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V8 Quick Start Guide
Version 8.2.0

ISS45 V8 Office Quick Start Guide Version 8.2.0

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Quick Start

We recommend you read this guide to familiarize yourself with ISS45's menu structure, icons, editing functions and so on.

This Quick Start guide will show you how to:

- Start ISS45
- Work with the menu
- Insert, edit and delete data
- Exit ISS45

Starting ISS45

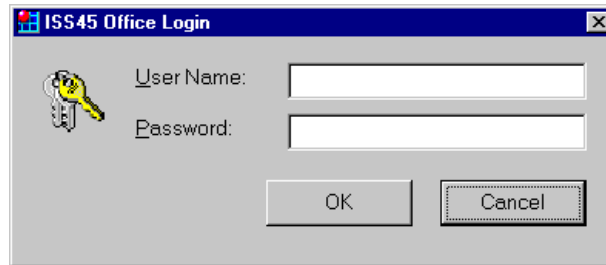
Depending on how your setup is customized, you could start ISS45 in a number of ways. The method described on the following page assumes you have the standard setup, as per the installation.

➤ To start ISS45

On the task bar, click  and select Programs | ISS45 | Office.













OR

- 1 On the Desktop, double-click the ISS45 icon.
The login prompt appears.



The screenshot shows a dialog box titled "ISS45 Office Login". It features a yellow key icon on the left. To the right of the icon are two text input fields: "User Name:" and "Password:". Below these fields are two buttons: "OK" and "Cancel". The dialog box has a standard Windows-style title bar with a close button (X) in the top right corner.

- 2 Type in your user name and password, then click **OK**.
If you are linked to more than one menu, you are prompted to select a menu. The Main menu appears.

Click	To
	Exit ISS45.
	Collapse the whole menu tree.
	Expand the whole menu tree (display all menu options).
	Collapse one (current) level of the menu tree.
	Expand one (current) level of the menu tree.
	Search for a menu, or menu option.
	Display large icons.
	Display small icons.
	Display options in a list format.
	Display details.
	Enter menu editor mode.
	Change user password.

ISS45's menu is designed to give you quick and easy access to any option, in four ways:

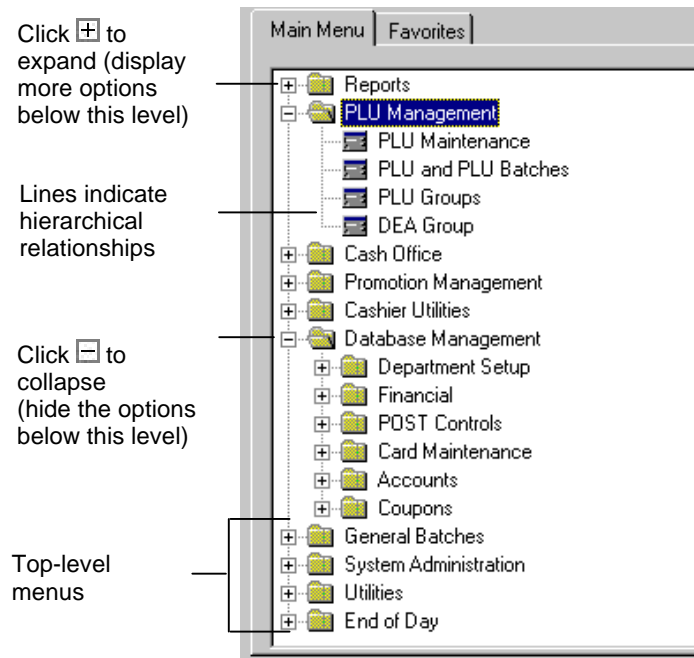
- Menu tree
- Favorites menu
- Menu icons
- Search tool

Using the Main Menu

Use the expandable/collapsible menu tree to access all the options in Office. When you click an option on the menu tree, the matching icons (options) automatically display in the right hand pane.

Click menu items (or the corresponding icons) to access an option.

Example of the menu tree in a partially expanded state.

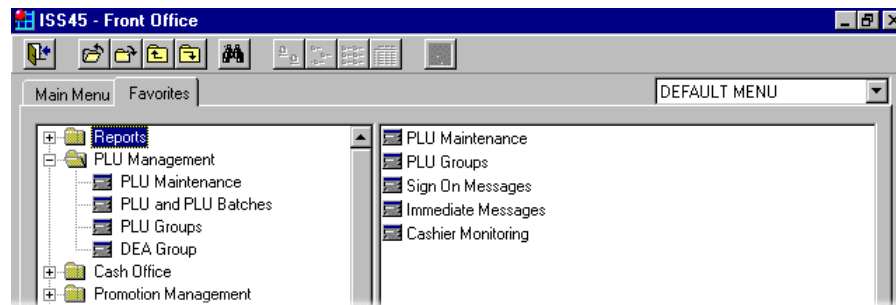


Note:

For details on building and customizing menus, or linking users to menus, see the *System Administrator's Reference*.

Favorites

Use the Favorites menu to access the options you use most frequently. Every user that logs in can set up their own personal menu, from any menu options they have already been given access to.



➤ To add options to the Favorites menu

- 1 In the menu, highlight the required option.
- 2 Click the right mouse button and select "Add to Favorites".
The option is copied to the Favorites menu.

➤ To remove options from the Favorites menu

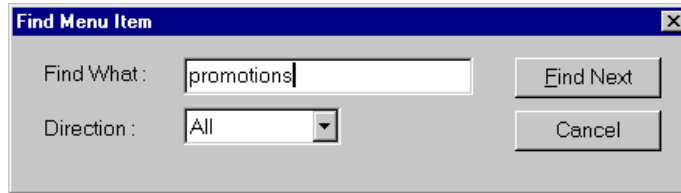
- 1 In the Favorites menu, highlight the option to remove.
- 2 Click the right mouse button and select "Remove from Favorites".
The option is removed from the Favorites menu.

Searching the Menu for an Option

Use the Search tool to find any menu option.

➤ To find a menu option

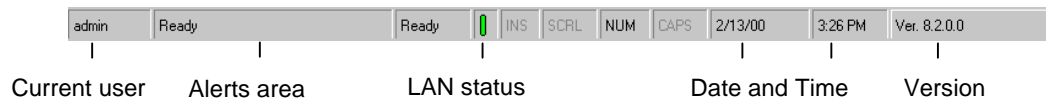
- 1 Click the Search  icon.
The Find Menu Item dialog appears.



- 2 Type in the text to search for, then click *Find Next*.
If the text is found, the first "hit" is highlighted in the menu.
- 3 To find the next occurrence, click *Find Next*.

Status Bar

The status bar at the bottom of the main menu shows various system statuses, alerts and other information:



ISS45 Basics

This section describes the basics of entering, editing and deleting data, how to use the various functions in dialog boxes, and generally how to find your way around the system.



Entering New Data

Data may be transmitted to your store from a head office, or other outside source. In some stores you have to manually insert data. Usually you enter data in a *dialog* box, which may have few options, or a *tabbed* dialog, containing many options.

In some areas, for example when defining banks in the system, you enter details directly into a *grid* or *list*. See also Editing Data, on page 16.

➤ **To enter new data**

- 1 To enter new data select a database to work with. The relevant list appears.
- 2 Click the *New* toolbar button. The dialog box appears.

Record number

Description

Drop-down combo box (*backspace* clears the selection)


Checkbox (select **on** or **off** with mouse or spacebar)

Saves data and closes the dialog

Closes the dialog without saving changes

Saves changes without closing the dialog

- 3 Enter the record number, for example: *Item Number*, *Description* and other details as required.
- 4 Either use *Tab* and *Shift+Tab* to move between the various fields and options, or use the mouse to click where required.
- 5 To check (or clear) a checkbox, click on the checkbox or its text. If you prefer, use the spacebar to toggle the checkbox on or off.

- 6 To specify a date, either type in the date directly, display the calendar and select the date, or use the spin  controls.
- 7 To save your work, click *OK* or *Apply*.
OK saves the data and closes the dialog. *Apply* saves the data and leaves the dialog open. You can then add other new data records to the database by typing in the new record number.

Finding Data in a List

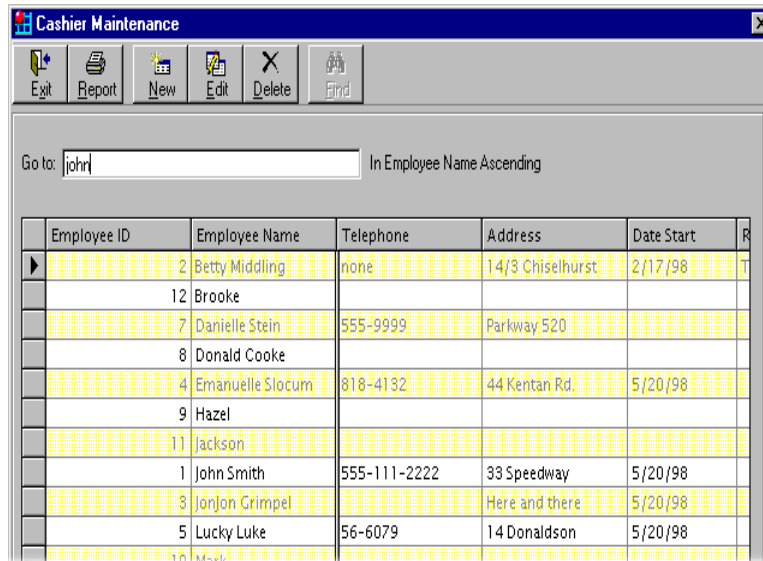
To find data in a list, follow the steps below.

Note:

In PLU Maintenance, a filter utility lets you build (and save) data searches. For details, see page 12.

➤ To find data

- 1 Select a database to work with. The relevant list appears.



- 1 Click a column heading; click again to change the sort order
- 2 In the Go to box, enter the text or number to find in that column

- 2 Click on the header of a column to sort the records. Each time you click a column header, data re-displays in ascending or descending order.
- 3 In the *Go to* box, type in the first part of a number (or first letters) of a record. The highlight bar jumps to the first occurrence of the entered numbers or text.

Finding Data in a Dialog Box

There are two ways to find data:

- Finding specific records
- Browsing through data

➤ **To find a specific data record**

In the record number box, type in the required record number and press *Enter*. The data for the specified record displays.

Type in a record number and press *Enter*.

Relevant data appears

The screenshot shows a dialog box titled "Sub-Department Maintenance". It contains the following fields and values:

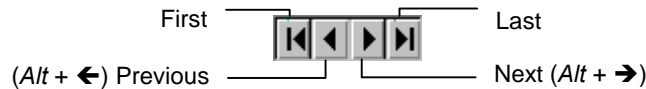
- Sub Department Number: 110
- Description: Frozen Pizza
- Department: Frozen
- Group Number: 1

At the bottom of the dialog, there are four navigation buttons: First (left arrow), Previous (left arrow), Next (right arrow), and Last (right arrow). To the right of these are three buttons: OK, Cancel, and Apply.

Browse data records

➤ **To browse through data records**

Use the record navigator to move between records.



Filtering Data

Some databases containing large amounts of data make it difficult to find specific records to work with. In PLU Maintenance, for example, you may have a database containing many thousands of items.

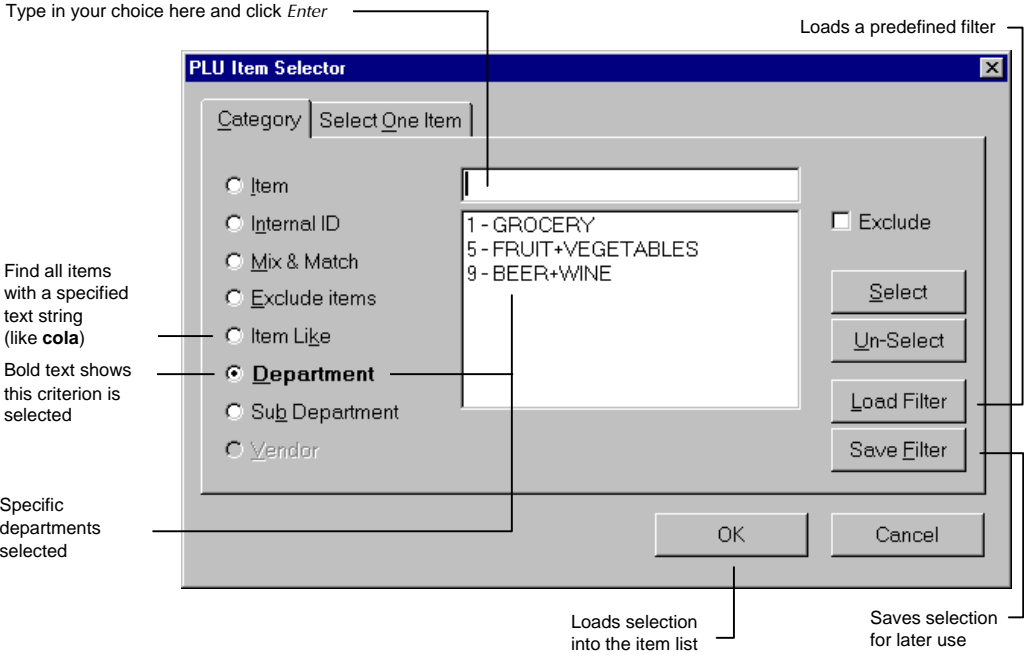
To make it easier for you, use the filter utility to extract a specific range of data you want to work with. With filters you can select criteria to include or exclude the various available options, then save your choices in a named filter to use later.

➤ **To filter data**

- 1 Select a database to work with, like PLU Maintenance. The blank data list appears, with the PLU Item Selector dialog on top.

Note:

If data is already displayed in the list, click the *Filter* toolbar button to display the PLU Item Selector.

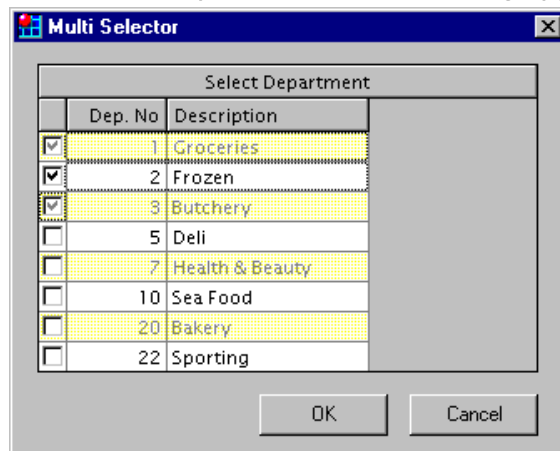


- 2 Select the desired criteria. Choose *Item*, *Internal ID*, *Mix and Match*, and so on. To be more specific, you could type in a range of items, like **1-100**, then press *Enter*. You may choose more than one criterion. Those you select are identified by bold text.

To search for items by name, that all contain some of the same letters, select *Item Like*, and type in the letters to find. For example, type in **cola** to find all items containing "cola" in their description.

- 3 To select specific departments, choose *Departments*, then click *Select*. The Department selector dialog appears.

Select departments



- 4 Select the required departments and click *OK*.

Note:

You can only see one selection at a time. Click on each criterion to see what you have selected.

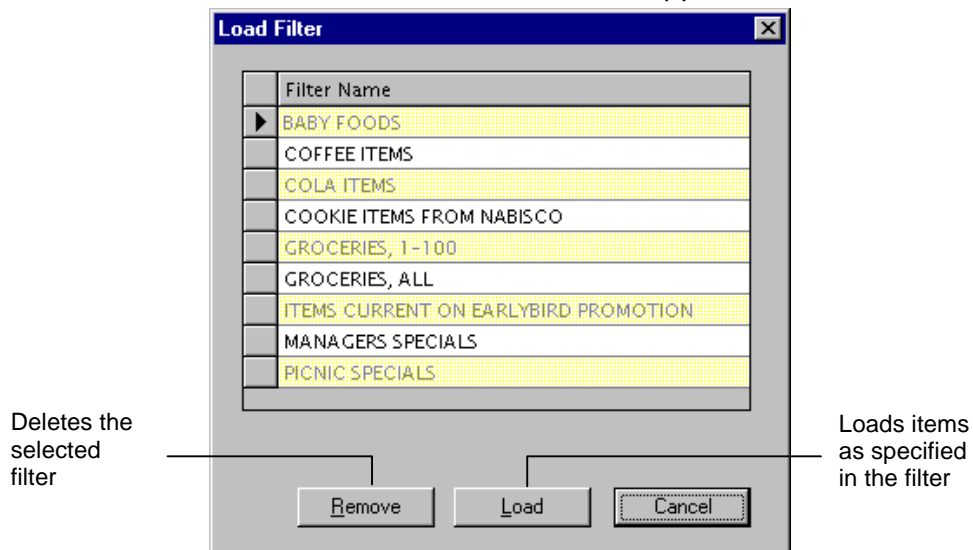
- 5 Select or exclude other items then, on the PLU Item Selector dialog, then click *OK* to load the selection into the item list.

➤ **To save a filter**

- 1 Specify the required criteria.
- 2 Click *Save Filter*. You are prompted to enter a filter name.
- 3 Type in the filter name and click *Save*. You can load this filter at any time. The next time you access PLU Maintenance, the Load Filter dialog will automatically appear.

➤ **To load a filter**

- 1 On the toolbar, click the *Filter* button. The PLU Item Selector dialog appears.
- 2 Click *Load Filter*. The list of filters appears.



- 3 Select the required filter and click *Load*. To build a new filter, click *Cancel*. To delete a filter, select it and click *Remove*.



Editing Data


Editing data is usually straight-forward. In some databases however, for example PLU Maintenance, you may be prompted to make choices before you are allowed to begin editing. PLUs could be *Mix and Match* items, sharing the same prices: if you change one of the items in a mix and match group, all the other items in the group get the same price.

➤ To edit a data record

- 1 To edit a record, either double-click on it, or highlight the record in the list and click the *Edit* toolbar button. The dialog box appears, containing the selected record's data.

Enter new details or change existing

A screenshot of a 'Cashier Maintenance' dialog box. The title bar reads 'Cashier Maintenance'. It contains several input fields: 'Cashier Number' with the value '2', 'Name' with 'Betty Middling', 'Address' with '14/3 Chiselhurst', 'Telephone' with 'none', 'Start Date' with a dropdown menu showing '09/27/1998', and 'Remarks' with 'Transferred from Broadway'. Below these fields are two sections for 'Cashier Priveleges': 'SALES Mode' and 'TRAINING Mode', each with a 2x4 grid of checkboxes numbered 1 through 8. At the bottom, there are navigation arrows and buttons for 'OK', 'Cancel', and 'Apply'.

- 2 Either use *Tab* and *Shift+Tab* to move between the various fields and options, or use the mouse to click where required.
- 3 To check (or clear) a checkbox, click on the checkbox or its text. If you prefer, use the spacebar to toggle the checkbox on or off.
- 4 To specify a date, either type in the date directly, display the calendar and select the date, or use the spin  controls.
- 5 To save your work, click *OK* or *Apply*. To close the dialog without saving, click *Cancel*.



Deleting Data

In most databases you can delete only one record at a time. In PLU Maintenance, you can specify a range of items and then delete them all. In some databases, where deleting data could be disastrous, you will be prompted with very specific messages before you can continue.

➤ To delete a data record

- 1 Highlight the record to delete.
- 2 Either click the *Delete* toolbar button, or the keyboard *Delete* key. A prompt appears.



- 3 Select *Yes* to delete, or *No* to leave the record.



Printing Reports

Most, but not all databases, allow you to print a basic report from each list screen.









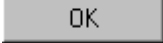
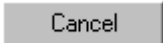


All other reports are available in the Reports option, in the main menu. For more details, see page 20.

➤ To print a report

- 1 Select a database to work with. The relevant list appears.
- 2 Click the *Report* toolbar button. A print preview displays. You can zoom, scroll and print the report.

Frequently Used Command Buttons

This table summarizes the more frequently-used buttons in the system.

Click	To
	Add a new record.
	Edit the selected record.
	Delete the selected record.
	Delete ALL records.
	Load (or set up) specific data, according to criteria.
	Go to first, previous, next or last record.
	Display a dialog box or more options.
	Restore the system defaults.
	Save any changes made and close a dialog.
	Exit a dialog without saving changes.
	Save changes without closing a dialog.
	Close a list screen.

Working with Reports and Graphs

This section describes the basics of report selection and creation.

All system reports are generated from the ISS45' s SQL database by Crystal Reports, a run-time version report-writer program included and integrated with ISS45.

Every time you request a report, Crystal Reports extracts and filters data from the SQL database according to criteria you enter, then displays a preview (or prints) the appropriate report.

Creating Reports

When you request a report, the system prompts for report criteria. Usually, this is only a range of dates. Some reports offer additional criteria, like item selection.

➤ **To create a report**

- 1 Select the required report option from the menu.
A criteria dialog appears.

The criteria vary from one report to another. Complex reports may include more criteria than others, like the Cashier Report dialog, below.

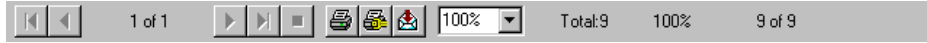
- 1 Mark "what" to report
- 2 Choose period
- 3 Choose Report By
- 4 Click *Preview* or *Print*

No.	Name	Report
1	Rob	<input checked="" type="checkbox"/>
2	Aviad	<input type="checkbox"/>
3	Simcha	<input type="checkbox"/>
5	Sigal	<input checked="" type="checkbox"/>
10	Dana	<input type="checkbox"/>
50	OFER	<input type="checkbox"/>
1111	Barbara	<input type="checkbox"/>
3333	Mana	<input checked="" type="checkbox"/>
9999	Supervisor	<input type="checkbox"/>

- 2 Set the options, dates and so on, as required.
- 3 Click *Preview* to display the report, or *Print* to send it directly to the printer.

Print Preview Toolbar

Use toolbar options to zoom in, page forward or backward, and print or export reports.



Click	To
-------	----



Print the report.



Edit the printer setup.



Export the report.
Formats include: Word, Excel, HTML, RTF, CSV and more.



Zoom in or out.

Creating Graphs

Most reports may be viewed graphically.

Create a report, then where available, select the *Graph* button or tab to view report data in chart format.

Graph Toolbar

Use the toolbar options to view a chart in different ways, or print it.



Click	To
	Copy the chart to the clipboard as a bitmap.
	Print the chart.
	Change the Gallery Type.
	Change chart colors. Select a color, then drag it to the chart.
	Switch between 3D and 2D views.
	Display vertical grid lines.
	Display horizontal grid lines.






Exiting ISS45

From the main menu there are three options for exiting.

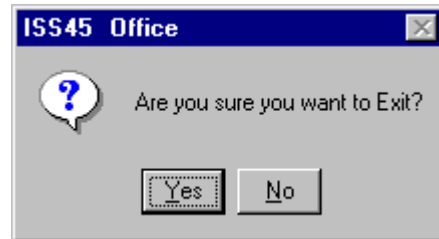
➤ **To exit ISS45**

1 Click:

-  on the main menu toolbar, OR
-  on the left corner of the title bar, OR
-  on the right of the title bar

The Login dialog appears.

2 Click *Cancel*. A confirmation prompt appears.



3 Select *Yes* to exit, or *Cancel* to return to the Login dialog.

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