SYSTEM ADMINISTRATION TRAINING GUIDE

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COURSE 1 - SYSTEM SUPERVISORS TRAINING AND INSTALLATION

Target Group

Staff who will be involved in the day to day management of the package, including those who will be responsible for maintaining lists of information used by the package and for setting up User accounts for new users.

Previous Knowledge

It would be helpful if delegates had a good working knowledge of operational practices and basic WINDOWS. Good basic keyboard skills. N.B. This course will not cover any aspects of Novell or any other network operating system, although network issues, as far as they affect the package, will be discussed.

Equipment

Copy of the User/Administration Guide
Area/Team lists

PROGRAMME

Introduction And Course Objectives

Session 1
Product Overview
Hardware Requirements
Installation and Refreshes
- Getting Started
- General Controls
- Form Controls
- System Options

Session 2
- Maintaining Lists
- Team Details

Creating Menus
- Setting Up New Accounts
- Reset Users Logged On

COURSE OBJECTIVES

By working through this training programme, you will be able to do the following:

Carry out basic System Administration functions

Hardware and Installation

Set up Lists for pre-defined options

Manage System defined options

Create Menus

Create User ID's

Understand Re-Index procedures

Understand Re-Set Users Logged On procedures

SESSION 1

HARDWARE REQUIREMENTS

This training copy is designed to run as a single user version, installed on a local PC. The machine specification that will be required is shown below. A full specification of equipment is included for information purposes only, as only the workstation requirements apply.

HARDWARE SUGGESTIONS FOR LOCAL NETWORK

Server

(Based on HP ProLiant ML115 G5)

Opteron 1352 2.1 GHz
Dual Processor or Dual Processor Support
8 Gb DDR2 SDRAM preferred
Serial ATA Controller
250 Gb Hard Drive Serial ATA 150
Ethernet, Fast Ethernet, Gigabit Ethernet
CD Drive or access to Rack CD
Windows Server 2003
Windows Small Business Server 2003

LAN CABLING

Support Ethernet, Fast Ethernet, Gigabit Ethernet

WORKSTATIONS

P4 min 1.6 GHz
2 Gb RAM
250 Gb Hard Disk
Ethernet, Fast Ethernet, Gigabit Ethernet
256 Mb Graphics Card
Windows Vista, XP or 2000
Internet Explorer 6.0 or higher
CD Drive
15” Monitor
Keyboard
Mouse

** 1 Workstation, with access to data sets, to be equipped with VPN and access for support, if required

INSTALLATION

Installation must take place on a machine that has been previously installed with Windows 2000 or XP Professional. Workstations also require Internet Explorer 6.0 or higher.

Before you begin the installation process check the hard disk and decide where you want to install the application. The default directory used during installation is **C:\SBAPPS\nnn\** and its sub-directories **\DATAFILE** and **\STATFILE.** Software will be installed automatically to the workstation. Databases and other folders are located in **\COMMON** on the CD. These should be copied to either the server or workstation in the case of a standalone installation, before running the application. If the application is to be networked, it is recommended that the data files are copied to the server first and that the users are given read, write and create privileges on all the folders and their contents. The users should also be given access to this area using a designated mapped drive. Please note that this application does not recognise long folder names or spaces in the path name. We recommend that the path name is kept short e.g. 'SBAPPS'

STARTING THE WORKSTATION INSTALLATION PROCESS - WINDOWS 2000 OR XP

During the installation process you can use the mouse to make selections. If you use the keyboard you can press **Tab** to select options or buttons. After selecting a check box or button with the **Tab** key, press the **Enter** key to complete the selection. Pressing **Enter** is the same as **OK**. Pressing **Esc** is the same as **Cancel.**
To begin installing follow these steps:

First close any open programs by displaying the taskbar, if hidden, and right click on the program button, and click **Close** on the menu that appears
If you are installing for the first time from CD-ROM, set-up starts automatically. You can skip the following steps, unless the CD-ROM installation does not start automatically.
Click the **Start** button on the taskbar, then click **Run**
When the **Run** dialogue box appears, type **d:\setup**, where D is the CD drive. If you have not already closed any open applications, you may get a message to close them before continuing. Click the **Install** button and follow the instructions.
A set-up box will show the path to which the application will be installed. The default path is **C:\SBAPPS\nnn\**
Copy the files located in **\COMMON** to either the PC directory or a location on the server. **NOTE: files copied from a CD will be read only unless the file attributes are changed (does not apply to Windows XP). It is essential that these file attributes are changed before attempting to run the application.**

Once all the files have been installed on your machine, if you need to change the default settings it will be necessary to run the SBSETUP utility, which is described below.

DIRECTORY STRUCTURES

The workstation directory structure is as follows:

C:\SBAPPS\nnn
This is the main application directory and contains the EXE file and configuration files. These are also the files that should be located upon individual workstations, if the application is being run in a network environment. This installation method is recommended in order to gain maximum performance benefits. A subfolder 'nnn' may also be included when products are being used singly

C:\SBAPPS\nnn\BACKUP
This folder is used for storing backups generated by the internal backup procedure. If this directory is not installed, it will be created automatically by the application.

C:\SBAPPS\nnn\ICONS
This folder holds the icons used by the application.

C:\SBAPPS\nnn\MANUAL
This folder stores a copy of this manual, and any additional User Guides that are required to support the individual options that have been purchased. The documents are in Word 2000 document format as a self-extracting EXE file

C:\SBAPPS\nnn\PRIVATE
This folder contains sub folders. These folders are created the first time the application is run at the location specified during installation see PC or Server Data Installation

..\PRIVATE\QUERIES
This contains any letters etc. that have been set up as 'private' utilities in the application.

The workstation installation should be repeated at each PC that will require access to the application.

PC OR SERVER DATA INSTALLATION

Before running the application, copy the following folders which are located on the CD in **\COMMON** to either a server location or to **C:\SBAPPS\nnn\** if the application is being run as a stand-alone.

C:\SBAPPS\nnn\AUTOMATION
This folder holds master templates of reports, spreadsheets etc. which are used by the application to create reports

C:\SBAPPS\nnn\CRYSTALREPORTS
This folder is used to store Crystal Reports, which have been included in the application

C:\SBAPPS\nnn\DATAFILE
This folder contains all databases storing client and provider details.

C:\SBAPPS\nnn\HELP
This directory stores all associated help files for F1 help. These are in HTML format and require Internet Explorer

C:\SBAPPS\nnn\SHARED
This folder contains sub folders. The root folder is also used to store files created by users for use with Crystal Reports

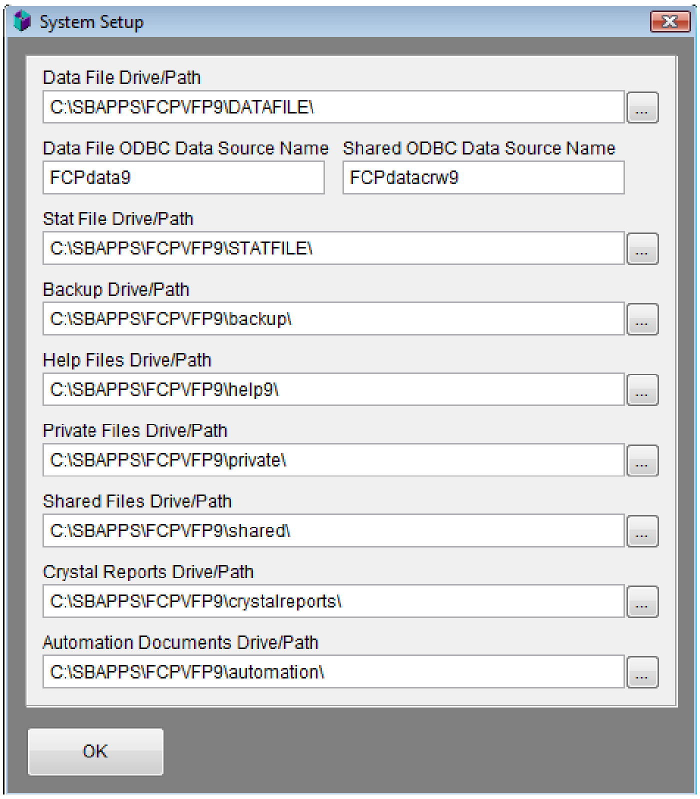
..\SHARED\QUERIES
This contains any letters etc. that have been set up as ‘shared’ utilities in the application.

..\SHARED\SAVEDOCS
this folder retains a history of user defined documents, reports etc. It is also used by the application to store copies of DfES Returns and similar key documents
..\SHARED\UPDATES
This folder contains new program files, which will have been loaded by a System Refresh procedure. This file will be copied automatically to any workstation the first time of logging on after a refresh.

C:\SBAPPS\nnn\STATFILE
This directory is used to store the list files for use by fields such as ‘District’

Once this task has been completed the utility SBSETUP should be run from **C:\SBAPPS\nnn\** to identify the paths that are being used for the folders copied from the **\COMMON** folder on the CD. Before running SBSETUP ensure that the necessary privileges and drive designation has been completed.

SBSETUP is run from the application directory, and the form is shown below:



Data File Drive/Path: C:\SBAPPS\FCPVFP9\DATAFILE\

Data File ODBC Data Source Name: FCPdata9

Shared ODBC Data Source Name: FCPdatacrw9

Stat File Drive/Path: C:\SBAPPS\FCPVFP9\STATFILE\

Backup Drive/Path: C:\SBAPPS\FCPVFP9\backup\

Help Files Drive/Path: C:\SBAPPS\FCPVFP9\help9\

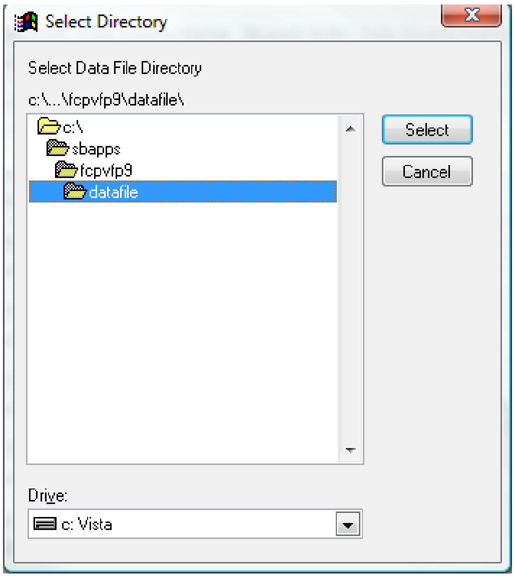
Private Files Drive/Path: C:\SBAPPS\FCPVFP9\private\

Shared Files Drive/Path: C:\SBAPPS\FCPVFP9\shared\

Crystal Reports Drive/Path: C:\SBAPPS\FCPVFP9\crystalreports\

Automation Documents Drive/Path: C:\SBAPPS\FCPVFP9\automation\

The default installation paths will be shown. To change these paths use ... to display the following ‘directory/folder selector’. First select the drive letter, and then the folder containing ‘datafile’, ‘statfile’, ‘backup’ or ‘help’ tables.



Select Data File Directory

c:\...\fcpvfp9\datafile\

Drive: c: Vista

The CD-ROM should then be used to install the software and support files at each workstation on which the software will be used. Note that the software cannot be run directly from the server, unless Windows is being run from the server/host machine. Installation at each workstation is the recommended solution as this leaves program files on the workstation with only data being managed on the server. Before running the application either run SBSETUP, to configure the path information, or copy \SBAPPS\nnn\CIWADMIN.DBF from the first workstation to the server and then from the server to the individual workstations. ***If the location of \SBAPPS\nnn\DATAFILE is not on the local PC, then it is essential to reconfigure the ODBC connection, see below.***

CREATING A SHORTCUT

If a shortcut is required on the desktop, please note that the executable programme is named LOADER.EXE. This executable includes a facility to automatically update application executables if they have been changed since the last time the programme was used.

INSTALLING A SYSTEM REFRESH

From time to time SoftBox will despatch to you a ‘System Refresh’. This may be to apply some modifications requested by you, or as part of a general upgrade of the application. When a refresh disk set or CD-ROM is received, it is installed in the same way as the original software. A System Refresh is always installed from a workstation.
When using a CD-ROM it will launch automatically. The Refresh disk will prompt for the location of the application \SBAPPS\nnn\. Folders ..\DATAFILE and ..\STATFILE will then be backed up into date named sub-directories, before new data structures are installed and data copied to them. A new program file is then installed to the workstation and to the UPDATES folder, for use by other users.

ODBC CONNECTIVITY

ODBC connections will be created automatically as part of the installation process. If you wish to run the **ODBC** administrator, it will be found in ◄🖱**Start**◄🖱**Settings** ◄🖱**Control Panel.** To view the connections, select **System DSN** tab card, highlight the connection name and use ◄🖱**Properties**

The connection uses **Microsoft Visual FoxPro Driver (Version 6.01.8629.01)**
PLEASE NOTE: The version number is important as earlier versions may not contain the require **Options** (see below).
Data Source name **nnnDATA**
Description **SoftBox Application Data**
Database Type **Visual FoxPro Database**
Path **C:\SBAPPS\nnn\DATAFILE\CIW_DATA.DBC** or network path as appropriate
Options only **deleted** and **fetch data in background** required. **Exclusive** and **null** should not be selected. If they are shown ‘ticked’, this should be removed.

A second connection for the shared options is required. Follow the same procedure for viewing the second connection.
Data Source name **nnnDATACRW**
Database Type **Free Table Directory**
Path **C:\SBAPPS\nnn\SHARED\** or network path as appropriate
Options only **deleted** and **fetch data in background** required.

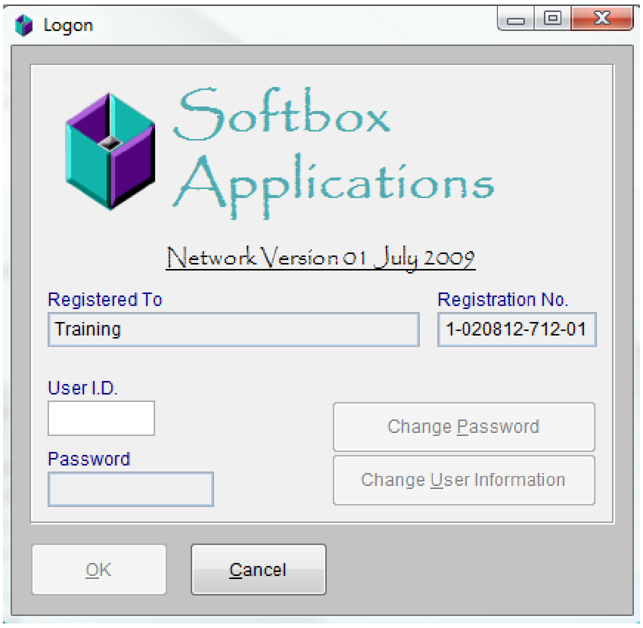
Note that the ODBC connection name is a default setting. If required the connection name can be changed by using SBSETUP.

The same connection name MUST be used for all installed PC's, otherwise connectivity errors will occur.

GETTING STARTED

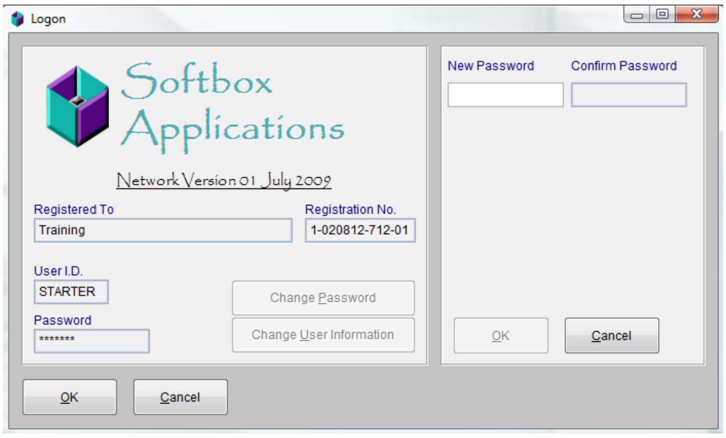
To start the application use the left mouse button to click on Start select Programs, SoftBox Applications, Application Name, Log On. The User ID and Password form is then displayed. Before entering the User ID/Password details a brief description about how the information in this training guide is presented.

◄🖰	This is used to denote a click on the left mouse button or ‘◄◄🖰‘ is used to signify a double click. A right mouse button click is signified by the symbol 🖰►. E.g. ◄🖰Cancel means click once, using the left mouse button, on the Cancel button on screen.
◄🖰Forms ◄🖰Client	When the mouse is used with a key word it signifies menu choices. For example, ◄🖰Forms ◄🖰Client to indicate select Forms from the menu bar and Client from the menu popup that is displayed beneath it.
Tab	You will find it easier if the ‘Tab’ key is used to move between one data item and the next, rather than the Enter key. Tab is usually to the left of the letter ‘Q’ and above ‘Caps Lock’. Just take a moment to locate it, if you are not sure


Logon
Softbox Applications
Network Version 01 July 2009
Change Password
Change User Information
OK
Cancel

Registered To: Training
Registration No.: 1-020812-712-01
User I.D.:
Password:

By selecting ‘Change Password’ you will be given a window that allows you to change your password. The password that is used cannot be the same as the current one. The maximum ‘life’ of your password is 365 days. Your System Administrator may have set a shorter period. When you are given your User ID you will have been assigned an initial password of STARTER. When you log-in using your new User ID you will be prompted to change the password. The Password Change window is shown below:


Logon
Softbox Applications
Network Version 01 July 2009
Change Password
Change User Information
OK
Cancel
New Password
Confirm Password
OK
Cancel

Registered To: Training
Registration No.: 1-020812-712-01
User I.D.: STARTER
Password: *******

Clicking on the Cancel button stops the procedure and the password remains unchanged.

The following initial User ID has been created:
STARTER
The initial Password for this User ID is:
STARTER

Please note that the new password cannot be the same as the User ID. Other restrictions apply to passwords. Please see the section on User ID’s/Passwords.

This User ID gives access to the Administration menu options which are designed to allow the creation of user id’s and menus for general staff use.

FORM CONTROLS

The application is organised around an ‘application desktop’ of which the standard menu controls, described in the previous section are part. The desktop however contains a number of additional controls, and the individual forms also contain controls for displaying additional forms.

The icons displayed on the tool bars use the latest Windows ‘flat buttons’. This means that all options appear flat and not as raised buttons used in earlier applications. A disabled button is shown in pale grey. All options that have been enabled will be shown in black or subdued colour. When the mouse pointer passes over an enabled option the full colour icon is shown and the button is raised. To select the raised icon button use ◄ as with previous icon tool bars.

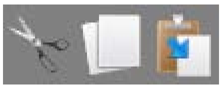
The icons displayed on a toolbar are controlled as part of the set up of profiles discussed in the next section. To maintain a standard, it is recommended that icons controlling forms should be placed on the top toolbar, whilst those for actions, e.g. Add are placed on the left toolbar.

Each tool bar icon also has a ‘tip’ attached to it. Pausing on the icon will reveal the ‘tip’. E.g. the first icon tip is Clients. The first three icons control the most commonly used forms - Clients, Carers and Resources. Attached to each of these icons is a button ▼ which when activated, displays a list of the last ten records used in this session. They are displayed in most recent first. The purpose of this is to allow the user to quickly re-select a record without the need for using trace facilities.

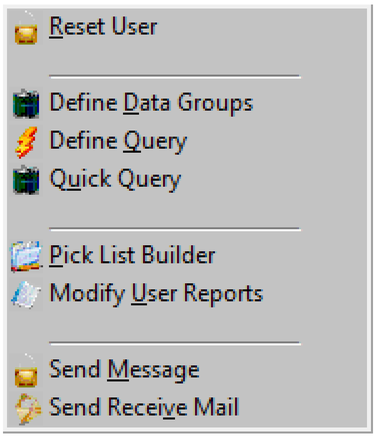
The top toolbar should always include the exit icon, ⏻ is **Exit**.

Navigation within records is always managed by displaying a list of entries for the form, within a list box. This list box will contain details from the record, enabling its identification. Once a record has been selected using ◄ the form will be refreshed with the details of the selected record.

The ‘cut and paste’ tools when available, are used to exchange details with the Windows clipboard.



Additionally, all forms can be controlled using the **menu bar** as described in the section ‘General Control Descriptions’. In the sample **Administration** menu shown below a number of options have been included, with the underscored letter shown.


Reset User
Define Data Groups
Define Query
Quick Query
Pick List Builder
Modify User Reports
Send Message
Send Receive Mail

The ⏻ icon is **Exit,** which is found on the **File** menu. Both **menu pad** and **menu popup** options contain an underlined letter. This allows the use of the underlined letter to execute the required function e.g. **A** would **Add** a new record to the current database.

Once a form has been brought onto the screen it can be closed by using the OK button displayed on the form.

To close a form **Close ◄ or** C or **Alt + F4.** You will see this alternative key combination of **ALT** and an **F** key used in a number of circumstances. The main difference between the different methods is that the **ALT** key can be used without having first activated the relevant menu. Leaving the record in this way will automatically save any of the changes that have been made to the information.

Active forms also contain controls. The first icon is a ‘Minimise’ facility. The last icon **X** is used to close a form once data has been entered.

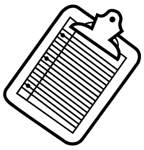
Some of the data items on forms will have lists attached to them. These are indicated by ▼ at the side of the data item. For example, Gender. To activate the list use ▼. To leave the item blank use *Spacebar* and *Tab* .

SYSTEM OPTIONS

OVERVIEW

In this section we will look at a number of options within the application, which will determine its appearance to the users.

INFORMATION REQUIRED FOR THE EXERCISE



DESCRIPTION	RESPONSE
Auto Client References	YES
Auto Provider References	YES

INSTRUCTIONS

Use ◄ 🖱 System ◄ 🖱 System Options to display the form

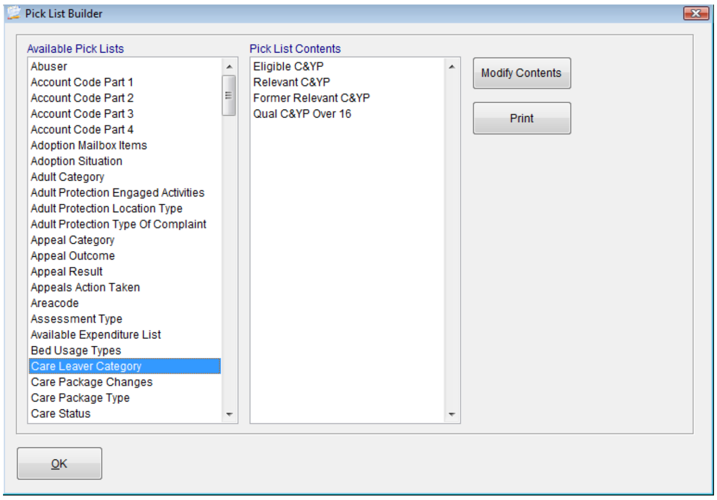
Set auto references to YES in both cases

Close the form using ◄ 🖱 OK

MAINTAINING LISTS

OVERVIEW

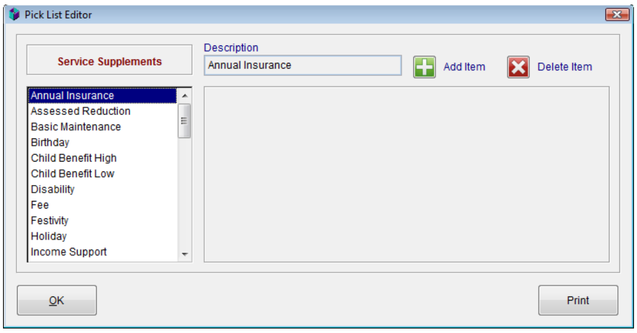
In this exercise we will examine the method to be used for maintaining look up tables used by the application. One of the privileges given by ‘Administration’ as part of the User ID is the ability to amend lists that appear behind such items as Client Category, etc.


Pick List Builder
Available Pick Lists
Pick List Contents
Modify Contents
Print
OK

Abuser
Account Code Part 1
Account Code Part 2
Account Code Part 3
Account Code Part 4
Adoption Mailbox Items
Adoption Situation
Adult Category
Adult Protection Engaged Activities
Adult Protection Location Type
Adult Protection Type Of Complaint
Appeal Category
Appeal Outcome
Appeal Result
Appeals Action Taken
Areacode
Assessment Type
Available Expenditure List
Bed Usage Types
Care Leaver Category
Care Package Changes
Care Package Type
Care Status

Eligible C&YP
Relevant C&YP
Former Relevant C&YP
Qual C&YP Over 16

In this application lists can be maintained centrally, from an Administration option as shown above, or from the form on which the item appears. If access has been granted to this utility, using ▶ on a list item field, also displays the list editor, as shown.

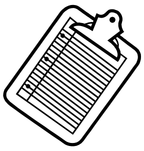

Pick List Editor
Service Supplements
Description
Add Item
Delete Item
OK
Print

Description: Annual Insurance

Annual Insurance
Assessed Reduction
Basic Maintenance
Birthday
Child Benefit High
Child Benefit Low
Disability
Fee
Festivity
Holiday
Income Support

In this list editor form an additional item is shown in order that a description can be added to the account code item. Most list items only require a description.

INFORMATION REQUIRED FOR EXERCISE 1



LANGUAGE
English
Other European
Urdu
Punjabi
Hindi
Bengali
Chinese
Arabic
Welsh
Other

INSTRUCTIONS

Use ◄🖱 System ◄🖱 Pick List Builder to display the form

Select ◄🖱 Language

Use ◄🖱 Modify Contents to display the list editor

Use ◄🖱 ⊞ Add to add new entry and to enable the fields

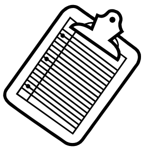
Enter the first data item from the table above

Repeat ◄🖱 ⊞ Add to add subsequent items. When entering additional details, ensure that the correct list item is selected by using ◄ to highlight

When all items are entered use ◄ OK to close list editor

Note that the contents of the list are now displayed in the pick list contents window

INFORMATION REQUIRED FOR EXERCISE 2



DISTRICT	CLIENT CATEGORY	RELATIONSHIP
Town	Elderly	Wife
Eastern	Physical Disability	Husband
Western	Learning Disability	Son
	Mental Illness	Daughter
	Substance Abuse	Uncle
	Child Care	Aunt
		Son-in-law
		Daughter-in-law
		None

INSTRUCTIONS

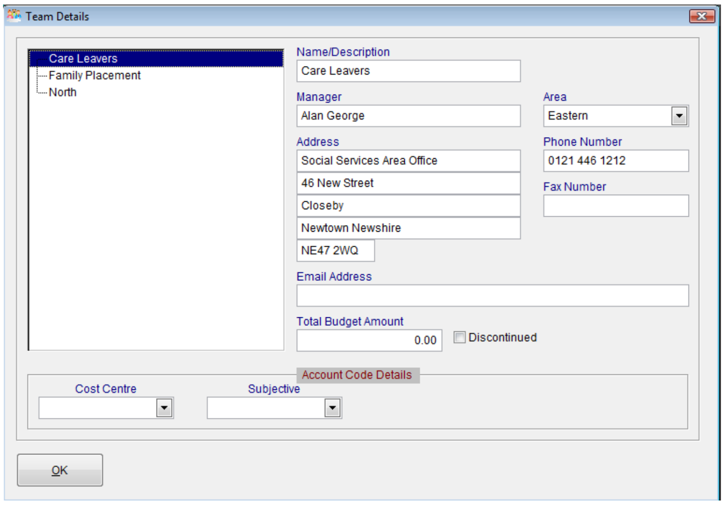
Repeat the process for the additional list items shown above.

When all lists have been created use ◀ OK to close the form

TEAM DETAILS

OVERVIEW

Before entering details of a user it will be necessary to set up team details. This is done using the team details form.



Team Details

- Care Leavers
  - Family Placement
  - North

Name/Description: Care Leavers

Manager: Alan George

Area: Eastern

Address:
Social Services Area Office
46 New Street
Closeby
Newtown Newshire
NE47 2WQ

Phone Number: 0121 446 1212

Fax Number:

Email Address:

Total Budget Amount: 0.00

☐ Discontinued

Account Code Details

Cost Centre:

Subjective:

The list editor cannot be used to create team names.

INFORMATION REQUIRED FOR EXERCISE 1

TEAM DETAILS

Team Name	North
Manager	Jane Richards
Address	Social Services Area Office
	46 New Street
	Closeby
	Newtown Newshire
	NE47 2WQ
District	Town
Phone	0121 446 3862
Budget Amount	
Cost Centre	
Subjective	

INSTRUCTIONS

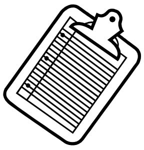
Use ◄🖰 **System** ◄🖰**Team Details** to display the form

Use ◄🖰 **File** ◄🖰 **Add** to enable the form and enter new details

Enter the team details from the table above

Use ◄🖰 **OK** to close the form

INFORMATION REQUIRED FOR EXERCISE 2



Team Details	
Team Name	Care Leavers
Manager	Alan George
Address	Social Services Area Office
	46 New Street
	Closeby
	Newtown Newshire
	NE47 2WQ
District	
Phone	0121 446 1212
Budget Amount	
Cost Centre	
Subjective	

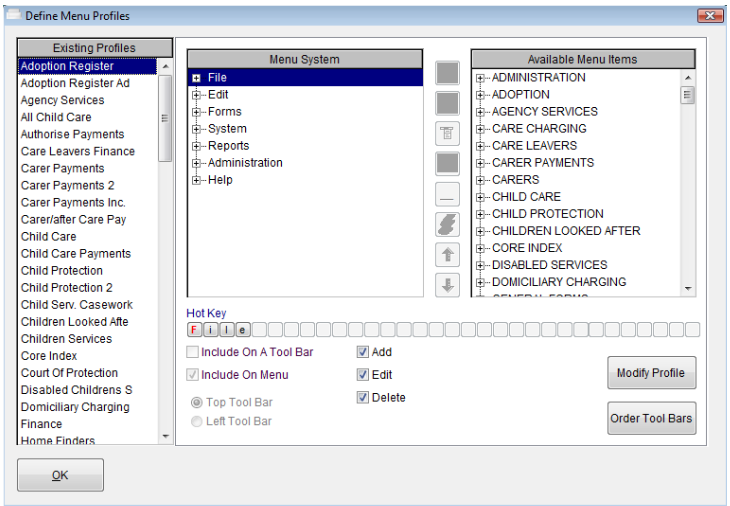
SESSION 2

CREATING MENUS

When the application is first installed, only a basic menu set is created. It is this menu set that is displayed when logging on with the initial User ID and Password. Before access can be given to users, one or more profiles will need to be created. It is these profiles that will control the functionality of groups and individual users.

In addition to the ability to create profiles, one or more sample templates will be included. These sample templates reflect the menu structure normally associated with a particular stand-alone product e.g. Residential Charging or Carer Payments.

Menu options ◄🖱System ◄🖱Define Menu Profiles display the following form.


Define Menu Profiles
Existing Profiles
Adoption Register
Adoption Register Ad
Agency Services
All Child Care
Authorise Payments
Care Leavers Finance
Carer Payments
Carer Payments 2
Carer Payments Inc.
Carer/after Care Pay
Child Care
Child Care Payments
Child Protection
Child Protection 2
Child Serv. Casework
Children Looked Afte
Children Services
Core Index
Court Of Protection
Disabled Childrens S
Domiciliary Charging
Finance
Home Finders
Menu System
File
Edit
Forms
System
Reports
Administration
Help
Available Menu Items
ADMINISTRATION
ADOPTION
AGENCY SERVICES
CARE CHARGING
CARE LEAVERS
CARER PAYMENTS
CARERS
CHILD CARE
CHILD PROTECTION
CHILDREN LOOKED AFTER
CORE INDEX
DISABLED SERVICES
DOMICILIARY CHARGING
Hot Key
F i l e
Modify Profile
Order Tool Bars
OK

☐ Include On A Tool Bar
☑ Include On Menu
● Top Tool Bar
○ Left Tool Bar
☑ Add
☑ Edit
☑ Delete

To create a new profile use ◄🖱File Add, this will enable a form containing a list of 'master' profiles included with the application. To base the profile on an existing template select the required template, which automatically enters that text into New Base Profile Name. Change the description of the profile to give it a new name and then ◄🖱Use Template. This places the new profile name into the list Base Profiles. Highlight the new profile name using ◄🖱. The contents of the profile are now listed in the central panel, under the heading of the new profile. Note that this list box contains expanding trees with '+' symbols appearing alongside the main menu items. To modify the profile use ◄🖱Modify Profile.

When an input form level is reached, the form appears along with the associated icon. Some of these forms may have a '+' sign indicating that there are further options. When this list is expanded further forms will be displayed along with a check box. If the check box is ticked users set up under this profile will have access to the sub-form.

The sub-form is associated with a main form. If no access has been provided to the main form, then the sub-forms are automatically excluded. These sub-forms are included in an ‘Outlook’ style toolbar adjacent to the form.

A further list area Available Menu Items contains all the functions that have been included in the application. Items may be added to the profile by first highlighting the menu level in the profile where the new option is to be included, this may also be at sub-menu level, if appropriate. The next stage is to highlight the option to be added and selecting ➕ from the central tool bar options. Once the item has been added to the menu list, its position can be moved by using ⇩ ⇧ tools.

The other options included at this stage are;

☰ This allows for a new menu option to be created, within the menu structure

▤ creates a sub-menu option within a menu pad item

__ inserts a separator into the menu structure

The Properties area at the bottom of the form is used to define whether the item is included on toolbars, either top or left, and the underscored letter to be used for keyboard shortcuts. Add/Edit/Delete options are set using this area.

Once all menu items have been added and the Properties option used to determine underscore letter and toolbar settings, select Order Tool Bars. This displays a list of all the items included in both top and left tool bars. The order of these items can now be set by using the button alongside the icon and holding the left mouse button down, drag the icon to the required position.

Once amendments to the profile are complete use OK to close the form.

OVERVIEW

In this exercise a standard menu is going to be created for and Administrator of the package. Icons will be assigned to toolbars and settings applied to the menu. The menu will then be used in conjunction with a user to give user access.

INSTRUCTIONS

Use ◄🖱 System ◄🖱 Define Menu **Profiles to display the Menu Generator**

Use ◄🖱 File ◄🖱 Add **to enable the form**

Select 'Carer Payments' from the templates list using ▼🖱 Templates

In field New Base Profile Name enter 'General User'

◄🖱 Use Template**. Confirm create menu based on template and** ◄🖱 OK **when complete**

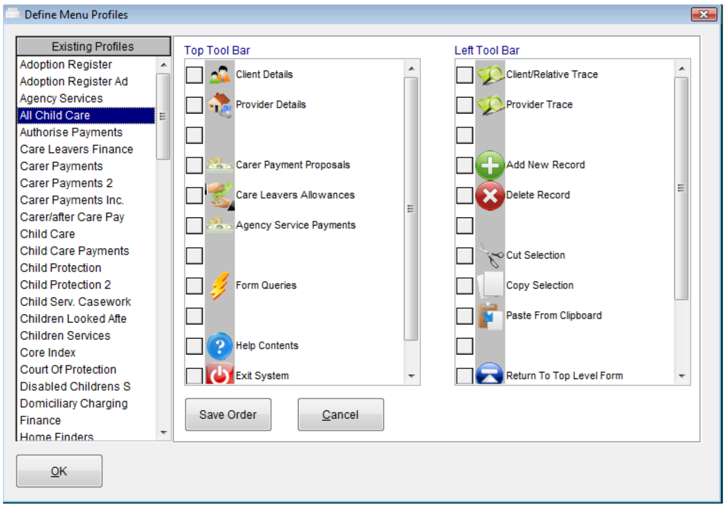
Use + to expand menu options. Note that further + indicators appear when a further menu level is attached. Each menu item displays its associated icon

Expand 'File' to reveal menu options. To change the options in this profile use ◄🖱 Modify Profile which enables the controls in between the two windows

To include or remove an item from either the top line menu pads or tool bars tick the appropriate check boxes

Select 'Administration' and expand to reveal options. With the highlight on Administration, use the delete icon in the centre column to remove all administrative options

To alter the toolbar properties use ◄🖱 Order Tool Bars **to display the form**


Define Menu Profiles
Existing Profiles
Adoption Register
Adoption Register Ad
Agency Services
All Child Care
Authorise Payments
Care Leavers Finance
Carer Payments
Carer Payments 2
Carer Payments Inc.
Carer/after Care Pay
Child Care
Child Care Payments
Child Protection
Child Protection 2
Child Serv. Casework
Children Looked Afte
Children Services
Core Index
Court Of Protection
Disabled Childrens S
Domiciliary Charging
Finance
Home Finders
Top Tool Bar
☐ Client Details
☐ Provider Details
☐
☐ Carer Payment Proposals
☐ Care Leavers Allowances
☐ Agency Service Payments
☐
☐ Form Queries
☐
☐ Help Contents
☐ Exit System
Left Tool Bar
☐ Client/Relative Trace
☐ Provider Trace
☐
☐ Add New Record
☐ Delete Record
☐
☐ Cut Selection
☐ Copy Selection
☐ Paste From Clipboard
☐
☐ Return To Top Level Form
Save Order
Cancel
OK

Use ◀ ☝ Save Order to return to the menu form

Use ◀ ☝ OK to close the menu definitions form

STAFF DETAILS

OVERVIEW

In this exercise we will enter details of a new member of staff. The first stage is to create a basic record for the new member of staff, entering personal details. This is followed by work location information. A member of staff may have more than one work location. Finally the personal details are updated with the main team and District/Area where the member of staff is based

INFORMATION REQUIRED FOR EXERCISE 1

TAB CARD	DESCRIPTION	RESPONSE
Personal Details	Title	Mr
	Forename	John
	Lastname	Brown
	House No/Name	47
	Address	Aston Avenue
		Closeby
		Newtown
		Newshire
		NE47 4QT
	Gender	Male
	Date Of Birth	01/10/69
Work Locations	Team	North
	Start Date	01/01/01
Personal Details	Team	North

INSTRUCTIONS

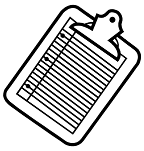
Use ◀🖱 Forms ◀🖱 Staffing Details to display the form

Use ◀🖱 File ◀🖱 Add to enable a new record

Enter the details shown above for the member of staff

Once completed close the form using ◀🖱 OK

INFORMATION REQUIRED FOR EXERCISE 2



TAB CARD	DESCRIPTION	RESPONSE
Personal Details	Title	Mrs
	Forename	Anthea
	Lastname	Busby
	House No/Name	48
	Address	Tythebarn Avenue
		Closeby
		Newtown
		Newshire
		NE47 4QX
	Gender	Female
	Date Of Birth	01/10/69
Work Locations	Team	Care Leavers
	Start Date	01/03/01
Personal Details	Team	Care Leavers

INFORMATION REQUIRED FOR EXERCISE 3

TAB CARD	DESCRIPTION	RESPONSE
Personal Details	Title	Mrs
	Forename	Brenda
	Lastname	Thompson
	House No/Name	4
	Address	Tytherington Close
		Closeby
		Newtown
		Newshire
		NE47 4QX
	Gender	Female
	Date Of Birth	19/09/59
Work Locations	Team	Care Leavers
	Start Date	01/03/01
Personal Details	Team	Care Leavers

INFORMATION REQUIRED FOR EXERCISE 4

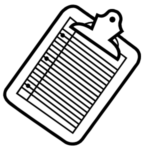
TAB CARD	DESCRIPTION	RESPONSE
Personal Details	Title	Mr
	Forename	John
	Lastname	Richardson
	House No/Name	34
	Address	Weston Close
		Closeby
		Newtown
		Newshire
		NE47 4QX
	Gender	Male
	Date Of Birth	19/09/55
Work Locations	Team	Care Leavers
	Start Date	01/03/01
Personal Details	Team	Care Leavers

USER ID

OVERVIEW

In this exercise we will assign a User ID to the member of staff whose details were entered previously. The User ID form will also be used to assign access rights to the individual based on the access profile that was created earlier.

INFORMATION REQUIRED FOR THE EXERCISE



DESCRIPTION	RESPONSE
User ID	USR1100
User Name	John Brown (entered automatically)
Base Menu Profile	General User
Issue Date	TODAY (auto)
Min Length	7
Duration	30
Exp Warning Days	21
Password Never Expires	NO
Manager	NO
Maintain Lists	NO

INSTRUCTIONS

Use ◀ 🔒 to display the User ID form

Use ◀🖱 File ◀🖱 Add to enable a new entry

Add the details from the information above

Use ◀🖱 Create User Menu Profile, to display the details assigned to the profile

This form allows for the individual permissions for a user to be modified from the profile that was used. By highlighting a form within the menu structure it is possible to withhold access rights

Expand ‘Forms’ to reveal ‘Agency Details’. Display ‘properties’ by using ◄ ✓ or ►’Agency Details’ and selecting ‘properties’ from the menu

Remove Add and Edit privileges from this form

Use ◄🖰 OK when complete

This returns to the User ID form

Use ◄🖰 OK when complete

This returns to Staffing Details

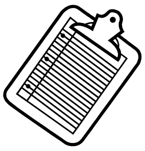
Use ◄🖰 OK when complete

LOG ON AS THE NEW USER

OVERVIEW

In order to continue with the training session it will now be necessary to log out of the application and re-enter as the new user that was created earlier.

INFORMATION REQUIRED FOR EXERCISE



USER ID	USR1100
Password	STARTER
New Password	John1100

INSTRUCTIONS

Use ◄🖱 File ◄🖱 Exit to leave the application

Re-start the application by using the desktop icon

Log in using User ID and Password above

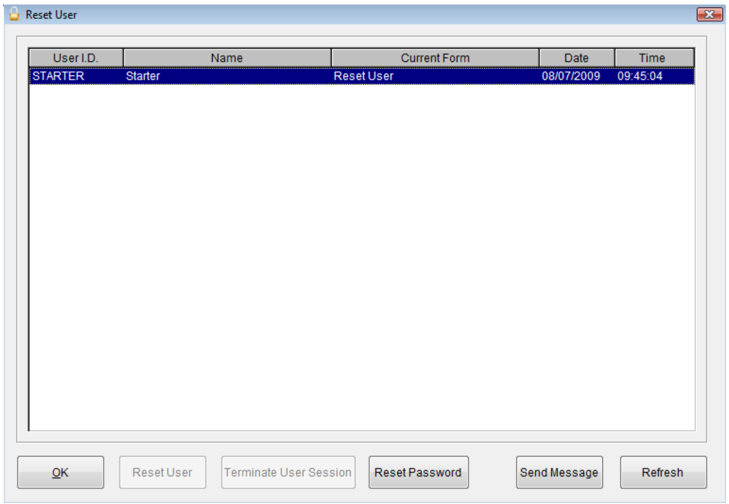
Change password to ‘John1100’

Note that the desktop layout now reflects the menu structure defined earlier

RESET USERS LOGGED ON

OVERVIEW

This feature, when used in a network environment, enables a system administrator to re-set any user who has logged out incorrectly, usually from switching off, before exiting the application. Such action will leave the user 'logged on' as far as the application is concerned and they will not be able to re-enter the application until reset.


Reset User
OK
Reset User
Terminate User Session
Reset Password
Send Message
Refresh

User I.D.	Name	Current Form	Date	Time
STARTER	Starter	Reset User	08/07/2009	09:45:04

INSTRUCTIONS

Highlight the required user with ◄🖱

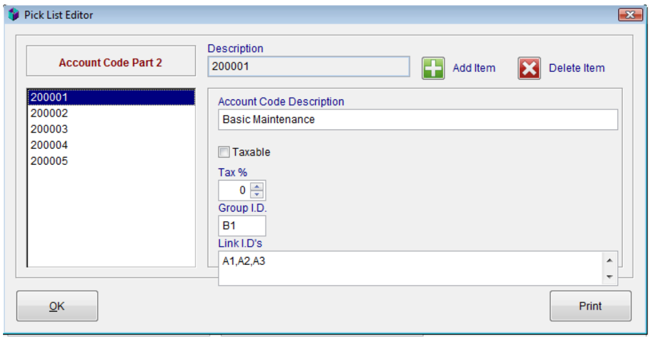
This enables the 'Reset User' button

Use ◄🖱 Reset

BUDGET CODES

OVERVIEW

Budget codes are set up in the same way as other list items. Up to four elements may be defined in the Budget Code structure. In this training example a 2-part budget code structure is used. In the live application the number of parts will depend upon the System Options used.



Description: 200001

200001
200002
200003
200004
200005

Account Code Description: Basic Maintenance

☐ Taxable

Tax %: 0

Group I.D.: B1

Link I.D's: A1,A2,A3

By selecting each of the individual codes entered into a particular section of the account codes, a description can also be entered. This enables the budget reports to place descriptive labels on the report, as well as the account codes. In the example below tow tables are used. The first displays Account Code Part 1, the second Account Code Part 2

INFORMATION REQUIRED

COST CENTRE	DESCRIPTION
100001	Short Term Fostering
100002	Long Term Fostering
100003	Family Placement
100004	Care Leavers

SUBJECTIVE	DESCRIPTION
200001	Basic Maintenance
200002	Birthday Allowances

200003	Festivity Allowances
200004	Holiday
200005	Pocket Money

INSTRUCTIONS

Use ◄🖰 Administration ◄🖰 Pick List Builder to display the form

Select Account Code Part 1 using ◄🖰

Use ◄🖰 Modify Contents to display the Pick List Editor

Use ◄🖰 ➕ Add to enable the form and enter the first cost centre from the table above

Use ◄🖰 *Account Code Description* and type in the description associated with the first Cost Centre

Repeat these steps until all the Cost Centres have been entered

Use ◄🖰 OK to close the form

Select *Account Code Part 2* using ◄🖰

Enter the details for the Subjective codes as outlined in the table above

When complete use ◄🖰 OK to close the form