

# Quick Tips for RSVP Information Management System

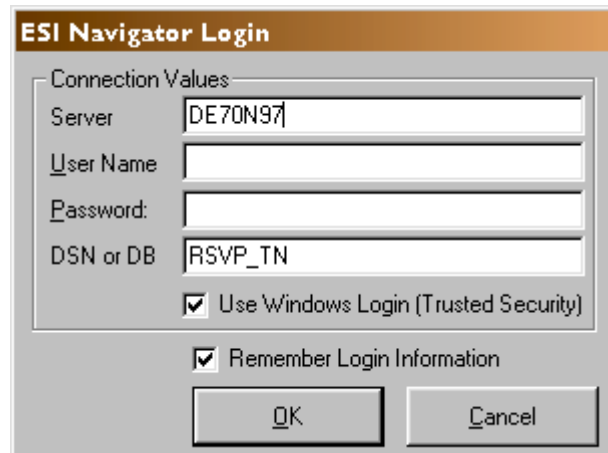
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SYLNX, Inc.  
November 4, 1999

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## Connecting to RSVP

After opening RSVP, you will be prompted with an ESI Navigator Login dialog. Edit the values within this dialog so that they match the values in the picture below. Once the values are the same, press Ok to continue to the RSVP application



The image shows a dialog box titled "ESI Navigator Login". It contains a section labeled "Connection Values" with four text input fields: "Server" (containing "DE70N97"), "User Name" (empty), "Password:" (empty), and "DSN or DB" (containing "RSVP\_TN"). Below these fields are two checked checkboxes: "Use Windows Login (Trusted Security)" and "Remember Login Information". At the bottom are two buttons: "OK" and "Cancel".

ESI Navigator Login	
Connection Values	
Server	DE70N97
User Name	
Password:	
DSN or DB	RSVP_TN
<input checked="" type="checkbox"/> Use Windows Login (Trusted Security)	
<input checked="" type="checkbox"/> Remember Login Information	
OK Cancel	

## RSVP “Analyzing Data by Grouping, Filtering, and Aggregating”

RSVP-IMS incorporates three techniques to examine data in the **Grid Display**: (1) *Grouping* allows the user to view data grouped by up to four column headings; (2) *Filtering* allows the user to filter data within columns to view only those rows containing the desired data; and, (3) *Aggregating* provides the ability to group, count, average, or sum data in multiple columns.

Before using these features, it is important to consider the three types of data that you might encounter in the **Grid Display** columns.

1. Columns containing *Text* are those containing words, names, addresses, and categories. Mathematical functions such as addition and subtraction cannot be performed on *Text*.
2. Columns containing *Numbers* are those containing amounts, dollars, etc. and you can perform mathematical functions on the data (such as add, subtract, etc).
3. Columns containing *Dates* are in the month, day, and year format in RSVP-IMS.

### Grouping

Why use *Grouping*?

*Grouping collects the data belonging to each of the values in a selected column and displays that data as a group. This feature makes it easy to see those members of the data set that meet your defined criteria. The column should contain data that is classified in some way. Grouping will not be useful if no two data items in the column are the same or if they are all the same.)*

*How to use Grouping:*

1. *Determine the column in which the data appears that you want to group by.*
2. *Move the mouse pointer to the column header you want.*
3. *Press the left mouse button and, while holding it down, drag the header up. As soon as it leaves its position, you will see two red arrows to the left. Drag the column header to the red arrows.*
4. *Data is now grouped by the unique data in the column you used.*
5. *You may now click and drag another column header up to join the first. Again, the red arrows show where to move the header.*
6. *Up to four headers may be used for grouping.*
7. *You may click and drag the headers being used for grouping to new positions relative to each other for different grouping views.*
8. *To Collapse Groups or Expand Groups click Data View on the Tool Bar and click your choice. An alternate way to do this is Ctrl+L for Collapse Groups and Ctrl+E for Expand Groups.*
9. *To remove (clear) the grouping view, drag each column header back to its original position. You don't need to take the header back to its exact position as anywhere in the general header area is fine.*
10. *Another way to group is to choose Group from the Tool Bar. A dialog box will appear and you may select (using the arrows) which column to Group first, second, third, and fourth. You may also choose whether you wish to have the Groups Expanded (see all detail) or Collapsed (see only the categories). Click OK when you have finished and the grouping will appear.*

## **Filtering**

Why use *Filtering*?

**Filtering allows you to select certain data in columns while not displaying the records that are of no interest. You may filter out data in up to four columns before it is necessary to clear the filter and start again.**

**How to use Filtering:**

1. To filter you must locate the column in which the data exists that you want to see after filtering. Each column may be filtered only once each session.
2. Place the mouse pointer on the cell that contains the value you want to use when filtering and then left click.
3. Right click and a menu will appear. You may substitute this right click by going to the **Menu Bar**, selecting **Data View**. This will provide you with the same menu as the right click.
4. For Numeric Data Only: Select **Filter** from the menu and a new box will appear. You may choose any one of the five selections from **Equal to Selection** through **Less than or equal to selection**. **Note:** These statements **Equal to...** , **Less than or equal to...** are relative to the number you originally left clicked on in the column.
5. For Text Data Only: Select **Filter** from the menu and a new box will appear. You may choose only **Equal to Selection** for Text Data.
6. For Date Data Only: Select **Filter** from the menu and a new box will appear. You may choose only **Date** and another box will appear with two choices: **Filter Equal to Year** and **Filter Equal to Month**. Choosing the first will return all records in the column with the same year as the cell you originally left clicked and choosing the second will return all records with the same month as the cell you originally left clicked. You may not select both or one and then the other.
7. If you are satisfied with the results, you may move to other functions now including grouping, aggregates, or you may filter another column. You may not filter any column more than once per session.
8. If you are not satisfied with the results, repeat steps 2, 3, and 4 except in step 4 choose **Clear** from the **Filter Menu**. At this point you may try filtering again.
9. It is always a good idea to **Clear** filters after you are through with them.

## Aggregates

### Why use Aggregates?

*Aggregating provides you with a summary report of data using the functions None, Group, Count, Average, or Sum. None provides no function and is used to reset the function. Group assembles categories in an order and is always used with Count, Average, or Sum to return numeric data. Count returns a numeric count of each unique value in the column selected and may be used with text, numeric, or date data. Average returns an arithmetic average of numeric data found in the column selected. Sum adds numeric data found in the column and returns the sum value. Average and Sum may only be used with numeric data not text or dates.*

*An important note about Group. This function is used when there is a logical subgroup or subgroups to the data you are grouping. The subgroup(s) will be assigned the aggregate function of Count, Average, or Sum. For example, if you want to find out how many Operators were male or female within each race category, first you would Group by race, and then count by gender. This would return so many males and females for each of the race categories.*

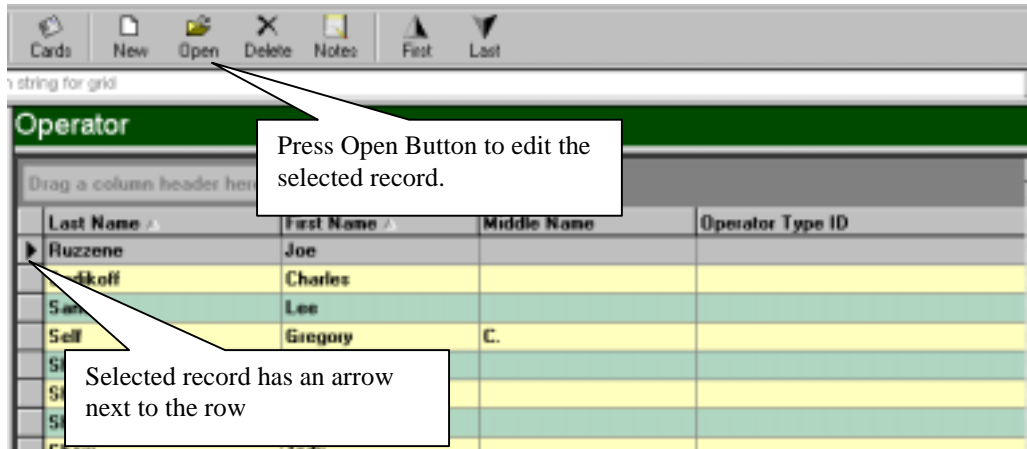
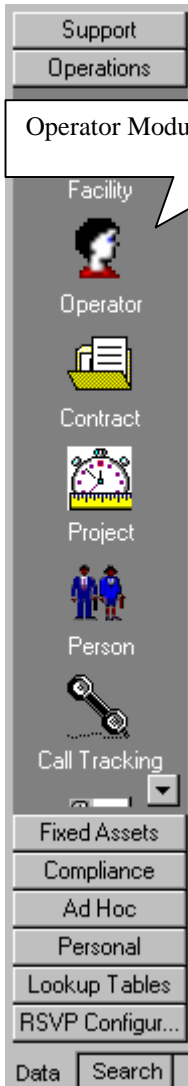
### How to use Aggregates:

1. To *Aggregate* you must locate the column in which the data exists that you want to see after aggregating.
2. Place the mouse pointer on the column that contains the values you want to use when aggregating and then left click.
3. Right click and a menu will appear. You may substitute this right click by going to the **Menu Bar**, selecting **Data View**. This will provide you with the same menu as the right click.
4. Select **Column Properties** (do not select **Aggregates** at this time) and look for the box in that dialog named **Aggregate Type**. By left clicking the arrow in that box, the selections will be presented. Left click on the one you want.
5. You may aggregate now, but if you first selected **Group** for your first column, you now want to select another column to **Count**, **Average**, or **Sum**. Repeat item 4 to do this. If your second column is text or date select **Count**. If it is numeric, you may select **Average** or **Sum**.
6. Right click and a menu will appear. Click on **Aggregates** and then **Show Values**. The table of aggregates you defined will appear.
7. You may export to Excel from the **Data View** menu if you wish to further refine, chart, and print the table.
8. When you are finished using the aggregate table go to the **Data View** on the **Menu Bar** and left click **Aggregates** and then **Clear**. This action clears the aggregate table and returns you to the Grid.

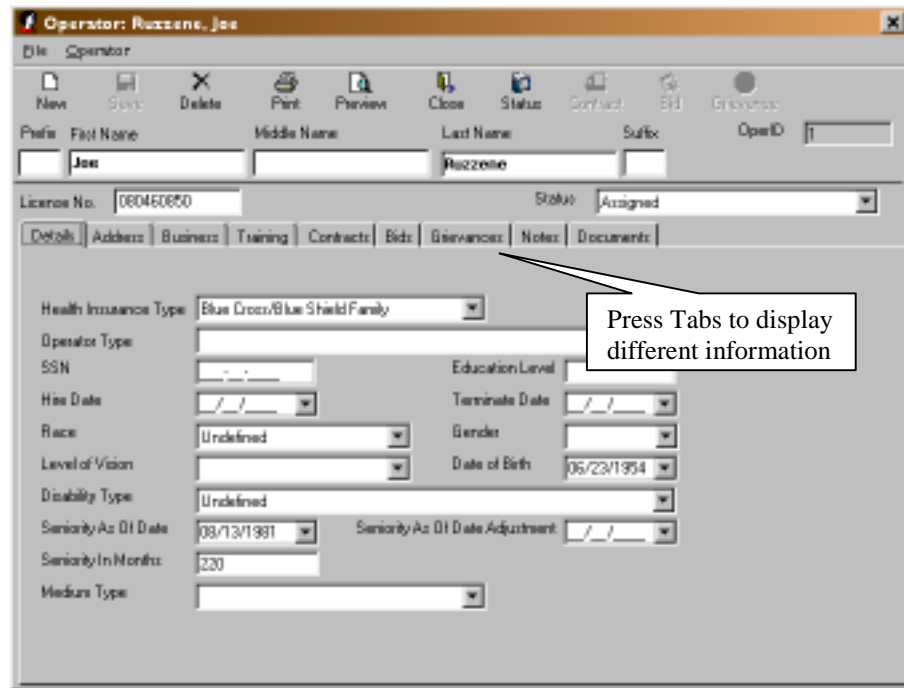
# Updating Operator Information

## How do you update Operator Information?

Select the Operator Module within the **Operations Group** to display a listing of **Operators** within the RSVP system. Once selected, a grid displaying Operator Names and other information is available. You may either edit the information on this grid, or press the Open button to open the **form view** of the operator for display or edit.



*Note: To edit address information, the record must be opened to the form view.*



Once the form view is displayed, you may review or edit the information as applicable. *Note: If you Administrator has not given you access to update the information, you will not be able to save the changes you have made.*

## Changing Address Information

Address information is available on the Address Tab within the Form View.



Once you select the address tab, you are presented with the Contact Information module within the RSVP application.

**Note: The Contact Information module is common to all business forms that track address, phone and email information.**

The first tab is the Address Tab. You may change the information on this tab to reflect the current address(s) of the operator.

Address Type	Address Line 1	Address Line 2	Address
Home	1305 COVINGTON DRIVE		
*			

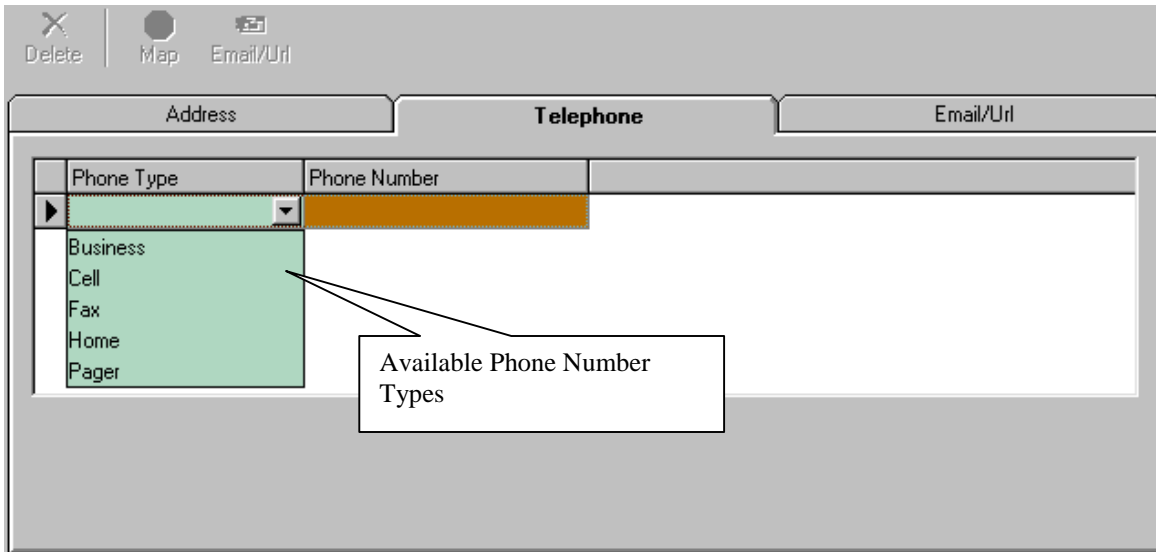
Address Detail:  
1305 COVINGTON DRIVE  
KNOXVILLE, TN 37919

Once you change information on a line, a status indicator (picture of a pencil) will display noting that the record is being changed and has not been committed. This indicator must be turned OFF for the data to be saved. To turn the indicator OFF, **press Return or move to the next record.**

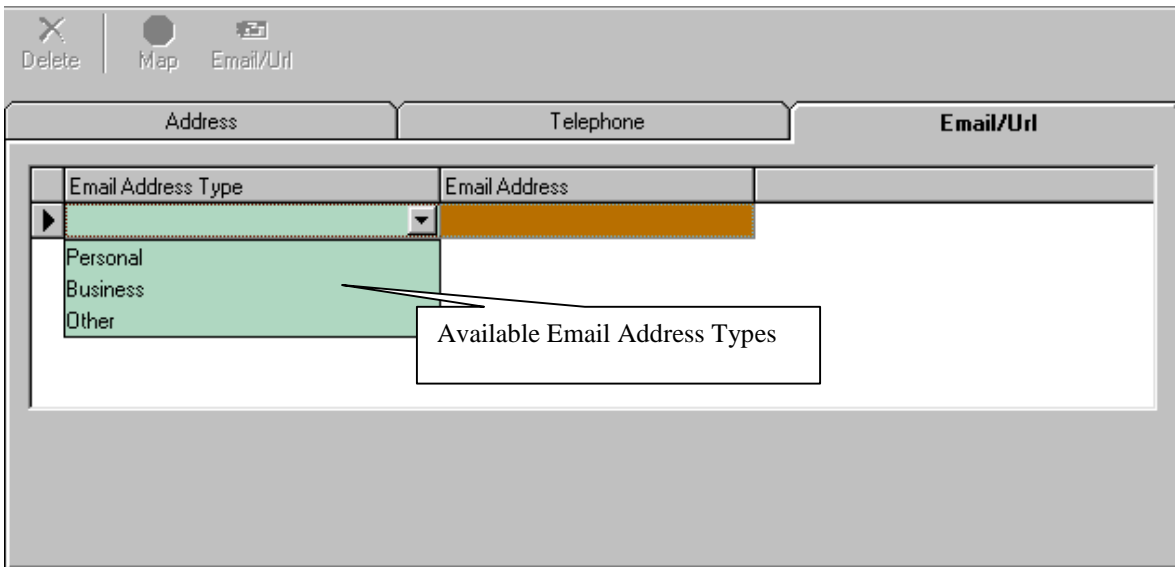
Address Type	Adc
Home	130
*	



Select the Telephone Tab to review or add new phone numbers.

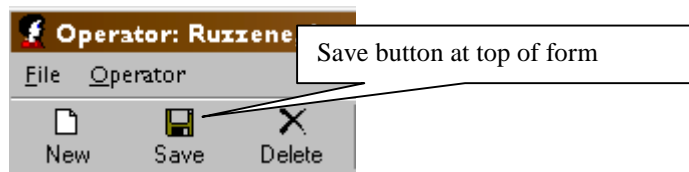


Select the Email/URL tab to review or add new email addresses.

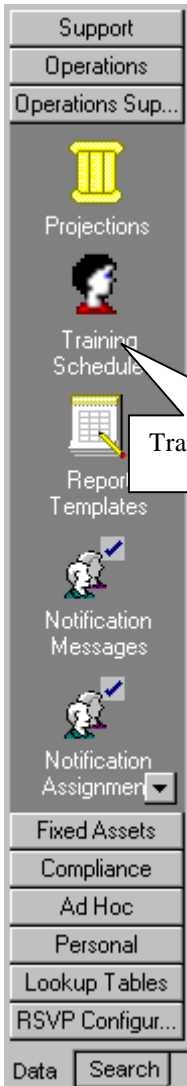


### ***Saving Operator Data that has changed***

Once you are satisfied that the information is correct on you business form, press the Save button at the top of the form.



## How do you record the training courses completed by an operator?



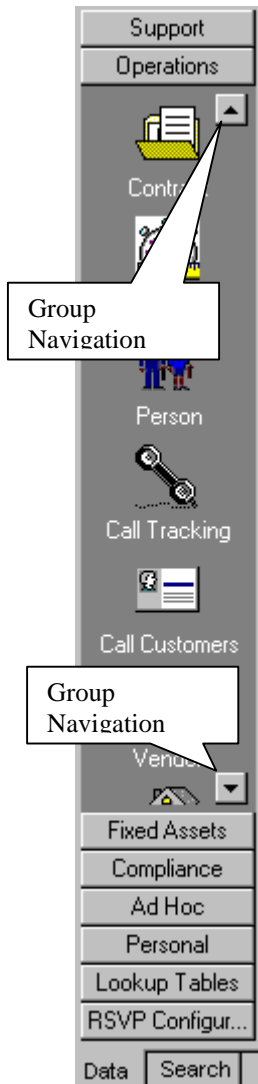
Operator training is tracked using two modules within RSVP. First, the Administrator must create records for each training class that is to be available for Operators. To accomplish this, the Administrator would select the Operations Support group within RSVP, and the Training Schedule module within it.

Once the training records have been created, you may go to the Operator Form View to enter training records on the training tab.

Training Course	Date Completed	Score

Remember to save the information prior to exiting the Operator Form View.

## How do you record phone calls about a manager or vending facility?



There are two modules that comprise the Call Tracking mechanism within RSVP.

1. Call Tracking – Information regarding the individual phone call
2. Call Customers – Information regarding the person(s) calling the complaint or accommodation.

Phone calls are tracked with the Call Tracking module within RSVP. To select this module, choose the Operations group and then select Call Tracking. **Note: You may need to move down within the Operations Group to display the Call Tracking module.**

Once selected, you may press the New button to create a new phone call tracking record.

Enter the information as appropriate. Note: If the customer does not exist within the RSVP Customer database, press Add Customer to create a new customer record.

After your customer information is complete, press Save to return and complete the call record.

## How do you move an operator from one facility to another?

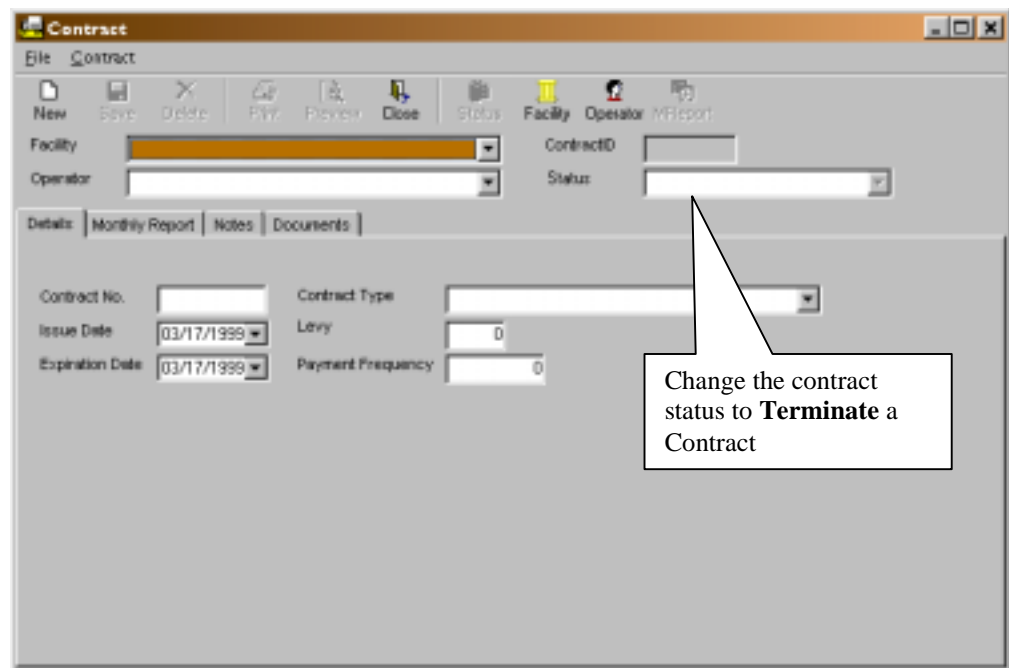


Operators are moved from facility to facility through the Contract module within the RSVP application. To accomplish this, select the Contract module from within the Operations Group of RSVP.

Once selected, RSVP will present you with a listing of current and historical contracts. To create new Contract, press the New button on the tool bar.



Pressing New, will generate a blank Contract Form View that allows you to create a new Contract.



**Note:** The Facility list will not show Facilities actively involved in a Contract.

If an operator is actively involved in a contract, you may choose to cancel the contract first prior to assigning them to a new facility. To do this, change the status of the contract appropriately and press save.

## How do you determine which operators are on transfer or demotion status?



Select the Operator Policy module within the Compliance group of RSVP. Once selected, you will be presented with a listing of Operators that have various Policies enacted upon them. To determine active policies of one type or another, group by Policy ID and sort by Date Inactive. Note: For instructions on Grouping and Sorting, see attachment.

Operator Policy				
Policy ID	Operator	Date Active	Date In Active	Notes
- Probation: Failure to send Setaside Check				
▶ Probation: Failure to se...	Jordan, Charles	11/01/1999	12/01/1999	Added by RSVP-IMS

## Updating Facility Information

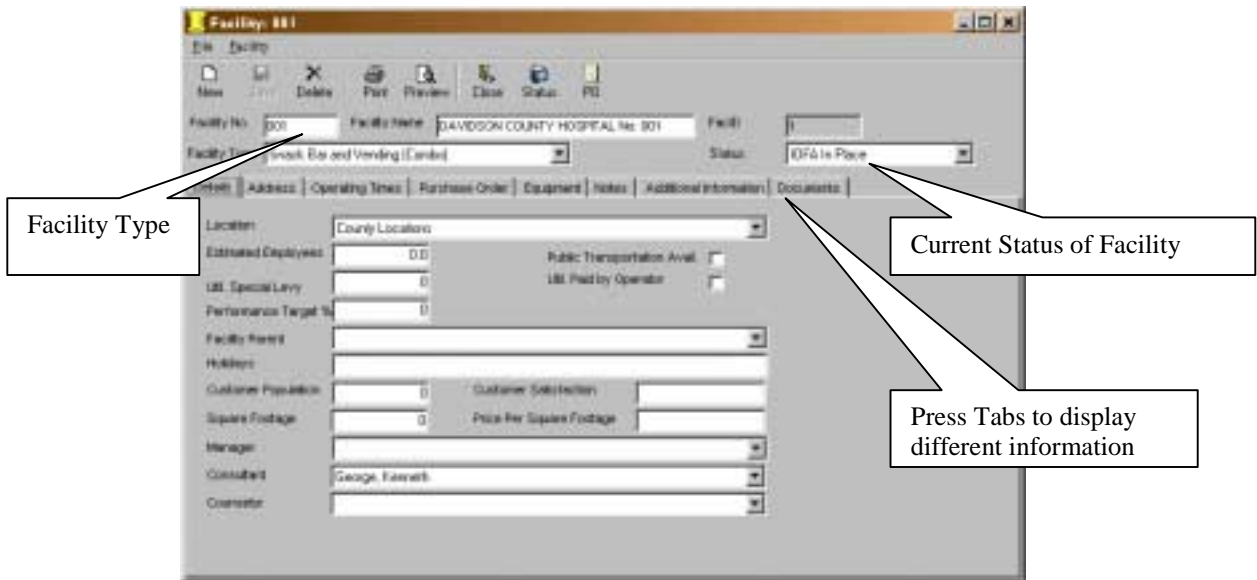
Select the Facility Module within the **Operations Group** to display a listing of **Facilities** within the RSVP system. Once selected, a grid displaying Facility Names and other information is available. You may either edit the information on this grid, or press the Open button to open the **form view** of the Facility for display or edit.

The screenshot shows the following interface elements:

- Left Navigation Panel:**
  - Support
  - Operations
  - Facility** (highlighted with a callout: "Facility Module")
  - Operator
  - Project
  - Person
  - Call Tracking
  - Fixed Assets
  - Compliance
  - Ad Hoc
  - Personal
  - Lookup Tables
  - RSVP Configur...
  - Data Search
- Main Window:**
  - Toolbar: Group, Sort, Cards, New, Open, Delete, Notes, First, Last
  - Find: Enter search string for grid
  - Facility
  - Drag a column header here
  - Grid:

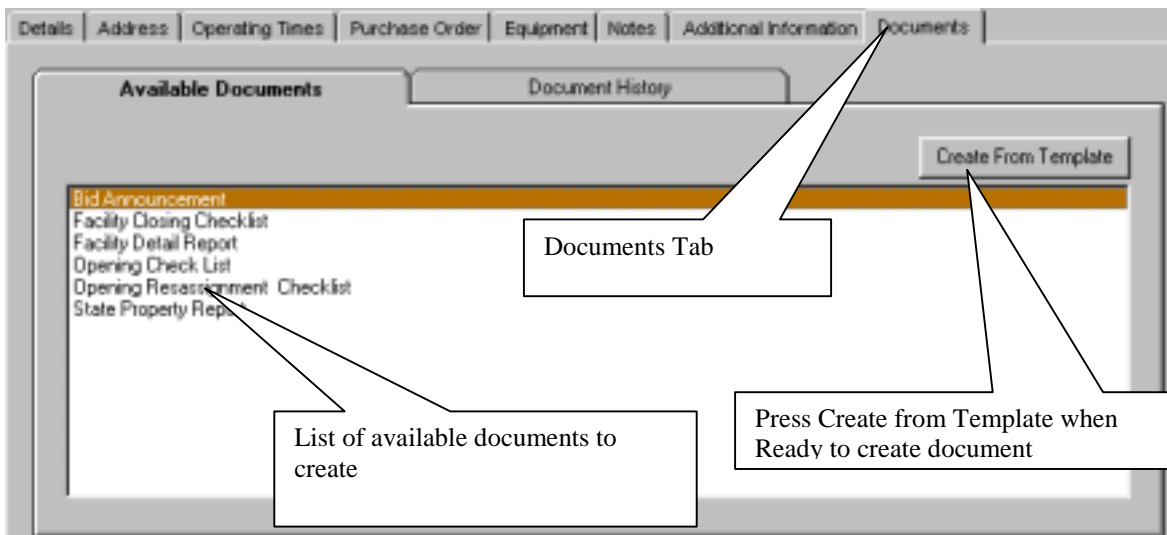
Status ID	Fac ID	Fac. No.
IOFA In Place	1	001
Available	2	010
IOFA In Place	3	013
IOFA In Place		0
IOFA In Place		003

The following dialog displays the detailed Facility form view,



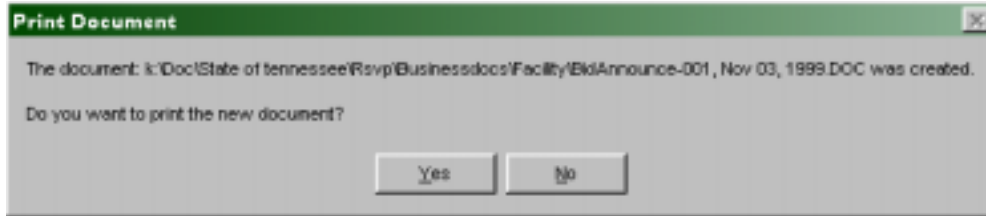
### ***Generating Documents for a Facility***

To generate documents (Facility Bids, Closing Check Lists, etc) select the Documents Tab on the Form View to view a listing of available documents that can be generated for a Facility.



To create a specific document, select the document from within the list, then press **Create From Template**. RSVP will start Microsoft Word, and will create the new document with available information from the database.

Once the document creation is complete, RSVP will notify you that the document has been created and will ask if you want to automatically print the document



You may switch to Microsoft Word by pressing Alt Tab in order to view the document.

**TENNESSEE BUSINESS ENTERPRISES**

**ANNOUNCEMENT**

This is to announce that Vending Facility No. 001 is available for assignment. Licensed Vendors interested in being considered for this location may make application on the form provided below. The application must be mailed to:

Tennessee Business Enterprises  
400 Deaderick Street, 11<sup>th</sup> Floor  
Nashville, Tennessee 37248-6209

Applications must be postmarked no later than \_\_\_\_\_

**CHARACTERISTICS OF FACILITY**

Location and Address: DANDYSON COUNTY HOSPITAL, No. 501, 3414 COUNTY HOSPITAL ROAD, NASHVILLE, 37209  
Category of Facility: Snack Bar and Vending (Combo) Approximate Number of Customers: 0  
Projected Annual Gross Sales: \$102,507.10  
Operating Hours: until \_\_\_\_\_, thru \_\_\_\_\_  
Number of Employees: 0 Public Transportation Available: No

NOTES:

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**APPLICATION**

I hereby make application for consideration as Manager of Vending Facility No. 001. I authorize the Tennessee Department of Revenue to release to the Department of Human Services any and all information relative to my record of paying taxes at any Facility to which I have been assigned and further I authorize the Department of Human Services to release all information regarding all aspects of my record of performance during the preceding 12 months to the members of the interview panel.

NAME: \_\_\_\_\_ TELEPHONE NO: \_\_\_\_\_

ADDRESS: \_\_\_\_\_

DATE: \_\_\_\_\_ SIGNATURE: \_\_\_\_\_

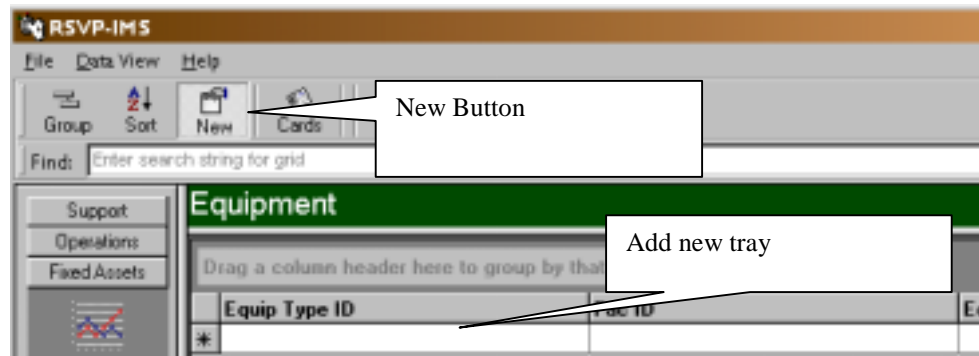


## Fixed Assets



### ***How do you add equipment without creating a Plan of Service or Purchase Order?***

Select the Equipment Module within the Fixed Assets Group of RSVP. Once selected, you will be presented with a listing of equipment currently within RSVP. To create a new item, select the New button off of the tool bar.



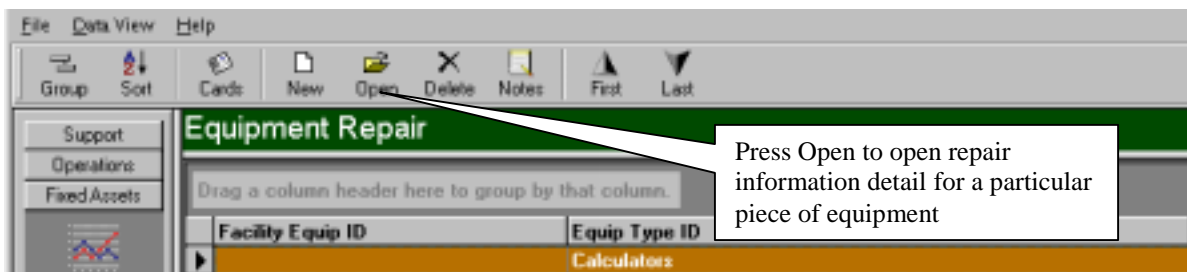
Once the New button is selected, the **Add New tray** is displayed at the top of the grid. This tray allows you to enter new equipment records into the system. Once you have entered the appropriate information, press **Enter** to confirm the creation of the record.

### ***How do you move a piece of equipment from one facility to another?***

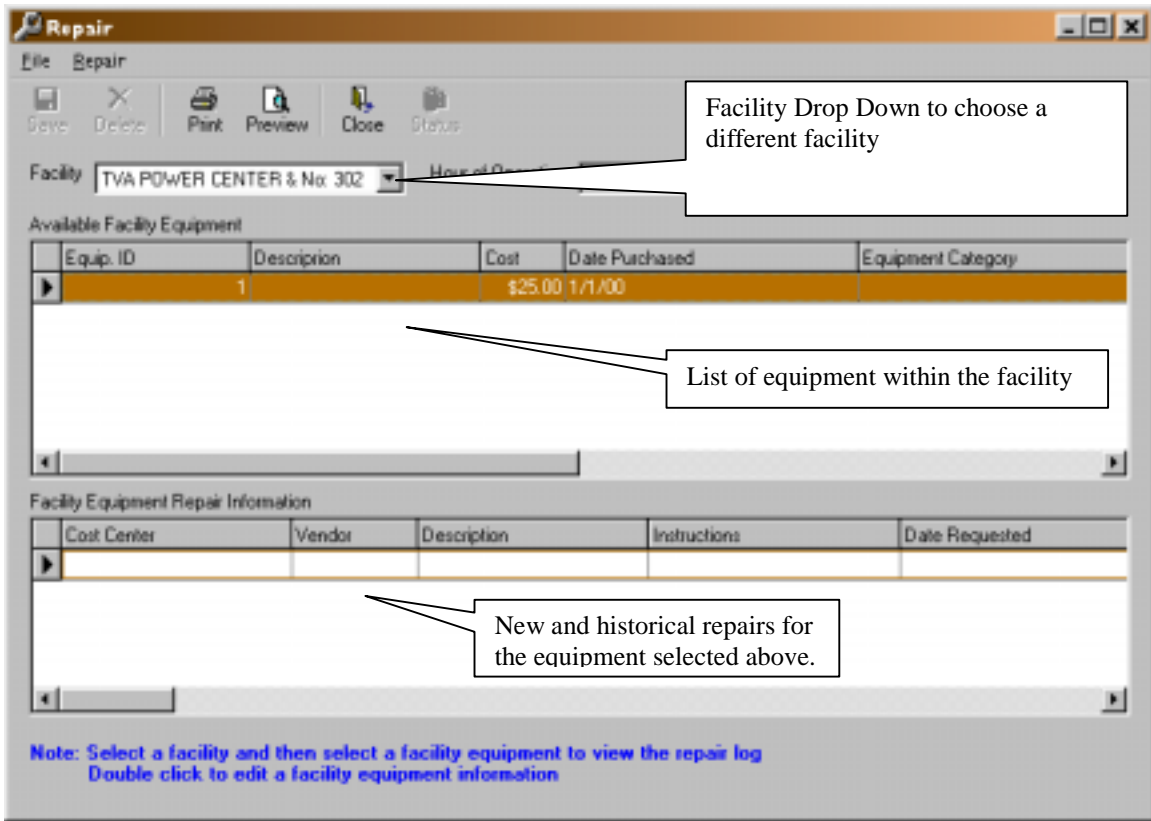
You can move a piece of equipment from one Facility to another, by using the Equipment module. To do this, select the piece of equipment that is to be moved, then choose a different **Fac ID** to associate the equipment to. Once the record is saved, the equipment has been assigned to the new Facility.

### ***How do you record an equipment repair call when it comes into the office?***

Equipment Repairs are entered on the Equipment Repair module within Fixed Assets (See above). To create a new Repair, select the item to be repaired and press **Open**.

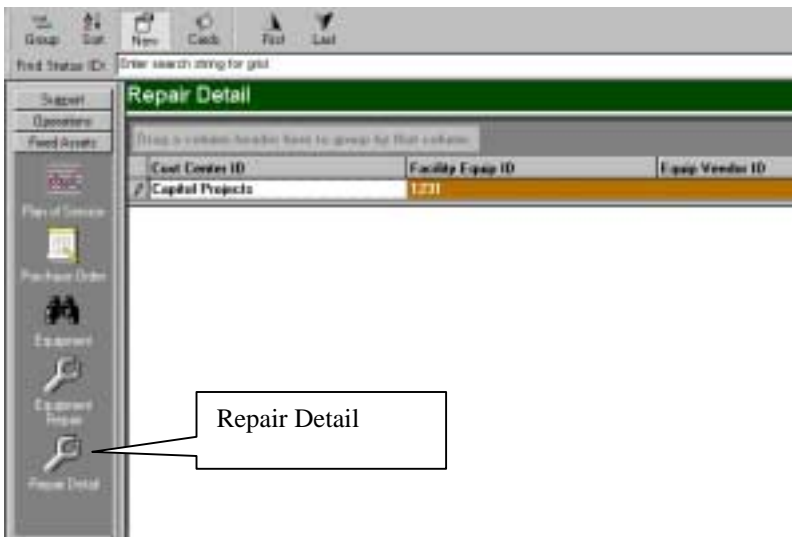


Once you have opened the Repair Form View, you will see a list of equipment within the facility that may be repaired. *Note: To view another facilities equipment, choose a different facility from the facility drop down.*



To create a new repair record, enter the information for the Cost Center, Vendor to perform the work and the other details necessary for the repair.

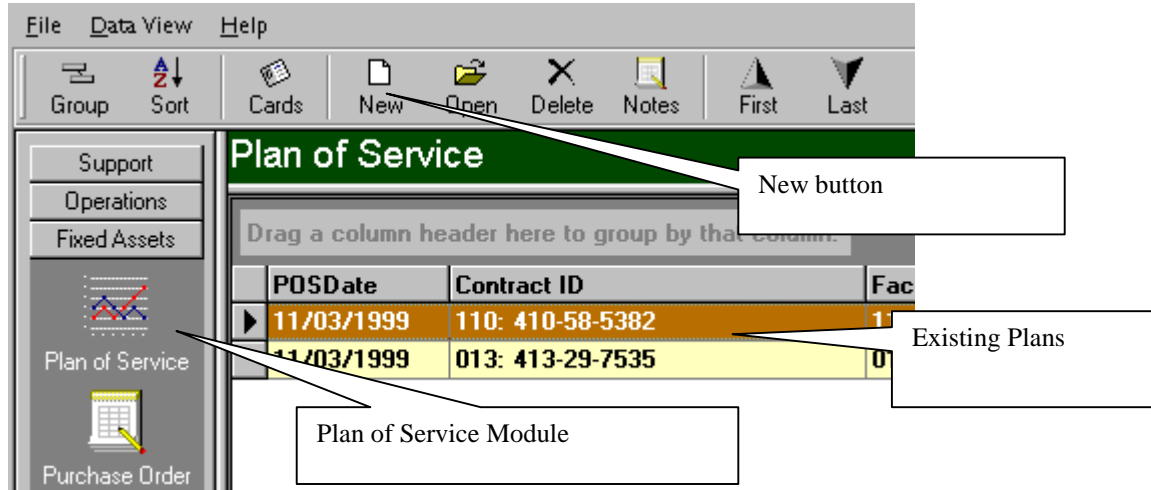
Once the repair **has been completed**, enter the information on this form to update the repair information.



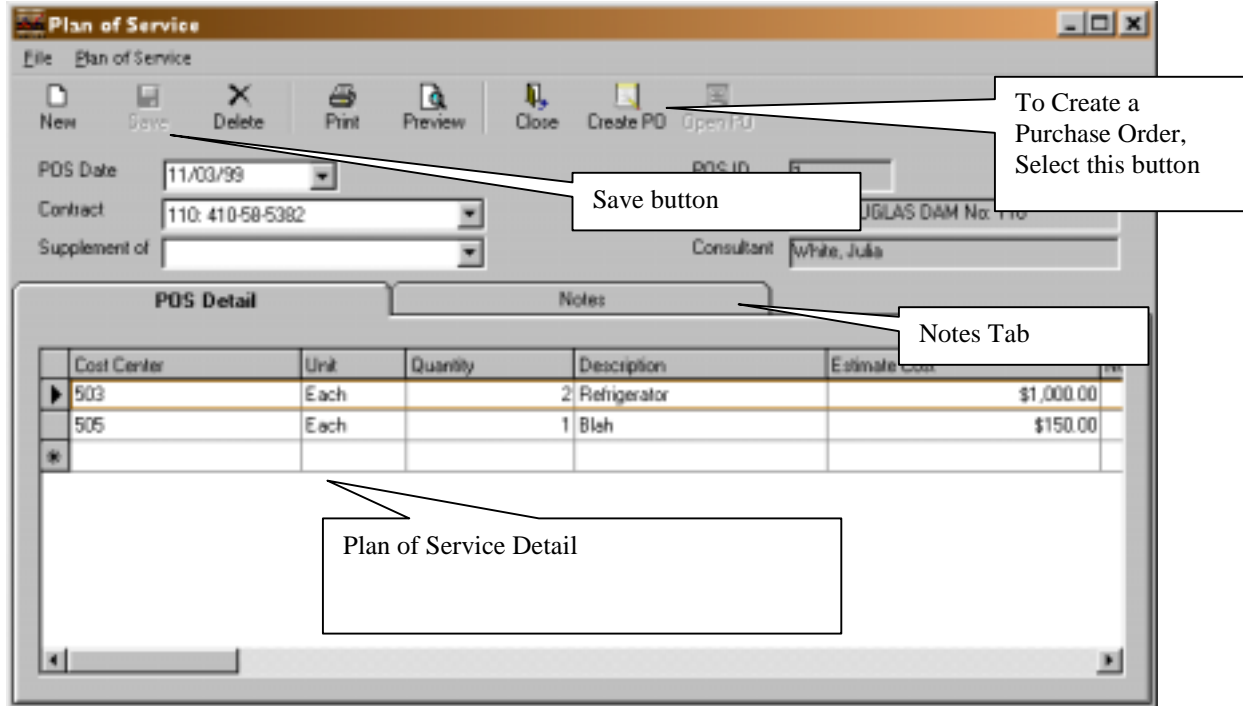
Alternatively, you may choose to enter the repair information from the main RSVP grid. To do so, select the Repair Detail module within Fixed Assets, and edit the information or press New to create a new repair item

## How do you create a Plan of Service?

To create a Plan of Service, first select the Plan of Service module from within the Fixed Assets group of RSVP. Once selected, press New to open a new Plan of Service Form View.



Once the Form View is displayed, enter the information as appropriate and press Save. **Note: Financial Approval and Supervisor Approval must be performed by a qualified person and cannot be accomplished until after the record has been saved.**



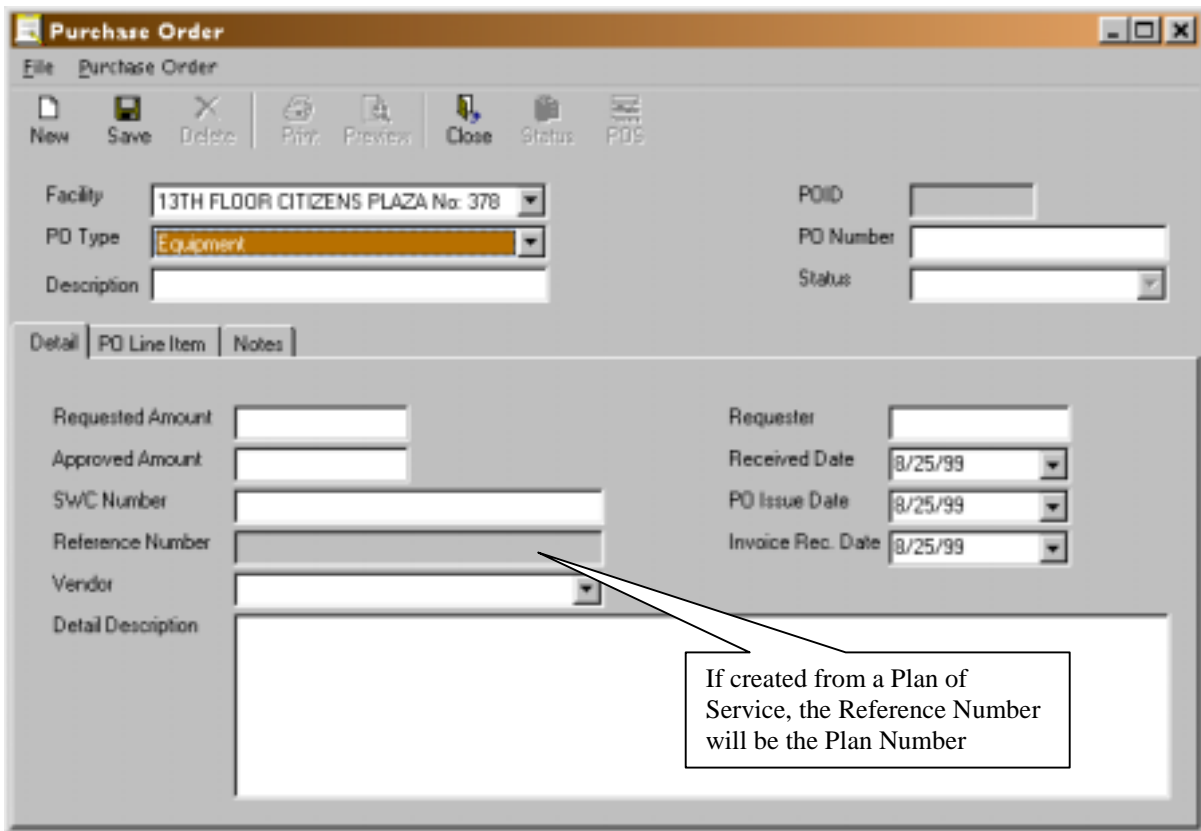
If you do not have sufficient rights to approve an item, you will be presented with the following error:

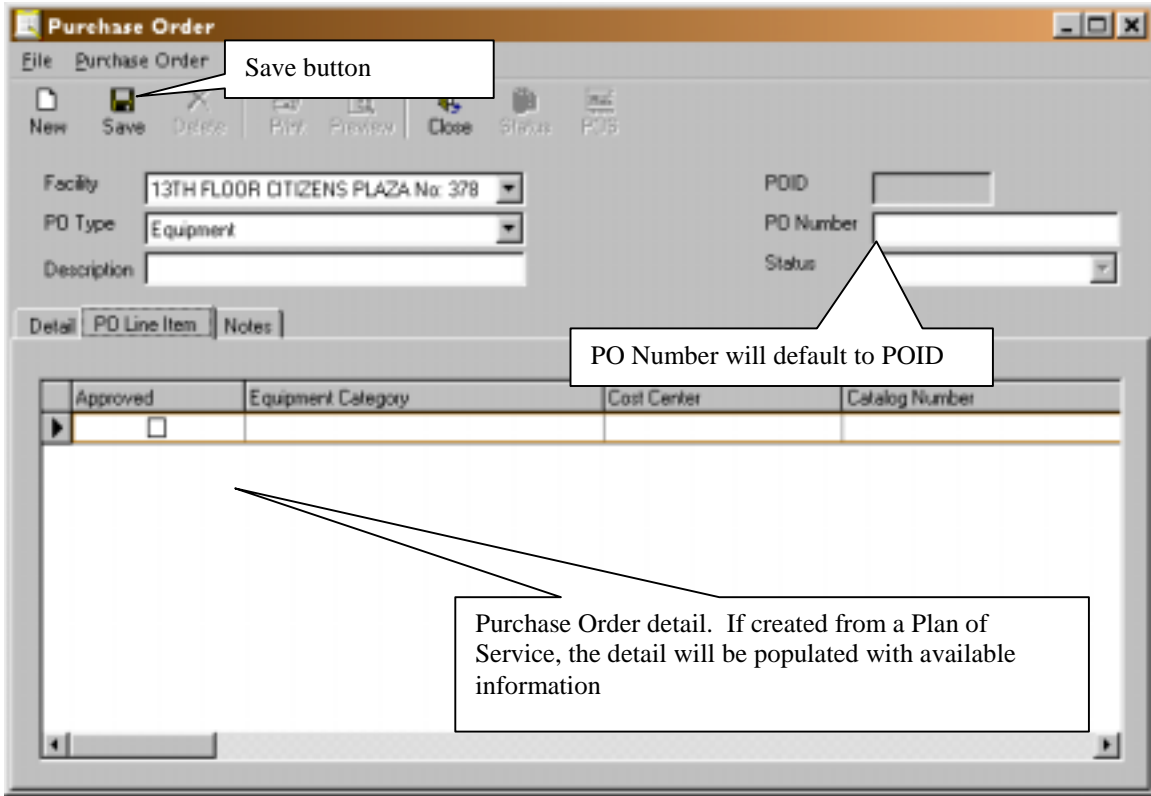


Once the items have Supervisor and Fiscal approval, select the Create PO button to generate a Purchase Order.



The Create Purchase Order dialog will be presented which allows you to select the items to include in the Purchase Order. Press Ok, to proceed to the Purchase Order Dialog.

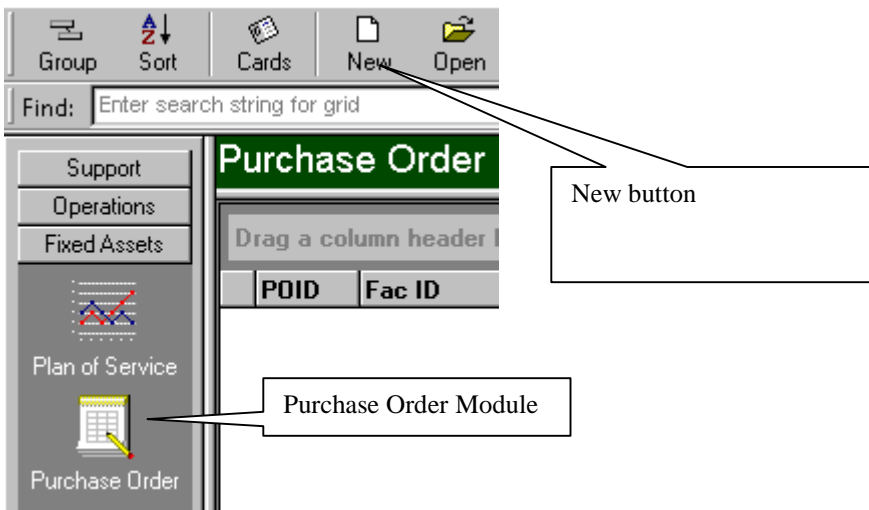




Once the information is entered, press save to complete the Purchase Order. *Note: Purchase Order details must be approved by a supervisor.*

### **How do you generate a purchase order without a plan of service?**

To create a Purchase Order without a Plan of Service, select the Purchase Order module from within the Fixed Asset group of RSVP and press the New button.



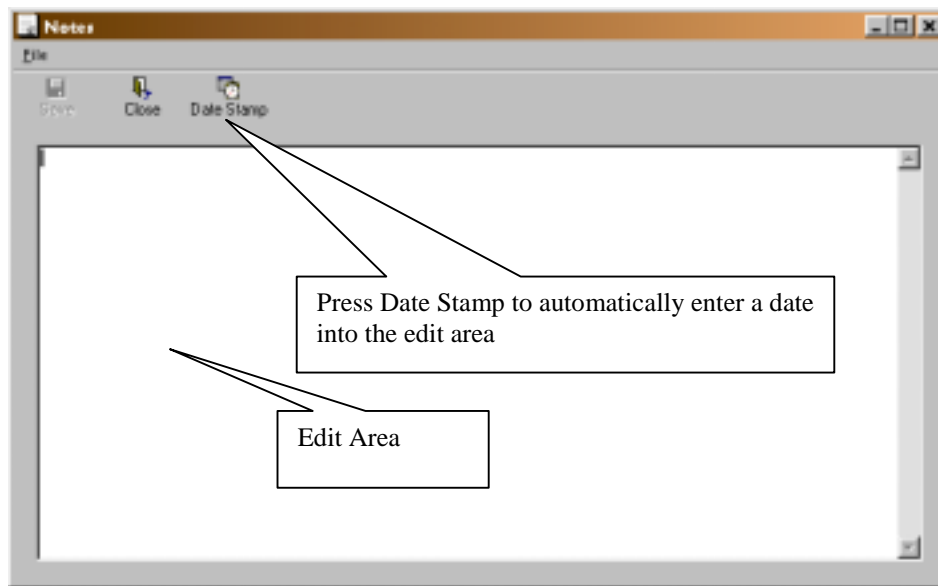
## General

### ***How do you create a Note for a Facility, Operator or Contract.***

Select the record in which you would like to attach the note and press the Note button on the tool bar.



The Note dialog will be displayed.



Press Save when done to save the record. Press Close to return to the RSVP Main View.