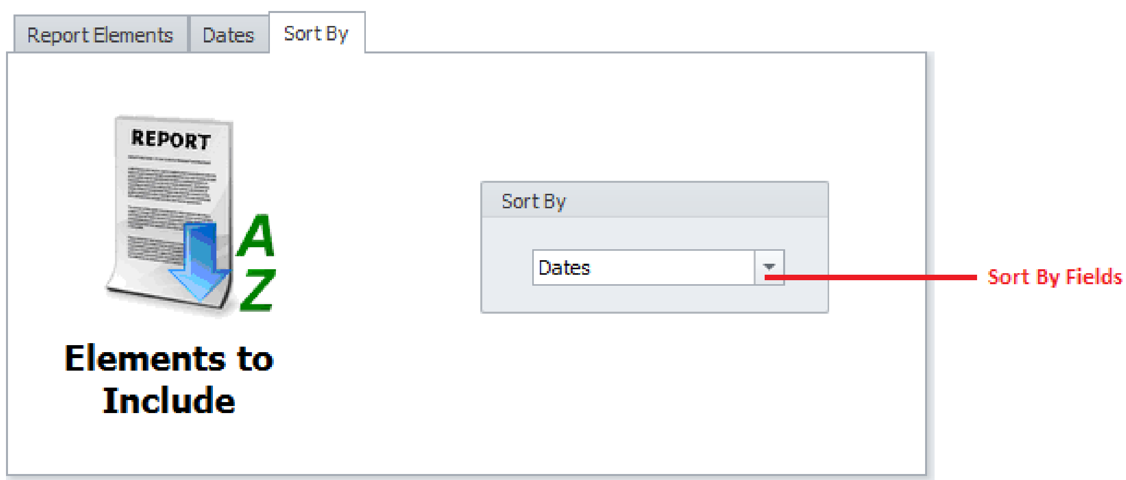


- This section allows you to select report elements that you want included in your report. To include an element place a checkmark next to the element's name from those listed.
- To have the program check all the elements for you, click on the **Select All** button.
- Non-selected items will not be included in the report.

- Move to the **Dates** tab by either clicking on the tab or clicking the **Next** button.



- Move to the **Start Date** field and using the drop down calendar, select the starting date of your report date range.
- Move to the **End Date** field and using the drop down calendar, select the ending date of your report date range.
- Move to the **Sort By** tab by either clicking on the tab or clicking the **Next** button.



- Move to **Sort By** drop down list, and select one of the available fields. The report will be sorted by the selected field.
- Click on the **Accept** button to generate the report with the criteria you have set.

Issues Wizard Report

This report returns information on all issues that equal the criteria you setup.

The following illustrations shows a basic **Issues Report**:

Production Issues

REPORTED	IDENTIFICATION	ISSUE DETAILS	STATUS
5/18/2011 13:03 Murray, Fred Days Crew	1105-9 Line 1 600 PSI High Pressure Air Compressor Over-Pressure Alarm	The compressor keeps shutting down from a High Presure alarm state. Adjusted the pressure regulator and it appears to have resolved the issue.	Issue Resolved (Open Issue) 1 hrs 15 mins
5/21/2011 15:00 Albright, George Days Crew	1105-10 Line 1 Multi-Lane Palletizer Hydraulic Line Broke	Hydraulic line broke. We did not have a new one, but I was able to find a used one from the bone yard. This should be replaced with a new one as soon as possible.	URGENT ISSUE (Open Issue) 1 hrs 10 mins

To create an **Issues Report**:

- Move the **Reports** tab in the ribbon and click on the **Issues Wizard** option. This action will invoke the **Issues Wizard**. Please refer to the ***Issues Wizard*** section of this chapter on how to use this wizard.

Down Time Report

The Down Time reports will report on total downtime for criteria that you setup. This information is taken directly from reported issues.

The following illustrations shows a basic **Down Time Report**:

Maintenance Issues

REPORTED	IDENTIFICATION	ISSUE DETAILS	STATUS
5/18/2011 13:03 Murray, Fred Days Crew	1105-9 Line 1 600 PSI High Pressure Air Compressor Over-Pressure Alarm	The compressor keeps shutting down from a High Presure alarm state. Adjusted the pressure regulator and it appears to have resolved the issue.	Issue Resolved (Open Issue) 1 hrs 15 mins
5/21/2011 15:00 Albright, George Days Crew	1105-10 Line 1 Multi-Lane Palletizer Hydraulic Line Broke	Hydraulic line broke. We did not have a new one, but I was able to find a used one from the bone yard. This should be replaced with a new one as soon as possible.	URGENT ISSUE (Open Issue) 1 hrs 10 mins

Total Down Time: 2 hrs 25 mins

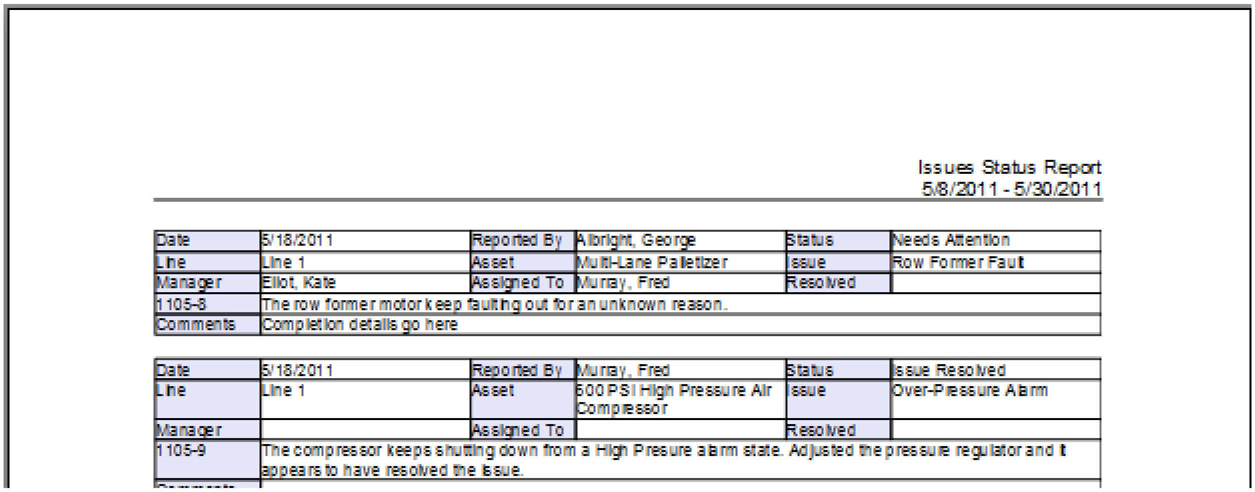
To create a **Down Time Report**:

- Move the **Reports** tab in the ribbon and click on the **Down Time Report** option. This action will invoke the **Issues Wizard**. Please refer to the ***Issues Wizard*** section of this chapter on how to use this wizard.

Status Report

The **Status Report** uses a wizard to assist you in creating reports on issues status, and issues that fall within a specified date range. This report was designed to help you stay on top of your open issues.

The following illustrations shows a basic **Status Report:**

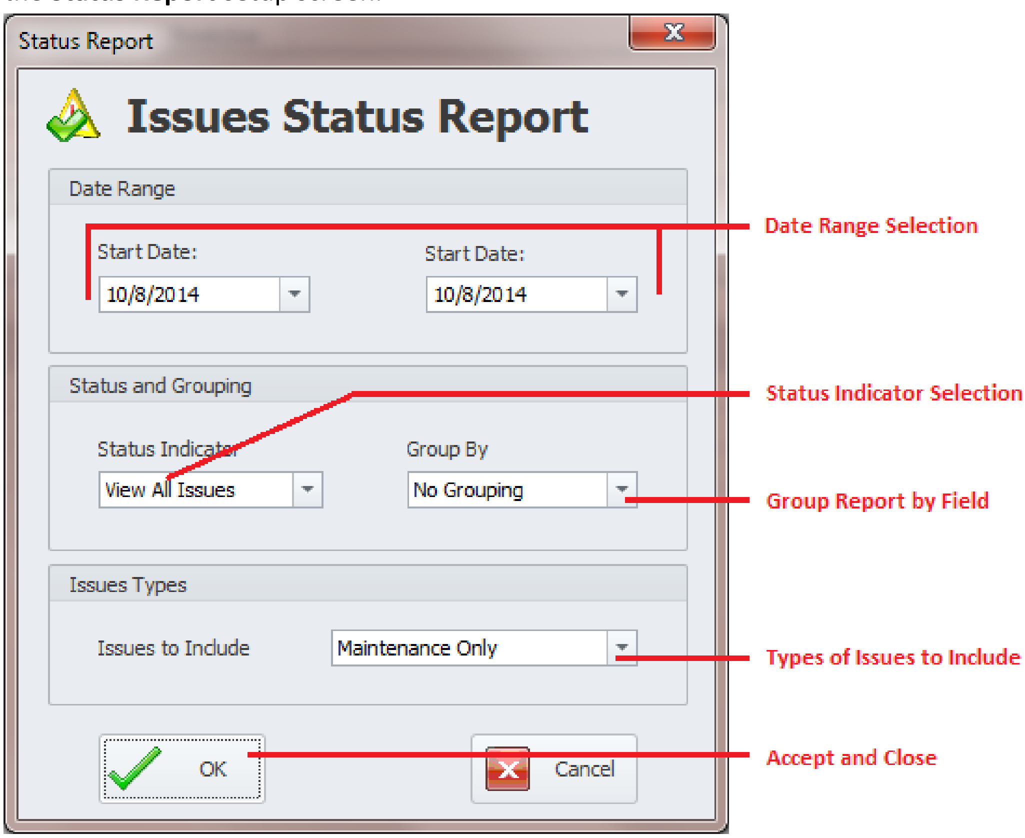

Issues Status Report
5/8/2011 - 5/30/2011

Date	5/18/2011	Reported By	Albright, George	Status	Needs Attention
Line	Line 1	Asset	Multi-Lane Palletizer	Issue	Row Former Fault
Manager	Elliot, Kate	Assigned To	Murray, Fred	Resolved	
1105-8	The row former motor keep faulting out for an unknown reason.				
Comments	Completion details go here				

Date	5/18/2011	Reported By	Murray, Fred	Status	Issue Resolved
Line	Line 1	Asset	500 PSI High Pressure Air Compressor	Issue	Over-Pressure Alarm
Manager		Assigned To		Resolved	
1105-9	The compressor keeps shutting down from a High Presure alarm state. Adjusted the pressure regulator and it appears to have resolved the issue.				

To create a **Status Report**:

- Move the **Reports** tab in the ribbon and click on the **Status Report** option. This action will invoke the **Status Report** setup screen.



- Move to the **Start Date** field and using the drop down calendar, select the starting date of your report date range.
- Move to the **End Date** field and using the drop down calendar, select the ending date of your report date range.
- Move to the Status Indicator drop down and select an indicator that best describes the issue status you want to report on. Options include:
    - **View All Issues**
    - **Open Issues**
    - **Close Issues**
- Move to the **Group By** drop down and select, if any, the way you want the report grouped. Options include:
    - **No Grouping**
    - **Lines**
    - **Managers**
    - **Assets**
    - **Assignments**
- Move to the **Issues to Include** drop down box and select the types of issues to include in the report. Options include:
    - **Maintenance Only**
    - **Production Only (General)**
    - **Show All Issues**
- Move to and click on the **OK** button to generate the report.

Parts Usage Report

This report will return a list of all parts that were used in the completion of issues and that fall within a given date range.

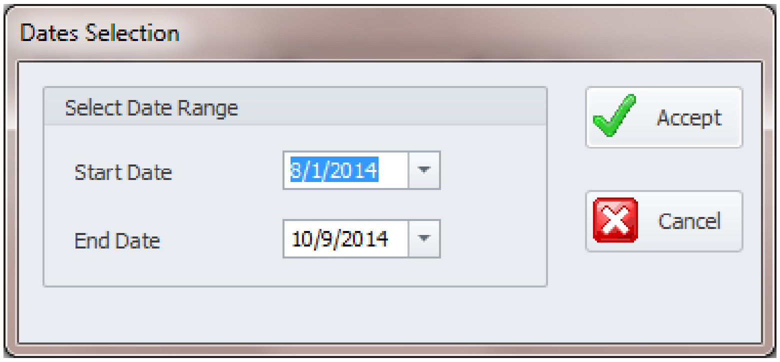
Parts Usage Report
7/1/2014 - 10/9/2014

Inventory Usage

Qty	Date	Issue ID	Description
1	8/5/2014	1105-8	[DRUM00001] 800T-77990 - Drum Switch
1	**10/8/2014**	**1105-10**	**[DRUM00001] 800T-77990 - Drum Switch**

To create a **Parts Usage Report**:

- Move to the **Reports** tab in the ribbon and click on the **Parts Usage** option. This action will invoke the **Date Range** dialog screen.



- Move to the **Start Date** field and using the drop down calendar, select the starting date of your report date range.
- Move to the **End Date** field and using the drop down calendar, select the ending date of your report date range.
- Click on the **Accept** button to create the report.

Top Ten Issues Report

This report returns the frequency of recurring issues for the entire facility, line or machine, and a date range you select. This report is ideal for pin pointing the number one problem areas, and then breaking down that issue even further. In summary, this report returns the top 10 recurring issues with actual counts, based on the criteria that you setup.

To create a **Top Ten Issues Report**:

- Move the **Reports** tab in the ribbon and click on the **Top Ten Issues** option. This action will invoke the **Issues Wizard**. Please refer to the ***Issues Wizard*** section of this chapter on how to use this wizard. The one tab that will be missing is the **Sort By** tab, as this type of report does not require sorting.
- This report produce a chart to help represent the data returned. You are allowed to edit this chart before continuing with the finished report. To learn about the feature of this Designer, please look at the ***Chart Designer*** section of the ***Reports and Graphics*** module.
- When done modifying the chart, close the Designer to view the final report.

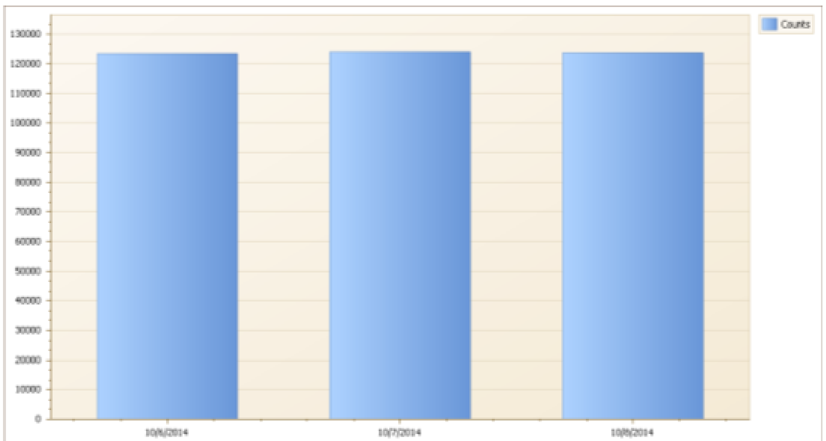
Production Counts and Issues Report

There are 3 different **Production Counts and Issues Reports** available. All three of these deal with the same basic information; the production counts for a given date range, a specific production line, and all the issues reported for the provided date range and selected line.

These reports are ideal for summarizing exactly how a production is performing along with any reported issues. We highly recommend using one of these reports prior to any maintenance days, this way you can analyze where to assign your resources to get the best results.

The following image shows an example of a **Production Counts and Issues Report.**

Production Report
10/2/2014 - 10/9/2014



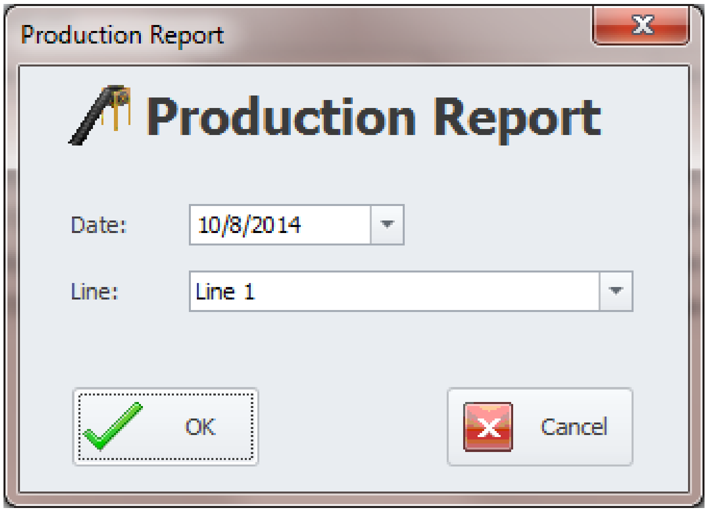
Reported Issues

REPORTED	IDENTIFICATION	ISSUE DETAILS	STATUS
10/6/2014 11:49 Martin, Scott	1410-12 Line 1 600 PSI High Pressure Air Compressor Over-Pressure Alarm	The over pressure relief value continues to activate. Tried adjusting, but it doesn't seem to help. We also don't have any new ones in stock.	Needs Attention (Open Issue) 1 hrs 13 mins
10/7/2014 13:03 Murray, Fred Days Crew	1105-9 Line 1 600 PSI High Pressure Air Compressor Over-Pressure Alarm	The compressor keeps shutting down from a High Presure alarm state. Adjusted the pressure regulator and it appears to have resolved the issue.	Issue Resolved (Open Issue) 1 hrs 15 mins
10/7/2014 10:44 Albright, George	1105-8 Line 1 Multi-Lane Palletizer	The row former motor keep faulting out for an unknown reason.	Needs Attention (Open Issue) 0 hrs 30 mins

To create a **Counts and Issues Report**:

- Move the **Reports** tab in the ribbon and click on the **Counts and Issues Report** option to expand the drop down.
- Next select the number of days to include in your report. Options include:
    - 7 Days
    - 14 Days
    - Month

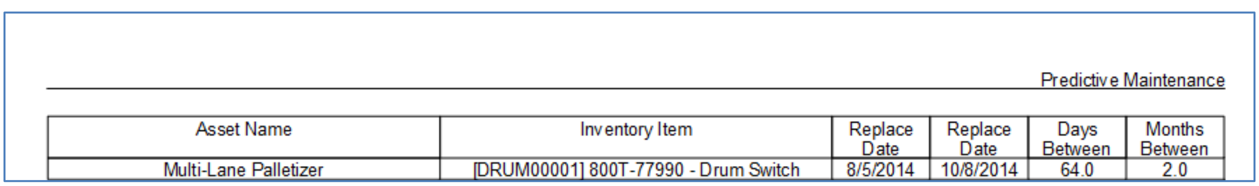
- Once the date range is selected, the **Production Report** setup dialog will load.



- Move to the **Date** field and select the beginning date of the date range. The number of days previously selected will be added to this beginning date to provide the report date range.
- Move to the **Line** drop down and select line you want to base your report on.
- Click on the **OK** button.
- This report produce a chart to help represent the data returned. You are allowed to edit this chart before continuing with the finished report. To learn about the feature of this Designer, please look at the ***Chart Designer*** section of the ***Reports and Graphics*** module.
- When done modifying the chart, close the Designer to view the final report.

Predictive Maintenance Report

This report provides a worksheet based on part replacement as it applies to Issues Part Usage. The report gives information about the replacement intervals of parts that have been replaced more than once. With this information the user should be able to predictive the failure rate of the reported parts, and schedule maintenance accordingly.



Predictive Maintenance

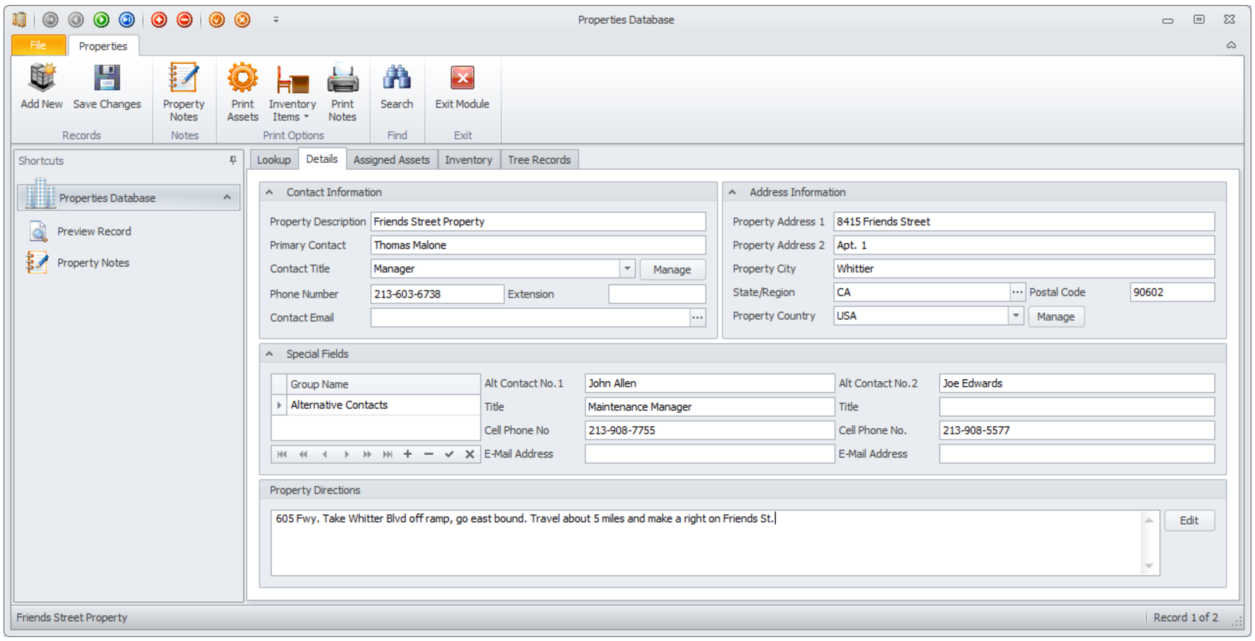
Asset Name	Inventory Item	Replace Date	Replace Date	Days Between	Months Between
Multi-Lane Palletizer	[DRUM00001] 800T-77990 - Drum Switch	8/5/2014	10/8/2014	64.0	2.0

To Predictive Maintenance Report:

- Click on the **Reports** tab in the ribbon, and then choose the **Predictive Maintenance** option in the Predictive group.

Properties Database

The **Properties Database** module was designed for two main audiences. One is for those that may manage various properties, and with these properties manage associated work orders, manage assets and track inventory for these locations. The others are for those that may only have one location to manage, but would still like to manage location inventory, contact information as it may apply to insurance companies, fire protection equipment, and other related items.



The inventory tracked by this module differs from the **Parts and Inventory** module, as it relates to assets and furnishing of a location, or even an apartment or room. The **Tree Records** part of this module supports the contact tracking feature where you can create an almost endless grouping of items as found in tree controls.

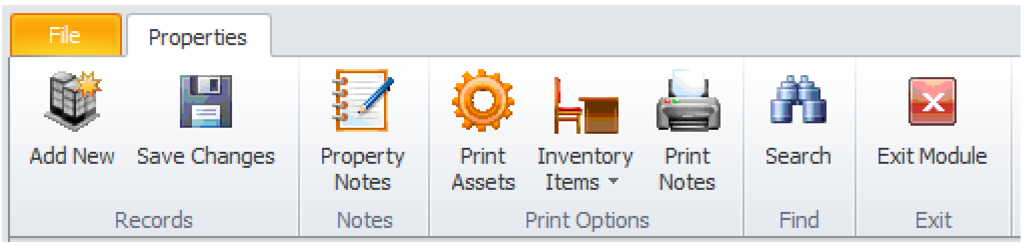
Key elements of this module include:

- General Property information – Address, location and main contact.
- Attached RTF Notes.
- Property Driving Directions.
- Unlimited Special User Defined field groups.
- View Assigned Assets and their work orders.
- Inventory database of items that can be grouped by classifications, rooms and more.
- Tree Records database that groups items in in a tree view, and also supports attachments.

Ribbon Control

The functionality of the Properties Database module is provided via the tabbed Ribbon control. Options on the page are structurally and visually split into logical groups. Each of these groups includes commands that perform specific functions.

PROPERTIES TAB



The following are the elements on the **Properties** ribbon tab, reading left to right:

- **Add New** – Create a new blank record in the database.
- **Save Changes** – Saves all current changes from all elements of a record (master save).
- **Properties Notes** - Allows the viewing and editing of the notes assigned to the current item.
- **Print Assets** - Creates a print preview of the current property and all assigned assets (Assigned Assets Report).
- **Inventory Items -** Creates a print preview of the current property and all assigned Inventory Items (Assigned Inventory Report). Options in the drop down include:
    - **Group by Rooms** – Groups inventory items by room assignments.
    - **Sort by Description** – Sorts inventory items by description.
    - **Selected Inventory Item** – Prints only the selected inventory item.
- **Print Notes** – Prints the property notes document (RFT).
- **Search -** Invokes the search/find routine on the Lookup Grid.
- **Exit Module** – Closes and exit the current module,

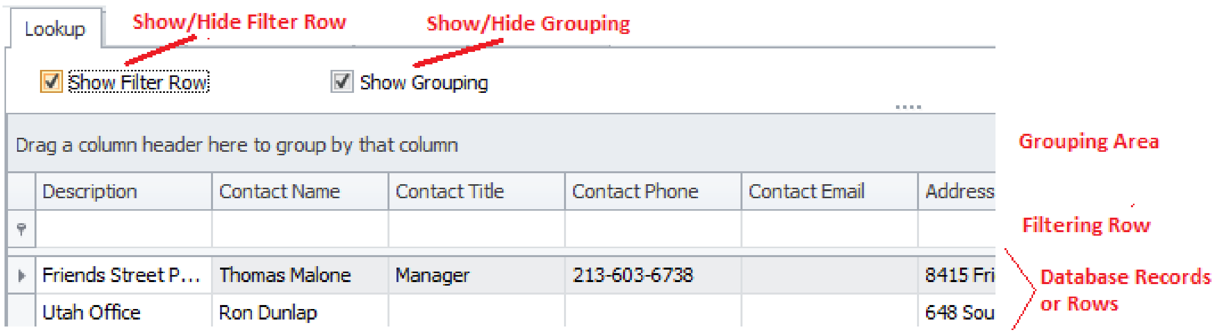
Features of the Properties Database Module

There are many features of the **Properties Database** module, with the majority of these features found on either the tabbed pages found there, or within the tabbed ribbon control. We are going to explain the use of these features as we move through the tabbed pages.

Lookup Tab

This tab helps in locating properties by grouping, filtering and sorting them. All the records in the current filter are located in the grid found here. To select a record and make it the active record, the user needs only to click on the item from within the grid. Once selected the user can click on the other tabs to view or edit the record itself.

The following image illustrates the features available on the Lookup tab:



The functions of the Lookup tabs are used through-out the system and are fairly common regardless of the modules that use them. Please review the chapter on ***Common Features*** to read about the functionality of the controls located on this tab. Apply special attention to the following:

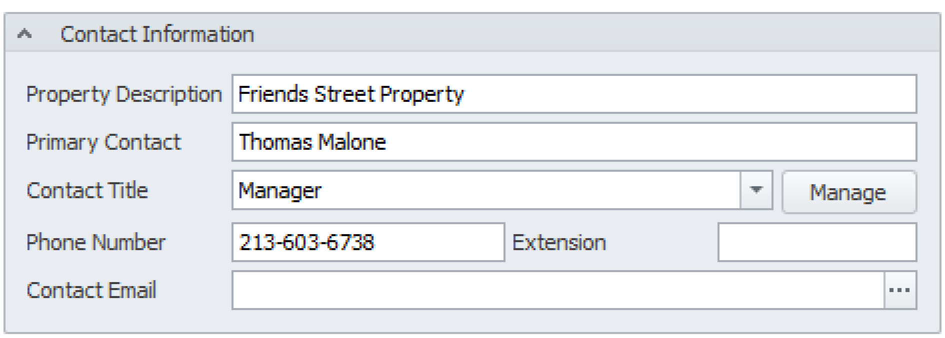
- Using the Lookup Grids
- Searching

Details Tab

Under the **Details** tab you can setup your address information, contact information and general assignments for the selected property.

Contact Information

This section allows you to maintain information on the primary contacts as it relates to the selected property. The following illustrates the elements found in this section:



Description

This alpha numeric field can accept up to 50 characters and is used to help identify the property record.

Primary Contact

This alpha numeric field can accept up to 30 characters and is used to record the name of the property's primary contact person.

Contact Title

This alpha numeric field can accept up to 30 characters and is used to record the job title of the property's primary contact person.

Phone Number

This alpha numeric field can accept up to 30 characters and is used to record the telephone number of the property's primary contact person.

Extension

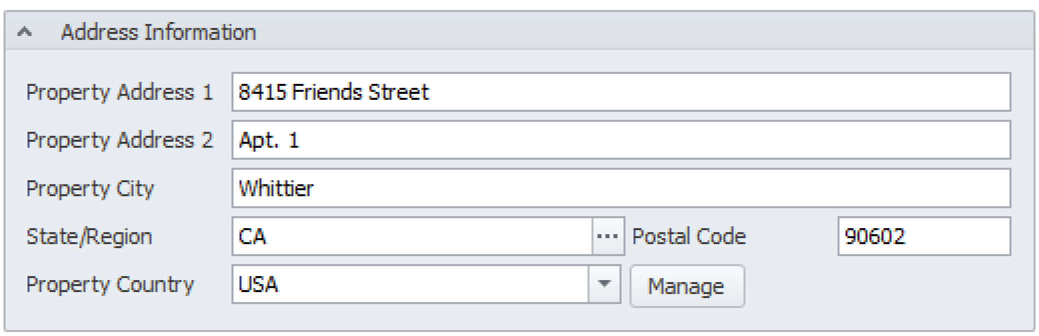
This alpha numeric field can accept up to 5 characters and is used to record the telephone extension number.

Contact Email

There is no size limitation to this alpha numeric field and is used to store the email address of the primary contact. Clicking on the ellipse button (…) found here will open the default email application with the specified address.

Address Information

This section allows you to maintain address information as it relates to the selected property. The following illustrates the elements found in this section:



Property Address

The two address fields found in this group will accept up to 30 alpha numeric characters each. Use these fields to record street, PO Box and other address information.

City

This alpha numeric field can accept up to 30 characters and is used to specify the city the property is located in.

State/Region

This alpha numeric field can accept up to 30 characters and is used to specify the state, region or province the property is located in.

Postal Code

This alpha numeric field can accept up to 15 characters and is used to specify the postal code used for this property.

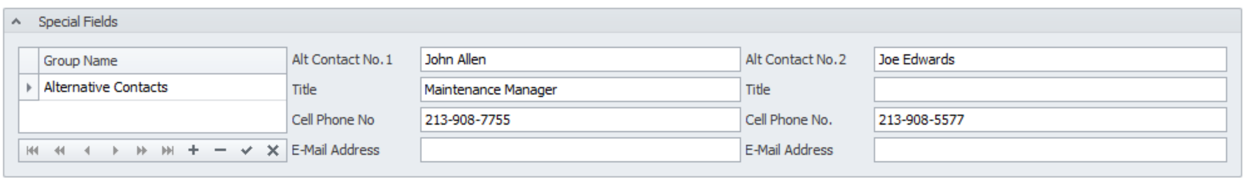
Property Country

This alpha numeric field can accept up to 30 characters and is used to specify the country the property is located in.

Special Fields

This section allows you to create and use **Special Fields**. **Special Fields** can be thought of as groups of User Defined Fields. Each group can have a Group Name and 8 fields with user defined titles.

The following illustrates the elements found in this section:



For more information about this feature please refer to the ***Special Fields*** section of the ***Common Features*** chapter.

Manage Selected Special Fields

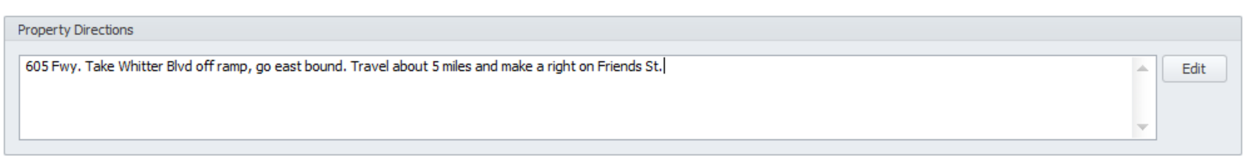
To setup the titles for the current set of special fields:

- Select the **Special Fields** group as found on the **Options** tab and within the grid.
- Open the **File** menu and expand the **Manage Special Fields** sub menu.
- Click on the **Manage Selected Fields** option.

For more information about this feature please refer to the ***Special Fields*** section of the ***Common Features*** chapter.

Property Directions

This section allows you to record driving directions to the current property. The following illustrates the elements found in this section:

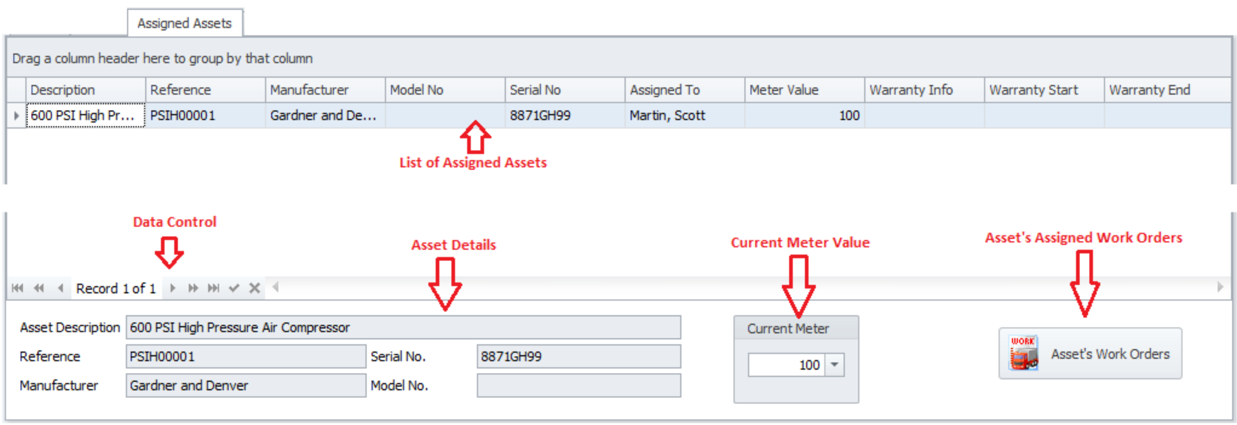


Type in your directions in the space provided, and this alpha numeric field has no size limitation. You can edit this information with the built in **Text Editor** by clicking on the **Edit** button found in this section.

Assigned Assets Tab

Under the **Assigned Assets** tab you can view the assets assigned to the currently selected property record.

The following illustrates the elements found on the **Assigned Assets** tab:



Assigning Assets to Properties

Assigning Assets to Properties is not supported in this module. These assignments are actually made from within the **Equipment and Assets** module. To assign assets to properties:

- From the Main Menu or Start-up screen navigate to **Equipment and Assets** module.
- Move to the **Options** tab of the assets database, and then click on the **Property Assignments** tab near the bottom.
- Click on the **Select Property** button.
- From the invoked **Properties and Locations** dialog move to the grid and select the property you want to assign.
- Click on the **Select** button.
- Exit the **Equipment and Assets** module when done.

Updating an Asset's Current Meter Value

You are provided with the means to update an Asset's meter value from within this module. To update an asset's meter value:

- Locate and make active the property record the asset is assign to.
- Move to the **Assigned Assets** tab.
- Move to the grid on this tab and select the asset record you want to update the meter value on.

- Move to the **Current Meter** group near the bottom and edit the meter value.
- Move to the **Data Control** and click on the **Post/Save** (✓) changes button.

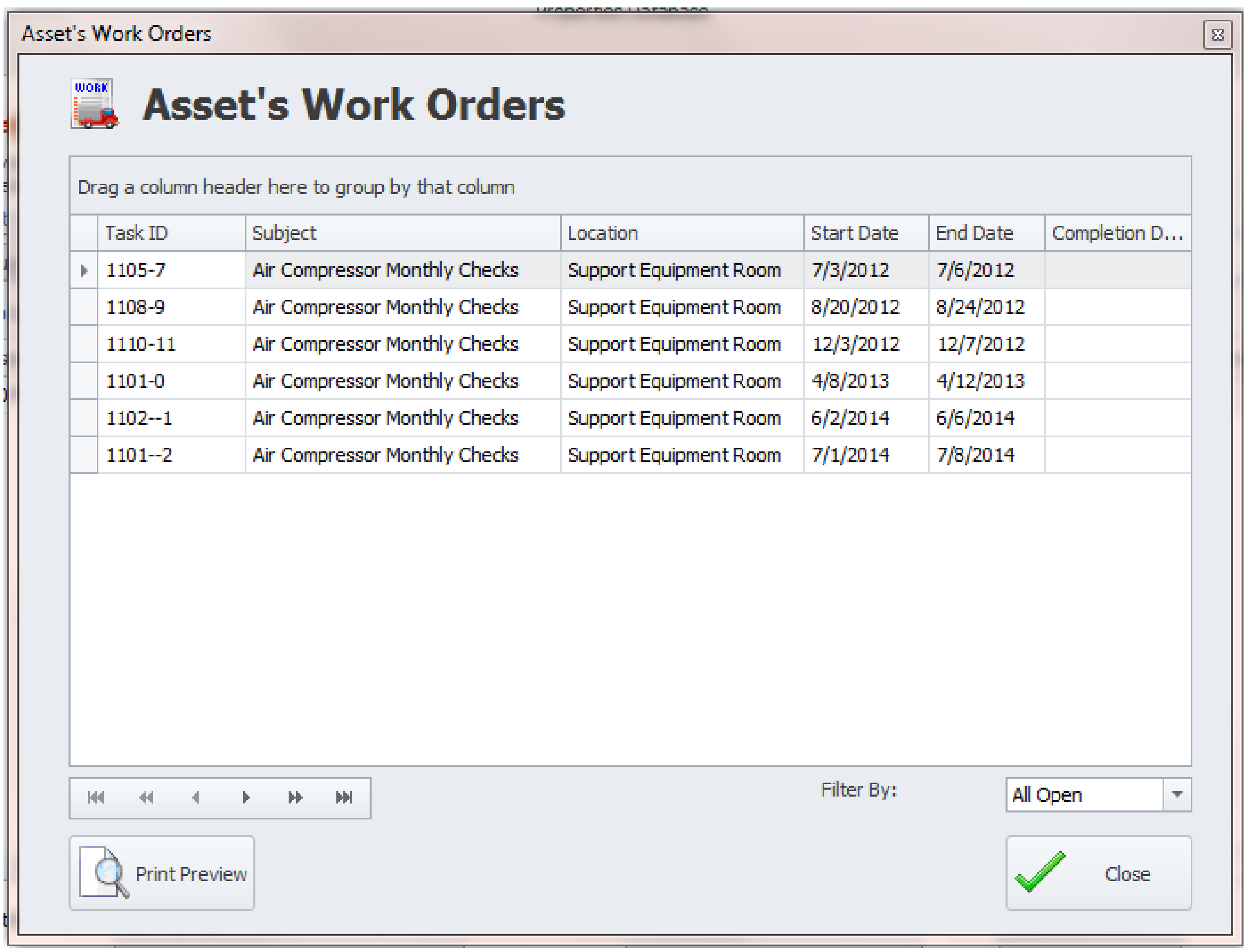
Viewing an Asset's Assigned Work Orders

You can view the work orders assigned to work orders by:

- Locate and make active the property record the asset is assign to.
- Move to the **Assigned Assets** tab.
- Move to the grid on this tab and select the asset record you want to view the work orders on.
- Click on the **Asset's Work Orders** button.

Printing an Asset's Work Order

To print one or more work orders for an assigned asset:

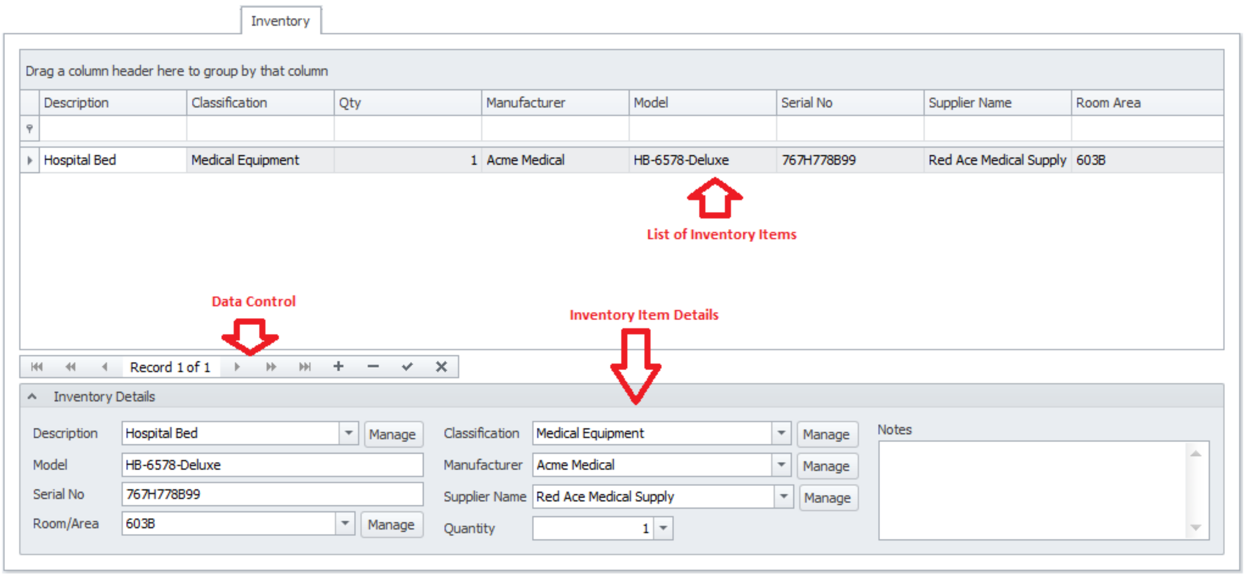


- Follow the ***Viewing an Asset's Assigned Work Orders*** instructions previously outlined in this chapter.
- Move to the grid and select the work order you want to print from those listed.

- Click on the **Print Preview** button.

Inventory Tab

On the **Inventory** tab you can assign inventory items that belong to the select property or room. The following illustrates the elements of this tab:



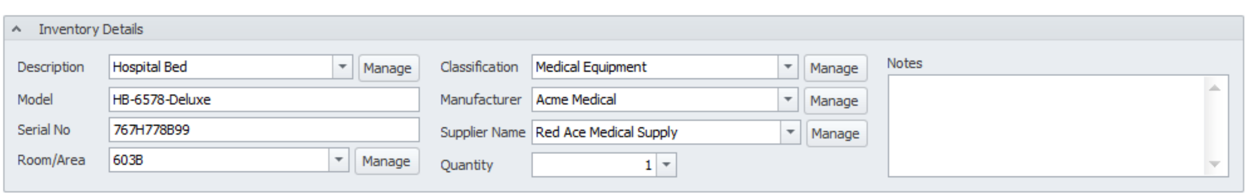
Adding a New Inventory Item

To add a new Inventory item:

- Locate and make active the property record that you want to add an item to.
- Move to the **Inventory** tab.
- Click on the **Append** (+) button in the **data control**.
- Move to the **Inventory Details** group and edit the information here detailing the new item.
- Return to the **Data Control** and click on the **Post/Save** (✓) changes button.

Inventory Details

This section allows you to edit or enter the details about the selected inventory item as shown in the following illustration:



Description
This alpha numeric field can accept up to 60 characters and is used to help identify the inventory item.

Classification
This alpha numeric field can accept up to 40 characters and is used to record the item's classification assignment.

Model
This alpha numeric field can accept up to 40 characters and is used to record the item's model number.

Manufacturer
This alpha numeric field can accept up to 40 characters and is used to record the item's manufacturer.

Serial Number
This alpha numeric field can accept up to 40 characters and is used to record the item's serial number.

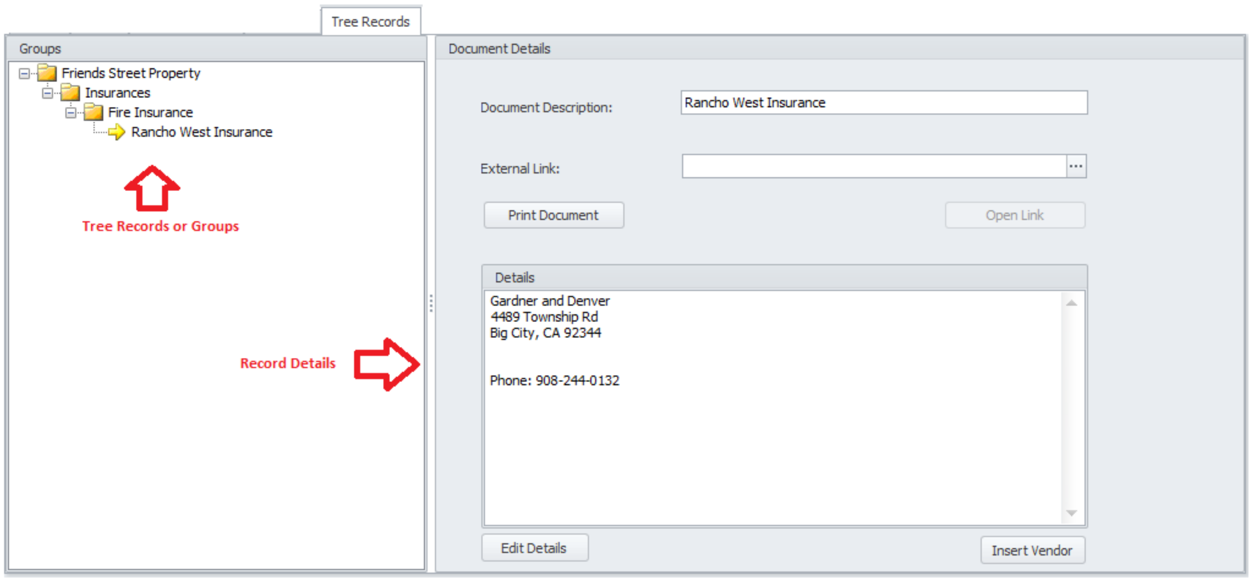
Supplier Name
This alpha numeric field can accept up to 50 characters and is used to record the item's supplier or Vendor assignment.

Room/Area
This alpha numeric field can accept up to 40 characters and is used to record the room or area the item is used or stored in.

Model
This numeric only field is used to record the quantity of the item being stored at this location.

Tree Records Tab
Tree Records are used to track contact records and or manage documents and links. Records stored here can contain information stored within the database, and/or linked to external documents. Also records are grouped by a Documents Tree that by design helps to define the documents purpose.

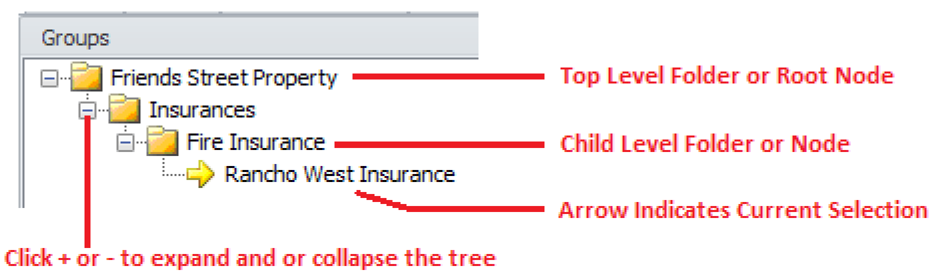
The following illustrates the elements of this tab:



Documents Trees

The *Documents Tree* is used to group the documents together in logical groups. The makes finding a documents much easier.

Understanding and Using the Documents Tree

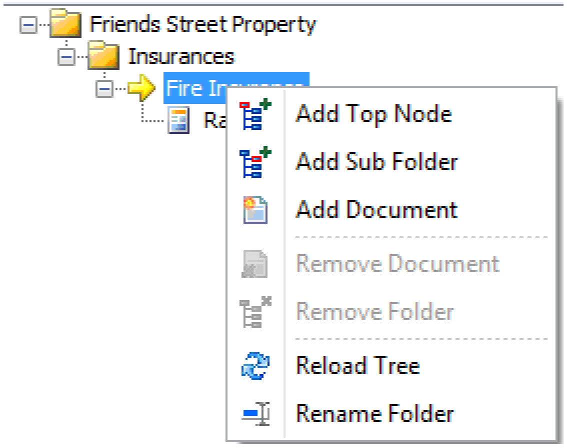


The **Documents Tree** allows for the organization of your documents in **Folders** or nodes. Basically you are not limited to the number of folders you can create and use. You can also create as many levels of these folders as maybe needed (parent – child folders). The supplied illustration shows the elements of a typical tree control.

Create a Document Folder

Each document in the system will be assigned to a folder or tree node in the **Documents Tree**. Once a folder is created documents can be added to it.

To create a new Document "Root" or "Top Level" folder:



- **Right mouse clicking** within a **Documents Tree** section will invoke a popup menu.
- Click on the **Add Top Folder** option.
- From the invoked dialog enter the name you want to use for this folder and click **OK.**

To create a new "Sub Folder" or "Child Node":

- Move to the **Documents Tree** and click and select the folder that you want to add a new sub folder to.
- **Right mouse click** within the **Documents Tree** section to invoke a popup menu.
- Click on the **Add Sub Folder** option.
- From the invoked dialog enter the name you want to use for this folder and click **OK.**

To Remove a Folder:

- Move to the **Documents Tree** and click on the folder you want to remove.
- Ensure there are no child folders or documents assigned to this folder. If there are items then either move and reassign these items or delete them. *You cannot remove a folder if anything is assigned to it.*
- **Right mouse click** on the folder you want to remove to invoke a popup menu.
- Click on the **Remove Folder** option.

To Rename a Folder:

- Move to the **Documents Tree** and click on the folder you want to rename.
- **Right mouse click** on the folder you want to remove to invoke a popup menu.
- Click on the **Rename Folder** option.
- From the invoked dialog edit the folder name to the way you want it and then click **OK**.

To move a Folder to the Top Level or Root position:

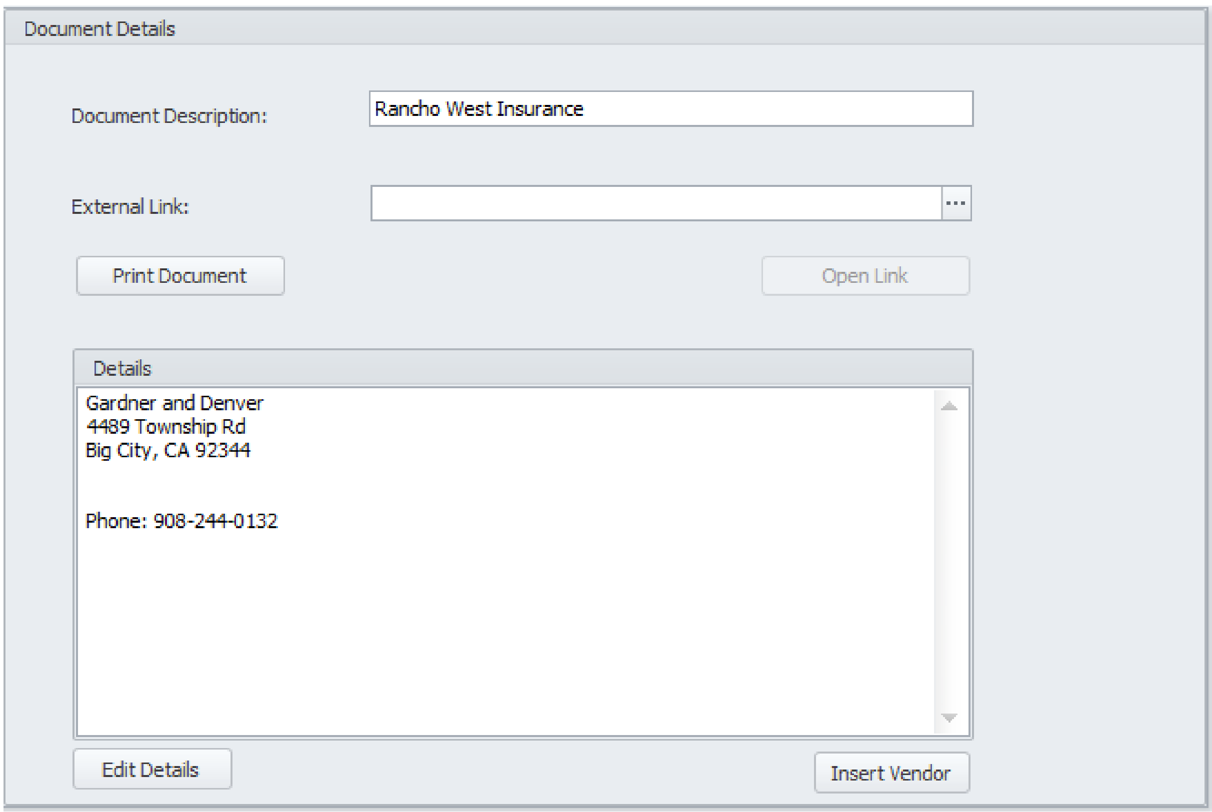
- Move to the **Documents Tree** and click on the folder you want to move.
- **Right mouse click** on the folder you want to move to invoke a popup menu.
- Click on the **Move Folder to Root (Top Level)** option.

To move a Folder and Reassign its position in the tree:

- Move to the **Documents Tree** and click on the folder you want to move.
- **Left mouse click** and hold on the folder you want to move.
- **Drag** the folder over the folder you want to move it to.
- Release the mouse button to **drop** the folder in to its new location.

Add a New Tree Document

- Move to the **Tree Document** folder.
- Move to the **Documents Tree** and click on the folder you want to add a document to.
- Right click on the folder to invoke the **Pop Up** menu.
- Select the **Add Document** option.



- Move to the **Document Details** group and edit your document.
- Click on **Save Changes** option in the ribbon.

Document Details Explained

Document Description

This alpha numeric field can accept up to 40 characters and is used to describe the document. This is also shown in the **Documents Tree**.

External Link

This field holds the complete path to a file saved to disk.

To set a document link:

- Move to the **External Link** field and click on the attached **ellipsis** (…) button.
- From the invoked **File Open** dialog box browse to where the file is stored.
- Select the file and click **Open**.

To view a linked document:

- Move to a record that contains a linked document.
- Click on the **Open Link** button.

Print Tree Document

To receive a print preview of the current Tree Document:

- Click on the **Print Document** button.

Details

There is no size limitation to this alpha numeric field, and this field can contain any information you want. You can also insert Vendor information by clicking on the **Insert Vendor** button. Selecting a vendor from the grid, and clicking **Select**.

To edit the Details information using our **Text Editor**, click on the **Edit Details** button found in this area.

Add a Property Record

To add a new property record:

- Move to the ribbon and click on the **Add New** option. This will create a new blank record in the database.
- Move through the various tabs and edit the new record.

Save Changes

To save changes to the main record, click on the **Post** (✓ check) button in the *Data Control* located within the ribbon's ***Quick Access*** toolbar.

To save changes to the main record and all the underlying records (inventory, tree documents, etc.), click on the **Save Changes** button found in the ribbon control.

Print Options

To print the current property record:

- Locate and select the item you want to print.

- Open the **File** menu and expand the **Print Options** menu by clicking on it.
- Click on the Print Option of your choice:
  - **Print Record** - Allows printer selection and other options before printing.
  - **Direct Print** - Sends the document directly to the default printer.
  - **Print Preview** - Provides a print preview of the current record.

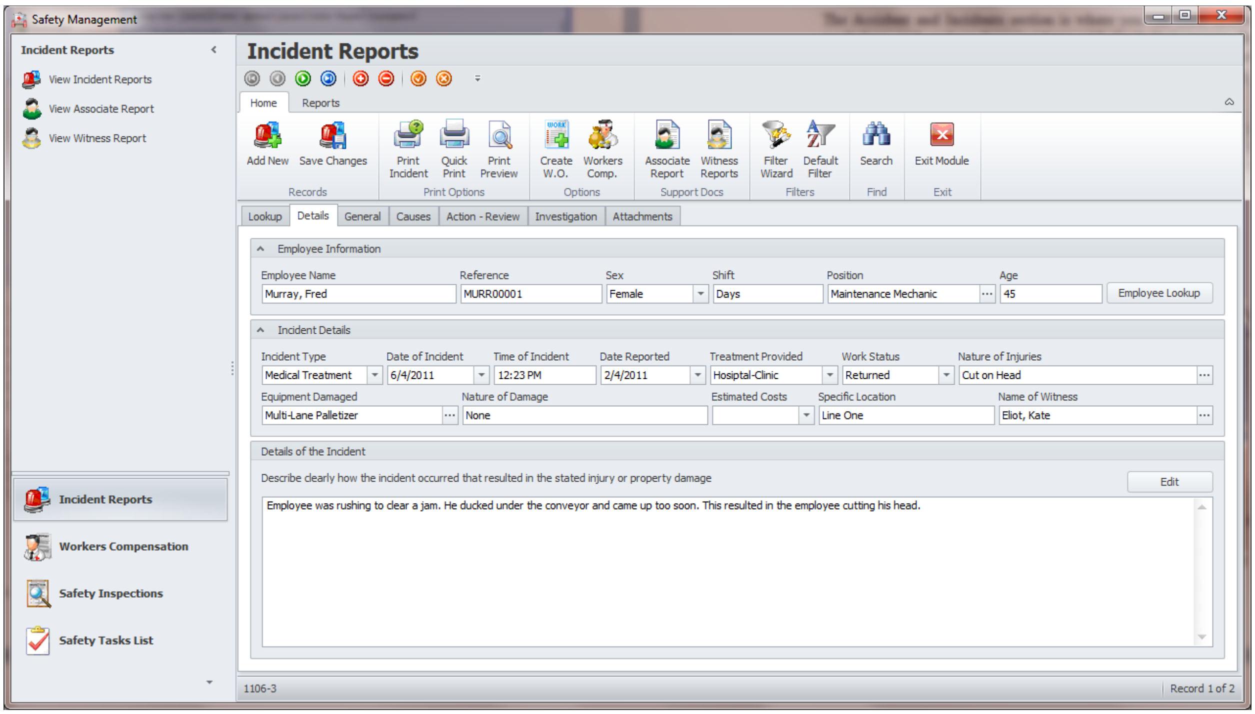
Search

To perform a search on the ***Properties*** database:

- Move to the **Properties** tab in the ribbon.
- Click on the **Search** option.
- Refer to the ***Search*** section of the ***Common Features*** chapter for more information.

Safety Management

We know that many times you'll find that the person responsible for maintenance is often responsible to oversee safety performance as well. With the **Safety Management** module we give you the tools to track accidents, do complete investigations on incidents, and make analyzes of incidents to prevent further occurrences, and more.



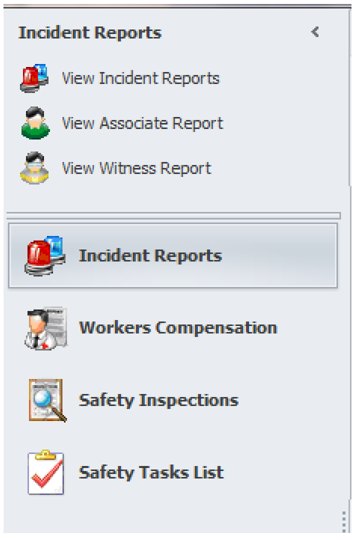
This module also allows you to track workmen compensation claims and costs, create and track safety inspections and create a safety punch list. It's also provides the means to turn incidents or punch list items into work orders. These work orders can also be tracked from within this module. So if you need safety management in your workplace, this module should provide you with the resources to get the job done.

This module is essentially made up of four different, but related internal components. You have Accidents (incidents), Workers Compensation, Safety Inspections and a Punch/Tasks list component. Our discussion on this module will be broken down into these segments or components.

Navigating the Safety Management Module

The following outlines the possible options that can be used in the navigation between the components of this module.

The navigation bar is located on the left side of the screen, and can be used to navigate through the components of this module.



- Click on a group within the **Navigation Bar** to branch to that component. The groups are the larger of the available items shown, with larger text and icons.
- Once a group is expanded, you can click on one of the available options to active that option or feature.

To open components simply click on its name. Options include:

- **Incident Reports**
- **Workers Compensation**
- **Safety Inspections**
- **Safety Task List**

Incident Reports

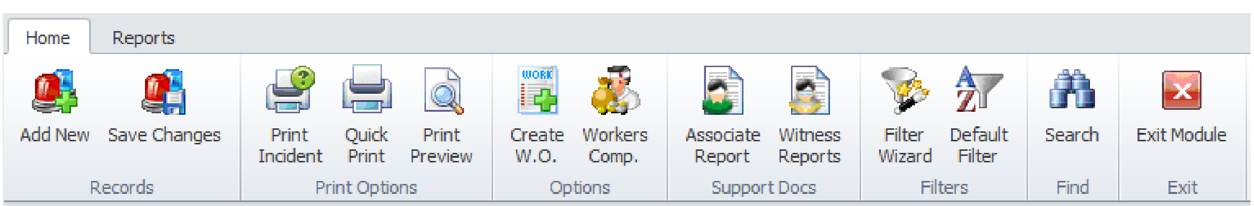
The **Accidents and Incidents** section is where you can track incidents in your workplace, and analyze these incidents with the built in reports. By analyzing this information problem areas can be identified and corrective action can be taken. Accidents can cost a company a lot of money as employees miss work, increased workers compensation costs, and property damage.

One area this section shines is in recordkeeping. You can keep detailed records on every incident within the database, and the documents can also be printed to provide for hard of these records. The advantage of keeping the incidents in a database, as opposed to just hard copies, is that the information can be more readily analyzed and reported on.

Ribbon Control

The comprehensive functionality of the **Incident Reports** component is provided via a set of Ribbon tabbed pages. Ribbon pages are structurally and visually split into logical groups. Each of these groups includes commands that perform specific functions.

HOME TAB

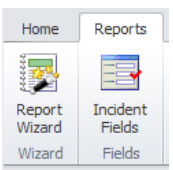


The following are the elements on the **Home** ribbon tab, reading left to right:

- **Add New** – Create a new blank record in the database.

- **Save Changes** – Saves all current changes from all elements of a record (master save).
- **Print Incident** - Allows printer selection and other options before printing.
- **Quick Print** - Sends the document directly to the default printer.
- **Print Preview** - Provides a print preview of the current record.
- **Create Work Order** – Invokes the **Work Order Creation** wizard that will allow the creation of a work order based on the current incident.
- **Workers Comp**. – Invokes the workers compensation **Claim Editor** that will allow you to track this type of information.
- **Associate Report** – Invokes an associate report where the involved employee can record what happened in their own words.
- **Witness Reports** – Invokes the witness reports routines where you can add and view witness reports.
- **Filter Wizard** – Invokes the **Incident Wizard** that lets you specify sorting and filtering criteria as it applies to incident records.
- **Default Filter** – Reapplies the default filtering criteria to the incidents database (show all).
- **Search -** Invokes the search/find routine on the Lookup Grid.
- **Exit Module** – Closes and exit the current module.

REPORTS TAB



The following are the elements on the **Home** ribbon tab, reading left to right:

- **Report Wizard** - Invokes the **Incident Wizard** that lets you specify sorting and filtering criteria as it applies to the creation of your report.
- **Incident Fields** – Invokes the **Incident Fields** dialog that allows for the creation of a report based on incident fields.

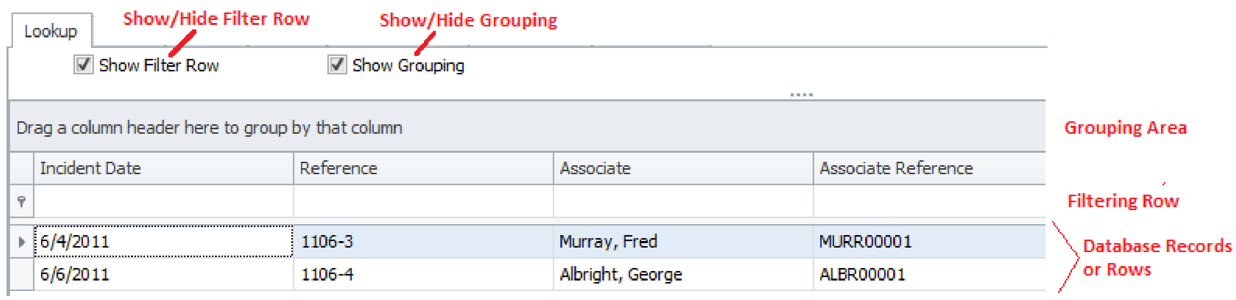
Features of the Incidents Component

There are many features of the **Incidents** Component, with the majority of these features found on either the tabbed pages found there, or within the tabbed ribbon control. We are going to explain the use of these features as we move through the tabbed pages.

Lookup Tab

This tab helps in locating incidents by grouping, filtering and sorting them. All the records in the current filter are located in the grid found here. To select a record and make it the active record, the user needs only to click on the item from within the grid. Once selected the user can click on the other tabs to view or edit the record itself.

The following image illustrates the features available on the Lookup tab:



The functions of the Lookup tabs are used through-out the system and are fairly common regardless of the modules that use them. Please review the chapter on ***Common Features*** to read about the functionality of the controls located on this tab. Apply special attention to the following:

- Using the Lookup Grids
- Searching

Other Tabs

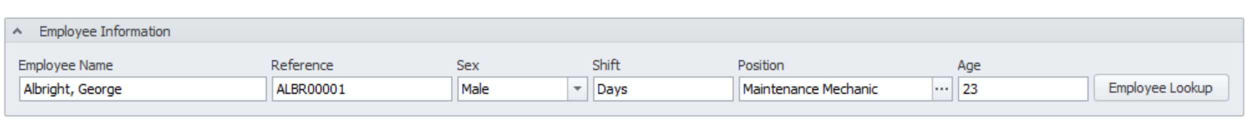
With the exception of the Lookup tab, each of the other tabs in this component all deal with different elements of the current record or incident.

Details Tab

Under the **Details** tab you can setup information on the involved employee and general details about the incident.

Employee Information

This section allows you to record information as it applies to the employee implicated in the incident. The following illustrates the elements of this group.



Employee Name

This alpha numeric field can contain up to 40 characters and is used to record the name of the person involved in the incident.

Reference
This alpha numeric field can contain up to 30 characters and is used to record the employee reference id.

Sex
This alpha numeric field can contain up to 6 characters and is used to indicate the gender of the employee. Set this field by selecting an option from the drop down list.

Shift
This alpha numeric field can contain up to 15 characters and is used to record the employee's assigned shift or crew.

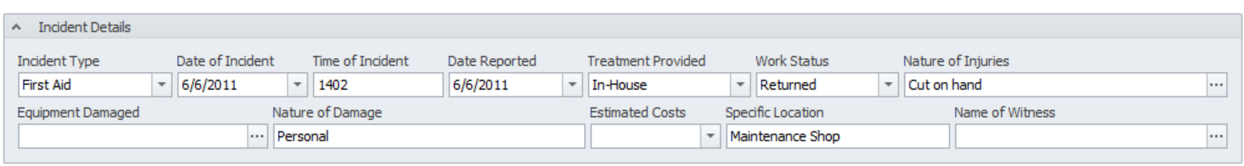
Position
This alpha numeric field can contain up to 30 characters and is used to record the employee's job title.

Age
This numeric only field is used to record the employee's age at the time of the incident.

Employee Lookup
Click this button to invoke the **Employee Database** dialog where you can select an employee from a lookup list. To use this feature:

- Click on the **Employee Lookup** button.
- When the lookup dialog loads, move to the grid and select the record you want to use.
- Click on the **Select** button.

Incident Details
This section allows you to record the what, when and where type information as it relates to the current incident. The following illustrates the elements of this section:



Incident Type
Selectable from the drop down list, this field specifics the type of incident that occurred. Options include:

- First Aid
- Loss Time
- Near Miss
- Medical Treatment

- Restricted Work
- Property Damage
- Other

Date of Incident

This date only field is used to indicate the date of the incident. Set this field by using the attached calendar.

Time of Incident

This alpha numeric field can contain up to 15 characters and is used to record time of the reported incident.

Date Reported

This date only field is used to indicate the date the incident was reported. Set this field by using the attached calendar.

Treatment Provided

Selectable from the drop down list, this field specifies the type of treatment that was provided as it relates to the incident. Options include:

- None
- In-House
- Hospital/Clinic

Work Status

Selectable from the drop down list, this field indicates the employee's work status immediately following the incident. Options include:

- Returned
- Did Not Return

Nature of Injuries

This alpha numeric field can contain up to 30 characters and is used to record the general nature of injuries or the body parts affected.

Equipment Damaged

This alpha numeric field can contain up to 60 characters and is used to specify the name of the equipment that was damaged. You can also set this field by accessing the **Equipment and Assets** database. To assign from the database:

- Click on the **Ellipsis** (…) button attached to this field.
- When the lookup dialog loads, move to the grid and select the record you want to use.
- Click on the **Select** button.

Nature of Damage

This alpha numeric field can contain up to 30 characters and is used to record the type of damage that occurred.

Estimated Costs

This is a numeric only field and is used to record (if known), the estimated cost of the damage. Set this field by using the attached calculator.

Specific Location

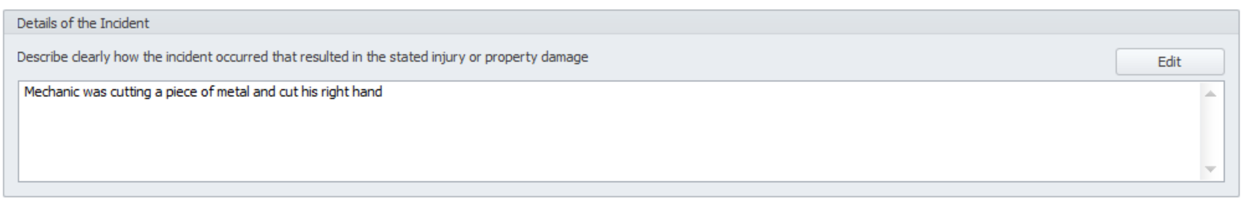
This alpha numeric field can contain up to 30 characters and is used to specify the location of the incident.

Name of Witness

This alpha numeric field can contain up to 30 characters and is used to record the name of the primary witness. You can actually record as many **Witness Reports** as needed.

Details of Incident

This section allows you to record the details as it relates to the incident. The following illustrates the elements of this section:



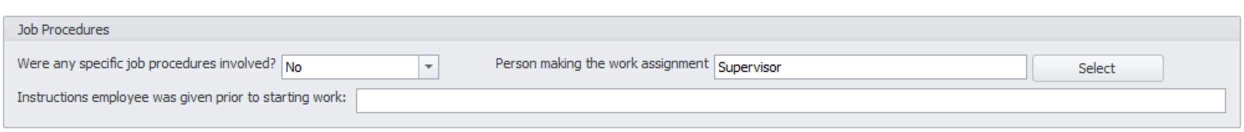
The alpha numeric field here has no size limitations. You can edit the field with the **Text Editor** by clicking on the **Edit** button found in this section.

General Tab

Under the **General** tab you can setup information on job procedures, risk evaluation and medical treatment provided.

Job Procedures

This section allow you to specify and job related procedures that were provided, and who made the work assignment. The following illustrates the elements of this section:



Were any specific job procedures included

Answer this question by selecting an answer as provided in the drop down list adjacent to this field.

Person making the work assignment

This alpha numeric field can contain up to 30 characters and is used to record the person making the work assignment. To assign from the database:

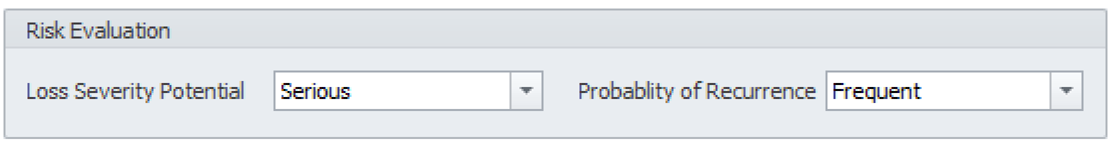
- Click on the **Select** button adjacent to this field.
- When the lookup dialog loads, move to the grid and select the record you want to use.
- Click on the **Select** button.

Instructions given to employee prior to starting work

There is no size limitations to this alpha numeric field. Use this field to record any special instructions provided to the employee prior to the commencement of the work.

Risk Evaluation

This section allows you to specify the severity and recurrence probability.



Loss Severity Potential

Selectable from the drop down, this field would indicate the Loss Severity Potential is the cause of the incident is not corrected. Options include:

- Major
- Serious
- Minor

Probability of Recurrence

Selectable from the drop down, this field would indicate the probability that incident could happen again if the cause of the incident is not corrected. Options include:

- Frequent
- Occasional
- Rare

Root Cause Assignment

This section allows you to specify the Root Cause of the incident.

The **Root Cause** field of the Incident document is somewhat different from the other fields of incident reports. This field does not show up on any of the printed documents but is used exclusively for reporting. This field lets you group like incidents on reports, and you should try to reuse the same description as often as possible. Good descriptions for this field maybe ducking under, machine malfunctions, running, horseplay, and so on. Hopefully, you can see how this may come in handy for grouping like causes on reports.

This alpha numeric field can contain up to 30 characters and best to set this field by selecting an item from the drop down list. If this cause is not available, you can add it by clicking on the **Manage** button adjacent to this field.

Medical Treatment Provided

This section allows you to record the medical treatment provided to an injured employee. The following illustrates the elements of this section:

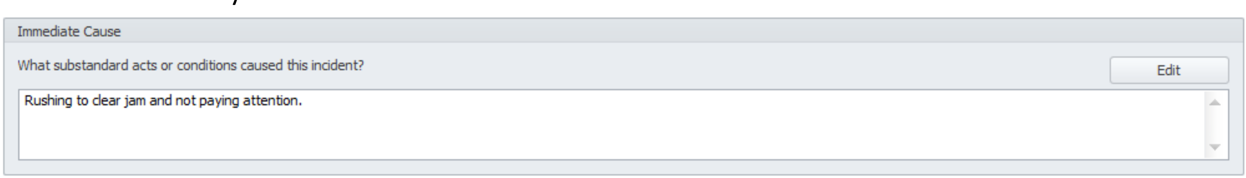
The alpha numeric field here has no size limitations. You can edit the field with the **Text Editor** by clicking on the **Edit** button found in this section.

Causes Tab

This tab allows you to provide details about the causes of the incident.

Immediate Cause

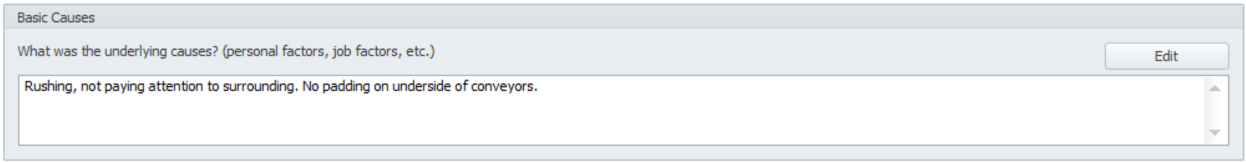
This section allows you to record the substandard acts of conditions that caused the incident.



The alpha numeric field here has no size limitations. You can edit the field with the **Text Editor** by clicking on the **Edit** button found in this section.

Basic Causes

This section allows you to record the underlying causes of the incident. This could include items such as job or personal factors, and so on.



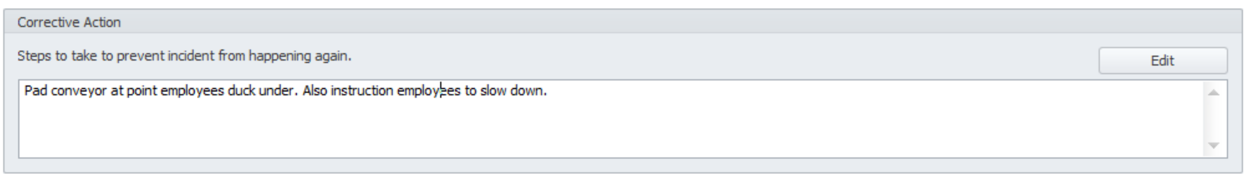
The alpha numeric field here has no size limitations. You can edit the field with the **Text Editor** by clicking on the **Edit** button found in this section.

Action - Review Tab

This tab allows you to record Corrective Action to help prevent further incidents, and your Health and Safety team's review of the incident.

Corrective Action

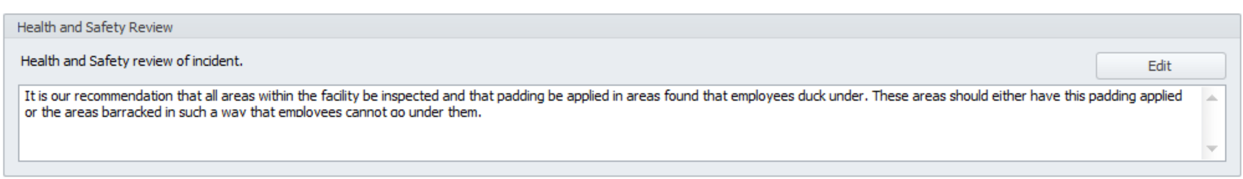
This section allows you to record the steps taken to prevent incident from happening again. The following illustrates the elements of this section:



The alpha numeric field here has no size limitations. You can edit the field with the **Text Editor** by clicking on the **Edit** button found in this section.

Health and Safety Review

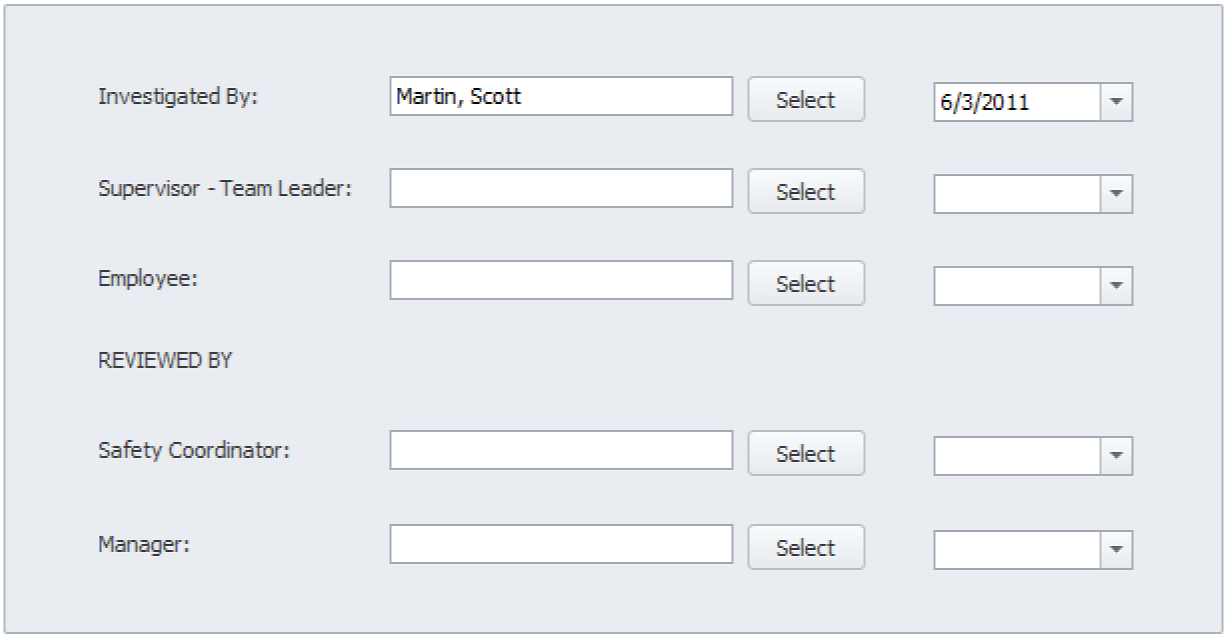
This section allows you to record the Health and Safety committee review of the incident. The following illustrates the elements of this section:



The alpha numeric field here has no size limitations. You can edit the field with the **Text Editor** by clicking on the **Edit** button found in this section.

Investigation Tab

This tab allows you to provide sign-offs for the investigation of the incident as shown in the following illustration:



All of these named fields can contain 30 alpha numeric characters each and can be directly typed in, or set by selecting employees from the **Employee Database**.

To set these fields from the Employees Database:

- Click on the **Select** button adjacent to the field you're working with.
- When the lookup dialog loads, move to the grid and select the record you want to use.
- Click on the **Select** button.

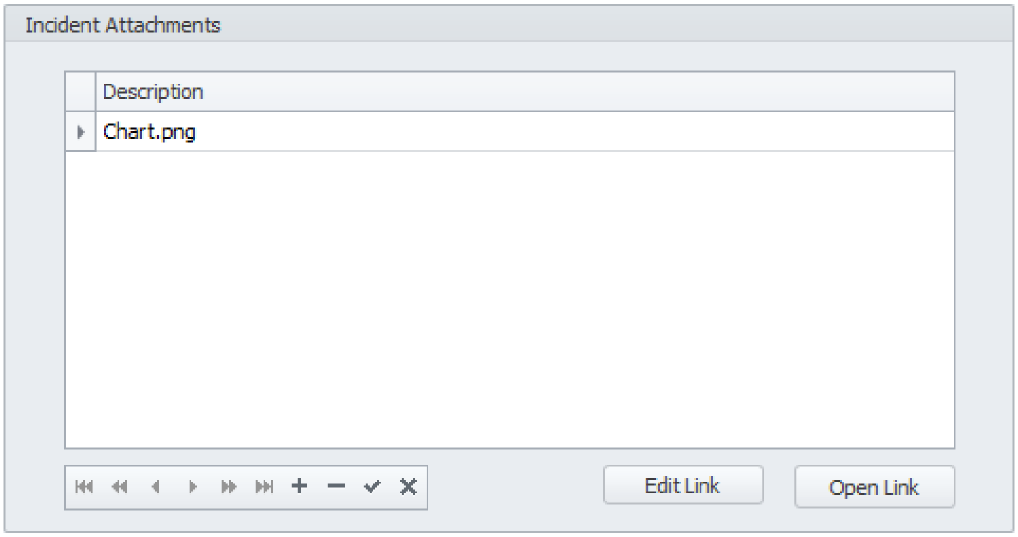
To set the date values on this tab, simply select the date from the attached calendars.

Attachments Tab

On this tab you can create links to external, supporting documents that relate to the incident. These could include pictures and other related documents.

You can attach as many external files as you would like to a record. These attachments can include images, mechanical drawings, PDF files, MSDS sheets and more. For more information on this feature, please refer to the ***Attachments*** section of the ***Common Features*** chapter.

The following illustrates the elements found in this section:



Saving Changes

Whenever you edit an incident record, you must save your changes to retain these edits.

To Save Changes:

- Move to the **Home** tab in the ribbon and click on the **Save Changes** option. This option saves all changes to all elements of the record.
  OR
- Move to the data control in the Quick Access toolbar and click on the **Post/Save Changes** button.

Creating a New Incident

To create a new incident record:

- Move to the **Home** tab in the ribbon and click on the **Add New** button.
- When prompted about using the wizard, click on the **No** button.
- Move through the fields of the various tabs and edit the information found there.
- Move to the **Home** tab in the ribbon and click on the **Save Changes** option.

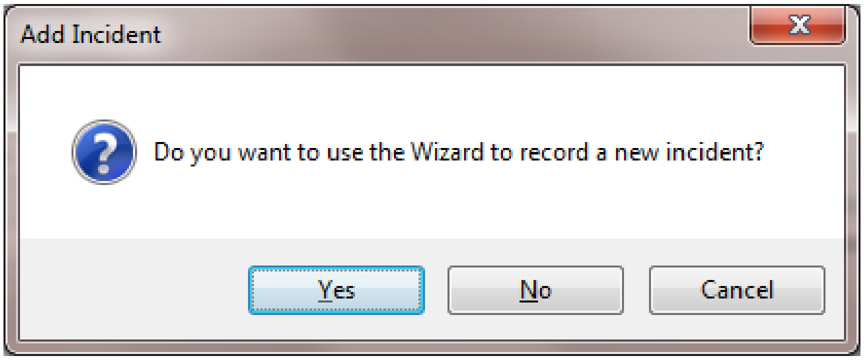
Creating a New Incident with the Wizard

In this tutorial we will try to accomplish two things. The first will be to outline the steps in creating an incident using the **Incident Creation Wizard**, and while we're at it, show the features of this wizard.

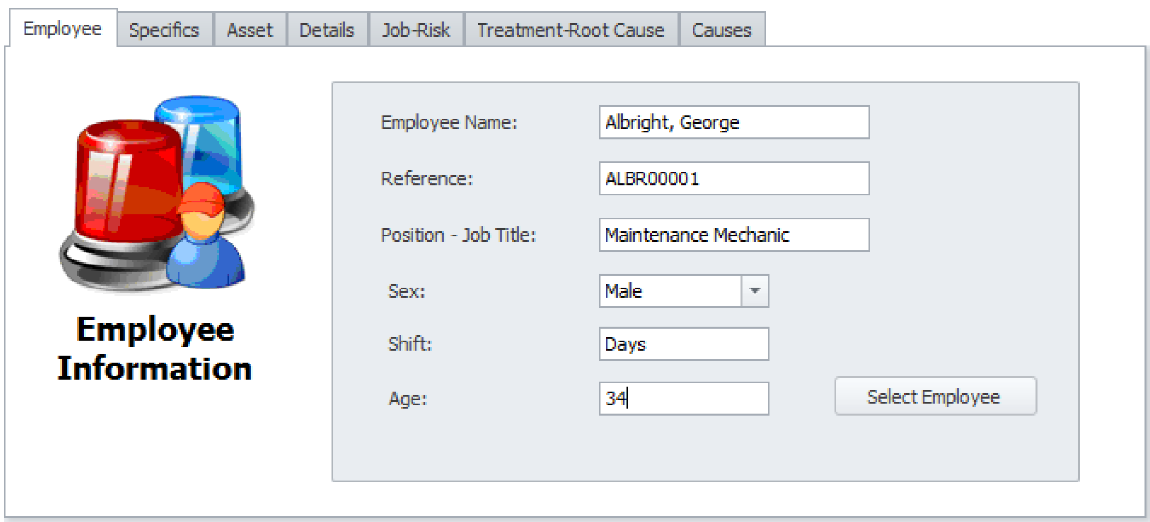
The **Incident Creation Wizard** is used to create a new incident tracking record. The wizard style of this dialog was designed to help ease the creation process by guiding you through the steps.

Note: The input fields of this wizard are same as those found on the main tabs of this component. The information outlined previously on these tabs will outline these fields in greater detail. If needed, please refer to the main tabs sections of this chapter for more information.

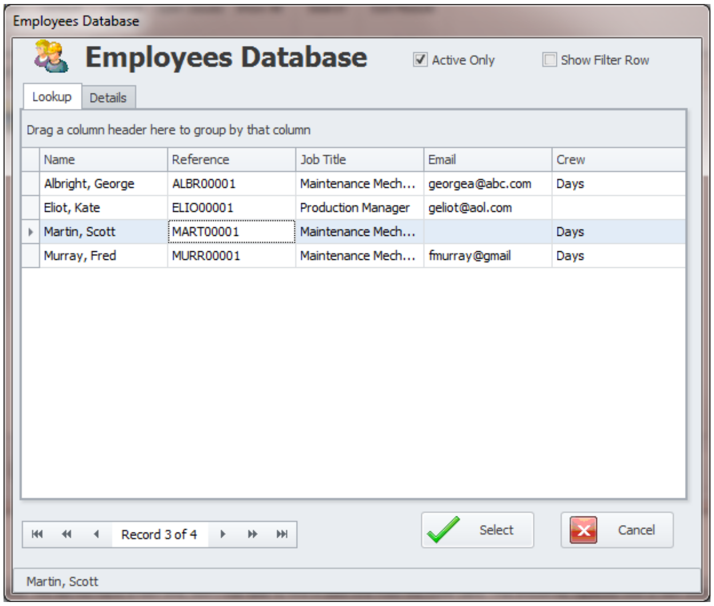
1. Move to the **Home** tab in the ribbon and click on the **Add New** button.



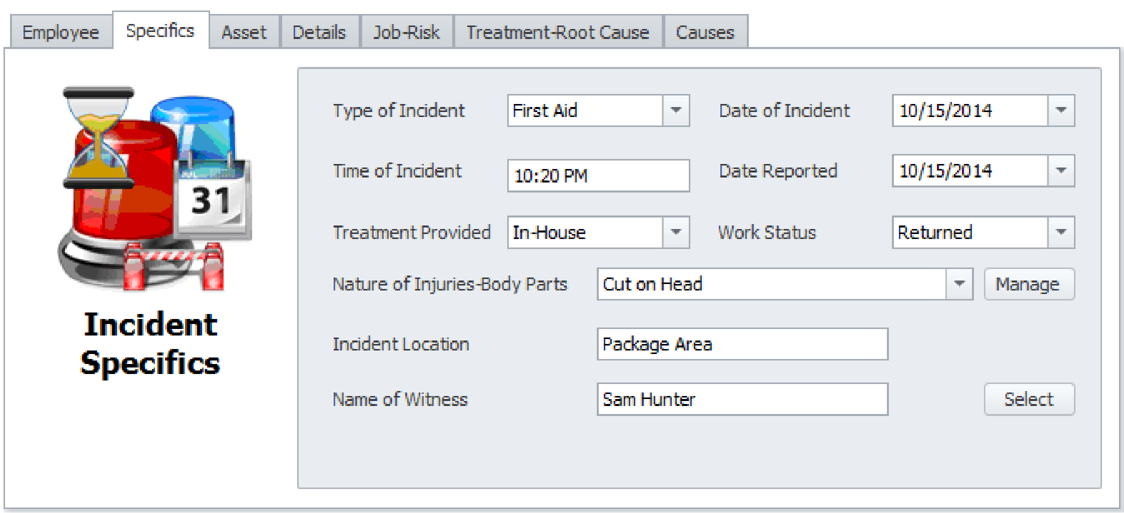
2. When prompted about using the wizard, click on the **Yes** button. This will invoke **the Incident Creation Wizard**.
3. Move to the **Employee** tab if not already there. The following illustrates the elements of this tab:



4. Move to and click on the **Select Employee** button. This will invoke the **Employees Database** lookup dialog.

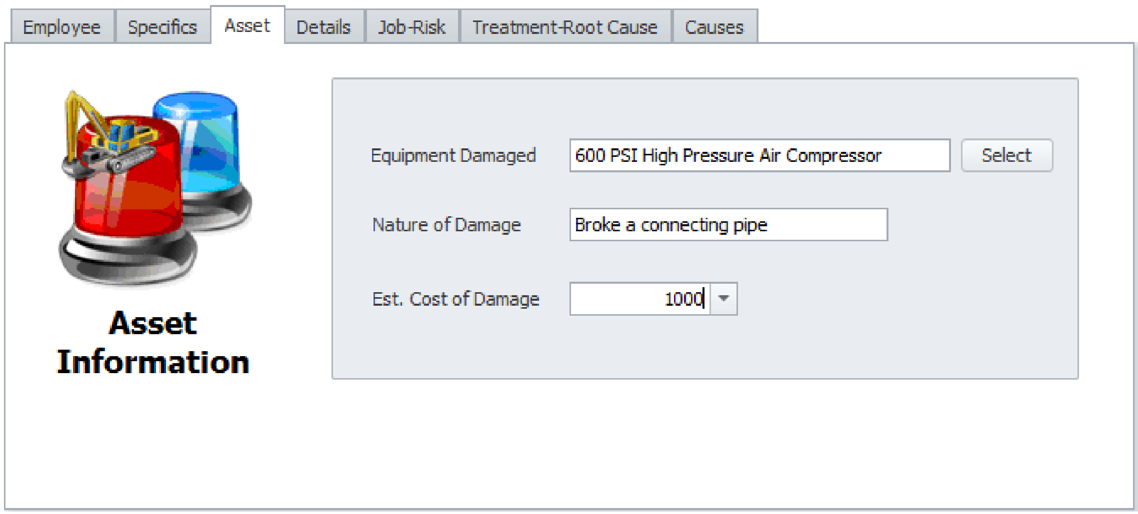


5. Select the employee record you want to assign from those listed in the grid.
6. Click on the **Select** button.
7. Set up the other fields on this tab that wasn't automatically filled in for you when the employee was selected.
8. Move to the **Specifics** tab by either clicking on the tab or clicking the **Next** button.

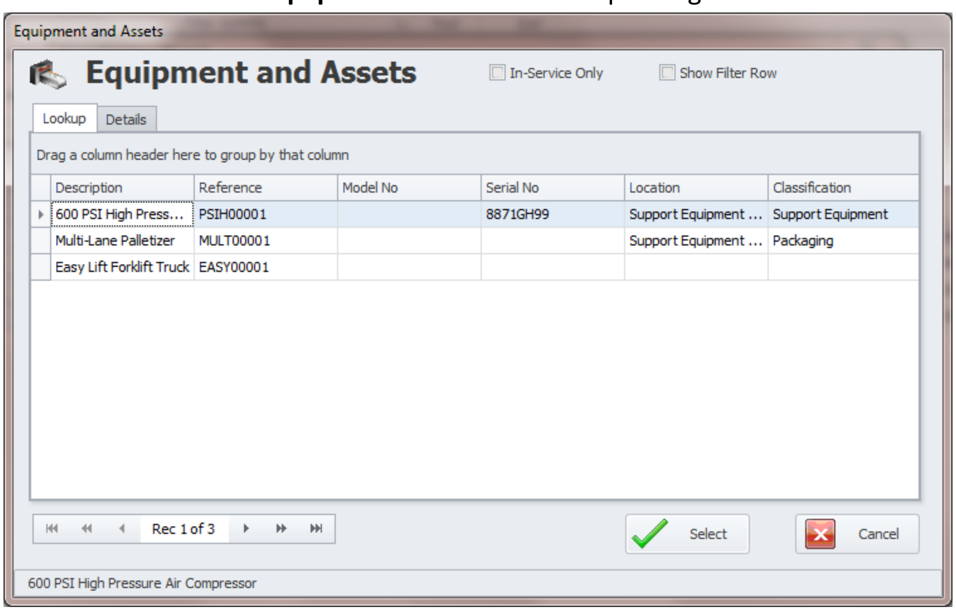


9. Move to the **Type of Incident** drop down and select an item from the list that best describes the type of incident this related to.
10. Move to the **Date of Incident** field and assign this information from the attached calendar.
11. Move to the **Time of Incident** field and type in the time this incident occurred.
12. Move to **Treatment Provided** drop down and make the appropriate selection from the list.
13. Move to the **Work Status** drop down and select if the employee returned to work or not.

14. Move to the **Nature of Injuries-Body Parts** section and either type in this information, or select an item from the drop down list.
15. Move to **Incident Location** field and type in where the incident took place.
16. Move to the **Name of Witness** field and type in the name of any witness.
17. Move to the **Asset** tab by either clicking on the tab or clicking the **Next** button.

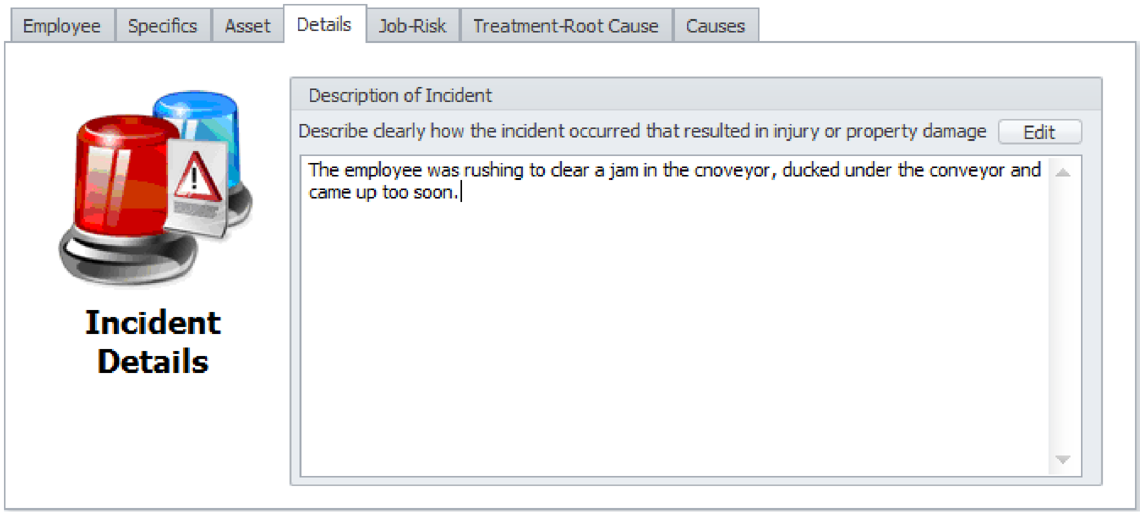


18. Move to the **Equipment Damaged** field and click on the **Select** button adjacent to this field. This action will invoke the **Equipment and Assets** lookup dialog.

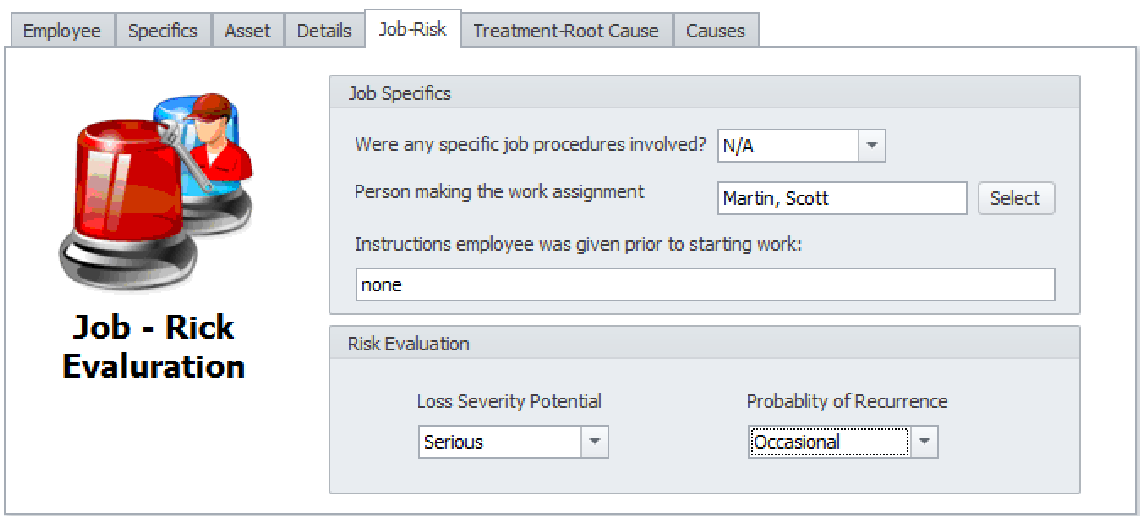


19. Select the equipment record you want to assign from those listed in the grid.
20. Click on the **Select** button.
21. Move to the **Nature of Damage** field and type in the damage that was done to the item.
22. If known, move to the **Estimated Cost of Damage** field and enter this amount.

23. Move to the **Details** tab by either clicking on the tab or clicking the **Next** button.

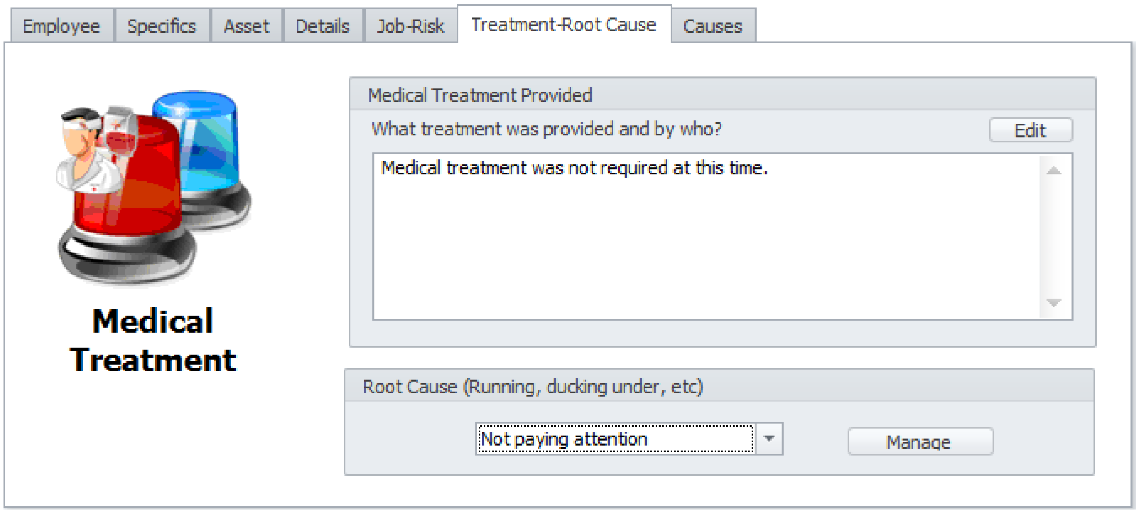


24. Move to the **Description of Incident** field and provide details about the incident.
25. Move to the **Job-Risk** tab by either clicking on the tab or clicking the **Next** button.

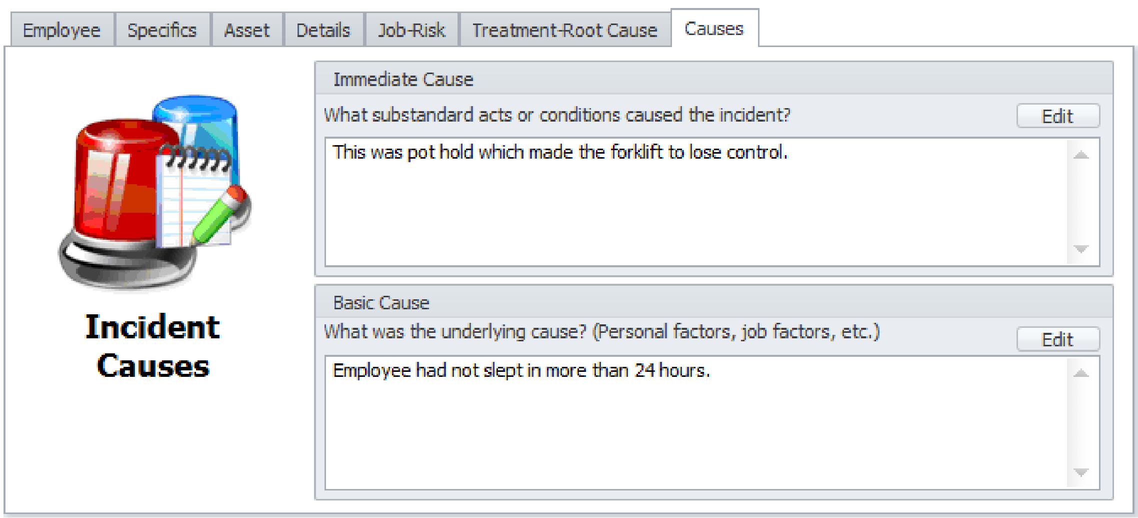


26. Answer the '**Were any specific job procedures involved?**' question by selecting a response from the drop down list.
27. Move to the **Person making the work assignment** field and type in this information. You can also select an employee from **Employees Database** by:
    a. Clicking on the **Select** button adjacent to this field.
    b. Select the employee record you want to assign from those listed in the grid.
    c. Click on the **Select** button.
28. Move to the **Instructions employee was given prior to starting work** field and enter (if any) this information.
29. Move to the **Loss Severity Potential** drop down and select the appropriate item you want to assign.
30. Move to the **Probability of Recurrence** drop down and select the appropriate item you want to assign to this item.

31. Move to the **Treatment-Root Cause** tab by either clicking on the tab or clicking the **Next** button.



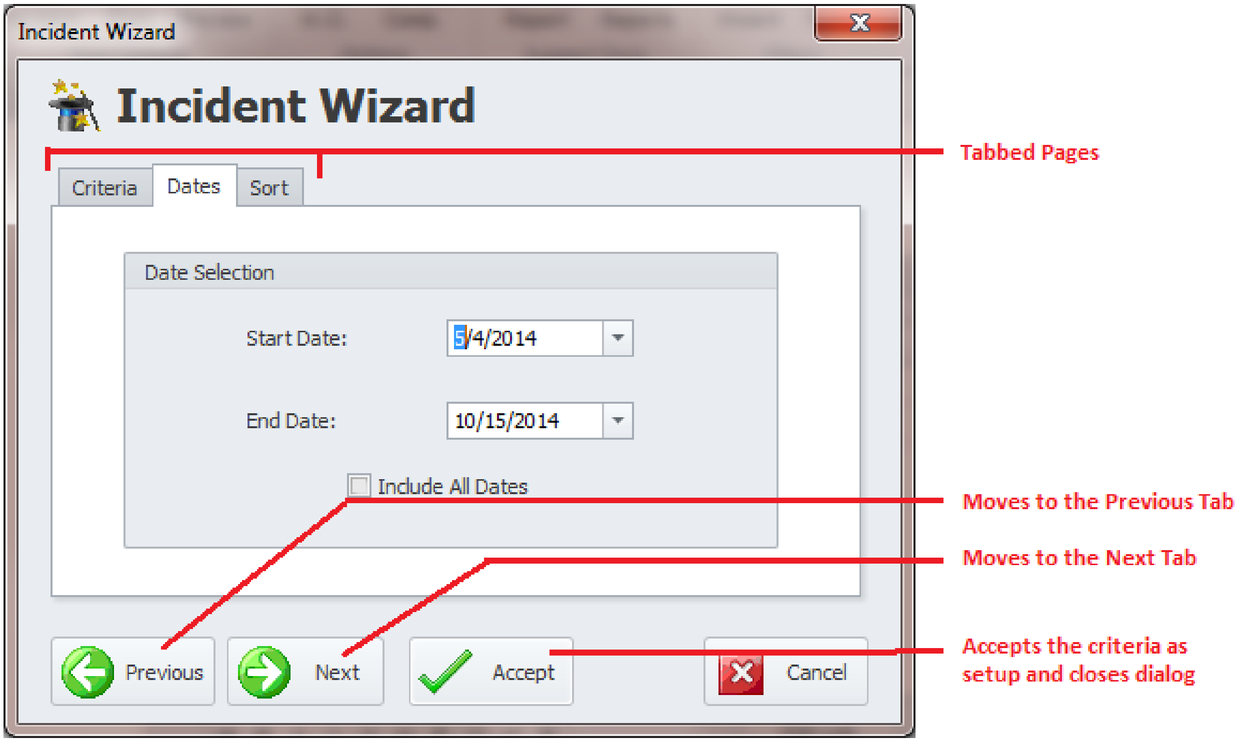
32. Move to the **Medical Treatment Provided** area and enter the treatment that was provided and who provided the treatment. You can also use the **Text Editor** to edit this information by clicking on the **Edit** button found in this area.
33. Move to the **Root Cause** area, and using the drop down list, assign a root cause for the incident.
34. Move to the **Causes** tab by either clicking on the tab or clicking the **Next** button.



35. Move to the **Immediate Cause** area and enter what substandard acts or conditions caused the incident. You can also use the **Text Editor** to edit this information by clicking on the **Edit** button found in this area.
36. Move to the **Basic Cause** group and enter what underlying items that may have caused the incident. You can also use the **Text Editor** to edit this information by clicking on the **Edit** button found in this area.
37. Click on the **Save and Close** button to save and create the incident record.

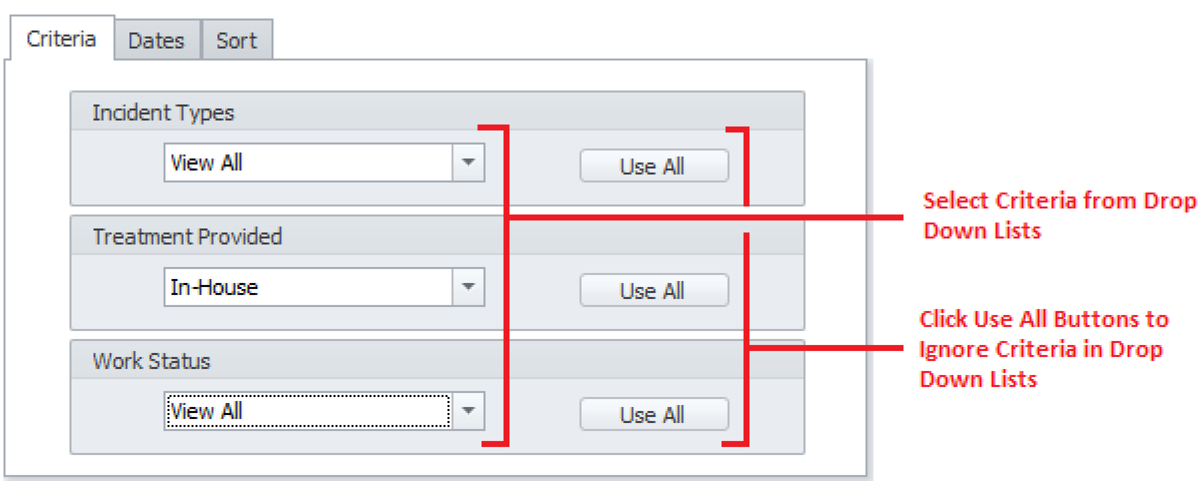
Incident Wizard

The **Incident Wizard** is used as the **Filter Wizard** and as the **Report Wizard**. The following illustration shows the main elements of this wizard.



Incident Wizard - Criteria Tab

The following illustration shows the elements of the **Criteria** tab:

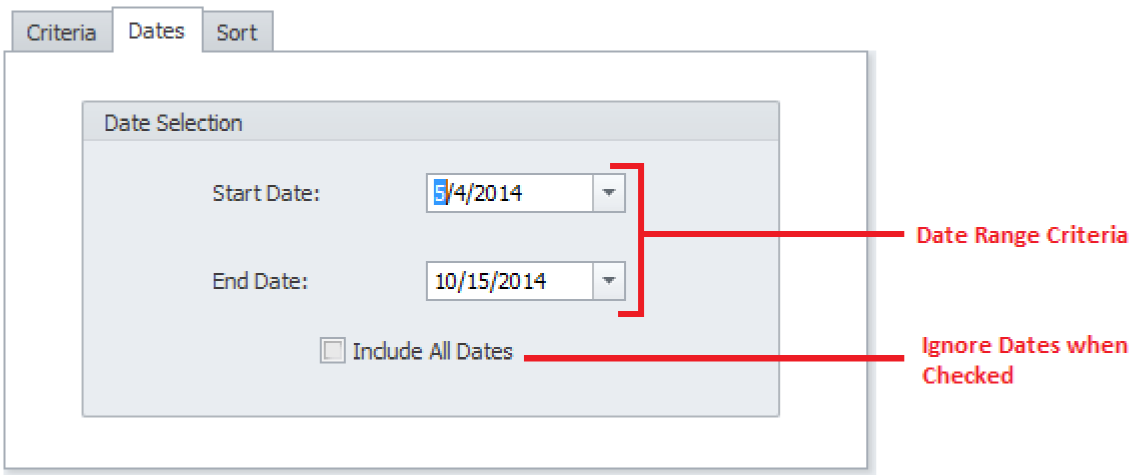


- To assign values to these fields:
    - Move to the appropriate fields and select the item you want to assign from the drop lists found here.
- To clear the assignments:

- Move to the appropriate field and click on the **Use All** button adjacent to them.

Incident Wizard - Criteria Tab

The following illustration shows the elements of the **Dates** tab:

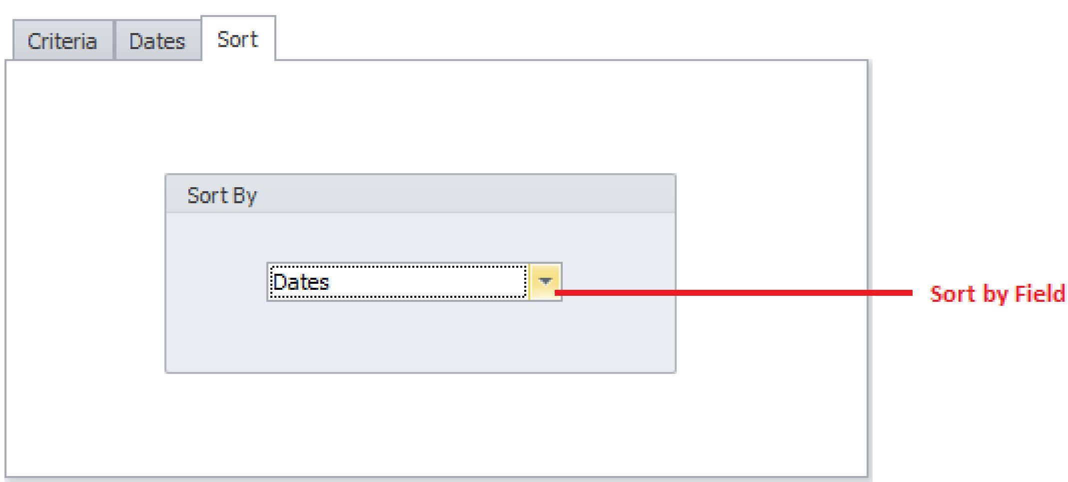


To assign date values:

- Move to the **Start Date** field and using the drop down calendar, select the starting date of your filtering criteria.
- Move to the **End Date** field and using the drop down calendar, select the ending date of your filtering criteria.
- To ignore or use all available dates, check the **Include All Dates** checkbox.

Incident Wizard - Sort Tab

The following illustration shows the elements of the **Sort** tab:



- To setup the field to sort by:
  - Move to **Sort By** drop down list, and select one of the available fields.

Incident Wizard – Finish

- Click on the **Accept** button when done setting up the criteria.

Printing an Incident Record/Report

The following image shows a preview an Incident Report:

1106-3
INCIDENT REPORT

INCIDENT DETAILS

Associate Name	Reference	Age	Gender	Crew	Hire Date	Position-Job Title
Murray, Fred	MURR00001	45.0	Female	Days	11/3/2009	Maintenance Mechanic

Type of Incident	Date of Incident	Time of Incident	Date Reported	Treatment Provided
Medical Treatment	10/15/2014	12:23 PM	10/15/2014	Hospital/Clinic

Work Status	Nature of Injuries	Equipment Damaged
Returned	Cut on Head	Multi-Lane Palletizer

Nature of Damage	Est. Cost of Damage	Specific Location of Incident	Name of Witness
None		Line One	Eliot, Kate

DESCRIPTION OF INCIDENT

How the incident occurred in the above outlined injury or damage:

Employee was rushing to clear a jam. He ducked under the conveyor and came up too soon. This resulted in the employee cutting his head.

JOB FACTORS

Were any specific job procedures involved:	Yes
Person who made work assignment:	Eliot, Kate
Instruction given before starting work:	Work safely

MEDICAL TREATMENT PROVIDED

What treatment was provide and by who:

Took to clinic. Had deep cuts in head that required 4 stitches.

RISK EVALUATION

Evalation of loss protential if not corrected:

Loss Serverity Protential:	Serious
Probaility of Recurrance:	Frequent

CAUSE ANALYSIS

IMMEDIATE CAUSE - Substandard acts of conditions that caused the incident:

Rushing to clear jam and not paying attention.

BASIC CAUSES - Underlying causes (personal factors, job factors, etc.):

Rushing, not paying attention to surrounding. No padding on underside of conveyors.

CORRECTIVE ACTION

Steps to take to prevent the incident from happening again:

Pad conveyor at point employees duck under. Also instruction employees to slow down.

INVESTIGATION

Investigated By:	Martin, Scott	Date	6/3/2011
Supervisor/Team Leader:		Date	
Associate:		Date	

Reviewed By:

Safety Coordinator:		Date	

Page 1 of 2

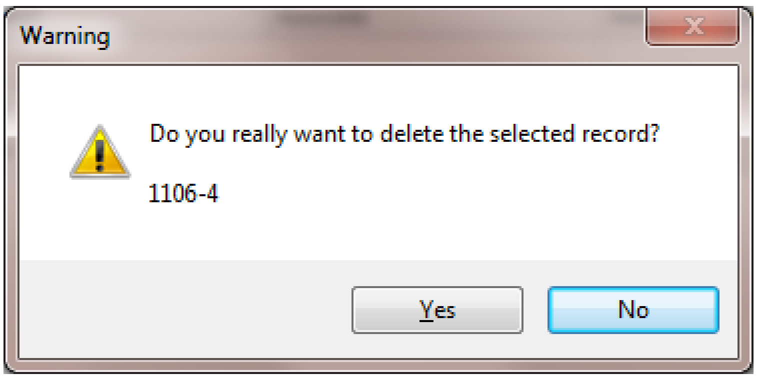
To print an incident record:

- Locate and make active the incident record you want to print.
- Move to the **Home** tab in the ribbon and locate the **Print Options** group.
- Click on one of the available options found in this group. Options include:
    - **Print Incident** - Allows printer selection and other options before printing.
    - **Quick Print** - Sends the document directly to the default printer.
    - **Print Preview** - Provides a print preview of the current record.

Deleting an Incident Record

To delete or remove an Incident Record from the database:

- Locate and make active the record you want to remove.
- Move to the Quick Access toolbar and click on the **Delete Record** option.



- When prompted about the deletion, click on the **Yes** button.

Creating a New Work Order

You can create a work order based on an incident by:

- Locate and make active the incident you want to create a work order for.
- Move to **Home** tab in the ribbon and click on the **Create W.O.** option. This will invoke the **Work Order Creation Wizard**.
- Refer to the ***Common Features*** chapter and the ***Work Order Wizard*** section to find how to use this wizard.

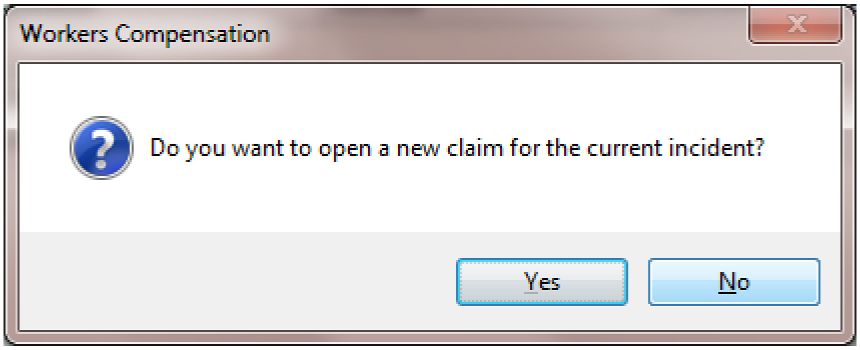
Creating a New Workers Compensation Claim

Workers Compensation Claims are based on **Incidents Reports.** Therefore all new claims must be initiated from within the **Incidents Reports** component.

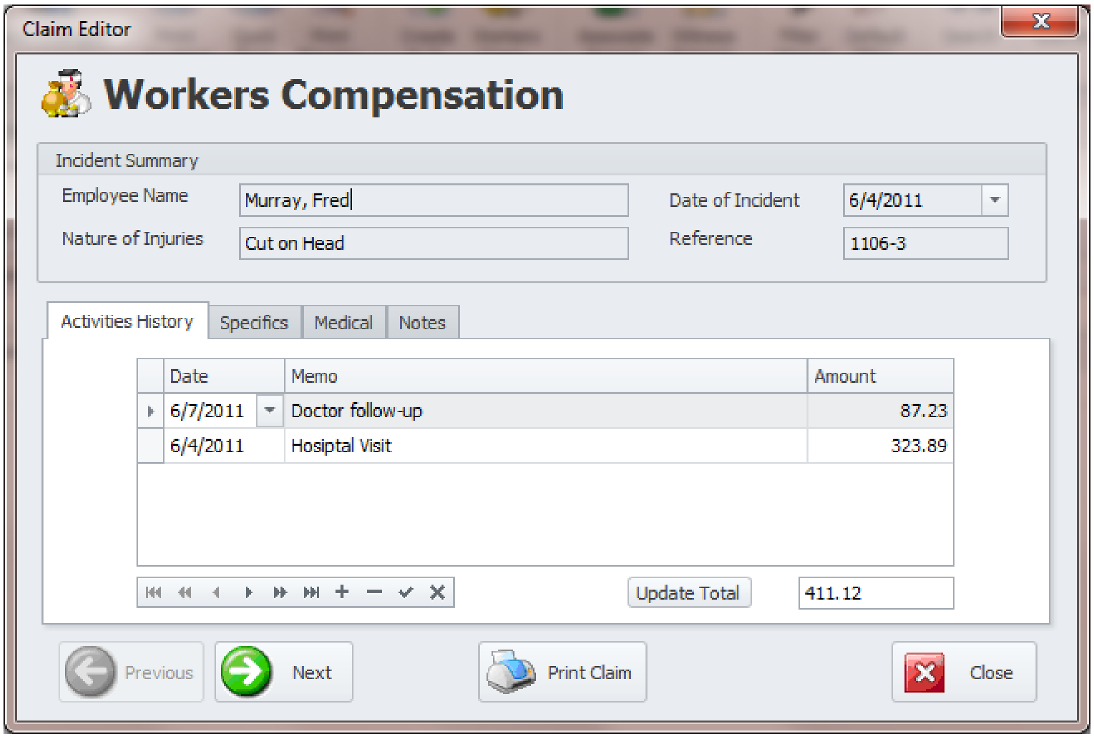
To create a new Workers Compensation claim:

1. Locate and make active the incident that you want to base the claim on.

2. Move to the **Home** tab and click on the **Workers Comp.** option.



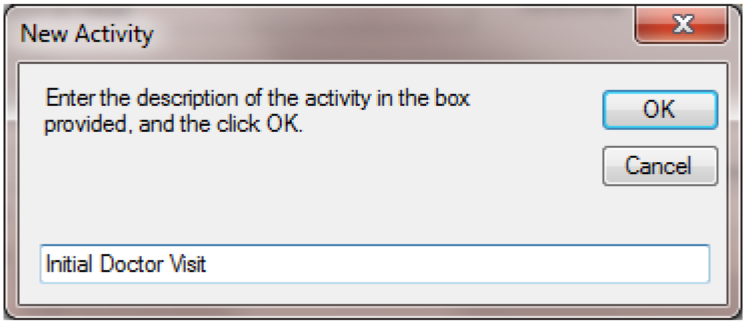
3. When prompted about creating a new claim, click on the **Yes** button. If a claim already exists for this incident, this step will be skipped.
4. This action will invoke the **Claim Editor** as shown in the following illustration:



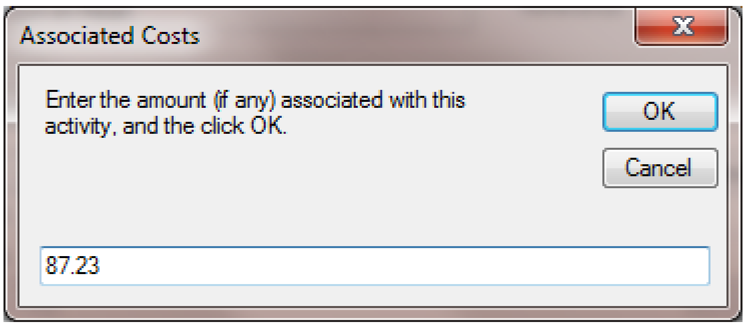
Incident Summary: This section is for information only and cannot be edited. It provides basic information on the incident this claim is being based on.

5. If you want to record an activity as it related to this claim, move to the **Activities History** tab. If you don't to add an activity record at this time, skip to step 11.

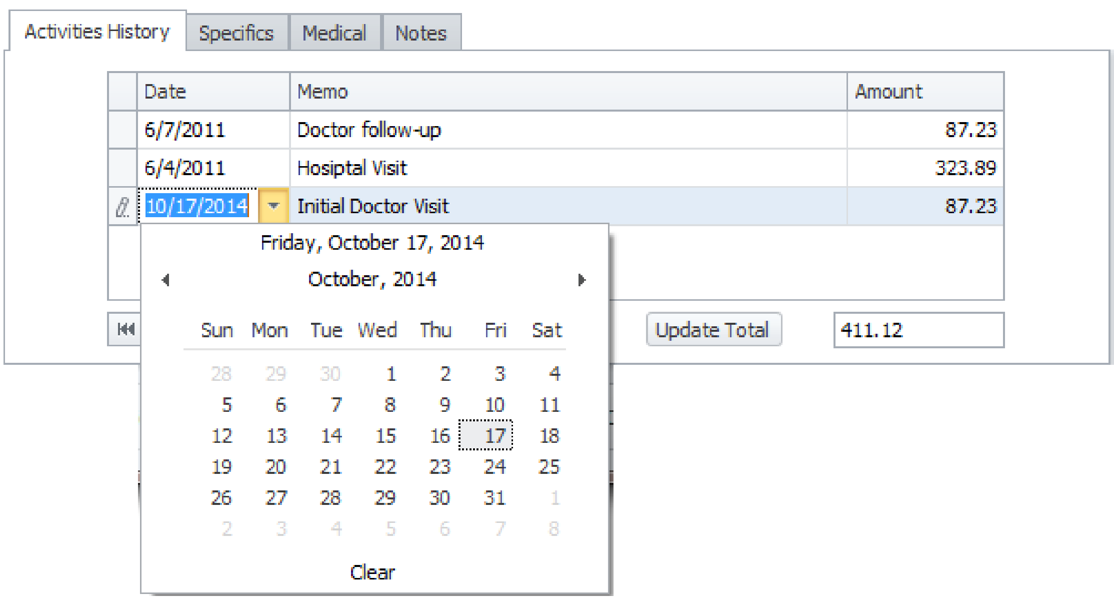
6. Click on the **Append** (+) within the **Data Control** located on this tab.



7. When prompted, move to the input area and type it the activity description you are adding. Click on the **OK** button when done.

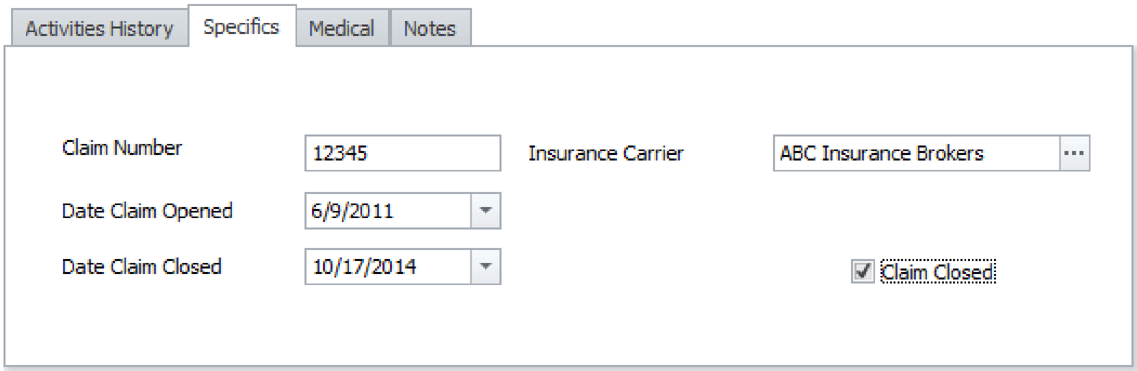


8. When prompted, move to the input area and enter any costs associated with this activity. Click on the **OK** button when done. If there are no associated costs, click on the **Cancel** button.

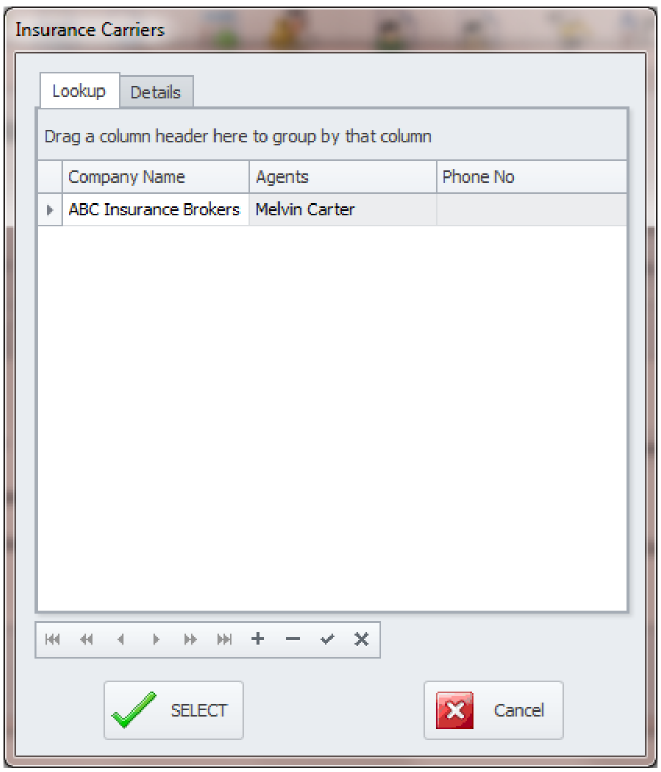


9. Once the activity has been added, you can edit the date of the activity by:
    a. Move to the **Date** column of the activity you just added and click in this column.
    b. Click on the **Down Arrow** here to invoke the calendar. Set the date using this calendar.
10. Repeat the above steps for each activity you want to add.

11. Move to the **Specifics** tab by either clicking on the tab or clicking the **Next** button.



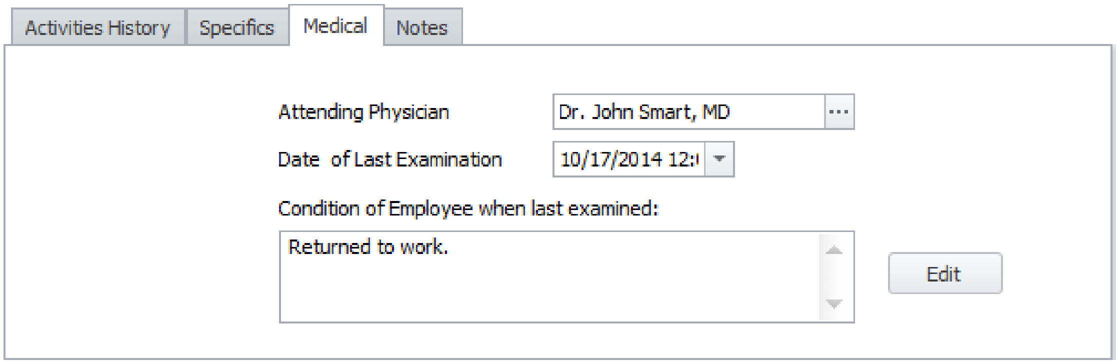
12. Move to the **Claim Number** field and enter this alpha numeric information.
13. Move to the **Date Claim Opened** field and using the attached calendar, set this value.
14. Move to the **Date Claim Closed** field and using the attached calendar, set this value.
15. Move to the **Insurance Carrier** field and either type in this information or you can select an insurance carrier from a database. To select the insurance carrier:



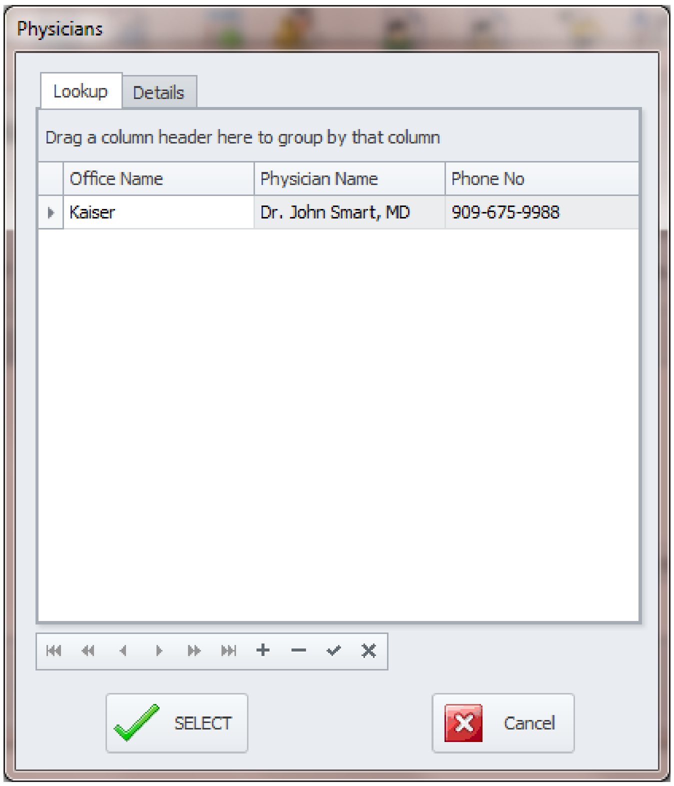
    a. Click on the **ellipsis** (…) button adjacent to the **Insurance Carrier** field to invoke the **Insurance Carriers** lookup.
    b. Select the company you want to assign by clicking on the record from within the grid and then clicking the **Select** button.

16. If the claim is closed, move to the **Claim Closed** checkbox and place a checkmark here by clicking on it.

17. Move to the **Medical** tab by either clicking on the tab or clicking the **Next** button.



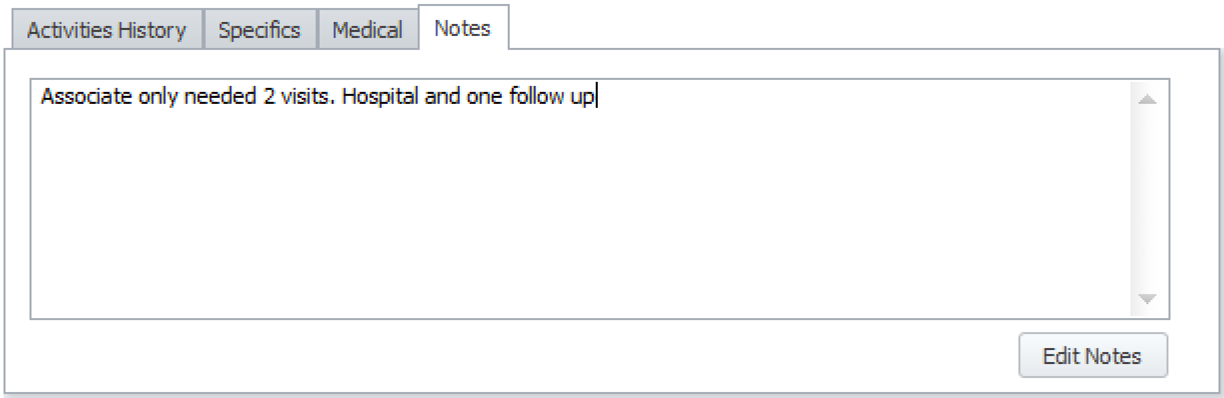
18. Move to the **Attending Physician** field and either type in this information or you can select a physician from a database. To select the physician:



   a. Click on the **ellipsis** (…) button adjacent to the **Attending Physician** field to invoke the **Physicians** lookup.
   b. Select the physician you want to assign by clicking on the record from within the grid and then clicking the **Select** button.

19. Move to the **Date of Last Examination** field and using the attached calendar, set this value.
20. Move to the **Condition of Employee when last examined** field and type in this alpha numeric information. You can also click on the **Edit** button to edit this information with the **Text Editor**.

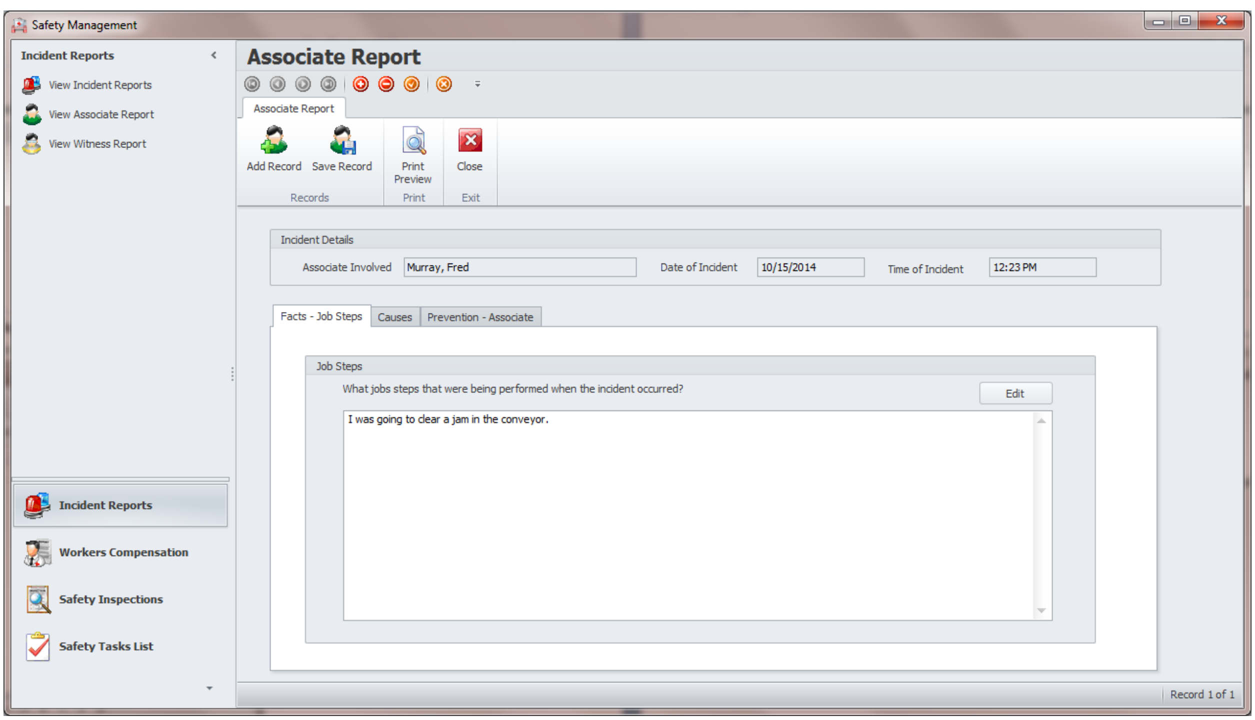
21. Move to the **Notes** tab by either clicking on the tab or clicking the **Next** button.



22. Move to edit field found on this tab and enter any notes you want to make of the current claim. You can also click on the **Edit Notes** button to edit this information with the **Text Editor.**
23. Click on the **Close** button when done editing the claim record.

Associate Report

This report is the facts of the incident as described by the employee or employees involved. You can create more than one Associate report per main incident if needed.



To create an Associate Report for the Incident:

- Locate and make active the incident that you want to base the report on.
- Move to the **Home** tab and click on the **Associate Report** option.
- When the **Associate Report** loads, move to the ribbon and click on the **Add Record** option.

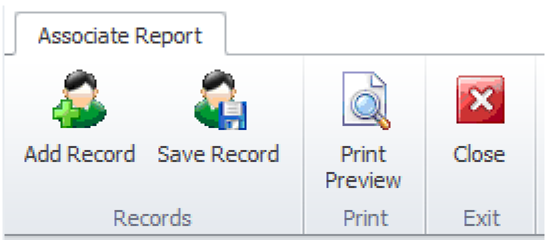
- Move through the various tabs and fields of this report and fill in or setup the appropriate information for each field.
- Return to the ribbon and click on the **Save Record** option to save changed or edited information.

Understanding the Associate Report

In this section we are going to outline the different elements of the **Associate Report**.

Associate Report – Ribbon

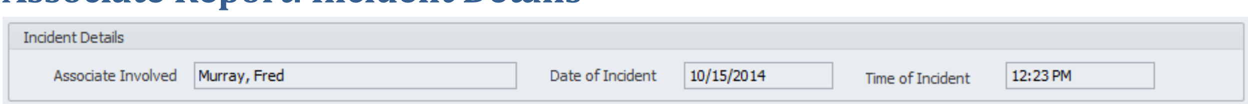
The functionality of the **Associate Reports** sub-component is provided via the Ribbon control. Options on this ribbon are structurally and visually split into logical groups. Each of these groups includes commands that perform specific functions.



The following are the elements on the **Associate Report** ribbon tab, reading left to right:

- **Add New** – Creates a new blank record supporting the selected incident as found in the **Incident Report** section.
- **Save Record** – This option saves any recent changes to the current record.
- **Print Preview** – This option provides a print preview of the current report.
- **Exit** – Exits this screen and returns to the **Incident Report** screen.

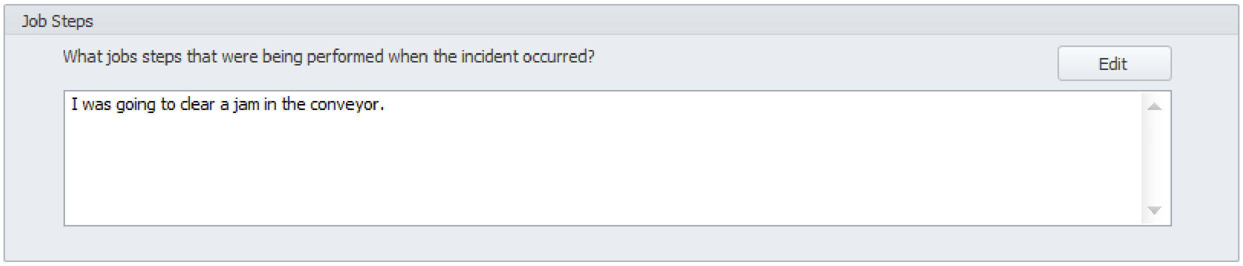
Associate Report: Incident Details



This is a non-editable region and is used to identify the **Incident Report** this supporting document is based on.

Associate Report: Facts – Job Steps tab

This tab only contains one element, and is used to record what job steps were being performed with the incident occurred.



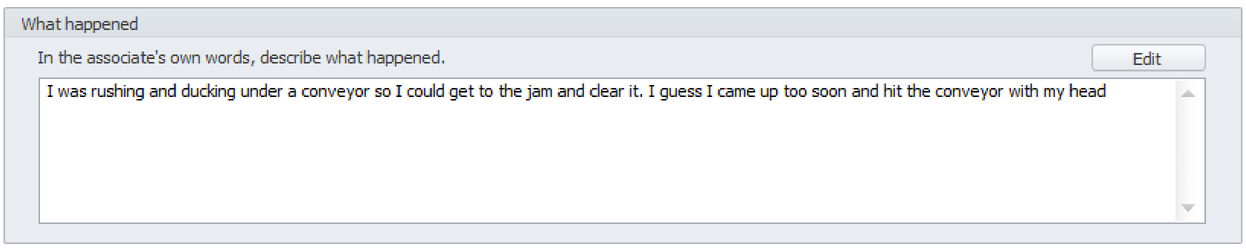
This alpha numeric field has no size limitations. You can edit this information with the **Text Editor** by clicking on the **Edit** button.

Associate Report: Causes tab

This section contains two main elements: **What Happened** and **What Caused the Incident**.

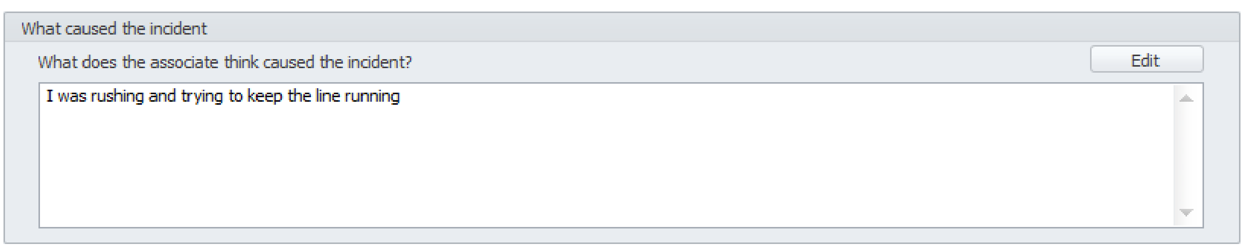
Cause tab: What Happened

This section allows the associate to record in their own words what they think happened.



Cause tab: What Caused the Incident

This section allows the associate to record in their own words what they think may have actually cause the incident.

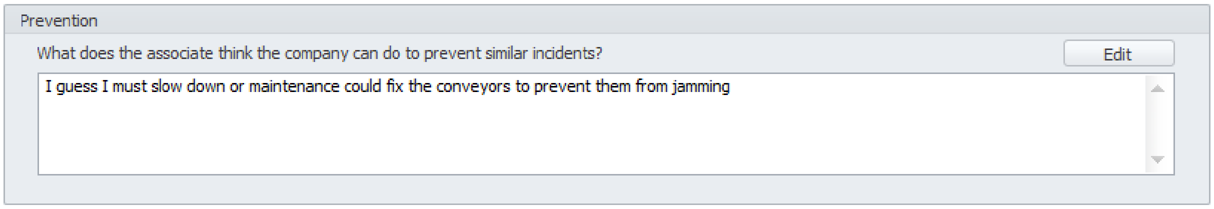


Associate Report: Prevention - Associate tab

This section contains two main elements: **Prevention** recommendations and the **Associate** making this report.

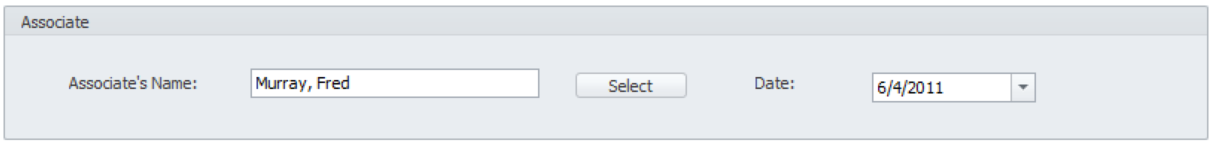
Prevention - Associate tab: Prevention

This section allows the involved associate to make their recommendations on how to help prevent similar incidents from occurring again.



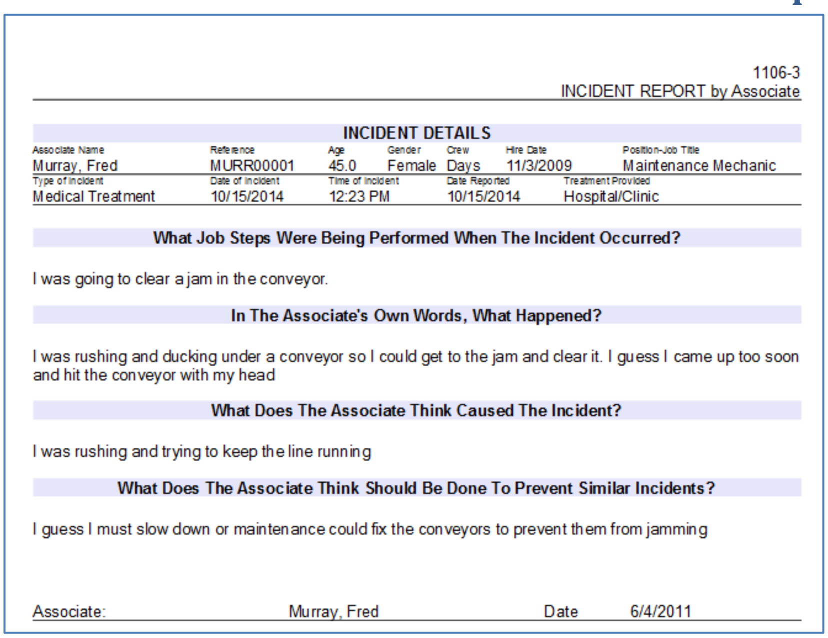
Prevention - Associate tab: Associate

This section allows you to specify who made this report and the date it was made.



- **Associate' Name** – This is the name of the person making this report. You can either directly type in this field or select an employee from lookup. To select an employee from lookup:
    - Move to and click on the **Select** button. This will invoke the **Employee Database** lookup screen.
    - Move to the grid and select the record you want to assign and then click **Select.**
- **Date** – This is the date this report was created. Set this field by using the attached calendar.

To Receive a Print Preview of the Associate Report



1106-3

INCIDENT REPORT by Associate

INCIDENT DETAILS

Associate Name	Reference	Age	Gender	Crew	Hire Date	Position-Job Title
Murray, Fred	MURR00001	45.0	Female	Days	11/3/2009	Maintenance Mechanic

Type of Incident	Date of Incident	Time of Incident	Date Reported	Treatment Provided
Medical Treatment	10/15/2014	12:23 PM	10/15/2014	Hospital/Clinic

What Job Steps Were Being Performed When The Incident Occurred?

I was going to clear a jam in the conveyor.

In The Associate's Own Words, What Happened?

I was rushing and ducking under a conveyor so I could get to the jam and clear it. I guess I came up too soon and hit the conveyor with my head

What Does The Associate Think Caused The Incident?

I was rushing and trying to keep the line running

What Does The Associate Think Should Be Done To Prevent Similar Incidents?

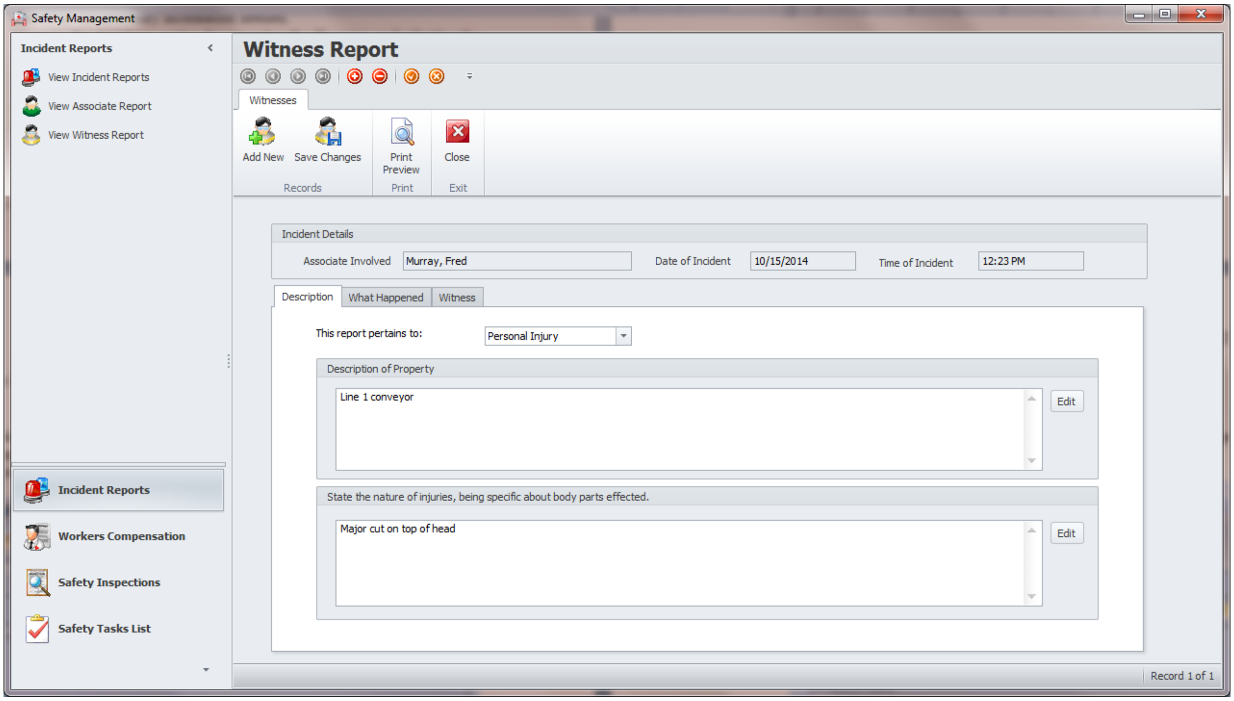
I guess I must slow down or maintenance could fix the conveyors to prevent them from jamming

Associate: Murray, Fred Date 6/4/2011

- Locate and make active the report that you want to print.
- Move to the ribbon and select the **Print Preview** option.

Witness Report

This report is the facts of the incident as described by someone that actually witnessed the incident. You can create more than one Witness report per main incident if needed.



To create a Witness Report for the Incident:

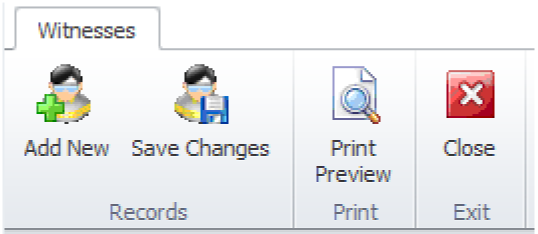
- Locate and make active the incident that you want to base the report on.
- Move to the **Home** tab and click on the **Witness Report** option.
- When the **Witness Report** loads, move to the ribbon and click on the **Add New** option.
- Move through the various tabs and fields of this report and fill in or setup the appropriate information for each field.
- Return to the ribbon and click on the **Save Changes** option to save changed or edited information.

Understanding the Witness Report

In this section we are going to outline the different elements of the Associate Report.

Witness Report – Ribbon

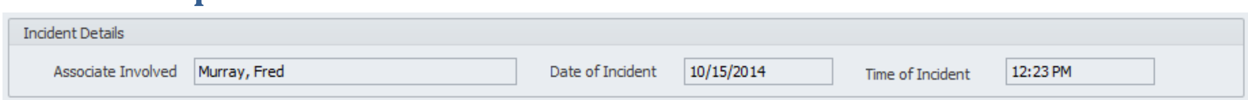
The functionality of the **Witness Reports** sub-component is provided via the Ribbon control. Options on this ribbon are structurally and visually split into logical groups. Each of these groups includes commands that perform specific functions.



The following are the elements on the **Witness** ribbon tab, reading left to right:

- **Add New** – Creates a new blank record supporting the selected incident as found in the **Incident Report** section.
- **Save Changes** – This option saves any recent changes to the current record.
- **Print Preview** – This option provide a print preview of the current report.
- **Close** – Exits this screen and returns to the **Incident Report** screen.

Witness Report: Incident Details



This is a non-editable region and is used to identify the **Incident Report** this supporting document is based on.

Witness Report – Description tab

This tab is used to provide a basic description of the incident being reported:

Witness - Description tab: This report pertains to

Selectable from the drop down list available here. This field would specify the category this incident relates to. Options include:

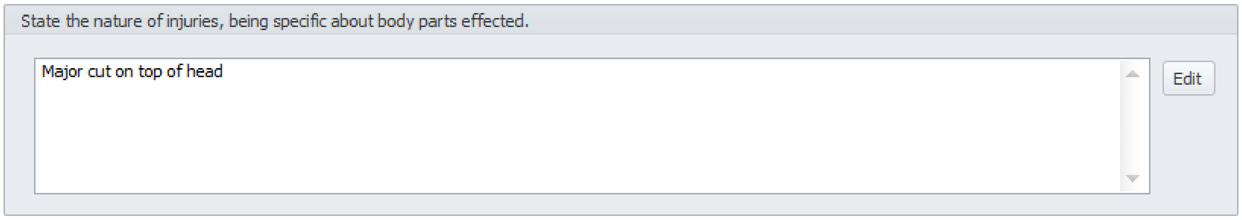
- Personal Injury
- Property Damage

Witness - Description tab: Description of Property

Use this alpha numeric field to provide a description of the damaged property. You can also click on the **Edit** button to edit this information with the **Text Editor.**

Witness - Description tab: State the Nature of Injuries

Use this alpha numeric field to provide a description of the injuries the employee obtained because of the incident. You can also click on the **Edit** button to edit this information with the **Text Editor**

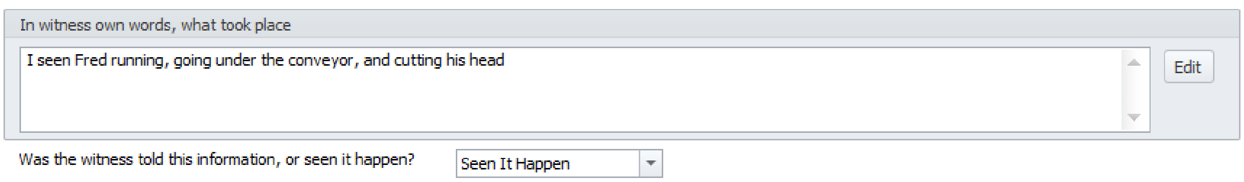


Witness Report – What Happened tab

This tab provides the witness's account of what happened as it related to the incident.

Witness – What Happened Tab – What Took Place

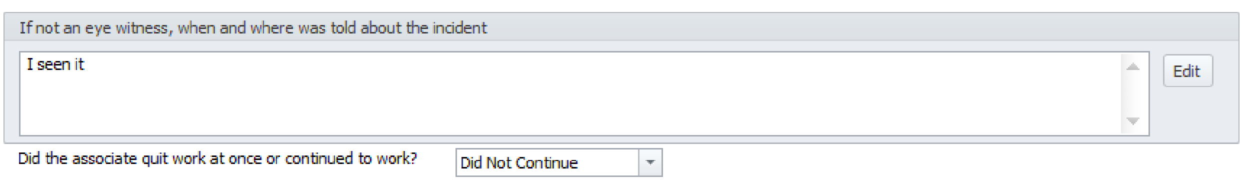
This field allows the witness (in their own words) to describe what happen.



The drop down here allows the witness to specify if they actually seen this happen or was told about it.

Witness – What Happened Tab – Non Eye Witness

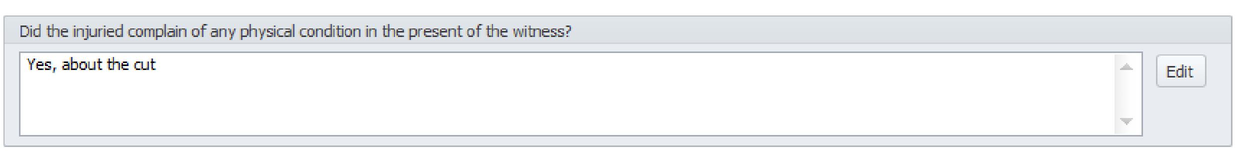
This section allows this person to record their non-eye witness account of the incident.



The drop down here allows the witness to specify if the employee returned to work or not, immediately after the incident occurred.

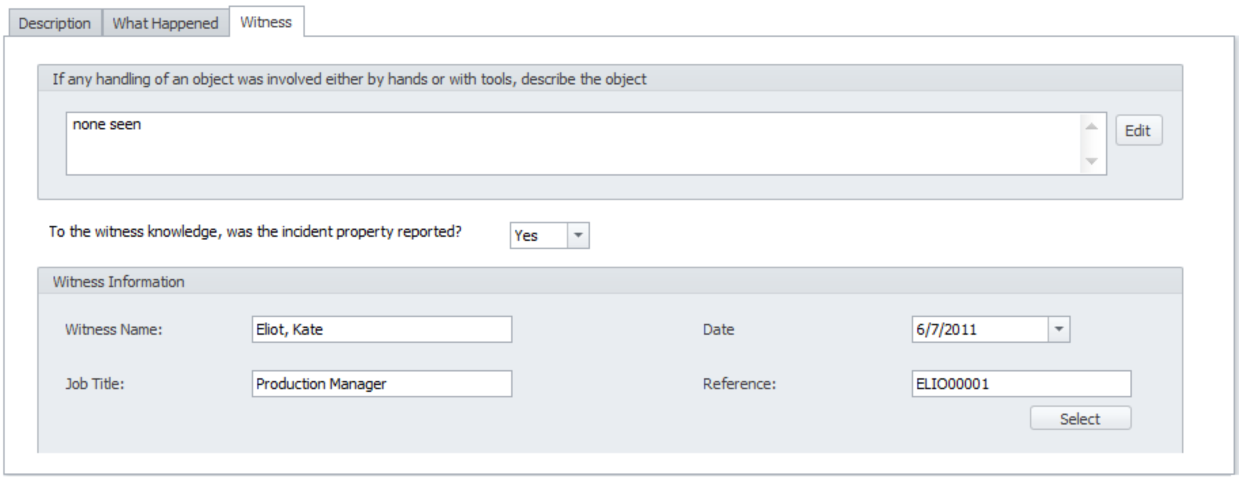
Witness – What Happened Tab – Injured Complains

This section allows the witness to record any complains of injuries the employee may have made.



Witness Report – Witness tab

The elements of this tab allows for the recording of any objects that may have been used and the name of the person making this report.



Witness – Witness tab – Objects Involved

This section allows the witness to specify any objects or tools that may have been in use when the incident occurred.

Witness – Witness tab – Properly Reported

Selectable from the drop down list, this allows the witness to specify if they think the incident was properly reported.

Witness – Witness tab – Witness Information

Information in this section allows you to specify information about the reporting witness. The following specifies the elements of this section:

- **Name of Witness** – This alpha numeric field specifies the name of the witness.
- **Date** – This specifies the date of this report and is selectable from the attached calendar.
- **Job Title** – This alpha numeric field is used to specify the job title of the witness.
- **Reference** – This alpha numeric field is used to specify the witness employee reference id.
- **Select** – Clicking this button allows you to select the witness from the **Employee Database** lookup. To select an employee from lookup:
  - Move to and click on the **Select** button. This will invoke the **Employee Database** lookup screen.
  - Move to the grid and select the record you want to assign and then click **Select.**

Filtering the Incident Database

You have two method of filtering the incident database. Using the default filter, or using the **Filter Wizard.**

Filter Wizard

This option allows you to filter the database by criteria that you specify. To use this option:

- Move to the **Home** tab in the ribbon and click on the **Filter Wizard** option. This will invoke the **Incident Wizard**. Please refer to the ***Incident Wizard*** section of this chapter to view how to use this feature.

Default Filter

This option filters the database by default setting which is view all. To filter by this option:

- Move to the **Home** tab in the ribbon and click on the **Default Filter** option.

Search

To perform a search on the ***Incidents*** database:

- Move to the **Home** tab in the ribbon.
- Click on the **Search** option.
- Refer to the ***Search*** section of the ***Common Features*** chapter for more information.

Report Wizard Report

The **Report Wizard Report** is actually multiple reports in one. It really depends on the grouping as assigned on the **Group** tab of the wizard. Options include:

- **Dates** – Create an **Incident Date Report**.
- **Incident Types** – Create an **Incident Types Report.**
- **Work Status** – Create an **Work Status Report**
- **Treatment** – Create an **Treatment Report**

The following illustrates a basic '**Incidents by Dates Report'**:

Incidents by Dates
Monday, September 01, 2014 - Friday, October 31, 2014

Sep-14	1.0
Oct-14	1.0

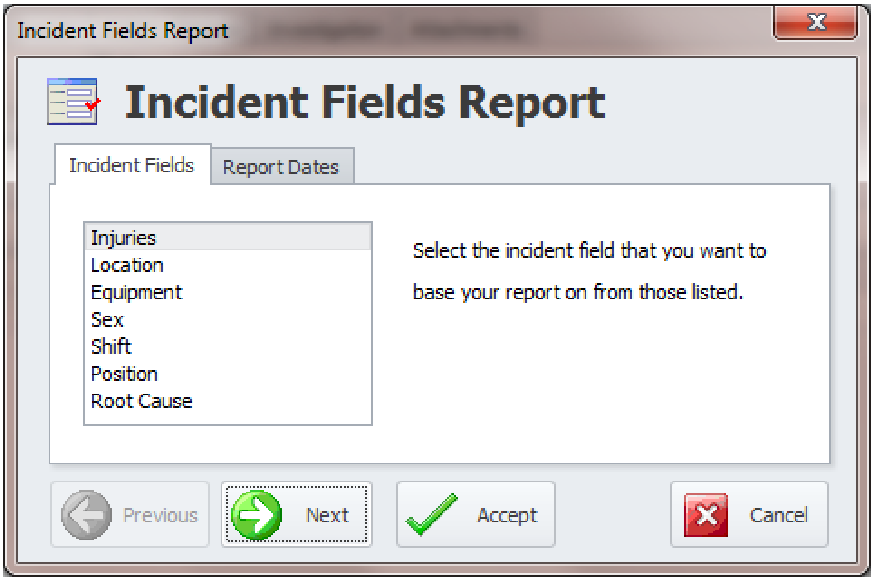
- Move the **Reports** tab in the ribbon and click on the **Report Wizard Report** option. This action will invoke the **Incident Wizard**. Please refer to the ***Incident Wizard*** section of this chapter on how to use this wizard.
- This report produce a chart to help represent the data returned. You are allowed to edit this chart before continuing with the finished report. To learn about the features of this Designer, please look at the ***Chart Designer*** section of the ***Reports and Graphics*** module.
- When done modifying the chart, close the Designer to view the final report.

Incident Fields Report

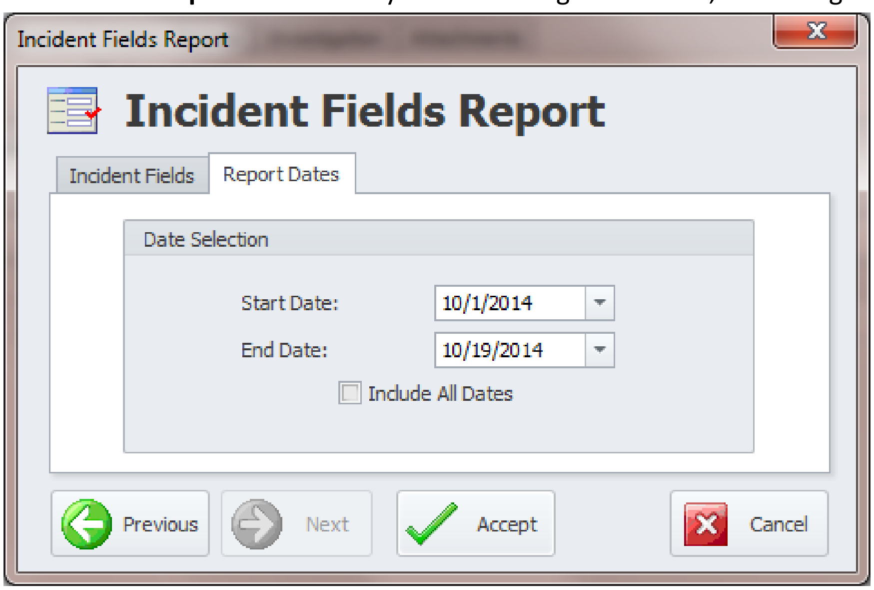
This report allows you to breakdown incidents by individual fields. This helps you gain insight to what's happening in your work place.

To create an Incident Field Report:

- Move the **Reports** tab in the ribbon and click on the **Incident Fields** option. This will invoke the **Incident Fields Report** wizard.



- Move to the **Incident Fields** tab, and move to the list of available fields.
- Select Incident field you want to base your report on from those listed.
- Move to the **Report Dates** tab by either clicking on that tab, or clicking the **Next** button.

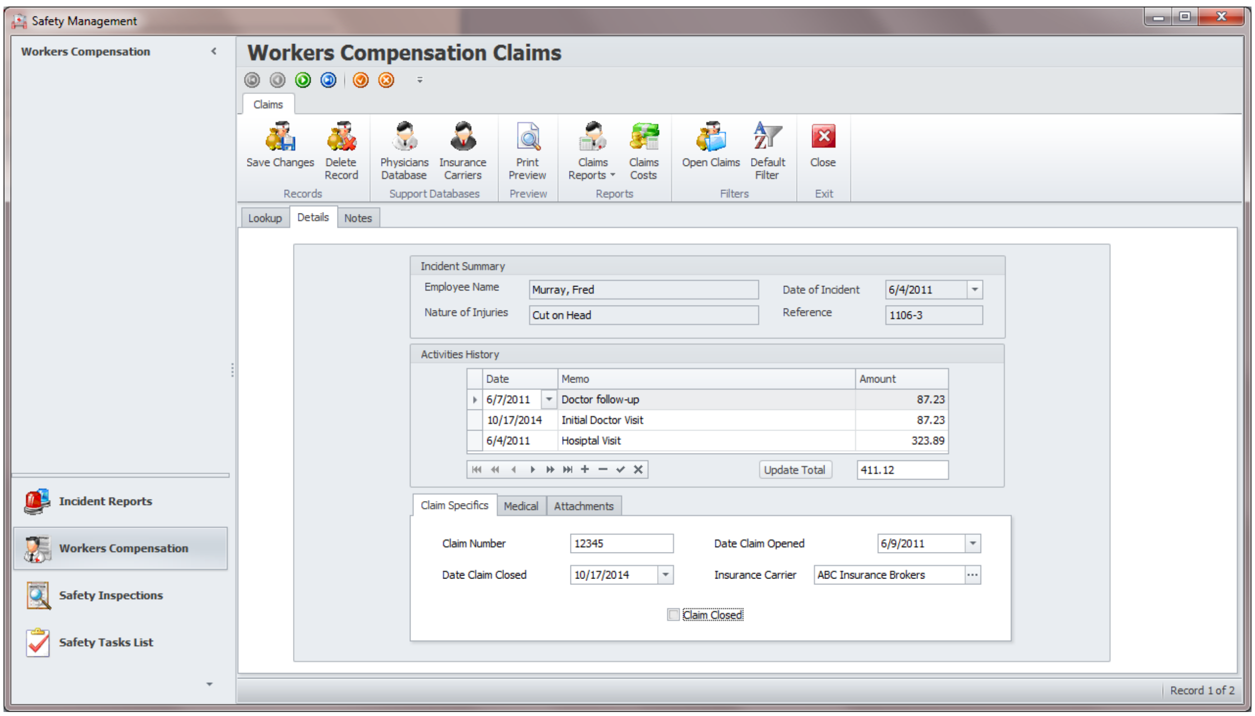


- Move to the **Start Date** field and using the drop down calendar, select the starting date of your filtering criteria.
- Move to the **End Date** field and using the drop down calendar, select the ending date of your filtering criteria.
- To ignore or use all available dates, check the **Include All Dates** checkbox.
- This report produce a chart to help represent the data returned. You are allowed to edit this chart before continuing with the finished report. To learn about the feature of this Designer, please look at the ***Chart Designer*** section of the ***Reports and Graphics*** module.

- When done modifying the chart, close the Designer to view the final report.

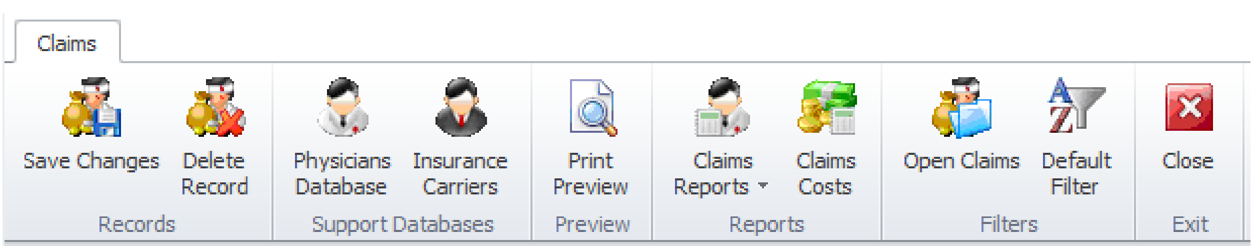
Workers Compensation

In this section we will be outlining the **Work Compensation** component of the **Safety Management module**. Workers Compensation Claims are handled as part of an incident report, and are treated as an extension to of this record. The two features are basically dependent on one another.



Workers Compensation Claims – Ribbon

The functionality of the **Workers Compensation Claims** component is provided via the Ribbon control. Options on this ribbon are structurally and visually split into logical groups. Each of these groups includes commands that perform specific functions.



The following are the elements on the **Home** ribbon tab, reading left to right:

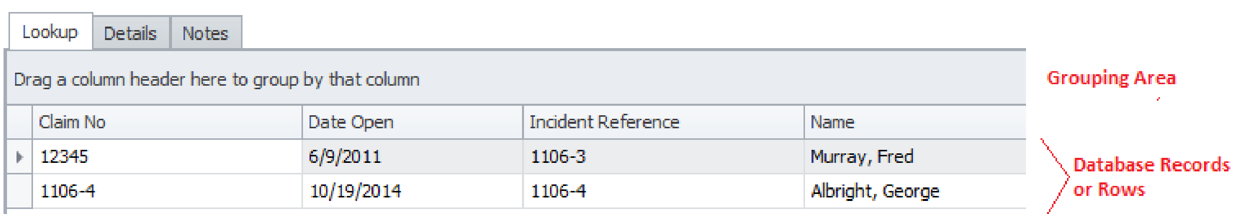
- **Save Changes** – This option saves any recent changes to the current record.

- **Delete** – Removes the selected record from the database.
- **Physicians Database** – Invokes **the Physicians Database** dialog.
- **Insurance Carriers** – Invokes the **Insurance Carriers** database dialog.
- **Print Preview** – Provides a print preview of the current claim.
- **Claims Reports** – Allows for the creation of claim reports. Options include:
    - **Open Claims (Date Range)**
    - **Closed Claims (Date Range)**
- **Claims Costs** -Allows the creation of a Claims Costs Report based on a date range.
- **Open Claims** – Filters the database to include only claims with a status of open.
- **Default Filter** – Reapplies default filter settings to the claims database.
- **Close** – Close the claims database and move control to the **Incidents Report** screen.

Claims: Lookup Tab

This tab helps in locating calims by grouping, filtering and sorting them. All the records in the current filter are located in the grid found here. To select a record and make it the active record, the user needs only to click on the item from within the grid. Once selected the user can click on the other tabs to view or edit the record itself.

The following image illustrates the features available on the Lookup tab:



The functions of the Lookup tabs are used through-out the system and are fairly common regardless of the modules that use them. Please review the chapter on ***Common Features*** to read about the functionality of the controls located on this tab. Apply special attention to the following:

Claims: Details Tab

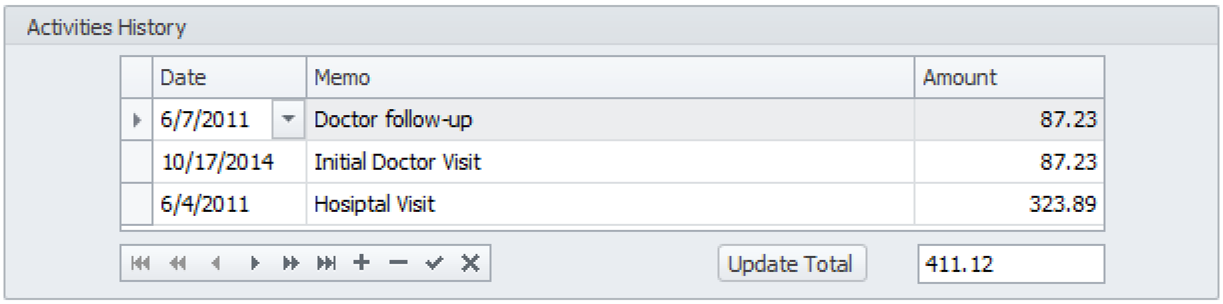
The Details tab, and the other support tabs located on it, is for maintaining the main elements of a workers compensation claim.

Claims: Incident Summary

This is a non-editable region and is used to identify the **Incident Report** this supporting document is based on.

Claim: Activities History

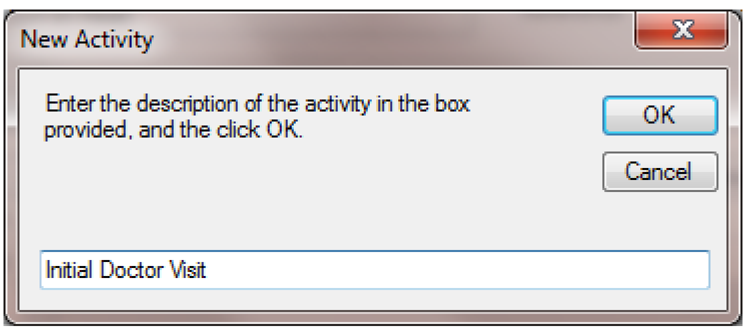
This section is used to record any activities that you want to track as they relate to the current claim. The following image illustrates the section:



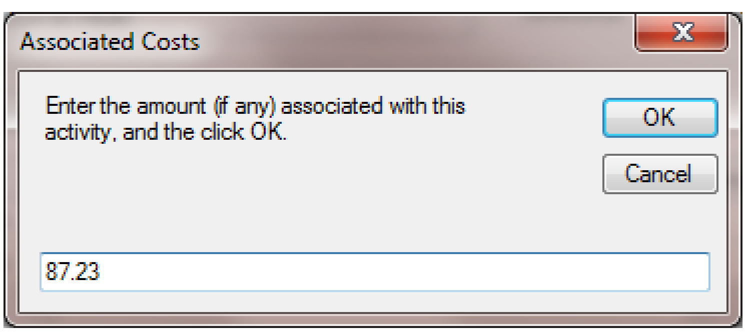
Add Activity

If you want to record an activity as it related to this claim:

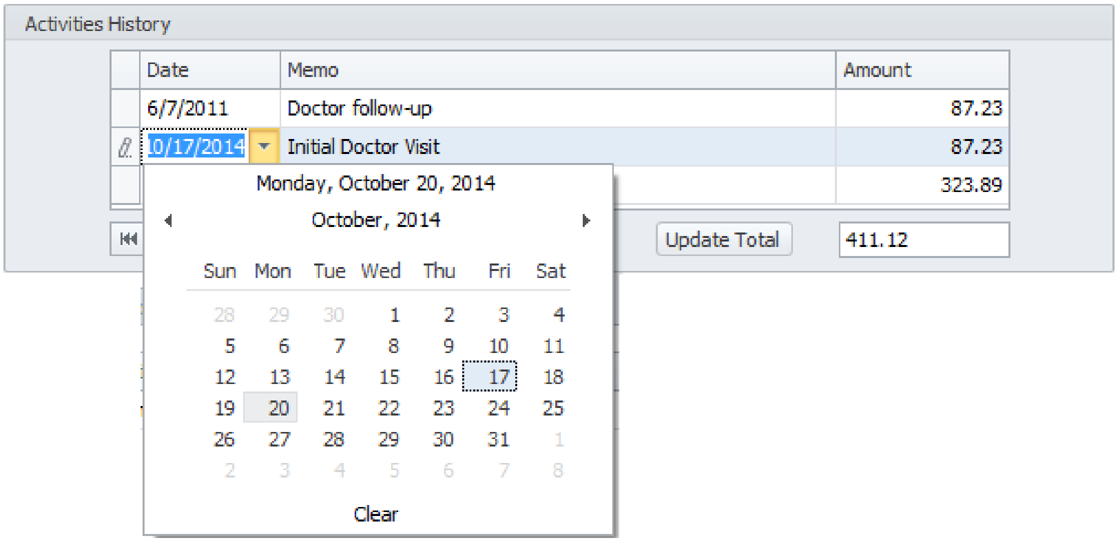
- Move to the **Activities History** group and click on the **Append** (+) button within the **Data Control** located here.



- When prompted, move to the input area and type it the activity description you are adding. Click on the **OK** button when done.



- When prompted, move to the input area and enter any costs associated with this claim. Click on the **OK** button when done. If there are no associated costs, click on the **Cancel** button.



- Once the activity has been added, you can edit the date of the activity by:
    a. Move to the **Date** column of the activity you just added and click in this column.
    b. Click on the **Down Arrow** here to invoke the calendar. Set the date using this calendar.
- Click on the **Post/Save** (✓) button to save your changes.
- Repeat the above steps for each activity you want to add.

Edit Activity

To edit a pre-existing activity:

- Move to list of activities and double mouse click in the cell you want to edit. This will invoke edit mode.
- Edit the cell's contents, clicking Enter to leave edit mode when done.
- Click on the **Post/Save** (✓) button to save your changes.

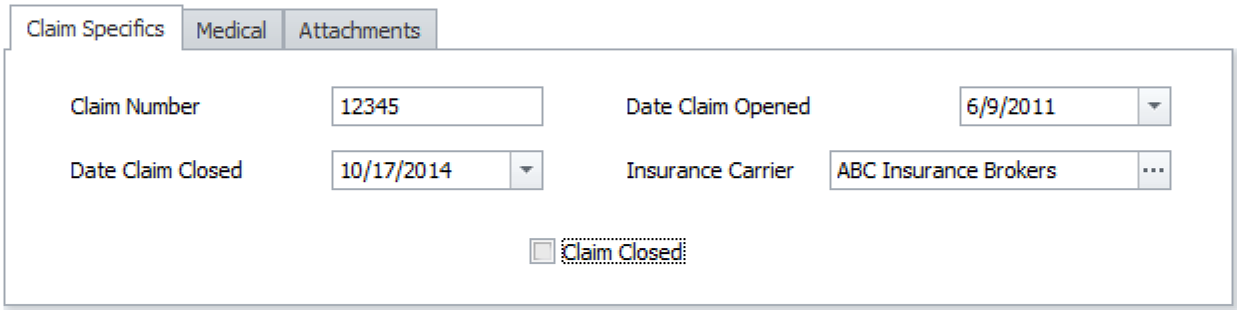
Delete Activity

To delete a pre-existing activity:

- Move to the list of activities and click in the activity record you want to delete.
- Click on the **Delete** (-) button to remove the record.
- Click on the **Post/Save** (✓) button.

Claim Specifics – Sub Tab

This tab is a sub tab found on the **Details** tab and is used to record specific information about the claim as shown in the following illustration:



Claim Number

This alpha/numeric field can contain up to 30 characters and is used to record the claim number as issued.

Date Claim Opened

This date only field is used to specify the date the claim was opened and can be set by using the attached calendar.

Date Claim Closed

This date only field is used to specify the date the claim was closed and can be set by using the attached calendar.

Insurance Carrier

This alpha/numeric field can contain up to 50 characters and is used to specify the Insurance Carrier handling this claim. You can either type directly into this field or select a carrier from the database. To select the insurance carrier:

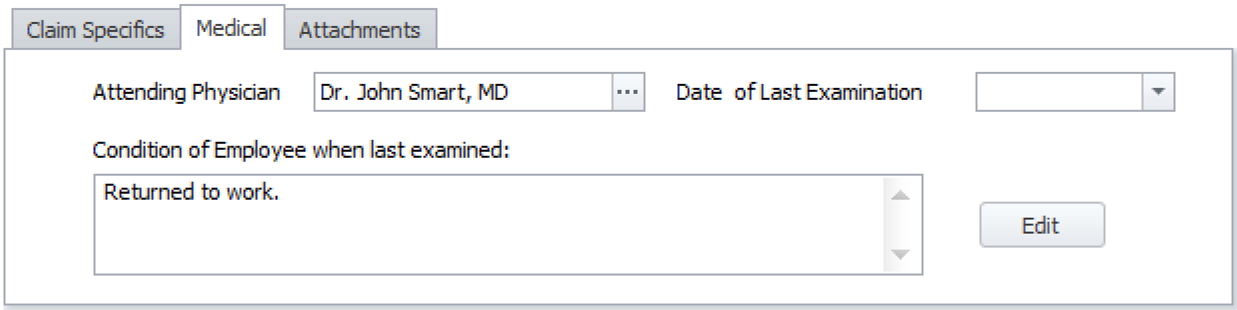
- Click on the **ellipsis** (…) button adjacent to the **Insurance Carrier** field to invoke the **Insurance Carriers** lookup.
- Select the company you want to assign by clicking on the record from within the grid and then clicking the **Select** button.

Claim Closed

Check this checkbox when the claim is closed.

Medical – Sub Tab

This tab is a sub tab found on the **Details** tab and used to record medical information about the claim as shown in the following illustration:



Attending Physician

This alpha/numeric field can contain up to 50 characters and is used to specify the physician handling this claim. You can either type directly into this field or select a physician from the database. To select the a physician:

- Click on the **ellipsis** (…) button adjacent to the **Attending Physician** field to invoke the **Physicians** lookup.
- Select the physician you want to assign by clicking on the record from within the grid and then clicking the **Select** button.

Date of Last Examination

This date only field is used to specify the date the employee was last seen by the attending physician and can be set by using the attached calendar.

Condition of Employee when last examined

This alpha/numeric field has no size limitations and is used to record the employee condition at their last examination. You can either type directly into this field or use the **Text Editor** by clicking on the **Edit** button.

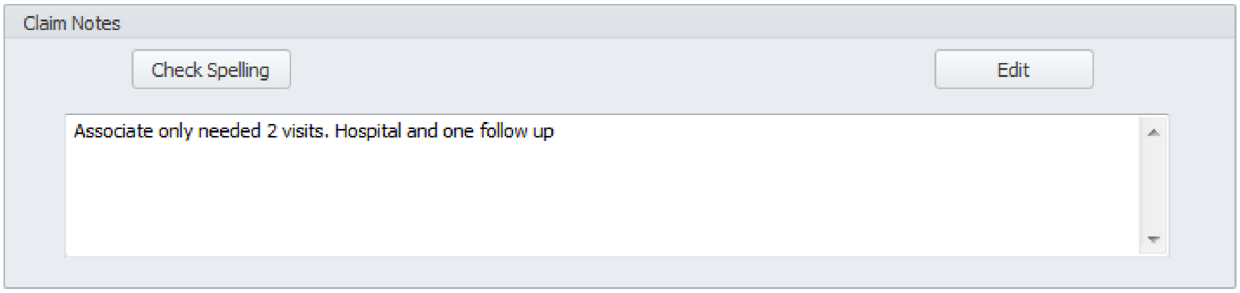
Attachments – Sub Tab

This tab is a sub tab found on the **Details** tab and used to maintain attachments to the current record. These could be copies of the Attending Physician's Statements, and other supporting documents. The following illustrates the elements of this tab:

For more information on this feature, please refer to the ***Attachments*** section of the ***Common Features*** chapter.

Claims: Notes Tab

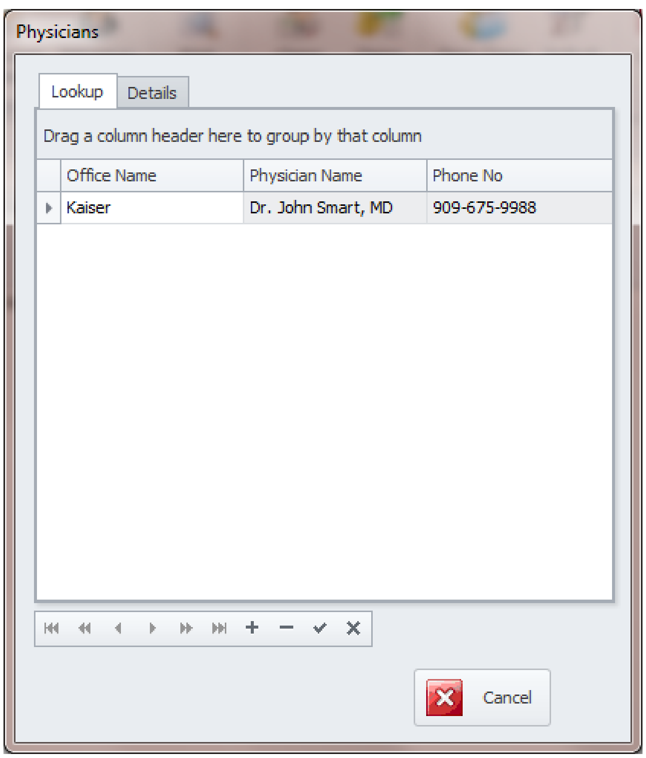
There is basically only a single element on this tab and that's the editor that you can record notes as they relate to the current claim. This alpha/numeric field has no size limitations. You can edit these notes using the built-in **Text Editor** by clicking on the **Edit** button.



Physicians Database

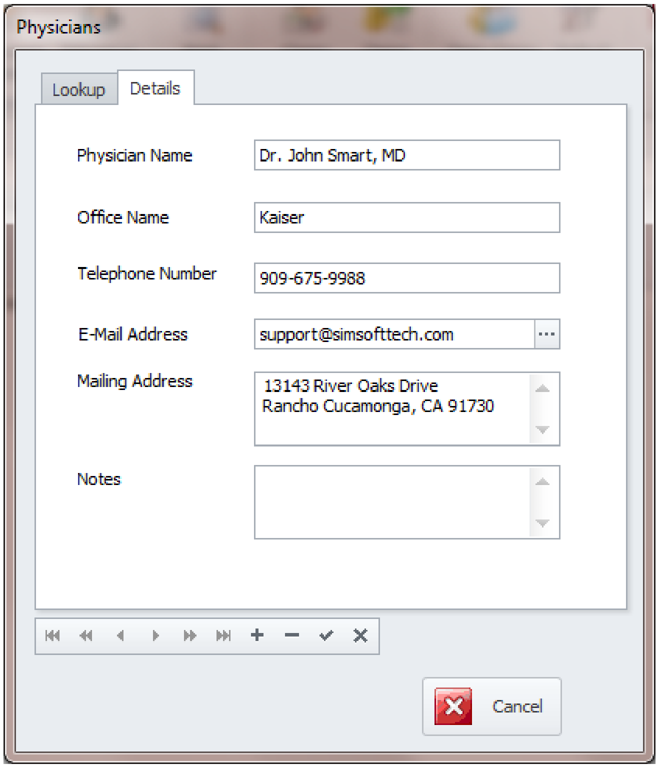
The **Physicians Database** allows you to maintain information of physicians and is also used as a lookup/assignment dialog when dealing with Workers Compensation Claims.

The following illustration shows the elements of the **Lookup** tab:



You select and make a record active by clicking on it from within the grid.

The following image illustrates the elements of the **Details** tab:



- **Physician Name** – This alpha/numeric field can contain up to 50 characters and is used to identify the physician.
- **Office Name** – This alpha/numeric field and can contain up to 50 characters and is used to indicate the office or business name of the physician.
- **Telephone Number** – This alpha/numeric field can contain up to 15 characters and represent the main telephone number.
- **E-Mail Address** – This alpha/numeric field has no size limitation. Clicking on the ellipsis button here will open the default email application with the email address information inserted for you.
- **Mailing Address** – This alpha/numeric field has no size limitation and is used to indicate the full mailing address as it relates to the record.
- **Notes -** This alpha/numeric field has no size limitation and is used to record any notes you want to provide on the current record.

Accessing the Physicians Database

To open the Physicians database:

- Move to the ribbon and click on the **Physicians Database** option.

Add a new Physician Record

To add a new physician record:

- Move to the data control and click on the **Append (+)** button.
- Move to the **Details** tab, and edit the fields found there.
- Move to the data control and click on the **Post/Save (✓) button** to save your changes.

Deleting a Physician Record

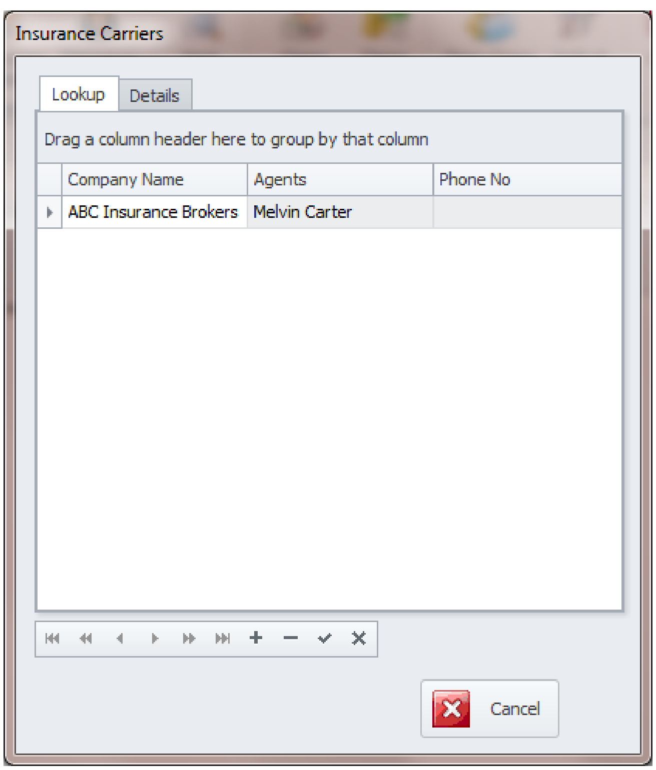
To delete an existing record:

- From the **Lookup** tab, select and make active the record you want to remove.
- Move to the data control and click on the **Remove (-)** button.
- When prompted about the deletion, click **Yes**.

Insurance Carriers Database

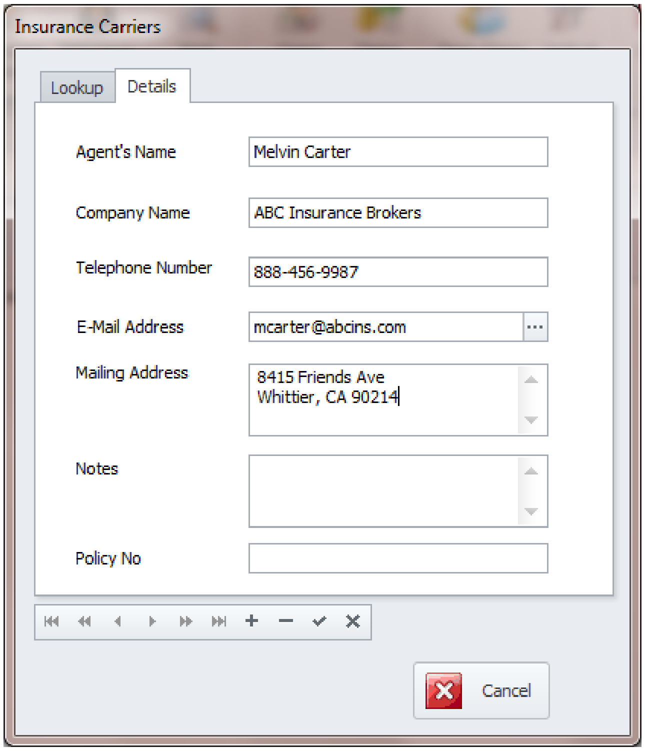
The **Insurance Carriers** allows you to maintain information of workers compensation insurance carriers and is also used as a lookup/assignment dialog when dealing with Workers Compensation Claims.

The following illustration shows the elements of the **Lookup** tab:



You select and make a record active by clicking on it from within the grid.

The following image illustrates the elements of the **Details** tab:



- **Agent's Name** – This alpha/numeric field can contain up to 50 characters and is used to identify the assigned insurance agent.
- **Company Name** – This alpha/numeric field and can contain up to 50 characters and is used to indicate the office or business name of the insuring company.
- **Telephone Number** – This alpha/numeric field can contain up to 15 characters and represent the main telephone number.
- **E-Mail Address** – This alpha/numeric field has no size limitation. Clicking on the ellipsis button here will open the default email application with the email address information inserted for you.
- **Mailing Address** – This alpha/numeric field has no size limitation and is used to indicate the full mailing address as it relates to the record.
- **Notes -** This alpha/numeric field has no size limitation and is used to record any notes you want to provide on the current record.
- **Policy No** – This alpha/numeric field can contain up to 50 characters and indicate the policy number you have with the insurance carrier.

Accessing the Insurance Carriers Database

To open the Insurance Carriers database:

- Move to the ribbon and click on the **Insurance Carriers** option.

Add a new Insurance Carrier

To add a new carrier record:

- Move to the data control and click on the **Append (+)** button.
- Move to the **Details** tab, and edit the fields found there.
- Move to the data control and click on the **Post/Save (✓) button** to save your changes.

Deleting an Insurance Carrier Record

To delete an existing record:

- From the **Lookup** tab, select and make active the record you want to remove.
- Move to the data control and click on the **Remove (-)** button.
- When prompted about the deletion, click **Yes**.

Printing a Worker Compensation Claim

To preview a workers compensation claim:

- Move to and make active the record you want to print.
- Move to the ribbon and click on the **Print Preview** option.

Murray, Fred
Claim No: 12345
WORKERS COMPENSATION CLAIM

Associate:	**Murray, Fred**
Claim No:	**12345**
Incident Reference:	**1106-3**
Date Claim Opened:	**6/9/2011**
Date Claim Closed:	**10/17/2014**
Total Claim Amount:	**411.12**
Attending Physician:	**Dr. John Smart, MD**
Insurance Carrier:	**ABC Insurance Brokers**

INCIDENT DETAILS

Associate Name	Reference	Age	Gender	Crew	Hire Date	Position-Job Title
Murray, Fred	MURR00001	45.0	Female	Days	11/3/2009	Maintenance Mechanic

Type of Incident	Date of Incident	Time of Incident	Date Reported	Treatment Provided
Medical Treatment	10/15/2014	12:23 PM	10/15/2014	Hospital/Clinic

ACTIVITY HISTORY

Date	Memo	Cost (if any)
6/4/2011	Hosiptal Visit	$323.89
6/7/2011	Doctor follow-up	$87.23
10/17/2014	Initial Doctor Visit	$87.23

Claims Reports

You have two options for Claims Reports, with both of these options dealing with a date range. The following report options are available:

- Open Claims (Date Range)
- Closed Claims (Date Range)

The following illustrates an example of one of these reports:

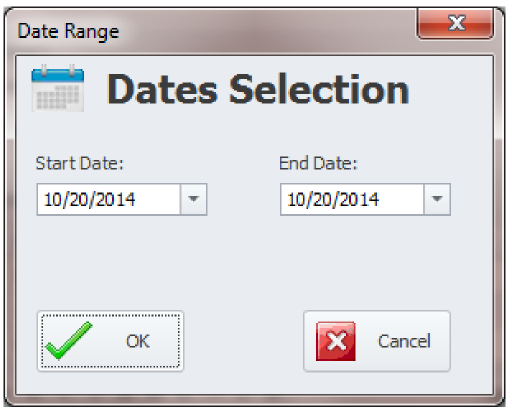
Opened Workers Compensation Claims
Friday, August 01, 2014 - Monday, October 20, 2014

1102 Albright, George

Incident Reference	1106-4	Date Opened	10/19/2014
Date Closed	10/10/2014	Total Amount	

To create a Claims Report:

- Move to the ribbon and click on the **Claims Reports** option.
- Click on one of the options available.



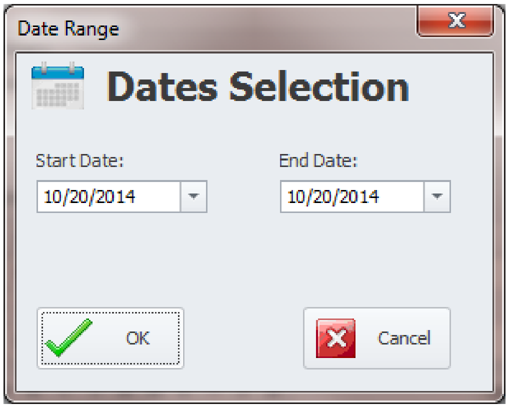
- From the invoked **Date Range** dialog setup the **Start Date** and **End Date** fields to specify the dates you want to report on.
- Click on the **OK** button.

Claims Costs Report

This report returns cost information for a date range that you specify. The report presents the returned data in the forms of a chart with the totals for each month.

To create a Claims Costs Report:

- Move to the ribbon and click on the **Claims Costs** option.



- From the invoked **Date Range** dialog setup the **Start Date** and **End Date** fields to specify the dates you want to report on.
- Click on the **OK** button.
- This report produce a chart to help represent the data returned. You are allowed to edit this chart before continuing with the finished report. To learn about the feature of this Designer, please look at the ***Chart Designer*** section of the ***Reports and Graphics*** module.

Filter the Claims Database by Open Claims

To filter the Claim Database to view only open claims:

- Move to the ribbon and click on the **Open Claims** option.

Filter the Claims Database by the Default Filter

To filter the Claim Database to view all claims:

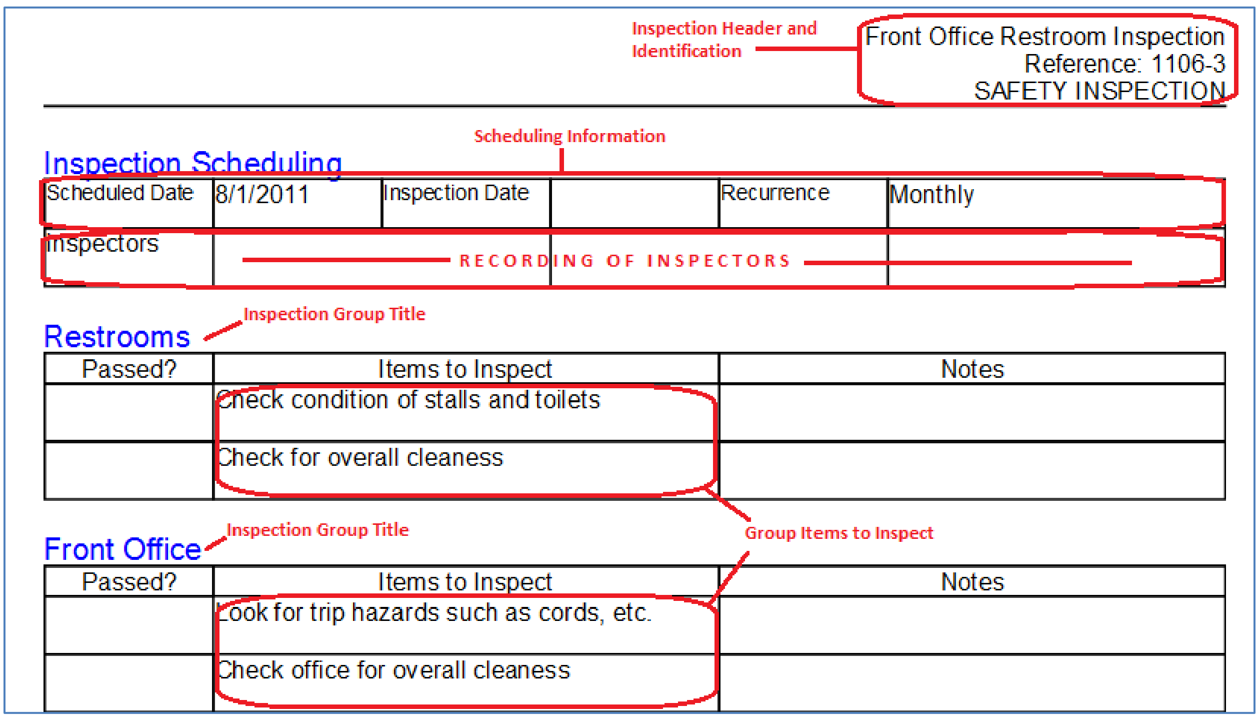
- Move to the ribbon and click on the **Default Filter** option.

Safety Inspections

As you know regular safety inspections are essential in keeping your plant safe, clean, and in compliance with various regulations. With the **Safety Inspections** component it's an easy task to create and administer regular safety inspections. This feature incorporates its own scheduler which will automatically generate future inspections for you.

A Typical Inspection Layout

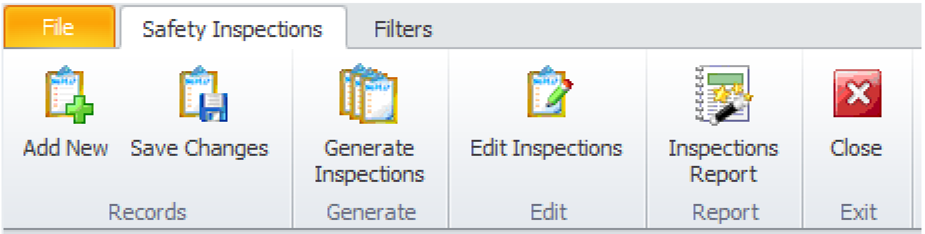
The following illustrates the layout of a typical inspection document:



Inspections – Ribbon

The functionality of the **Safety Inspections** component is provided via the Ribbon control. Options on this ribbon are structurally and visually split into logical groups. Each of these groups includes commands that perform specific functions.

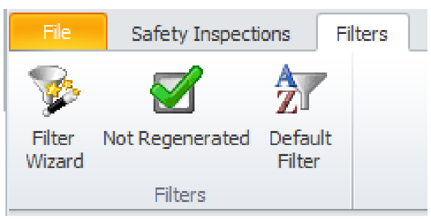
SAFETY INSPECTIONS TAB



The following are the elements on the **Safety Inspections** ribbon tab, reading left to right:

- **Add New** – Create a new blank inspection record.
- **Save Changes** – Saves all current changes from all elements of a record (master save).
- **Generate Inspections** – Allows you to generate and print a date range of inspections.
- **Edit Inspections** – Allows you to edit inspections.
- **Inspections Report** – Invokes the **Inspection Wizard** that allows you to specify the criteria to base your report on.
- **Close** – Close this component and branches control back to Incident Reports.

FILTERS TAB



The following are the elements on the **Filters** ribbon tab, reading left to right:

- **Filter Wizard** – Invokes the **Inspection Wizard** that allows you to specify the criteria to filter the database on.
- **Not Regenerated** – Filters the database by all inspections that have not yet regenerated.
- **Default Filter** – Filters the database by all open inspections.

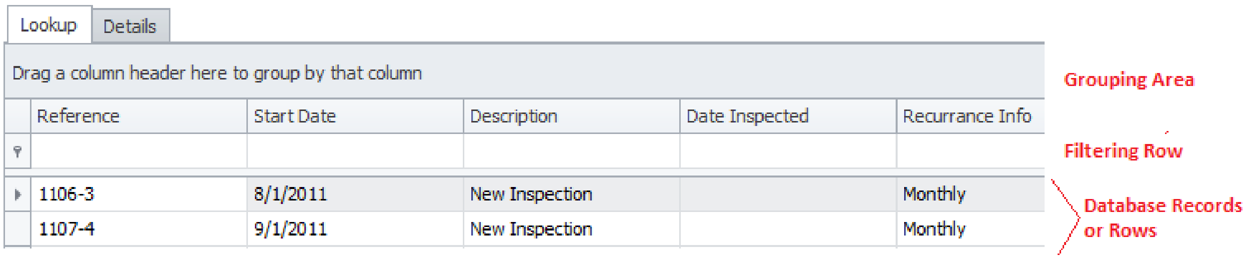
Features of the Inspection Component

There are many features of the Safety Inspections Component, with the majority of these features found on either the tabbed pages found there, or within the tabbed ribbon control. We are going start by explaining the use of these features as we move through the tabbed pages.

Inspections: Lookup Tab

This tab helps in locating inspections by grouping, filtering and sorting them. All the inspections in the current filter are located in the grid found here. To select an inspection and make it the active record, the user needs only to click on the record from within the grid. Once selected the user can click on the other tabs to view or edit the record itself. Also note that double clicking on a record will move you to the **Details** tab showing the selected record.

The following image illustrates the features available on the Lookup tab:



The functions of the **Lookup** tabs are used through-out the system and are fairly common regardless of the modules that use them. Please review the chapter on ***Common Features*** to read about the functionality of the controls located on this tab.

Inspections: Details Tab

This tab allows you to setup the specifics about an inspection such identification and recurrence information.

Inspection Description

This section allows you to record inspection description information to help identify the document. The following illustrates the elements of this section:

Inspection Description

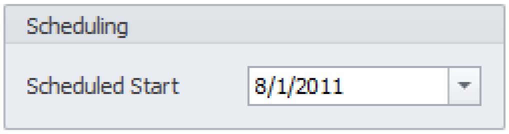
This alpha/numeric field can contain up to 60 characters and is used to help identify the document.

Inspection Reference

This field is generation for you by the application and is used to help identify the document. These numbers use the following format: *yymm – xx*. Where *yy* equals the year of document creation; mm equals the month of creation and *xx* is a sequential number.

Inspection Scheduling

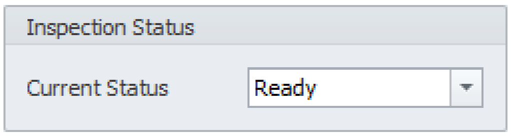
There is only one element in this section as shown in the following illustration:



This date only field would indicate the date you want the inspection to occur. You can set the value of this field using the attached calendar.

Inspection Status

There is only one element in this section as shown in the following illustration:



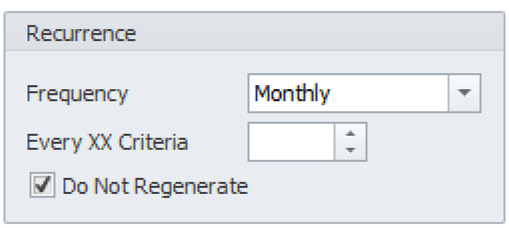
Selectable from the drop down list, this is the status indicator as it applies to the current inspection document. Options include:

- Ready
- Oh Hold
- Completed
- Canceled

Inspection Recurrence

The information in this area is used to tell the application at what frequency to recreate the inspection.

The following image illustrates the elements of this section:



Frequency

This **Frequency** field allows you to specify the frequency at which the recurring inspection will recreate (regenerate) itself.

To setup the **Frequency**:

- Click on the down arrow attached to this field.
- Click on the value you want to assign from those listed.

Available values are:

- None
- Every XX Meters (*see note below)
- Every XX Days
- XX Days (Mon-Fri)
- Daily
- Daily (Mon-Fri)
- Weekly
- Bi-Weekly
- Every XX Weeks
- Monthly
- Bi-Monthly
- Every XX Months
- Quarterly
- Semi-Annually
- Annually
- Every XX Years

Every XX Criteria

If the selected **Frequency** has **XX** anywhere in its description, the **XX Criteria** value must also be provided. This field only accepts numeric values.

To assign the **Every XX Criteria** value, please do one of the following:

- Click the up arrow to increase the value here.
- Click the down arrow to decrease the value here.
- Click and type in your value in the space provided.

The value entered here replaces the 'XX' criteria of the selected frequency. For example, if you have a Frequency of 'Every XX Months' selected, and you enter '3' for the XX Criteria, the inspection would regenerate 'Every 3 Months'.

Do Not Regenerate

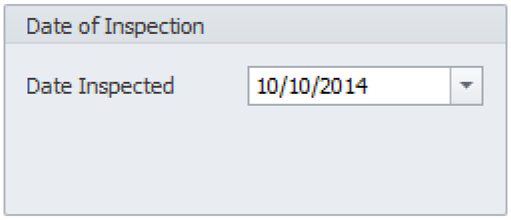
For recurring types of inspections, setting this value will prevent the program from regenerating the inspection at the set frequency. Also be aware that as the program executes one of the built-in regeneration routines, it will automatically set this flag. This basically does two things:

- It tells the application and the user that the inspection has already regenerated itself and a new one should already be present in the database.
- It prevents the program from regenerating the 'same' inspection again. Thereby preventing possible duplicates from being created.

Checking this checkbox will prevent the inspection from regenerating.

Date of Inspection

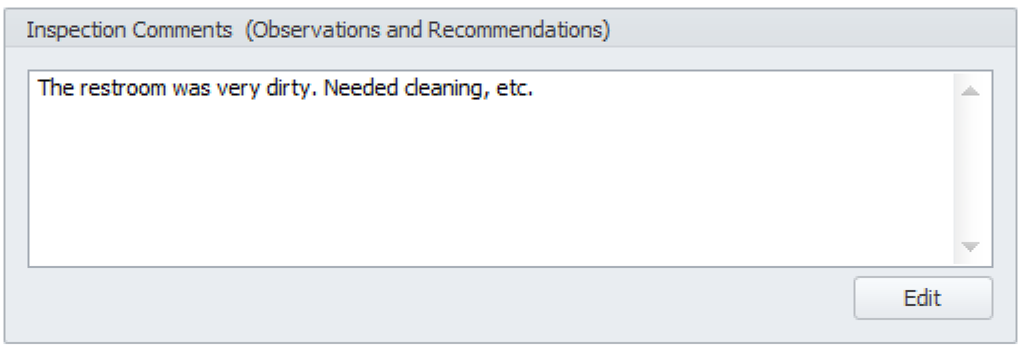
There is only one element in this section as shown in the following illustration:



This date only field would indicate the date the inspection took place. You can set the value of this field using the attached calendar.

Inspection Comments

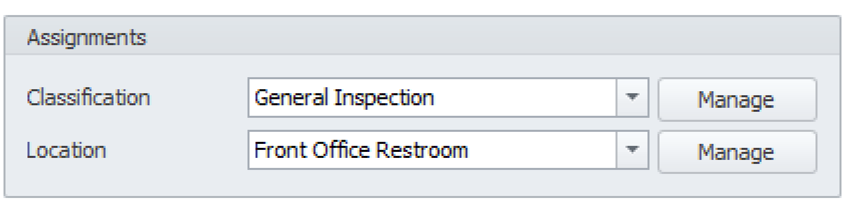
There is only one element in this section as shown in the following illustration:



This alpha/numeric field has no size limitations and is used to record comments, observations and recommendations as it applies to the inspection that was made. You can edit this field with the **Text Editor** by clicking on the **Edit** button.

Inspection Assignments

The assignments made in this section will assist you in grouping your inspections on both the Lookup tab, and for use in reports and filtering. The following illustrates the elements of this section:



Classification

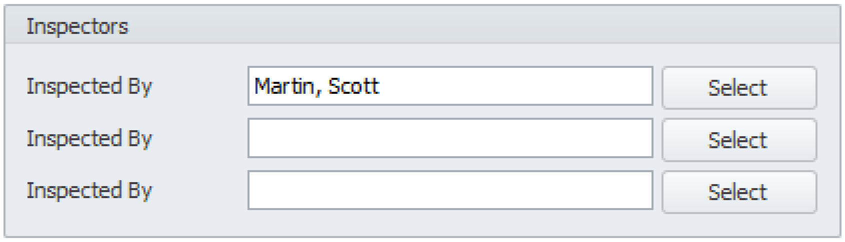
Selectable from the drop down list here, this field represents the Classification you want to assign to this inspection.

Location

Selectable from the drop down list here, this field represents the Location you want to assign to this inspection.

Inspection Inspectors

This section allows you to record the names of up to 3 people that performed the actual inspections. The following shows the elements of this section:

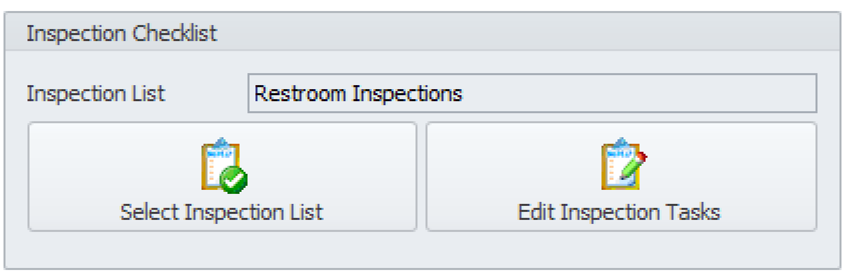


Each of these 3 fields can contain up to 30 alpha/numeric characters each. You can either type directly in to these fields of select assignments from the **Employees Database**. To assign from the database:

- Move to and click on the **Select** button adjacent to the field you want to make an assignment on.
- From the invoked **Employee Database** lookup, select the record you want to assign from those listed in the grid.
- Click on the **Select** button.

Inspection Group

This section allows you to view and assign an inspection group to the current inspection, and also edit group's inspection items. The following illustrates the elements of this section:



Inspection List

This field indicates the name of the checklist currently assigned to this inspection.

Select Inspection List

Clicking this button will allow you to assign an inspection checklist to be used by the current inspection record. Inspection lists can be assigned to more than one inspection. To assign an Inspection List:

- Move to and click on the **Select Inspection List** button.
- From the invoked **Safety Inspections List** dialog, move to the grid and select the item you want to assign.
- Click on the **Select** button.

Edit Inspection Tasks

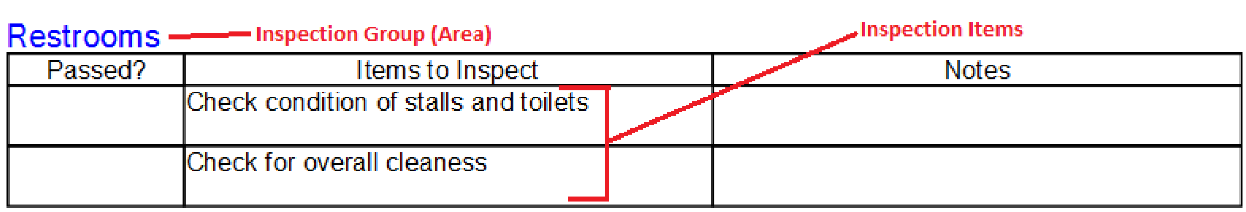
Clicking this button will invoke the **Safety Inspection Items** dialog. With this screen you can view and edit the group assignments and the inspection items belonging to the groups. For more information on this dialog please refer to the following couple of sections.

Safety Inspection Checklists

In this section we are going to outline or try to explain the elements of Safety Inspection Checklists.

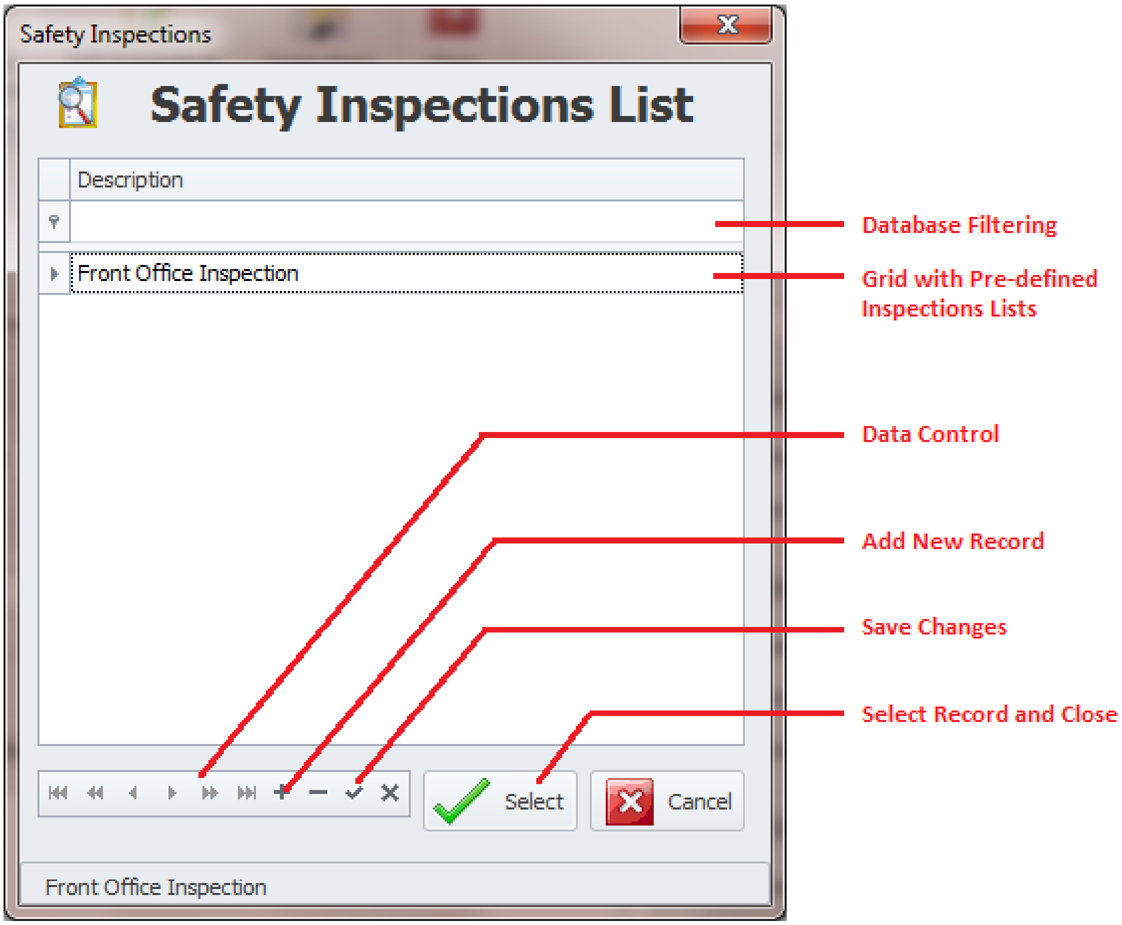
- **Inspections** are documents that are provided to personnel (inspectors) so they can perform inspections as outlined in groups (areas), and the items to inspect as assigned to these groups.
- **Inspection Lists** help organize related **Inspection Groups**, and that group's associated **Inspection Items**. Each main **Inspection Document** can have only one **Inspection List** assigned to it. However, an **Inspection List** can be assigned to an unlimited number of main **Inspections Documents**. Basically, an **Inspection List** contains all groups and items of an inspection.
- **Inspection Groups** are assigned to **Inspection Lists**, and you can assign as many **Inspection Groups** to an **Inspection List** as needed. **Inspection Groups** provide a means to divide **Inspection Items** in to logical groups or areas. For clarification on the **Inspection** document, it is suggested to use an area description for these group titles. Examples could be: 'Lunchroom', 'Storage Area', and 'Production Room'.
- **Inspection Items** are the actual items to be inspected. **Inspection Items** are assigned to **Inspection Groups**, and you can assign as many **Inspection Items** to an **Inspection Group** as needed. An example of an **Inspection Item** would be: 'Ensure there are no slip hazards in the area'.

The following illustrates an **Inspection Group** and its assigned **Inspection Items**:



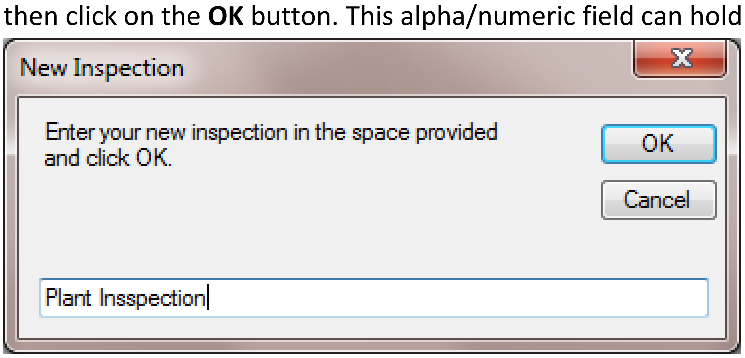
Safety Inspection Lists

Safety Inspection Lists hold the items to be inspected. In order to create inspection items to be checked, a list to hold these items must first be created. The following is an illustration of the **Safety Inspection List** dialog:



To add a new item to the Safety Inspection List

- Invoke the **Safety Inspection List** dialog by either clicking on the **Edit Inspections** option in the ribbon or moving to the **Details** tab and clicking the **Select Inspection List** button.
- Move to the Data Control and click on the **Append (+)** button.
- When prompted to enter a name for this inspection list, enter this in the space provided and then click on the **OK** button. This alpha/numeric field can hold up to 50 characters.



- Click on the **Post/Save Changes (✓)** button to save the changes.

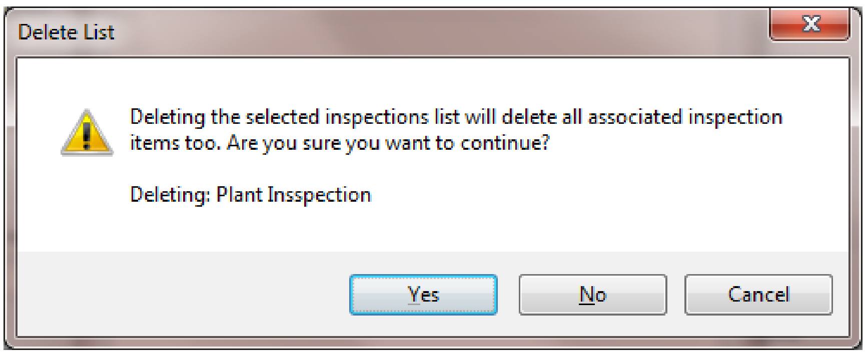
To edit an item in the Safety Inspection List

- Move to the grid and double click in the cell that holds the item you want to edit. This action will invoke edit mode.
- Edit the text.
- Click on the **Post/Save Changes (✓)** button to save the changes.

Deleting an item in the Safety Inspection List

Note: Deleting the selected inspections list will delete all associated inspection items at the same time.

- Move to the grid and select the item you want to remove.
- Move to the data control and click on the **Remove (-)** button.



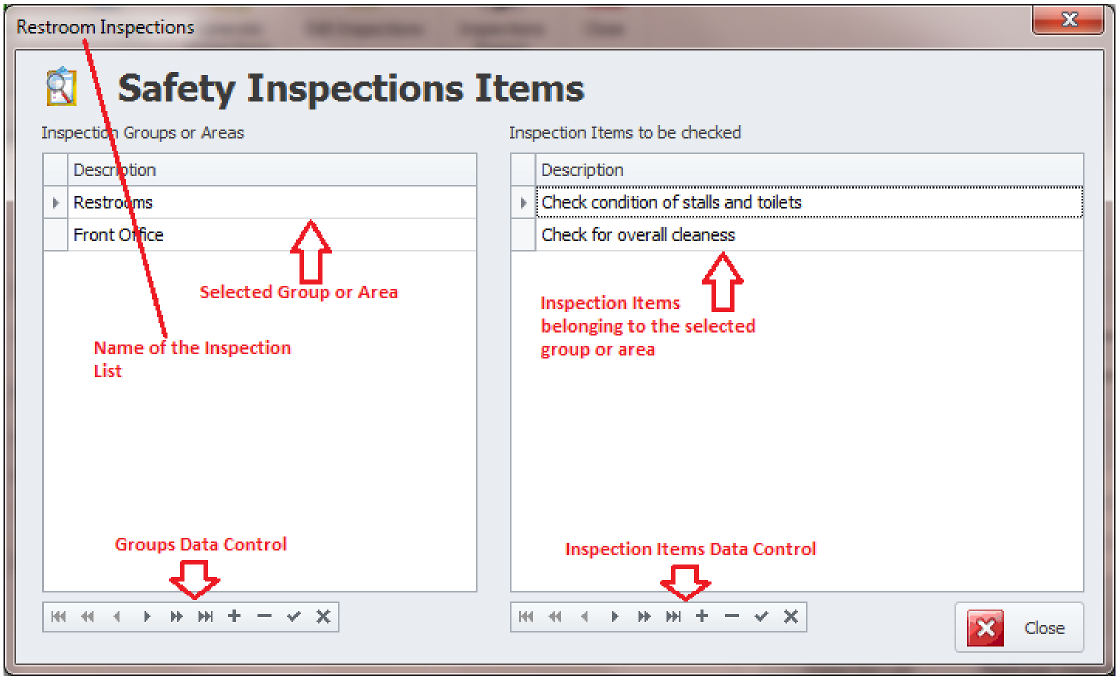
- When prompted about the deletion, click on the **Yes** button.

Edit Inspection Tasks

Inspection Tasks would indicate the items to be inspected as arranged in groups. To edit the items to be inspected, this sequence must first be followed:

- Creation and selection of the **Inspection List**.
- Creation and selection of an **Inspection Group**.
- The Editing of the **Inspection Items**.

The following illustrates the elements of the **Safety Inspection Items** Editor:



To access the Safety Inspections Items Editor

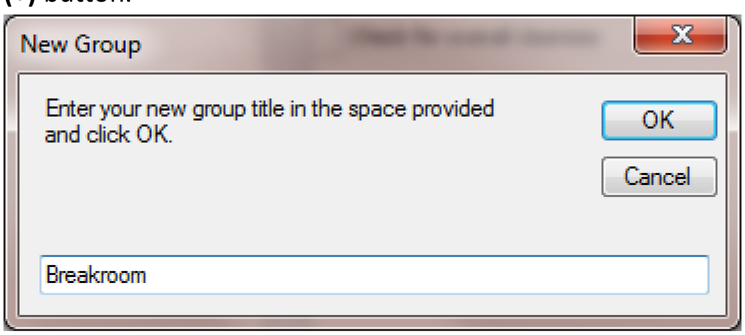
From the ribbon control:

- Move to the ribbon and click on the **Edit Inspections** option.
- From the invoked **Safety Instructions List,** select the List that contains the items you want to access or edit from those listed in the grid.
- Click on the **Select** button to invoke the **Safety Inspections Items** dialog.

Adding a New Group or Area

To add a new group or area:

- Move to the **Data Control** on the left of the screen (inspection groups) and click on the **Append (+)** button.

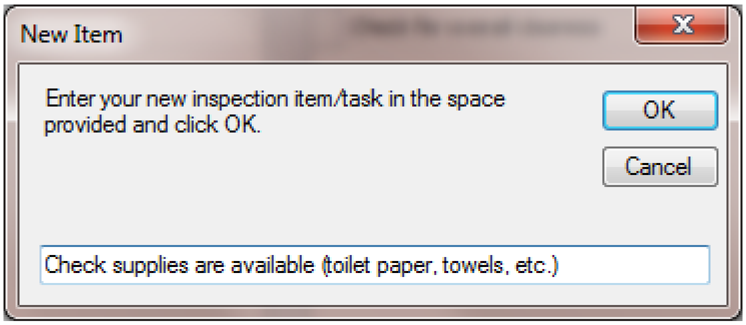


- When prompted to enter a name for the new group, enter this in the space provided and then click on the **OK** button. This alpha/numeric field can hold up to 40 characters.
- Return to the same **data control** and click on the **Post/Save Changes (✓)** button to save the changes and add the group.

Adding a New Inspection Item

To add a new inspection item:

- Move to the grid of all the groups or areas and select the group you want to add an inspection item to by selecting it.
- Move to the **Data Control** on the right side of the screen (inspection items) and click on the **Append (+)** button.



- When prompted to enter a new inspection item, enter this in the space provided and then click on the **OK** button. This alpha/numeric field can hold up to 80 characters.
- Return to the same **data control** and click on the **Post/Save Changes (✓)** button to save the changes.

Creating a New Inspection

To create a new inspection record:

- Move to the ribbon and click on the **Add New** button.
- Move through the fields of the **Details** tab and edit the information found there.
- Move to the ribbon and click on the **Save Changes** option.

Saving Changes

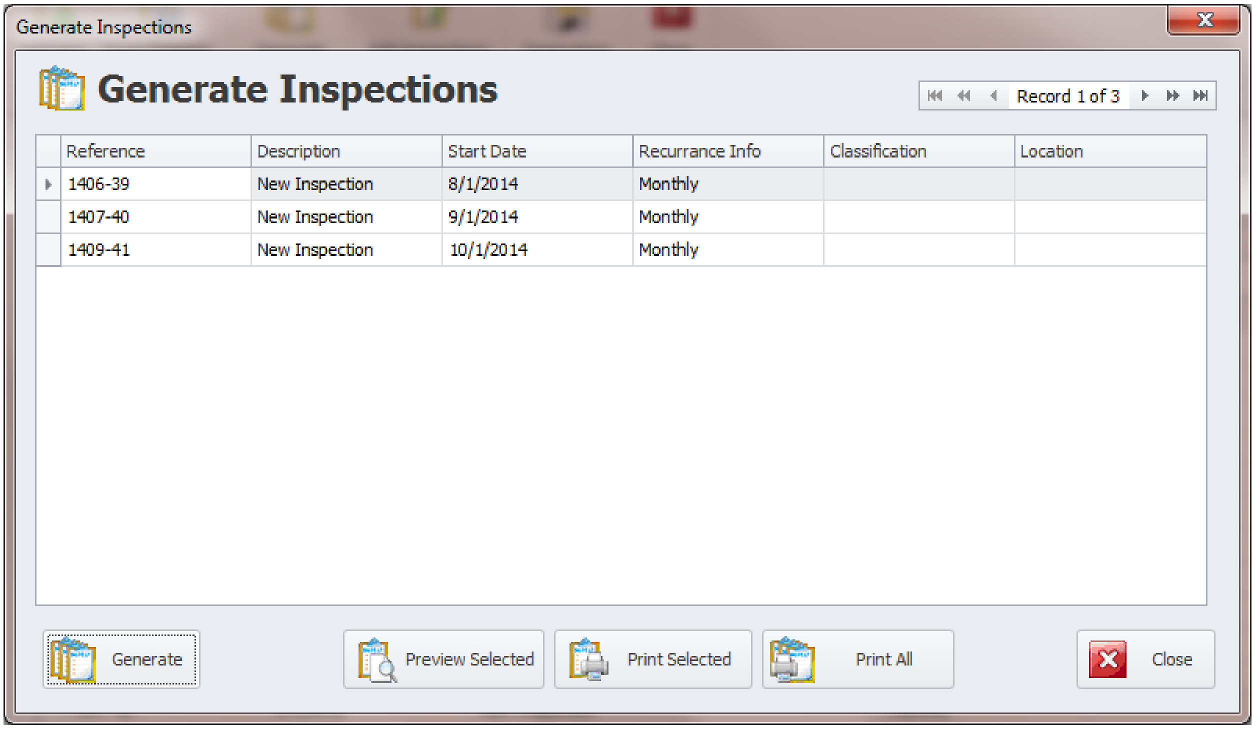
Whenever you edit a record, you must save your changes to retain these edits.

To Save Changes:

- Move to the ribbon and click on the **Save Changes** option.
  OR
- Move to the data control in the Quick Access toolbar and click on the **Post/Save Changes** button.

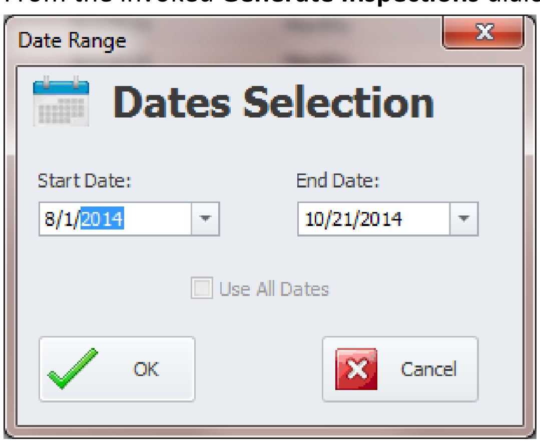
Generate Inspections

With the Generate Inspections routines you can generate a date range of inspection records. Once generated, you can then print some or all of these records. The following illustrates the elements of this feature:



To Generate a Date Range of Inspections

- Move to the ribbon and click on the **Generate Inspections** option.
- From the invoked **Generate Inspections** dialog, move to and click on the **Generate** button.



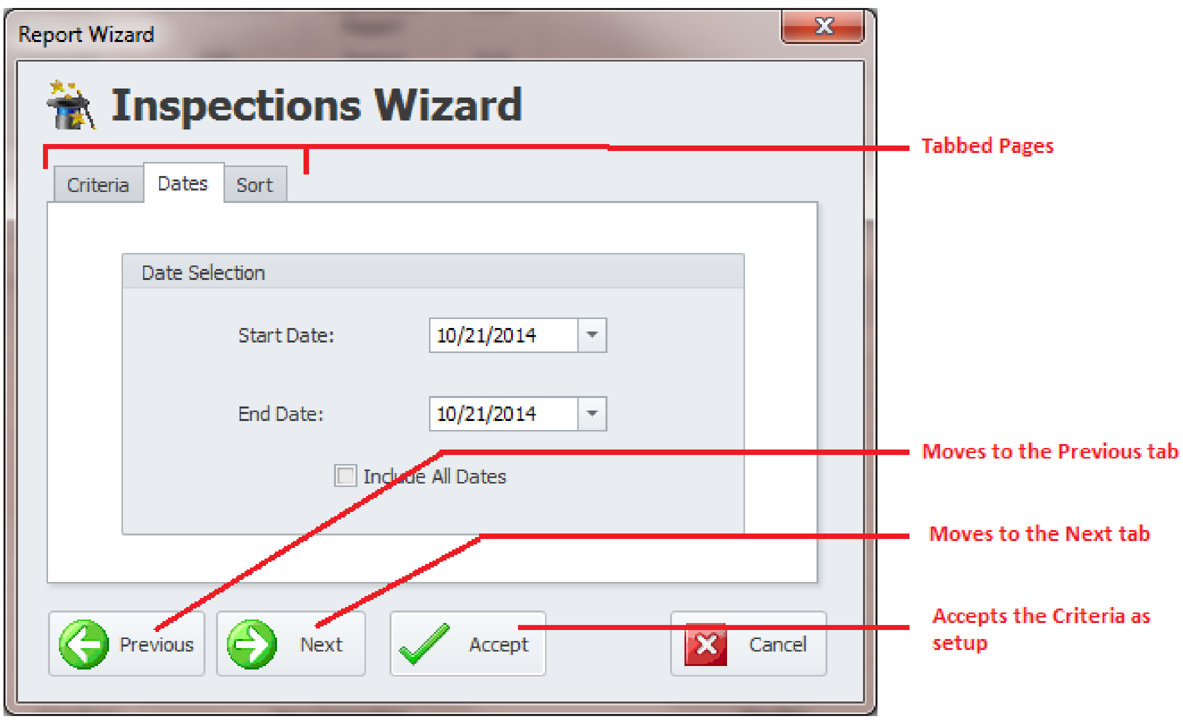
- From the invoked **Date Range** dialog, move to the **Start Date** field, and using the attached calendar, select the starting date that you want to use.
- Move to the **End Date** field, and using the attached calendar, select the ending of Inspection generation.
- Click on the **OK** button.

- You now have the following print options:
  - **Preview Selected** – Clicking this button will provide a print preview of the selected record.
  - **Print Selected** – Clicking this button will send the selected inspection record to the printer.
  - **Print All** – Clicking this button will send all inspection records, as shown, to the printer.

Inspections Wizard

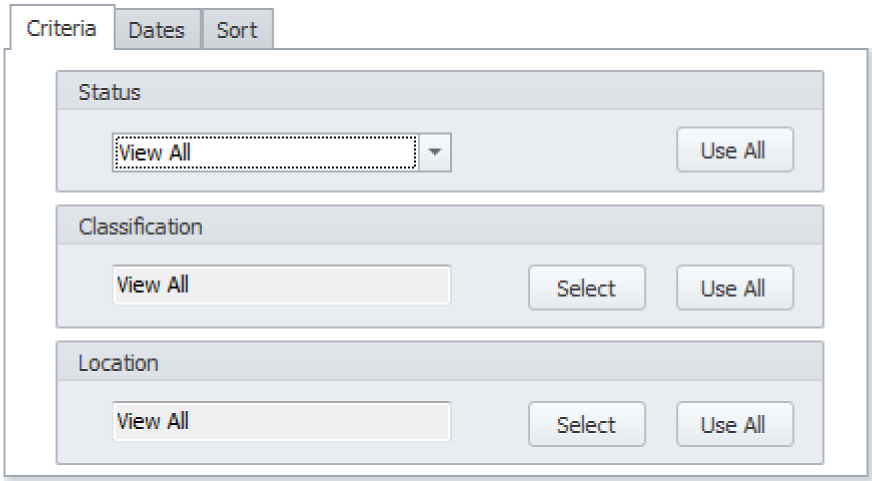
The **Inspections Wizard** is used to create the **Inspections Report**, and is also used as the **Filter Wizard**. This wizard will be outlined next.

The following illustrates the common feature of the **Inspections Wizard**:



CRITERIA TAB

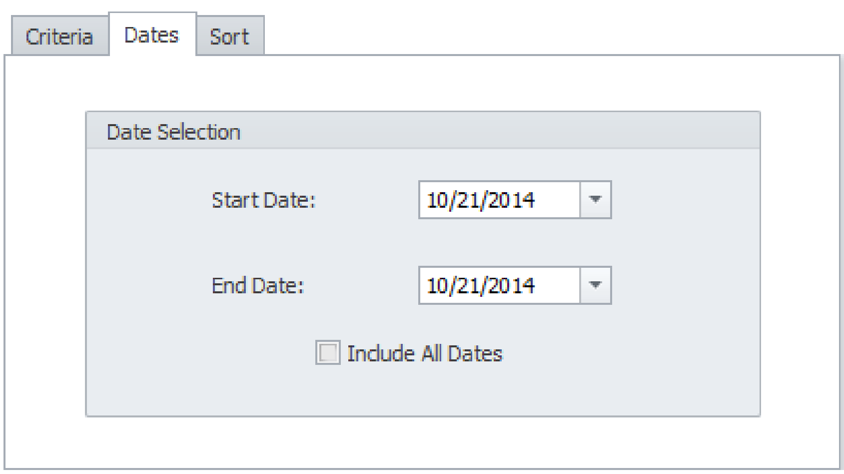
The following are the elements of the Criteria tab:



- **Status** – Selectable from the drop down list, this is the Status indicator to filter by. Click the **Use All** button to ignore this criteria.
- **Classification** – This field criteria is selectable from a Lookup dialog. Click on the **Use All** button to ignore this criteria.
- **Location** – This field criteria is selectable from a Lookup dialog. Click on the **Use All** button to ignore this criteria.

DATES TAB

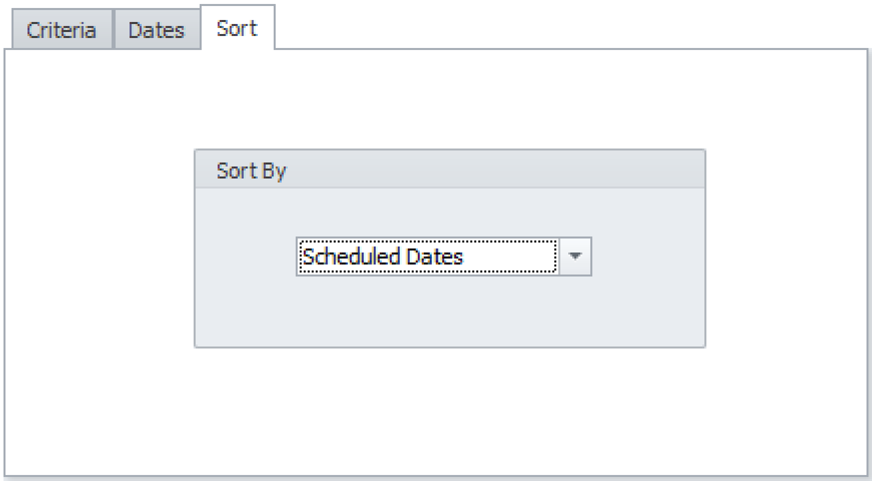
This tab allows you to specify the date range of inspection records to filter by. The following illustrates the elements of this tab:



- **Start Date** – This is the start date of the filtering range and is set by using the attached calendar.
- **End Date** – This is the end date of the filtering range and is set by using the attached calendar.
- **Use All Dates** – Checking this checkbox will ignore date criteria.

SORT TAB

This field allows you to specify which field to sort by. The following illustrates the elements of this tab:



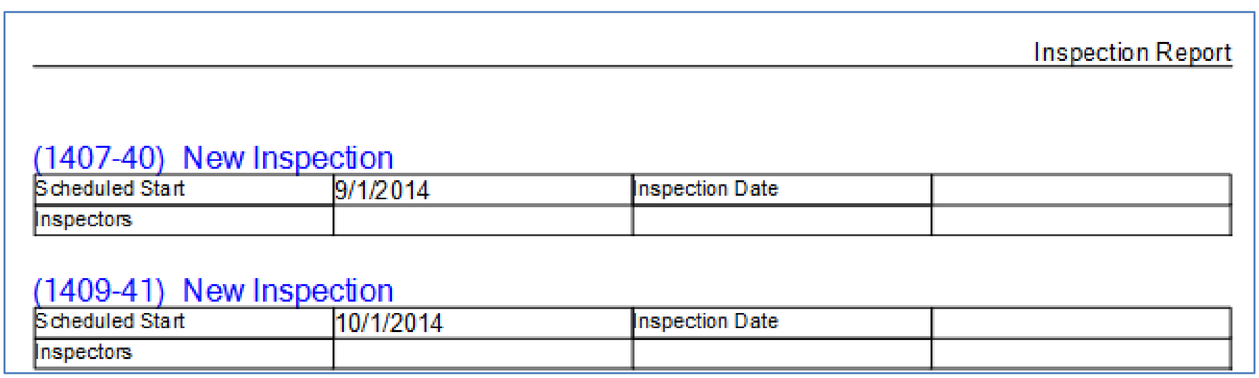
- Selectable from the drop down list, this field specifies how the returned data should be sorted. Options include:
    - **Scheduled Dates**
    - **Inspection Dates**
    - **Reference**

Accept Criteria

Once you're done setting up your criteria, move to and click on the **Accept** button to apply the options you have setup.

Inspections Report

The following illustrates the elements as found on an Inspection Report:



Inspection Report

(1407-40) New Inspection

Scheduled Start	9/1/2014	Inspection Date	
Inspectors			

(1409-41) New Inspection

Scheduled Start	10/1/2014	Inspection Date	
Inspectors			

To create the Inspections Report:

- Move to the **Safety Inspections** tab in the ribbon and click on the **Inspections Report** option.
- This report use the **Inspections Wizard** to setup the criteria to base the report on. Please refer to the ***Inspection Wizard*** section of this chapter on how to use this wizard.

Filter Wizard

The **Filter Wizard** allows you to apply special filtering options on the Inspections database. To use the Filter Wizard:

- Move to the **Filters** tab in the ribbon and select the **Filter Wizard** option.
- This filter uses the **Inspections Wizard** to setup the criteria to filter the database by. Please refer to the ***Inspection Wizard*** section of this chapter on how to use this wizard.

Not Regenerated Filter

This option filters the Inspections database by all inspection records that have yet to regenerate themselves. This can be useful when you want to turn off regeneration on selected inspections. To filter the database by Not Regenerated Inspections:

- Move to the **Filters** tab in the ribbon and select the **Not Regenerated** option.

Default Filter

This option removes any custom filtering that has been applied to the database and returns to the default filter (all open). To reapply the default filter:

- Move to the **Filters** tab in the ribbon and select the **Default Filter** option.

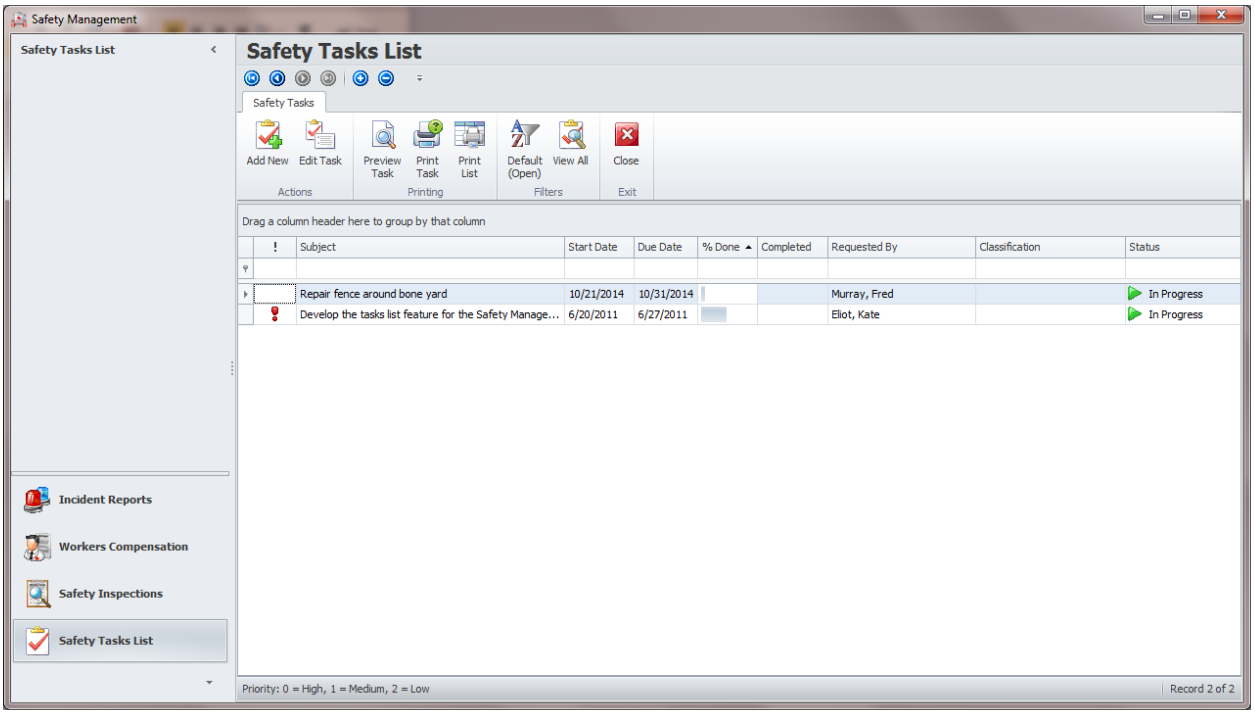
Print Options

To print the current inspection record:

- Locate and select the record you want to print.
- Open the **File** menu and expand the **Print Options** menu by clicking on it.
- Click on the Print Option of your choice:
    - **Print Inspection** - Allows printer selection and other options before printing.
    - **Quick Print** - Sends the document directly to the default printer.
    - **Print Preview** - Provides a print preview of the current record.

Safety Tasks List

Any good safety program is sure to generate a list of things that need attention. These can come from the results of safety inspections, suggestions, and incidents. The punch list allows you to keep track on these items and can actually create work orders form this list.

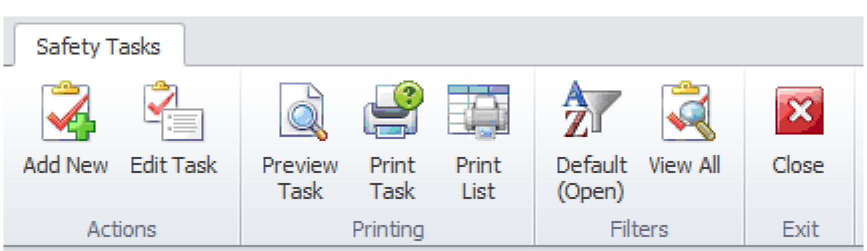


To access the **Safety Task List**:

- Move to and click on the **Safety Task List** tab in the **Navigation Bar**.

Safety List - Ribbon

The functionality of the **Safety Task List** is provided via the ribbon control. This control is structurally and visually split into logical groups. Each of these groups includes commands that perform specific functions.



The following are the elements on the **Safety Tasks List** ribbon control, reading left to right:

- **Add New** – Creates a new task record and opens it in the **Safety Task Editor**.
- **Edit Task** – Allows you to edit and delete a pre-existing task.
- **Print** – Prints the task record as it related to the selected record.
- **Print Preview** – Provides a print preview of the task record.
- **Print List** – Prints the current list of tasks.
- **Default Filter** – Filters the database by documents with an open status.
- **View All** – Allows you to view all tasks regardless of status.
- **Close** - Exits **Personal Task List** and invokes the menu screen.

Adding a New Task

To add a new task:

- Move to the **Safety Tasks List** screen.
- Move to the ribbon and click on the **Add New** button.
- Follow the instructions on using the ***Safety Task Editor*** as found in this chapter.

Editing a Task

To edit a pre-existing task:

- Move to the **Safety Tasks List** screen.
- Move to the list of tasks and select the task you want to edit.
- Move to the ribbon and click on the **Edit Task** button.
- Follow the instructions on using the ***Safety Task Editor*** as found in this chapter.

Printing a Task

You can print the selected work order:

- Select and make active the task record you want to print.
- Locate the **Print Options** group in the ribbon.
- Click on the **Print** or **Print Preview** options.

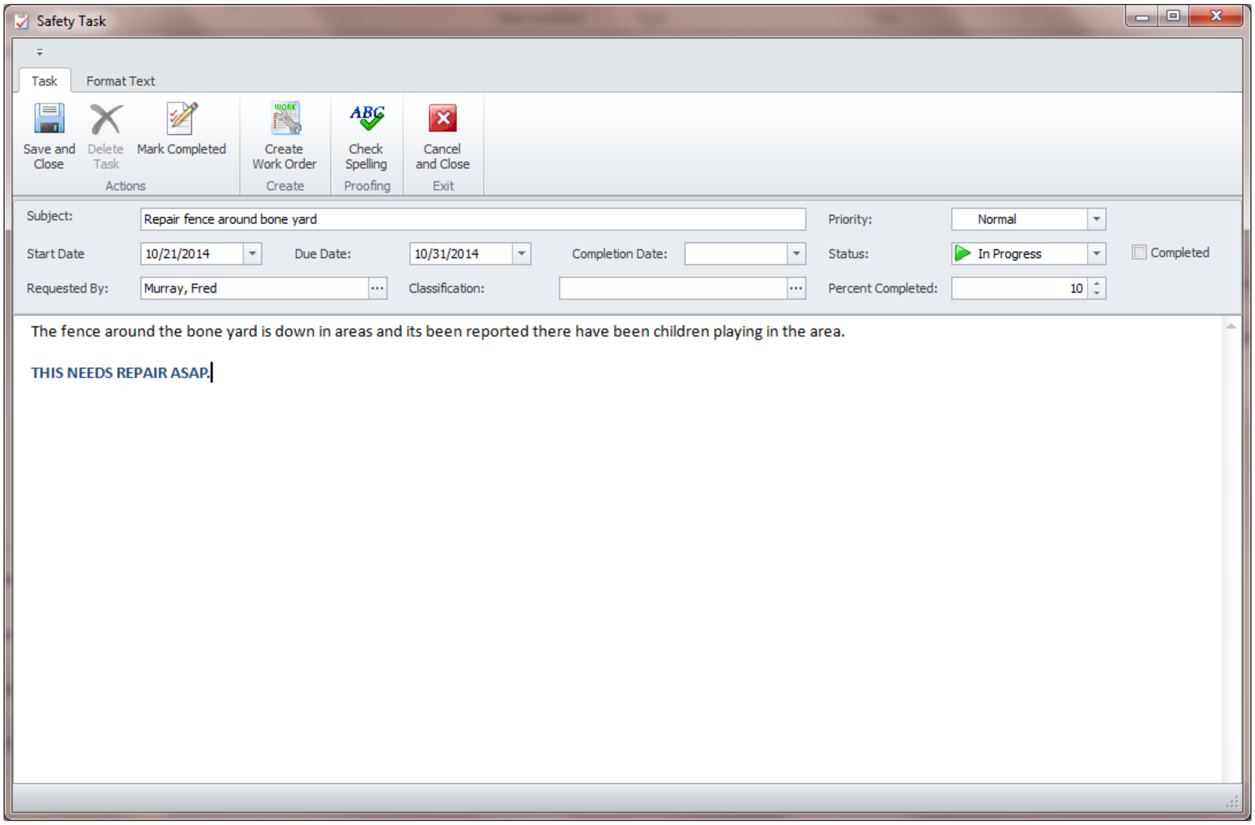
Print Tasks List

To print the entire tasks list as currently shown:

- Move to the **Safety Tasks List** screen.
- Move to the ribbon and click on the **Print List** option.

Safety Tasks Editor

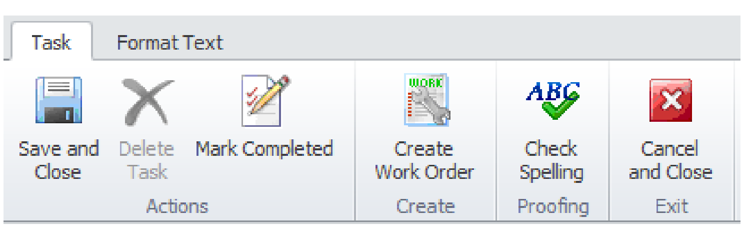
Tasks are created and edited using the **Task Editor**. This editor allows you to setup specifics about a task.



Safety Tasks Editor - Ribbon

The functionality of the **Safety Tasks Editor** is provided via the ribbon control. This control is structurally and visually split into logical groups. Each of these groups includes commands that perform specific functions.

The ribbon found here has two tab pages, **Tasks** and **Format**. The **Tasks** page is exclusive to the editor and will be explained. The **Format** page deals with formatting the main body of the tasks and share features of the **Rich Text Editor**. Please refer to the ***Rich Text Editor*** chapter for information on the options available on the **Format** ribbon page.



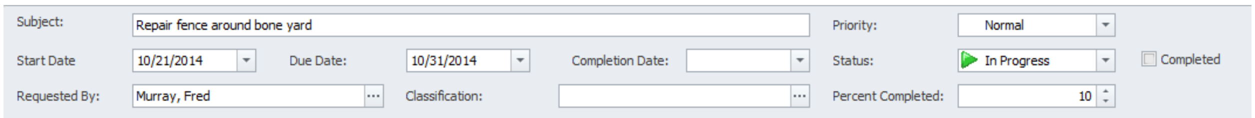
The following are the elements on the **Task** page in the ribbon control, reading left to right:

- **Save and Close** – Saves any changes made and closes this editor.

- **Delete Task** – Deletes and removes the loaded task from the database.
- **Mark as Completed** – Moves through the various task fields marking the task as completed.
- **Create Work Order** – Create a new work order based off the selected task.
- **Check Spelling** – Checks the spelling as it applies to the main body of the task.
- **Cancel and Close** – Closes the editor without applying any changes made to the task.

Elements of the Task Editor

The following is an outline of the data input fields as it relates to the **Safety Tasks Editor**:



- **Subject** – This alpha/numeric field can contain up to 100 characters. Use this field to provide a brief identification for the task.
- **Priority** – Selectable from the drop down list, this would indicate the priority you are assigning to the tasks. Option include: **High Importance, Normal** and **Low Importance**.
- **Start Date** – This date only field would indicate the scheduled date work on this task will commence.
- **Due Date** – This date only field would indicate the date you would like this task to be completed by.
- **Completion Date** – This date only field would indicate the actual date the task was completed.
- **Status** – Selectable from the drop down list, this would indicate the current status of the task Options include: **Not Started, In Progress, Completed, On Hold** and **Deferred**.
- **Completed** – When checked, this would indicate that the task has been completed.
- **Requested By** – This alpha/numeric field can contain up to 30 characters. Use this field to show who requested this task. You can select an employee by clicking on the ellipse button attached to this field.
- **Classification** – This alpha/numeric field can contain up to 30 characters. Use this field to assign a classification to the tasks.
- **Percent Completed** – This field is used to indicate how much of the task has been completed. This numeric only field will accept values in the range of 0 to 100.
- **Main Editor** – This area is used to outline the complete task. There is no size limitation to this field and it makes use of a rich text editor allowing for many formatting options.

Creating a Work Order from Task List

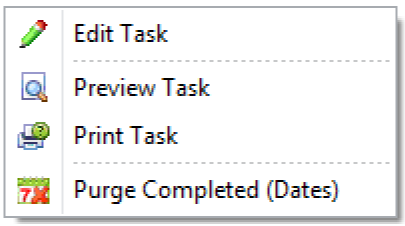
You can create a work order based on a task by:

- Locate and make active the task you want to create a work order for.
- Move to the ribbon and click on the **Edit Task** button.
- Move to **Task** tab in the ribbon and click in the **Create Work Order** option. This will invoke the Work Order creation wizard.

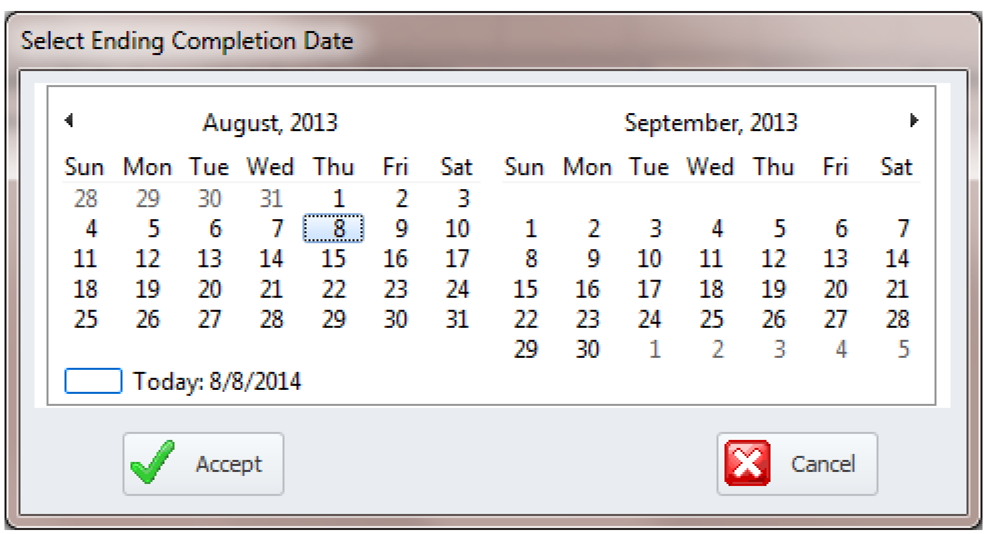
- Refer to the ***Common Features*** chapter and the ***Work Order Wizard*** section to find how to use this wizard.

Purging Older Tasks Records

Once you've been using the **Safety Tasks** for a while, you may want to purge or delete some of the older, completed tasks out of the database. To do this:



- Move to the **Safety Tasks List** screen.
- Move to the list of tasks and right-mouse click on the grid.
- Select the **Purge Completed (Dates)** option.
- From the invoked calendar, select the ending date of the purge. All completed tasks prior to this date will be removed from the database.



- Click on the **Accept** button.

When prompt about the deletion, click on the **OK** button to proceed