# MainBoss Advanced 3.2, Update 1
# Getting Started

## (Read this first!)

Introduction
# Welcome to MainBoss Advanced

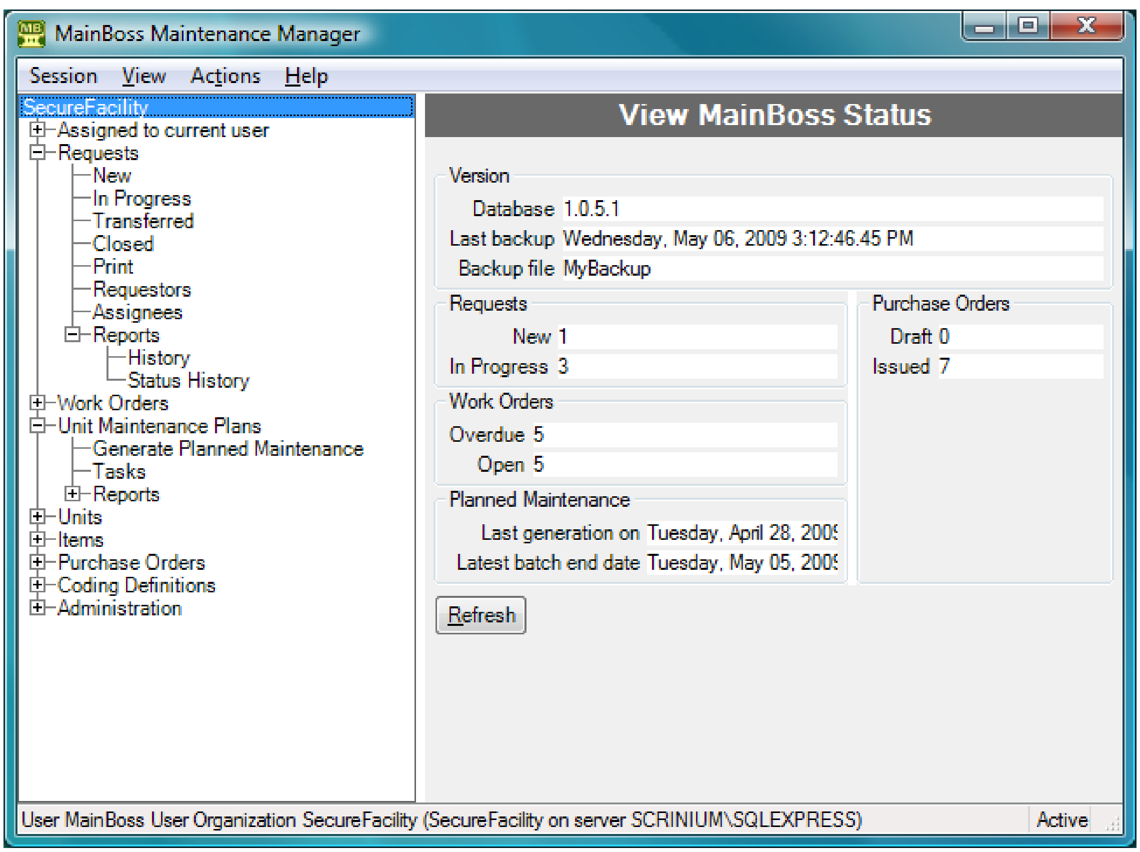
This guide provides a quick introduction to principles of using MainBoss Advanced.

- For details of MainBoss set-up, see *Configuration Quick-Start* or the full *Configuration* guide
- For information about day-to-day use, see *Operations Quick-Start* or the full *Operations* guide

This guide assumes that MainBoss has already been installed at your site. If you are the person who will install the software, see the *Installation and Administration Guide* before reading this *Getting Started* guide.

## What You See

Here's a typical picture of the program's main window:



On the left is the *control panel*. This provides access to all standard actions and information. On the right, the **Refresh** button updates the information displayed (in case other users have recently made changes to your organization's data).

**General Principle:** In MainBoss Advanced, you use the control panel (on the left) to go to a table, then you use the table's buttons (on the right) to do work.

This manual uses the notation **Entry** | **Subentry** to refer to items in the control panel. For example, **Work Orders** | **Reports** refers to **Reports** under the **Work Orders** entry in the control panel.

Whenever you select an entry in the control panel, the rest of the window changes to show information about what you selected. For example, if you click **Work Orders** in the panel, the right-hand part of the window changes to show information on work orders.

We recommend that you maximize the main window so that MainBoss has the most possible screen-space to display information.

**Keyboard Shortcuts:** MainBoss allows standard Windows keyboard shortcuts such as **<Ctrl+C>** for copy and **<Ctrl+V>** for paste. You can also use **<Tab>** to move to the next field in a window; if you're filling out a form, you can just tab from one field to another rather than using the mouse. **<Shift+Tab>** moves backward to the previous field.

In any table viewer, the shortcut sequence **<Ctrl+F>** opens the search window. (For technical reasons, this sequence will not work if your most recent click was on the MainBoss control panel; it only works if your most recent click was in the table viewer part of the window.)

If the search window is not open, the **<F3>** function key has the effect of **Find Next**, searching for whatever you searched for most recently. This means that pressing **<F3>** repeatedly will perform the same search over and over.

MainBoss buttons often allow keyboard shortcuts. To see the shortcuts in a window, press the **<Alt>** key. One letter of each button will be underlined, as in **Save**. Pressing **<Alt>** plus the underlined letter is equivalent to clicking the button, so that **<Alt+S>** is equivalent to clicking the **Save** button.

**View Options:** The **View** menu provides options that control how information is displayed:

- **Zoom in on View**: If you click this menu item, MainBoss will hide the control panel in this window. If you were looking at a table viewer, you will see an enlarged version of the **View** section (without any other of the table viewer's sections). If you were looking at a report window, you will see all sections of the window.

  When you are zoomed in like this, **Zoom in on View** will be marked with a checkmark in the **View** menu. To zoom out again, click **Zoom in on View** again. This returns to the window's usual appearance.

- **Open in New Window**: If you select this option, MainBoss opens a new window containing the same information as the current one. This is useful if you want to compare information between tables: have two windows open, one showing one table and one showing the other.

### Getting Help

There are several ways to obtain online help while using MainBoss:

- Pressing the **<F1>** function key displays information about the window currently on the screen.
- If you point the mouse to something on the screen, MainBoss displays a tooltip (a small yellow message) providing information about what you're pointing at. This is particularly useful if a button on the screen is currently disabled (i.e. grayed out). The tool-tip explains why the button isn't currently available.
- The MainBoss **Help** menu provides access to MainBoss's help files.
  - **Help** → **Contents** gives you the table of contents for the help files.
  - **Help** → **Help Index** gives you an index of important terms.

### Tooltips

A tooltip is a small message that may appear if you point the cursor to something on your monitor screen. MainBoss uses tooltips to explain any situations that may be confusing.

For example, if you don't have appropriate security permissions, you may not be allowed to fill in certain information fields or to click certain buttons. In this case, pointing the cursor to the field or the button will produce a tooltip message explaining the situation (and telling what security roles you'd need in order to use the field or button).

Similarly, if you've filled in a field with an unacceptable value, MainBoss will display an error marker. Pointing the cursor to the error marker will display a tooltip explaining why the value is unacceptable. (For example, MainBoss may expect the field to contain a date rather than what you've typed in.)

| |
|---|
| If you're ever confused about MainBoss's behavior, use the cursor to obtain tooltips. These should help you figure out what's happening. |

### Specifying Your MainBoss Database

The first time you start MainBoss, you must specify how to connect with your MainBoss database.

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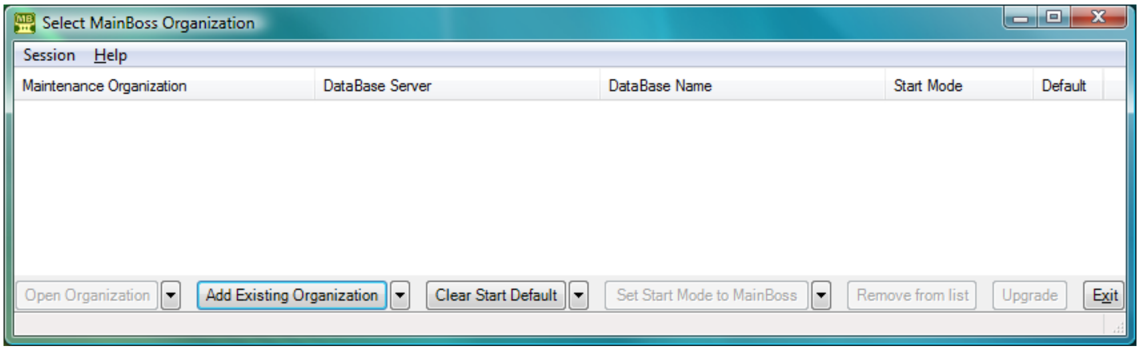
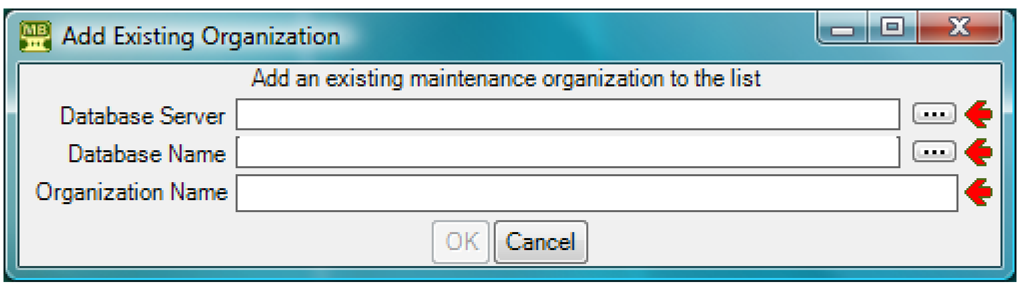
☐ **To set up MainBoss so that it can access an existing database:**

1. Log in to the computer under your usual login name.
2. Start MainBoss on the new machine. It will display a window asking you to specify the maintenance organization (database):

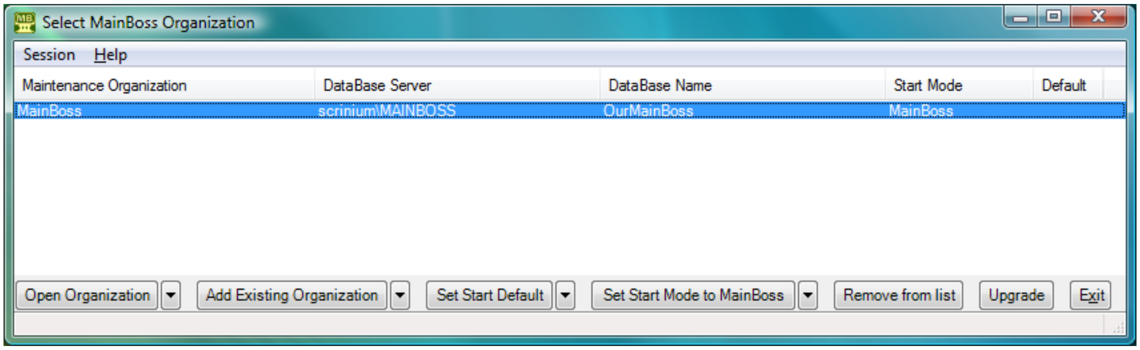



3. Click **Add Existing Organization**. This opens a window like this:




4. The person in charge of MainBoss at your site will tell you the values to specify for "**Database Server**" and "**Database Name**". In most cases, you can click the "..." buttons associated with these fields and select the appropriate values from the resulting lists. However, for technical reasons related to firewalls and SQL Server configuration, you may not find the values you want in the lists. In that case, you'll have to type in the values by hand.
5. Once you specify "**Database Server**" and "**Database Name**", "**Organization Name**" will be filled in with a value from the database. Usually, you should simply keep this name; however, you have the option of changing "**Organization Name**" if you wish. What you enter will become your own private name for the organization—it will not affect other users.

6. Click **OK**. MainBoss will add the database name to the list. You'll see something like this:




7. Click **Open Organization**.

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Once you have set up this computer to access the maintenance organization, you don't have to do it again. Every time you start MainBoss on this computer, it will automatically start working with the specified database.

### Table Viewers

A table is a list of entries, each of which contains information about something. For example, the **Vendors** table is a list of your suppliers.

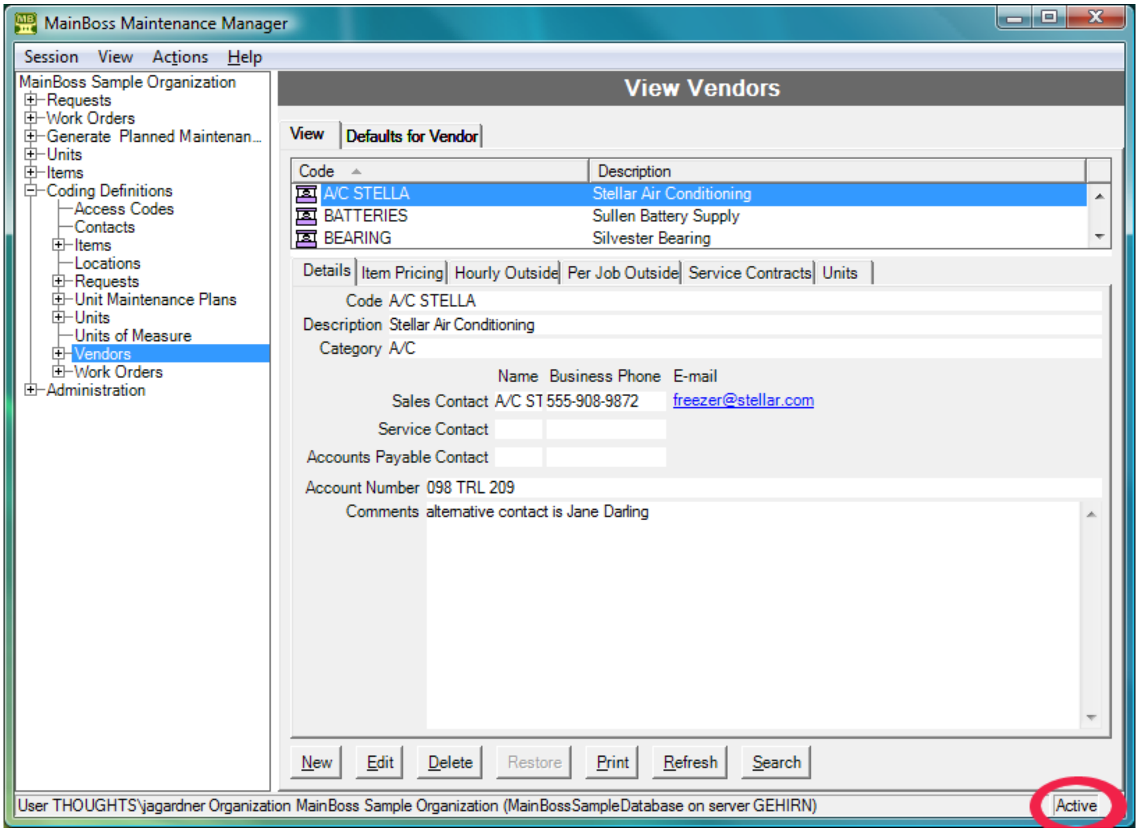
Each entry in a table is called a record. For example, each entry in the **Vendors** table gives information about one of your suppliers.

A table viewer lists the records in a particular table. For example, the **Vendors** table viewer lists the entries in your **Vendors** table.

Table viewers usually have two sections:

**View**: A list of normal records—this can be anything from work orders to information about spare parts.

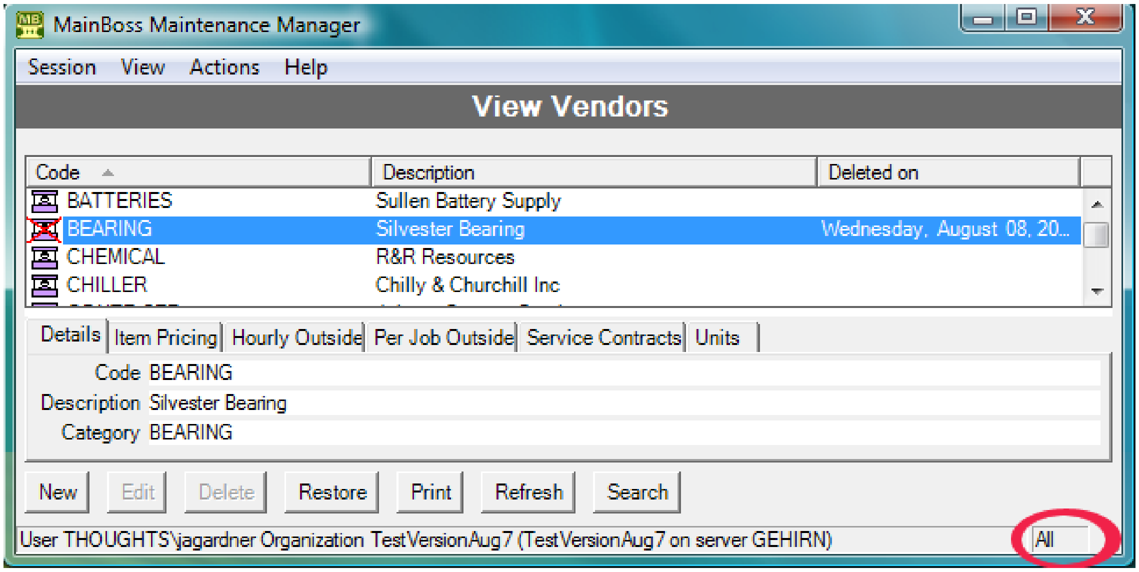
**Defaults**: Default values for creating new records. For example, the default values in the **Vendors** viewer will be used whenever you create a new vendor record.




*Deleted Records*

In the bottom right hand corner of most table viewers and editor windows, you'll see either `Active` or `All`:

- If the word is `Active`, lists of records displayed in the window only include *active* records. This means that the window only shows records that haven't been deleted. This situation is shown in the preceding picture. (Note that in rare cases, deleted records sometimes have to be shown in order to display undeleted ones).
- If the word is `All`, the viewer is showing *all* records including those that have been deleted. Deleted records are marked with a red X on the left.




In most tables, MainBoss never completely erases deleted records. This makes it possible to maintain a complete audit trail of everything you do.

To switch from `Active` to `All` or vice versa, *double-click* the word. You'll see deleted records appear or disappear.

The **Restore** button lets you bring back a selected record. MainBoss opens a window where you can examine the record to be restored and make changes if necessary. When you save the record and close the window (typically by using **Save & Close**), the record will be restored to the active list.

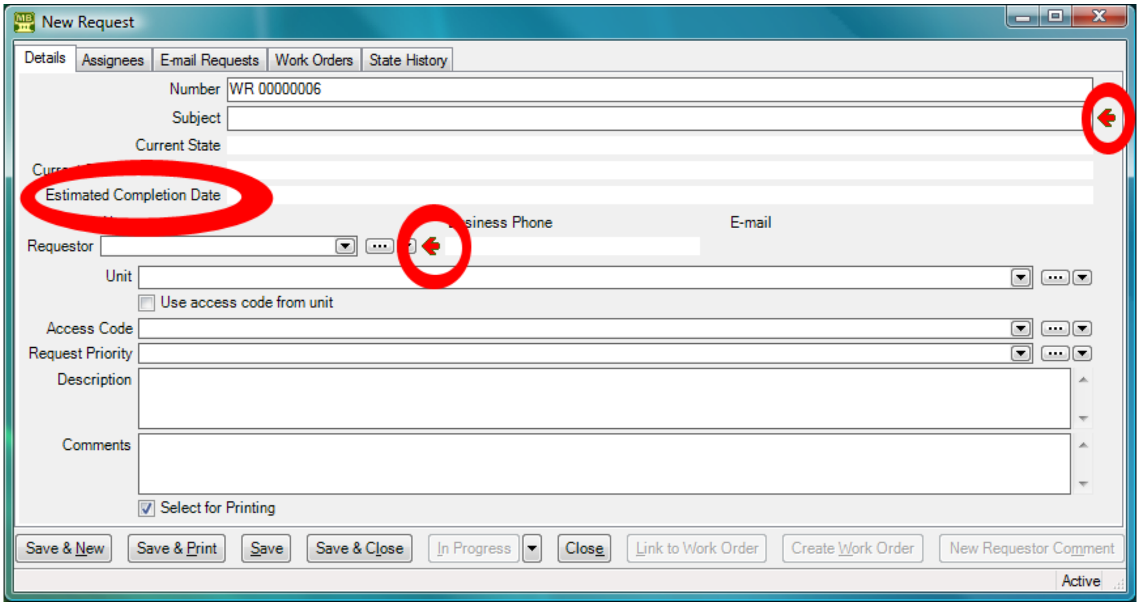
**Records That Refer to Deleted Information:** When you delete a record, it's possible that other records still refer to it. For example, suppose a worker leaves your organization so you delete that person from your **Employees** list. That worker's name will still appear in old records (e.g. work orders that the person worked on).

MainBoss indicates that data comes from a deleted record by ~~striking out~~ the data. For example, if you delete Joe Smith's employee record, all work orders that refer to that person will show the name as ~~Joe Smith~~. This shows that the associated employee record has been deleted (and will reduce your confusion when you can't find Joe Smith's name in your list of `Active` employees).

### Editors

An editor is a window where you can enter information. Most editor windows have a **Details** section where you can enter basic information; many editor windows have more sections for additional information.

- Mandatory fields are marked with a red arrow until they're filled in. You can't save the record until you specify values for those fields. (In the picture below, "**Requestor**" and "**Subject**" are mandatory.)




- Read-only fields can't be changed. They can be recognized because they are *not* surrounded by a black border line. In the picture above, several fields are read-only. For example, "**Current State**", "**Current State's Effective Date**" and "**Estimated Completion Date**" are all read-only.

- As shown above, editor windows have several buttons containing the word **Save**:

  **Save**: Just saves information you've entered.

  **Save & Close**: Saves the information and closes the window.

  **Save & New**: Saves the information and starts a new record. This lets you create one record after another; for example, if you're recording contact information for people, you can **Save & New** after each person, which saves what you've just entered and starts a record for someone else. (Fields in the new record are initialized with default values as set in the **Defaults** section of the appropriate table viewer.)

  **Save & Print**: Saves the information and opens a window that will let you print the record you've just created.

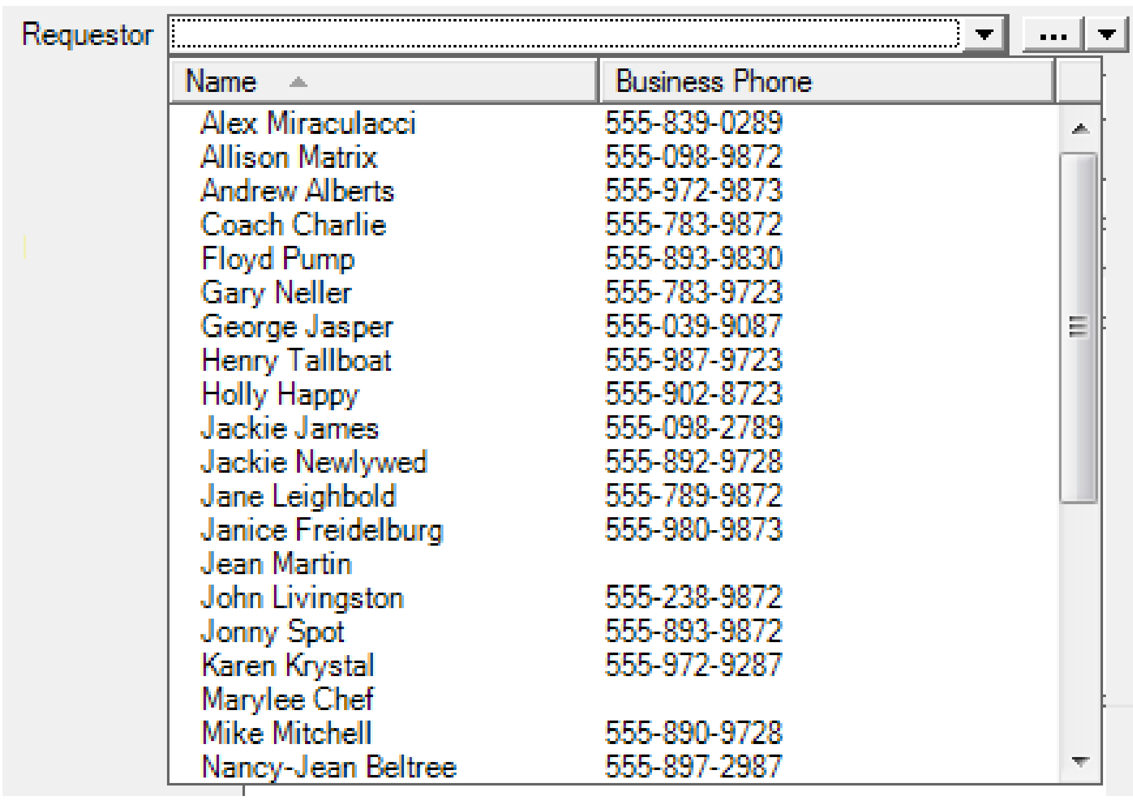
**General Tip:** When you're filling out a record, if you don't know what value a field should have, leave it blank. Filling in dubious values will cause confusion down the line, and finding values that need to be changed can be difficult. If MainBoss really needs a field to be filled in, it uses the red arrow to make the field as mandatory.

*Drop-Down Lists (Pickers)*

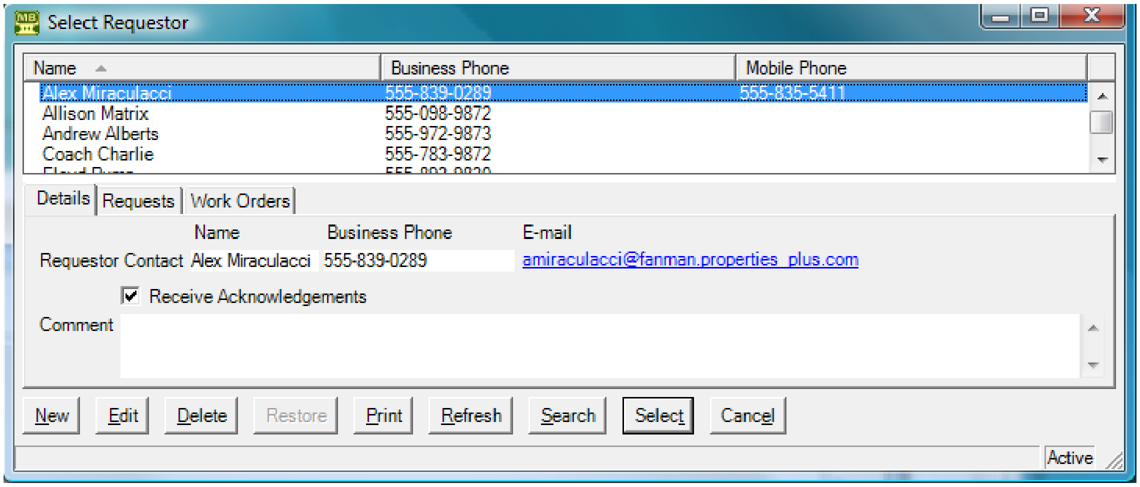
Editor windows often specify information using *drop-down lists*, also known as *pickers*. For example, the "**Requestor**" field in a work request editor is a drop-down list:


As shown above, a drop-down list ends with three symbols:

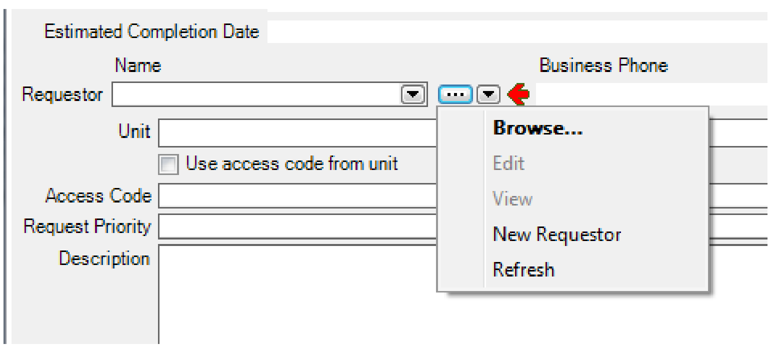
- The left-most arrow displays a list of available values for the field. In the case of "**Requestor**" this will be a list of the people whom you've authorized to submit work requests.




- The "..." opens a window showing the complete table. For example, if you click the "..." for "**Requestor**", you get the **Requestors** table. Click an entry in the table, then click **Select** to fill in the original field.




- The right-most arrow of the drop-down list opens a menu that gives you a number of options. For example, if you click this arrow for the "**Requestor**" field, you'll see the following:

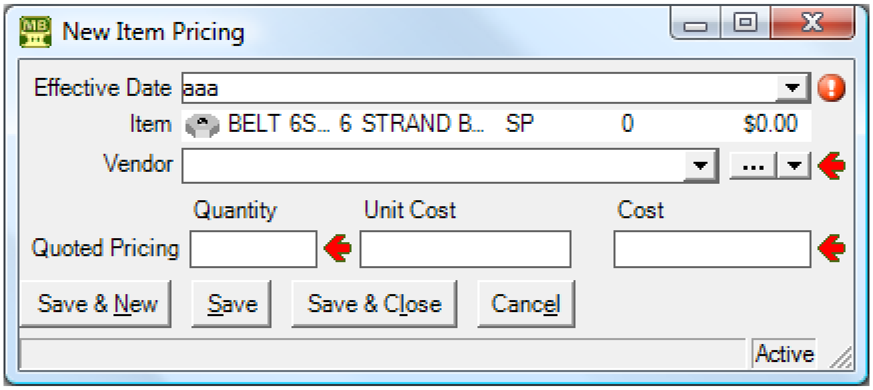



**Browse** lets you look at the existing **Requestors** table, just like the "..." button. **Edit** lets you edit the selected requestor record, while **View** lets you look at the record (but not change it). **New Requestor** lets you create a new requestor record; if you do this, the requestor will be filled into the original "**Requestor**" field once you save and close the new record. This makes it easy to create new records as needed if you don't already have an appropriate record. **Refresh** lets you update the drop-down list of **Requestors** to show any changes since you first opened the current window.

If you want to delete (clear) the value that's currently shown in this kind of field, right-click on the field and choose **Clear**. (With drop-down lists, the **Clear** option only shows up in non-mandatory fields; you can't clear the value of a mandatory drop-down list once it's been given a value, although you can give the field a different value.)

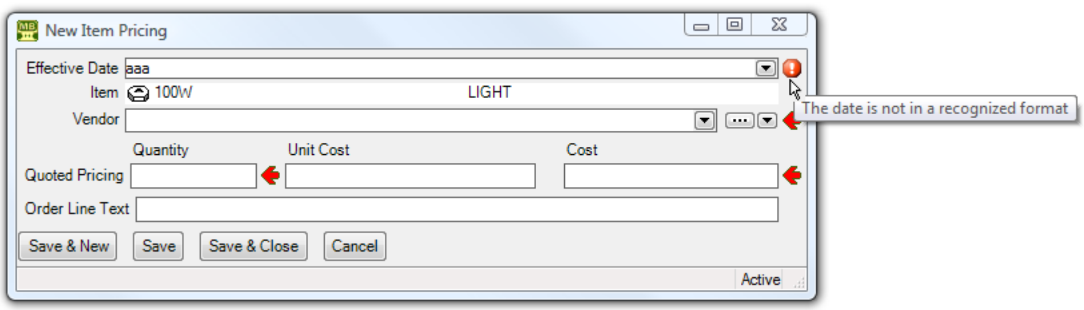
*Errors*

MainBoss puts a marker beside data fields that contain invalid data. The error marker is a red circle containing a white exclamation point. This is shown below, where the "**Effective Date**" field should contain a date, but instead contains meaningless text:




If you try to save a record when it contains an invalid field, MainBoss will display an error message and won't save the record.

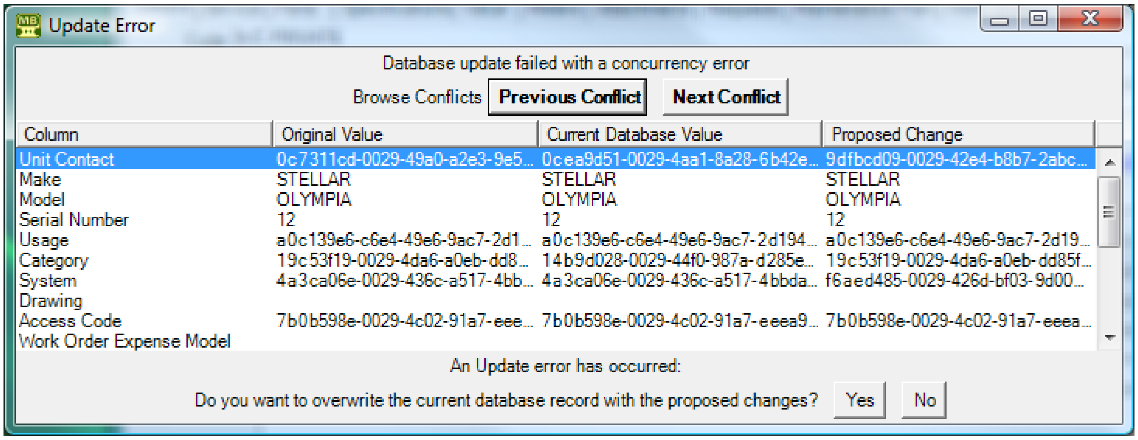
To find out why a data value is invalid, move your cursor to the error marker. MainBoss will display a tooltip with a message explaining why the current value can't be accepted. This is shown below:




*Concurrency Errors*

In the rare case that two people try to edit the same record at the same time, MainBoss will report a *concurrency error*.

For example, suppose you start editing a **Units** table record and before you're done, someone else tries to edit the same record. The first person to save the record will succeed. The second person to save the record will receive an error message indicating that the record has changed while you were making your changes:




MainBoss is asking you to resolve conflicts between the changes that were just made. The error message lists the fields in the record. For each field, there are three columns:

- The first column shows the record's values at the time you began editing
- The second column shows what the values are now (the ones that the other person saved)
- The third column shows the new values you've specified yourself

Where the values are different, you can see fields where your values differed from the other person's. The **Next Conflict** and **Previous Conflict** buttons jump to fields where the values conflict.

In many records, some field values will look like nonsense strings of characters. These strings are actually links to other tables. For example, the "**Unit Contact**" field refers to an entry in the **Contacts** list. The field's value is a meaningless character string that serves as a pointer. You can see if two pointers have the same value, but you can't tell anything about the record they point to.

When conflicts occur, it's best to click the **No** button on every conflict; this basically says, "Ignore what I just did." ) Then just go back and start editing the record again. This time you'll see the values that the other person put in. You can then decide which of these you want to change.

### *Interrelated Records*

MainBoss records are often linked to each other. For example, a record describing a piece of equipment might have a link to a service contract record, indicating that the equipment is covered by the service contract. This link is roughly analogous to a link on a web page: it's a pointer that MainBoss can follow in order to find related information.

If record A links to record B, record B often links back to record A. For example, just as an equipment record can link to a service contract, each service contract record has links to all the units covered by the contract. This makes it possible for MainBoss to go from equipment to service contracts or vice versa.

Now suppose you're creating a new unit record and you go to the **Service Contracts** section. If you haven't yet saved the unit record, you'll see that the **New Service Contract** button in the **Service Contracts** section is disabled. Why? Because the unit record doesn't exist until you save it. If you tried to create a new service contract record before the unit record was saved, there'd be nothing to link the service contract back to.

For this reason, **New Service Contract** stays disabled until you save the unit record. After that, **New Service Contract** is enabled and you can use it to create a new service contract.

Note that if you hold the cursor on a disabled **New** button, a tooltip will explain the situation.

If this seems confusing, just remember this rule: **If you're in the middle of creating a new record, MainBoss may not let you create a connected record until you save the first record.**

If you find that a **New** button is deactivated, saving the current record will usually activate the button.

### *Corrections*

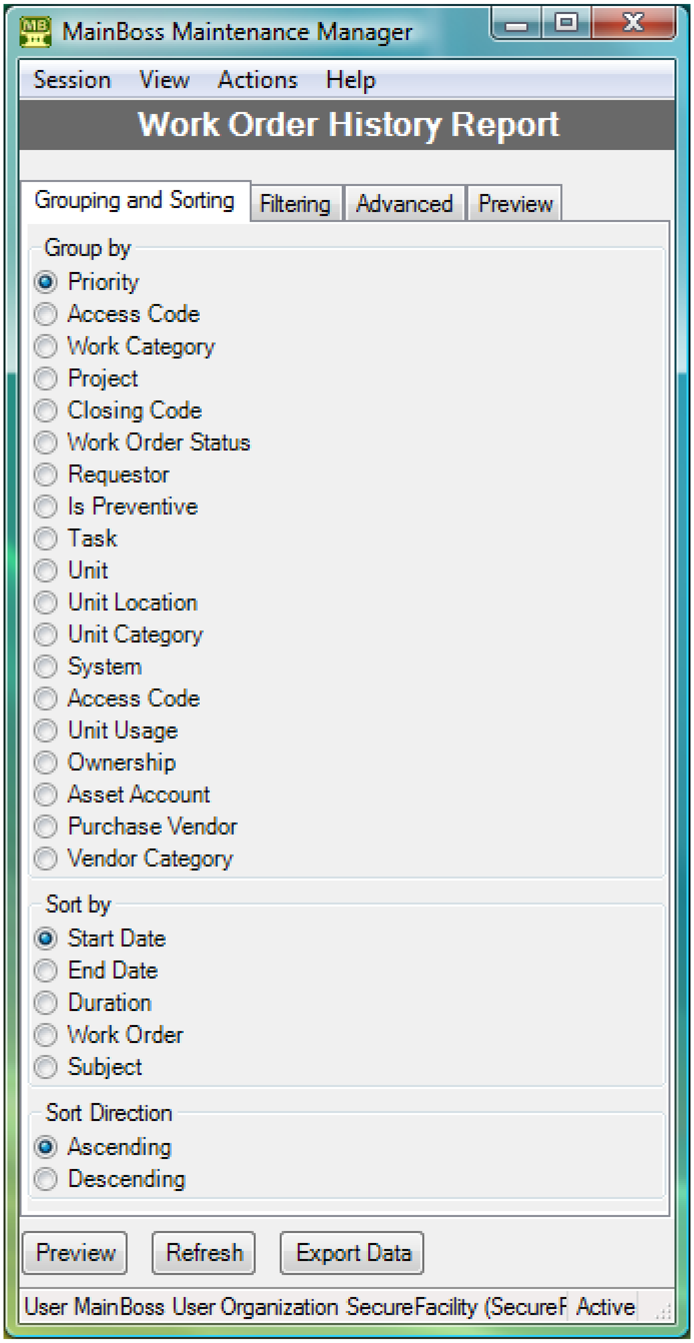
Some editors have a **Correct** button. **Correct** is used to make corrections to information that has already generated accounting transactions (e.g. records of actual costs on work orders). To maintain an accurate audit trail, MainBoss doesn't let you change or delete existing accounting records. Instead, you have to create new *correction* records which add or subtract from previous monetary values.

On a similar principle, *physical count* records resulting from taking inventory can't have their numbers altered once the record is saved. Instead, you have to *void* (cancel) a physical count, then record a new count. Again, the point is to prevent numbers from being fudged—you always leave an audit trail.

## Reports

Reports can display and analyze your maintenance information. Many sections in the control panel have subsections that offer reports; for example, **Work Orders** | **Reports** offers you a number of reports dealing with work orders.

When you choose the control panel entry for a report, you get a window that lets you specify options for the report:




*Report Sections*

The window associated with a report organizes options into sections. Different reports have different sections, but here are the most common:

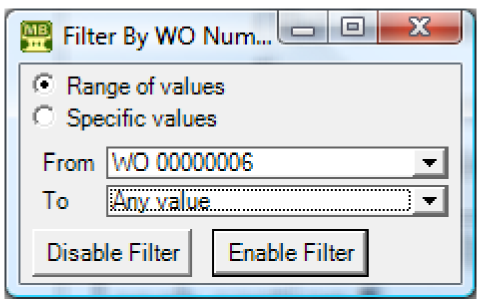
**Grouping and Sorting**: Lets you control how the report is organized. For example, suppose you're printing information on work orders. The report will be divided into sections, with each section containing work orders that have something in common. For example, each section might refer to a different location (which gives you a location-by-location breakdown of the work you do). As another example, you might group your information by unit, so that you get a unit-by-unit breakdown of your work orders.

Within each section, you can *sort* by other criteria. With work orders, for example, you can sort by "**Start Date**" (the date each job began), by "**End Date**" (the date each job ended), by work order number, and so on.

**Filtering**: A *filter* lets you select which records you do and don't want in the report. For example, you might want to restrict a report on units to units in a particular category. Filter sections let you specify such restrictions.

The **Filtering** section lists a number of checkboxes; each is associated with a type of information that you can select. When you checkmark one of the boxes, MainBoss opens a window where you can specify the information that you want included in the report:

**Range of values:** If you select **Range of values**, you can restrict the report to a consecutive set of records.



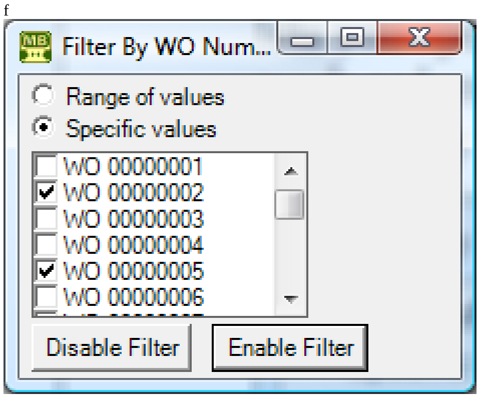

You specify the start of the range in the "**From**" line. You can select any record or else specify `Any value`, in which case the report will begin at the start of the list. For example, if you're filtering by work order number and you set "**From**" to `WO 00000006`, the report will begin with the specified work order and continue on from there. If you specify `Any value`, the report will begin with the very first value in the appropriate table.

Similarly, you specify the end of the range in the "**To**" line. You can select any record or else specify `Any value`, in which case the report will end with the end of the list.

If you select the same value in both "**From**" and "**To**", the report will only cover the single selected value. For example, if you set both "**From**" and "**To**" to `WO 00000006`, the report will only give you information about that work order.

**Note:** In ranges (and lists in general), MainBoss only sorts information in numeric order if all the information is numeric. If the information can contain both letters and numbers, then MainBoss sorts all of the information in textual order. This means, for example, that the value `011` sorts *before* `10`—anything that starts with `0` sorts before anything that starts with `1`.

**Specific values**: If you select **Specific values**, MainBoss gives you a check-list of possible values.




Checkmark the entries you want to include in the report.

**Enable Filter**: Clicking this *activates* the selection you've just made. MainBoss closes the filtering window and restricts the report as you specified. When you return to the previous window, you'll see that the filter has been checkmarked.

**Disable Filter**: Clicking this *de-activates* an existing selection. MainBoss closes the filtering window and removes any associated restrictions on the report. When you return to the previous window, you'll see that the filter has been marked as blank.

**Advanced**: Lets you specify a title for the report when it is printed, and the fonts to be used. Depending on the type of report, this section may also let you specify additional options.

**Preview**: Displays a preview of the report—a version of what you'd see if you actually printed the report on paper. Preparing such a preview often takes time, since MainBoss may have to process a lot of data; therefore, you might have to wait while MainBoss creates the preview.

### *The Preview Window*

The **Preview** section of a print window contains a control bar like this:

This bar contains the following (from left to right):

Document Map button: By default, the left side of the **Preview** section contains a *map* of the report. This shows you the report's sections and the contents of each section. If you click the Document Map button, the map will disappear; click it again and the map comes back.

If you click an entry in the document map, the preview changes to show you that entry.

First Page button: Goes to the start of the document.

Previous Page button: Goes to the previous page of the document.

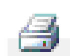

Gives the number of the page that is currently being displayed and the total number of pages in the report. You can go to a specific page by typing the appropriate page number into the box.

Next Page button: Goes to the next page of the document.

Last Page button: Goes to the last page of the document.

Parent Report button: Goes to the item that contains the currently selected item. For example if you're looking at an item within a section, this button goes to the beginning of the containing section.

Stop button: Stops processing the report. You might click this you start preparing a lengthy report, then change your mind.



Print button: This is the button that actually prints the report.

Print Layout button: Switches the display to *layout* format. This shows you a scaled-down version of the page as it will actually print. Click the button again and you go back to the normal display format.

Page Setup button: Opens a window where you can specify paper size, margin size, and other printing information.

Export button: Exports information from the report into a file suitable for use with some other program. If you click the down-arrow associated with this button, you'll see a list of available export formats.


Scale: Controls the scale of information displayed in the preview window. For example, if you set the scale to 200%, you'll see the information at twice its normal size. If you set the scale to 50%, you'll see it at half its normal size.


Searching: To search for information in the report, type what you want to find in the box, then click "Find". For example, if you're looking at a full Units report and want information on a particular unit, type the unit name in the box and click "Find". Clicking the associated "Next" button goes to the next occurrence of the same text.