HOW TO NAVIGATE IN BASEPLAN ENTERPRISE

The purpose of this document is to provide users with an overview of the modules and screens within Baseplan Enterprise. This document also aims to familiarise all users with basic functions, such as filtering and searching records in the system.

Software Version: 1801

TABLE OF CONTENTS

The following items must have been previously set up and configured. These options are usually managed by your system administrator.

SECURITY / MODULE	DESCRIPTION
Security Permissions	Security permissions determine your level of access to the modules, functions and reports within Baseplan Enterprise. As a result, menu items and functions that you do not have access to, will either not be visible or will be greyed out (disabled).
System Colour Settings	The basic theme colour can be customised. Therefore, the colours referred to in this document may differ from your application.
Utilities > Company	This record holds the wild card symbol. By default, the symbol is a percentage sign [**%**]. *Please contact your system administrator for more information*.

LOGGING IN

1. Double click the Baseplan Enterprise icon on the desktop 

This will display the *Baseplan Enterprise Login* screen.

Note: Company set up may determine the steps required to get to this screen. The Systems Administrator will be able to assist.

The default database will be displayed in the **Company** field. If the user has access to more than one database, the relevant database can be chosen from this drop down list.

The **Domain** field displays information as per the network configuration.

2. Enter **User Name**
3. Enter **Password**

Note: Password is case sensitive

4. Click LOGIN

<u>Incorrect Credentials</u>

If incorrect credentials have been entered, the system will display the following error message:

Info: “User id and password is incorrect. Please enter a valid user id or password.”

Otherwise, the *Baseplan Enterprise Main Menu* screen will be displayed.

If incorrect credentials have been entered:

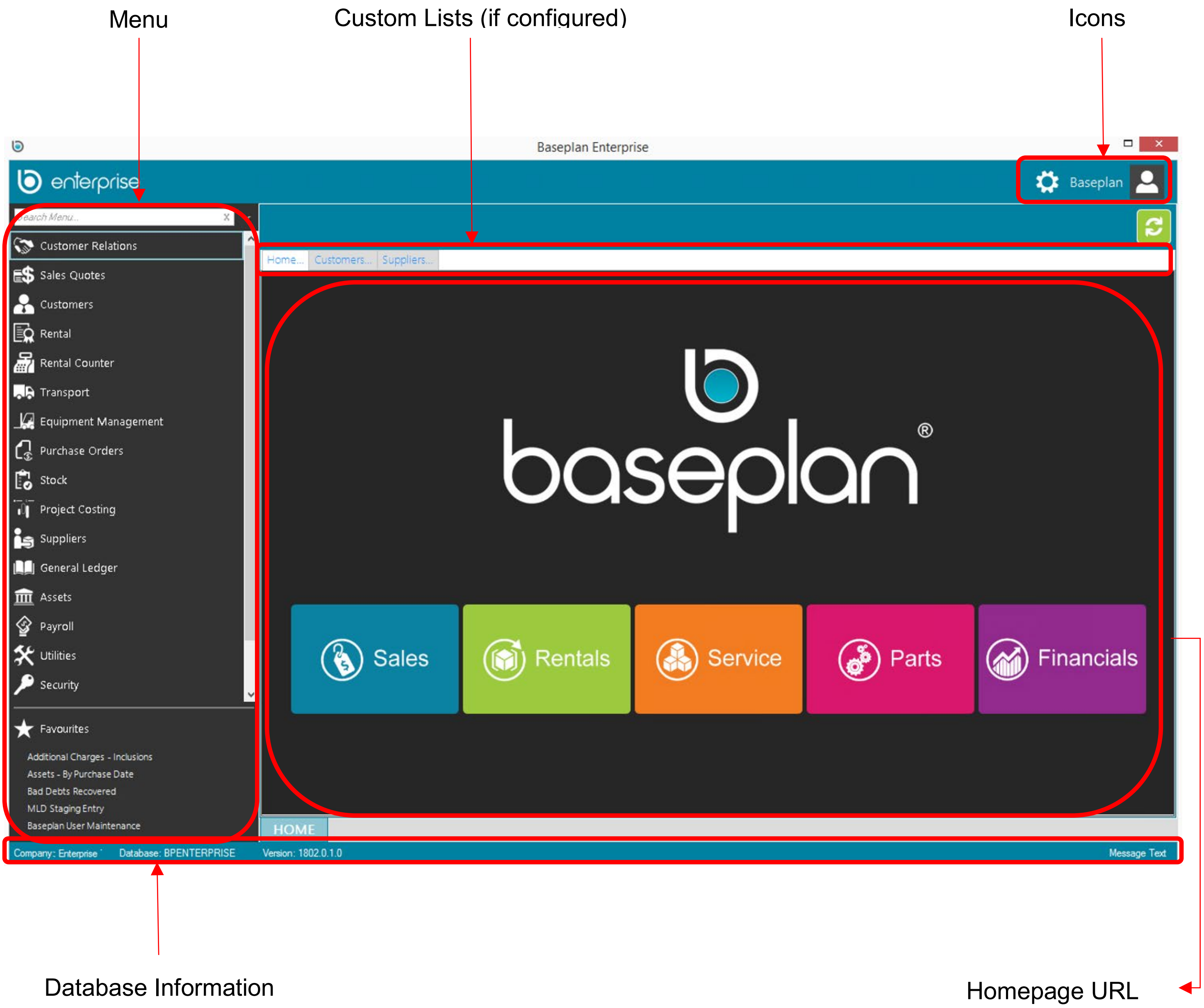
1. Click OK on the error message

This will display the *Baseplan Enterprise Login* screen again.

2. Enter the correct credentials

MAIN MENU

Baseplan Enterprise Main Menu is the first screen that displays after logging in. It is designed in the sections shown below:



Home Page URL

The middle section of the Main Menu can be linked to a URL (through configuration). **For example:** A company's website or intranet site.

Main Menu Tools

On the top right of the Main Menu, the Tools icon is displayed which is relevant to System Administrators only.

The User icon in this section also displays the user name of the currently logged in user.

The User icon is used to log out of the application. *Please refer to the 'Logging Out' section in the document for more information*.

Custom Lists

If Custom Lists are implemented, they are displayed as tabs on the Main Menu.

Custom Lists can be designed and implemented to suit customer specific requirements. These lists allow quick and easy access to targeted data and information.

For example: It might be required to monitor the equipment item that is rented out during the day. A custom list can provide this information in one step and allow the user to drill down from this list to associated screens and data.

Note: Custom lists are configured using the dashboard configuration file located in the application installation folder. *Please contact Baseplan Support for more information*.

Database Information

The database information in this section relates to the database currently used, and displays the database name and application version.

Application Colour

The colours of Baseplan Enterprise application can be customised, hence the colours at a user's workplace may differ to the Baseplan Enterprise application colours in this document.

Menu

The Menu shows the modules, screens, functions and reports that are available to a user according to their security permissions.

Security permissions determine the level of access to:

- Modules
- Screens
- Actions
- Views
- Functions
- Menu Icons
- Buttons

Clicking on a module expands to display the available functions, screens and reports within the module.

For example: Clicking on the Customers module expands to show the screens, functions and reports within the Customers module. Clicking on the Customers module again collapses the options displayed.

Functions and reports which have further underlying entries are marked with a triangular indicator to the left side of the function. To further expand on those screens, functions, and reports, click on the triangular indicator to display the available options.

Search Function

The Search function in the Menu allows for entering search criteria, which is applied to the available screens, functions and reports.

For example: Typing 'purchase orders' in the **Search** field will filter the screens, functions and reports matching the criteria entered. Clicking the 'x' in the **Search** field displays the default view of the Menu.

SCREENS

The Baseplan Enterprise screens follow a specific design and layout, which allows new users to quickly become familiar with the application.

Panels

Screens are designed in panels, and allow users to collapse or expand the panels depending on the information that is required.

When a panel is expanded, the panel heading is displayed in blue. If the panel is collapsed, the heading is coloured in black. By default, all panels are expanded.

In the example below, the panels *Customer Details* and the *Address Details* are expanded whereas the *Banking Details* and *Drivers Licence* | *Contract Defaults* | *Admittance Details* panels are collapsed.

Tab Order

Each screen is set to a default tab order. Starting at the top of each panel, tabbing down to the last field within a row in a column, starting in the next column on the top tabbing down and so on.

Master Data Screens

Master data screens capture master data which is widely static information.

For example: Customer information such as customer name, customer address, contact details, payment terms are unlikely to change on a regular basis. Master data is informative and generally stagnant.

The most frequently used master data screens within Baseplan Enterprise are:

- Customer Master
- Supplier Master
- Equipment Ledger
- Stock Master
- Asset Master

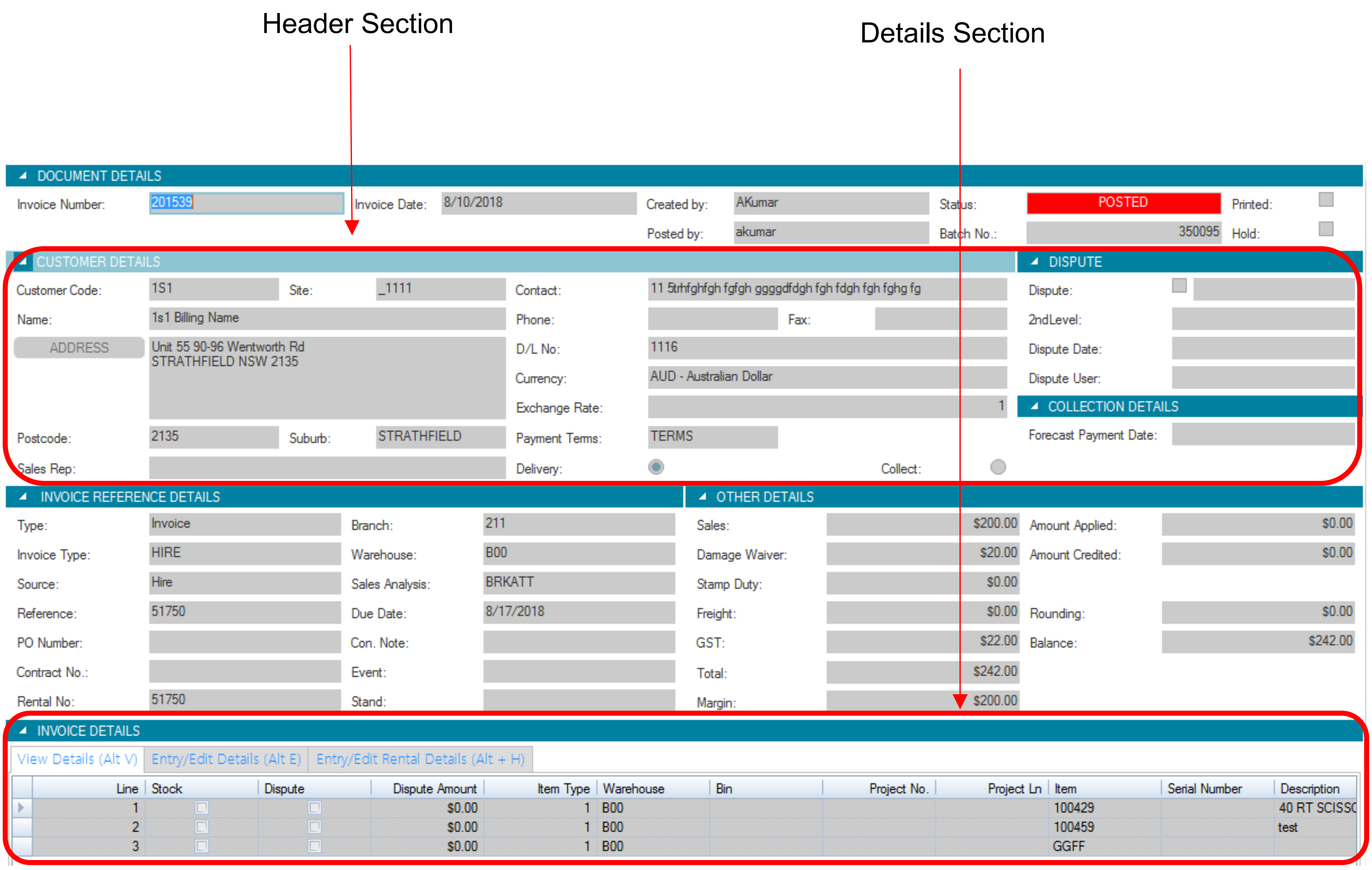
Transactional Screens

Transactional screens are reliant on the master data initially, but the actual transactions created are process driven and the transactional information recorded might change throughout specific process stages.

For example: Customer invoices or customer payment transactions include information from the *Customer Master* screen.

Transactional screens allow for processing of transactions and are designed in two sections:

- Header section
- Detail section



Header Section

Information from the master data screen is populated in the Header Section in the transactional screen.

For example: When a customer invoice is processed, according to the **Customer Code** or **Customer Name** entered, the customer details are populated in the *Header Section*.

Details Section

The Details section contains transaction details. One or more detail lines can be added.

For example: Creating a customer invoice for a part sale with 1 battery and 2 tyres most likely includes 2 transaction detail lines, one line for the battery and one line for the tyres.

The detail line shown in the Details section in a transactional screen is also called a *Grid* view.

The user can scroll through the *Grid* view by using the horizontal or vertical scroll bar. Most grids within this system can be customised to the user's requirements.

Please refer to the 'How to Customise the Grid View' guide for more information.

SCREEN MODES

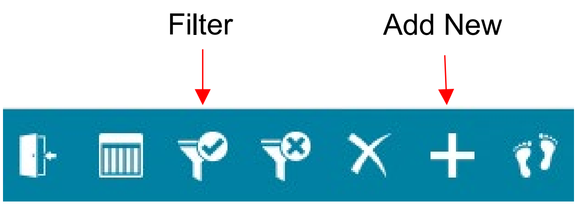
There are four different screen modes that apply to the Baseplan Enterprise screens:

- Filter and search mode
- View mode
- Add new mode
- Edit mode

Filter and Search Mode

When a screen is first opened, the default screen mode is FILTER or SEARCH and no data is shown at this point.

If user security permissions allow to add a new record, then the ADD NEW button will also be available in this mode.



In order to view data on the screen, specific information and/or search criteria must be entered in one or multiple fields on the screen.

Fields coloured in blue are available for searching and/or filtering.

Fields coloured in grey are excluded from searching and/or filtering.

There are a number of ways to locate and view required data, such as:

- Filtering records without specific search criteria
- Filtering records using a drop down list
- Filtering records using a wildcard
- Filtering records with a unique code or text field
- Filtering records using a checkbox
- Filtering records by status
- Filtering records with a number of search criteria (combining some or all of the above)

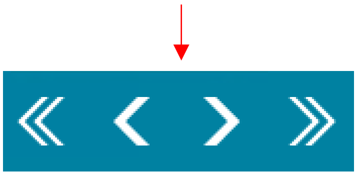
Filtering Records without Specific Search Criteria

When using the Filter/Search function without specific criteria, if the system retrieves more than 50 records then a set of 50 records can be viewed at a time.

1. Display the relevant screen
2. Click FILTER

Record Selectors allow the user to move through the record results.

Record Selectors



For example: The system has retrieved 90 records. In this case, the first 50 records are available for viewing and by using the '>' record selector the user can step through the records. To jump to the 52nd record, the '>>' record selector will jump to the 50th record and then using the '>' record selector will allow the user to step further through the search results in increments of 1.

There is a difference in the results when filtering on master data or on transactional data:

- Master data returns the first 50 records
- Transactional data returns the last 50 records

Filtering Records using a Drop Down List

A drop down list displays the data belonging to a specific field in tabular form.

For example: In the *Supplier Master* screen the data for the (Supplier) **Name** field is displayed within a drop down list.

There are a number of ways of using the drop down list:

- Clicking on the down arrow key on the drop down list to display the options within the list
- Entering information in the field and the drop down list displays the records matching the data entered
- Using the up arrow and/or down arrow keys to go through the list end select the required record
- Clicking FILTER will retrieve the records according the filtering criteria entered

Filtering Records using a Wildcard

The wildcard search allows searching by specific text components. This is particularly useful when working with a large volume of data and when specifics are unknown.

Wildcard searches can include whole words or only a part of a word.

For example: It is required to search for all customer master records where the word ‘Service’ is included.

SEARCH FORMAT	OUTCOME
 Enter **%Service%** as search criteria and press ENTER on keyboard	Searches for records including the word ‘service’
 Enter **%Service** as search criteria and press ENTER on keyboard	Searches for records ending with the word / letters ‘service’

1. Enter the search criteria using the wildcard
2. Click FILTER

If no matching search results are found, the system will display a message ‘No records found’.

Filtering Records with a Unique Code or Text Field

If search criteria are known, the information should be entered into the relevant field.

For example: A customer requires information regarding a specific invoice number.

1. Display the relevant screen
2. Enter the exact search criteria in the desired fields
3. Click FILTER

Filtering Records Using a Checkbox

Filtering or searching using a checkbox allows to search for specific records where a checkbox is checked/unchecked.

For example: Searching for Supplier Master records that are checked as **Not In Use**.

1. Display the relevant screen
2. Check the checkbox to include the required records or uncheck to exclude the records
3. Click FILTER

Filtering Records by Status

Status in most screens is displayed as a drop down list. This allows to filter and/or search by a specific status of a transaction. **For example:** Apply a filter on all purchase orders that are in 'OPEN' status.

1. Display the relevant screen
2. Click on the **Status** drop down list
3. Select the required status
4. Click FILTER

Filtering Records using a Number of Search Criteria

Any of the above filter and/or search methods can be combined in order to achieve the required search results.

Clearing Search Criteria

The search criteria entered will need to be cleared before a new search can be performed.

1. Click CLEAR before starting a new search

View Mode

Once the filter has been applied, the screen is in View mode and the first record from the filter/search result is displayed. There are a number of additional icons made available in the toolbar.

Actions

In most screens, there a several actions available that can be accessed through the toolbar.

Available actions depend on the user security access and the current transaction status or the process stage.

The **Actions** will only be displayed when a record is viewed on the screen.The actions available in the drop down menu relate to the record that is currently viewed on the screen.

1. Display the relevant record
2. Click on the **Actions** Menu
3. Select an action using the arrow keys on the keyboard
4. Press ENTER on the keyboard

For example: Clicking on the action **Change Customer Code** opens a new screen on top of the *Customer Master Screen.*

5. Make the required changes
6. Click SAVE
7. Click CLOSE

This will close the screen accessed from **Actions** and will return to the previously viewed, open screen.

Views

In most screens, there are several views available that can be accessed from the toolbar.

Available views depend on the user security access and the current status of process or transactions.

The views available in the drop down menu relate to the current record viewed on the screen.

1. Display the relevant record
2. Click on the **Views** Menu
3. Select a view using the arrow keys on the keyboard
4. Press ENTER on the keyboard

For example: Clicking on the view 'Transactions' opens a new screen on top of the *Customer Master* screen.

5. Click CLOSE

This closes the screen accessed from **Views** and returns to the previously viewed, open screen.

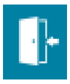
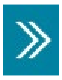
Icons

When in View mode, additional icons are made available in the toolbar.

The availability of the icons depends on the following criteria:

- User access
- Current screen mode
- Process stage or transaction status

For example: A user has access to the *Customer Master* screen to view customer records, but does not have access to add a new customer master record. In this case, the ADD NEW button on the toolbar will not be visible.

ICON	NAME	DESCRIPTION
	Close	Exits the current screen and moves back to the previous screen.
	Datasheet View	Displays records in a datasheet view.
	Search	Opens a search window where search criteria can be entered (for text fields only).
	Filter	• Applies the filter or search criteria entered and retrieves the found record(s). If there is more then one matching record retrieved, the first record of the record set will be viewed for a masterfile and the last record for a transaction. • If there is no data entered, the system will retrieve 50 available records relevant to the screen where the search has been applied. Record selectors can be used (as described below) to move through the records. Datasheet view can be used to view the filtered records.
	Move First Record	Record Selector: Moves to the first record in the search results of a record set. (A record set includes 50 records)
	Move Previous	Record Selector: Moves one record back from the currently displayed record set.
	Move Next	Record Selector: Moves one record forward from the currently displayed record set.
	Move Last	Record Selector: Moves to the last record in the search results of a record set. (A record set includes 50 records)

ICON	NAME	DESCRIPTION
	Add New	Adds a new record.
	Edit	Edits an existing record.
	Graph	Displays data in graph format.
	Notes	Opens a new screen and allows for the entry of notes. The notes are attached to the current record displayed.
	Attachments	Views attached documents.
	Refresh	Refreshes the current screen.
	Cancel Filter	Cancels the search mode and displays the first 50 records for a master screen or the last 50 records for a transaction screen.
	Cancel	Cancels the current action performed.
	Clear	Clears the data entered.
	Post current	Posts the current record.
	Export to Excel	Exports the displayed / or selected records to Excel.
	Audit Trail	Displays the *Audit Trail* screen of the current screen and shows the audit history of the record displayed. Requires the auditing functionality to be turned on.
	Print	Prints the currently viewed information / transaction
	Print Preview	Previews the currently viewed information / transaction
	Email	Attaches a viewed document to email and opens an email screen.
	Export to PDF	Exports the current report to PDF format.

ICON	NAME	DESCRIPTION
	Delete	Deletes the current record.
	Save	Saves the changes made to the current record.
	Pop Out Screen	Puts the current screen in its own window (pop out).
	Add to Favourites	Saves the current screen to Favourites.

<u>Add New Mode</u>

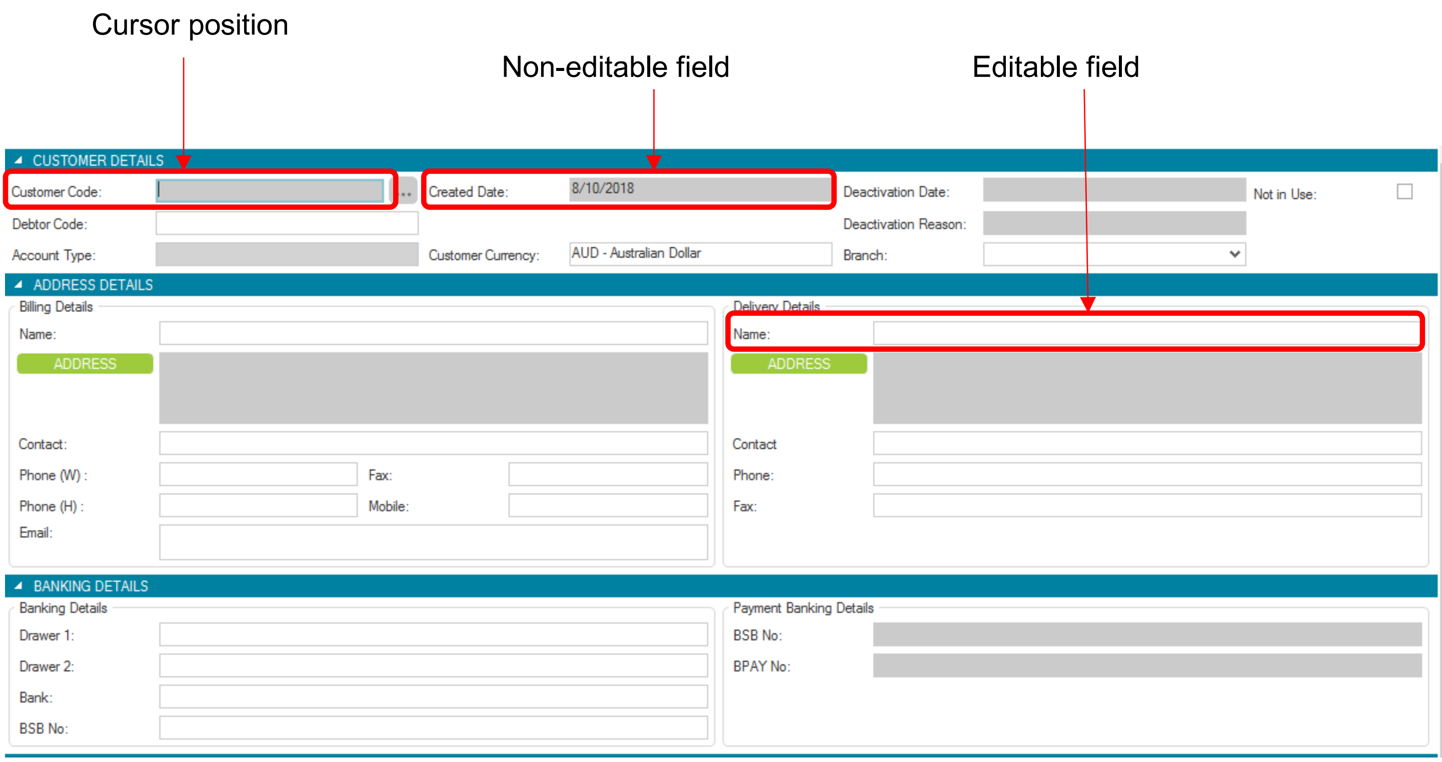
1. Display the relevant screen
2. Click ADD NEW

When in Add New mode, the fields open for data entry are coloured in white. Fields that are locked for data entry are coloured in grey.

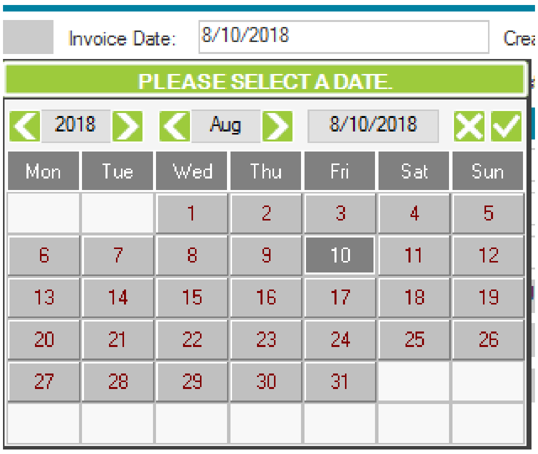
The cursor is positioned in the first field that is active for data entry. This field is blue.

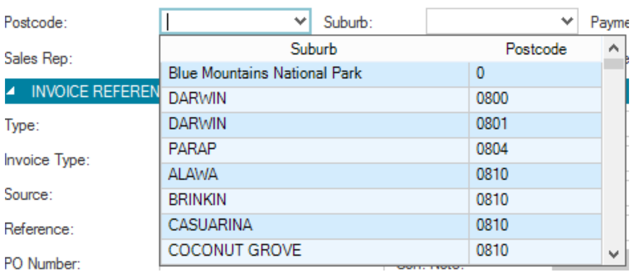
The Tab key or Mouse Click can be used to navigate through the screen. The tab order of each screen is pre-defined to ensure efficient data entry.

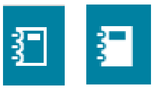
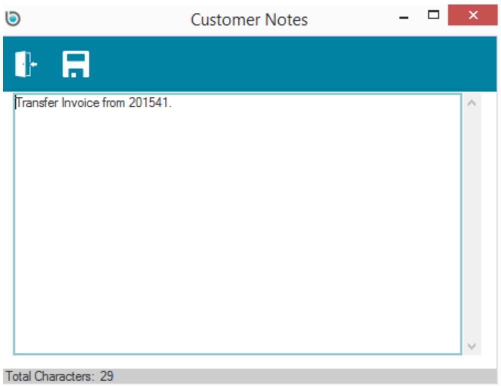
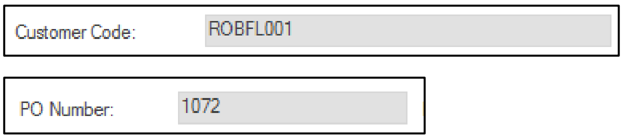
We recommend not to use the Enter key to navigate through the screen, as this key does not follow a pre-defined tab order.

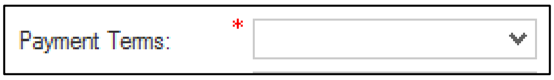


Screen Components

<table>
<tr><th>COMPONENT</th><th>DESCRIPTION</th></tr>
<tr><td>Text Field</td><td>A text field is an alphanumeric field that allows for free form data entry.
The only restriction is the length of the field.</td></tr>
<tr><td>Date Field

</td><td>The date format depends on the regional settings of the user's environment.
The entry of the date can be simplified by entering:
dd - the system will assume the date is in the current month and year
ddmm - the system assumes the date is in the current year
Especially useful for entering dates in the future (rental contracts and or purchase orders).
For example:
6d in 6 days from today
2m in 2 months from today
1w in 1 week from today
1y in 1 year from today
The same logic can be applied for entering dates in the past by entering a '-' as a prefix. For example: -6d.
Double click on the date field to open a Calendar and select the requested dates from the Calendar.</td></tr>
<tr><td>Checkbox

</td><td>Click on the checkbox to set it to 'checked' / 'unchecked'.</td></tr>
<tr><td>Drop Down List

</td><td>A drop down list contains configured reference data for a particular field.
Clicking on the down arrow key in the drop down list or pressing the F4 key displays the available data.
Select the data in the drop down list by clicking on the requested record or use the up and down arrow keys to select the record and then press Enter.</td></tr>
<tr><td>Currency sign</td><td>Any field related to an amount is formatted as a currency field. Hence, it is not required to enter the currency sign and the decimal point, if the amount is a full amount.
For example: 123 will be displayed as $123.00 and 12.50 will be displayed as $12.50.</td></tr>
</table>

COMPONENT	DESCRIPTION
Email	Ensure that the email address has the correct format i.e. training@baseplan.com Multiple email addresses can be entered by separating the emails addresses with a colon (;) and a space.
Notes  	Opens a screen on top of the current screen and allows the user to enter notes that can be attached to the current record displayed. The notes are free form text. The NOTE button shows a folder with a border when there are no notes attached. The NOTE button shows a white folder when there are notes attached. 3. Click NOTES 4. Click EDIT 5. Enter the required notes 6. Click SAVE
Ellipsis 	Opens a network drive to store an attached document or opens another screen to add further information.
Record ID Field 	In order to save a record, the record requires a record code (record ID) • Record Code for Master Records Master records such as customer records, supplier records or equipment records require an ID. This can be configured so that the system will automatically assign a record ID or the user will need to enter the record ID before saving the record. The record ID for a master record can be numeric or alphanumeric. • Record Code for Transactions Records Transaction records, such as customer invoices, purchase orders, rental contracts require an ID. When the record is saved, the system will automatically assign a record ID to the transaction. The record ID for a transaction is always numeric.

COMPONENT	DESCRIPTION
Buttons  	The click of a button executes a command/function assigned to the button. An enabled button is coloured in blue, whereas a disabled button is coloured in grey. If a button is enabled or disabled depends on: • User Access • Process stage/stage of transaction
Select / Deselect Columns	Many grids include **Select/Deselect** which allow the user to include or exclude entries from a list. Select/deselect by clicking on desired entries to include/exclude the desired information.
Drill Down Functionality	Fields that relate to an underlying transaction have drill down capability. **For example:** In the *Customer Transactions* screen, double clicking on the **Rental No** in the Grid view will display the rental contract or double clicking on the **Ref No** in the Grid view will display the customer invoice.
 	On saving a record, the system will validate the mandatory fields. The system will not save the record, unless all the mandatory information has been provided. Most mandatory fields are listed with a red asterisk next to the field caption.

Edit Mode

1. Display the relevant record
2. Click EDIT

When in Edit mode, the fields that are open for data entry will be coloured in white. Fields that are locked for data entry will be coloured in grey.

The cursor will be positioned as per configured tab order.

Use the Tab key or Mouse Click to navigate through the screen. We recommend not to use the Enter key to navigate through the screen.

3. Enter the relevant information

Note: There may be fields that are not mandatory from a system perspective, but may be mandatory according to customer specific business processes.

4. Click SAVE

The system validates the data entered. An error message will be displayed if the system detects invalid or missing data. If the data entered passes the validation process, the edited record is saved.

DATASHEET VIEW

Traditionally, when the system has returned the records as a result of an applied filter and/or search criteria, it displays the first record within a master data screen and the last record within a transactional screen from the search result.

Although the record selectors can be used to navigate through the records on the screen one by one, switching to the Datasheet View allows to view the record selection in one screen.

1. Display the relevant screen
2. Enter the search criteria
3. Click FILTER
4. Click DATASHEET VIEW

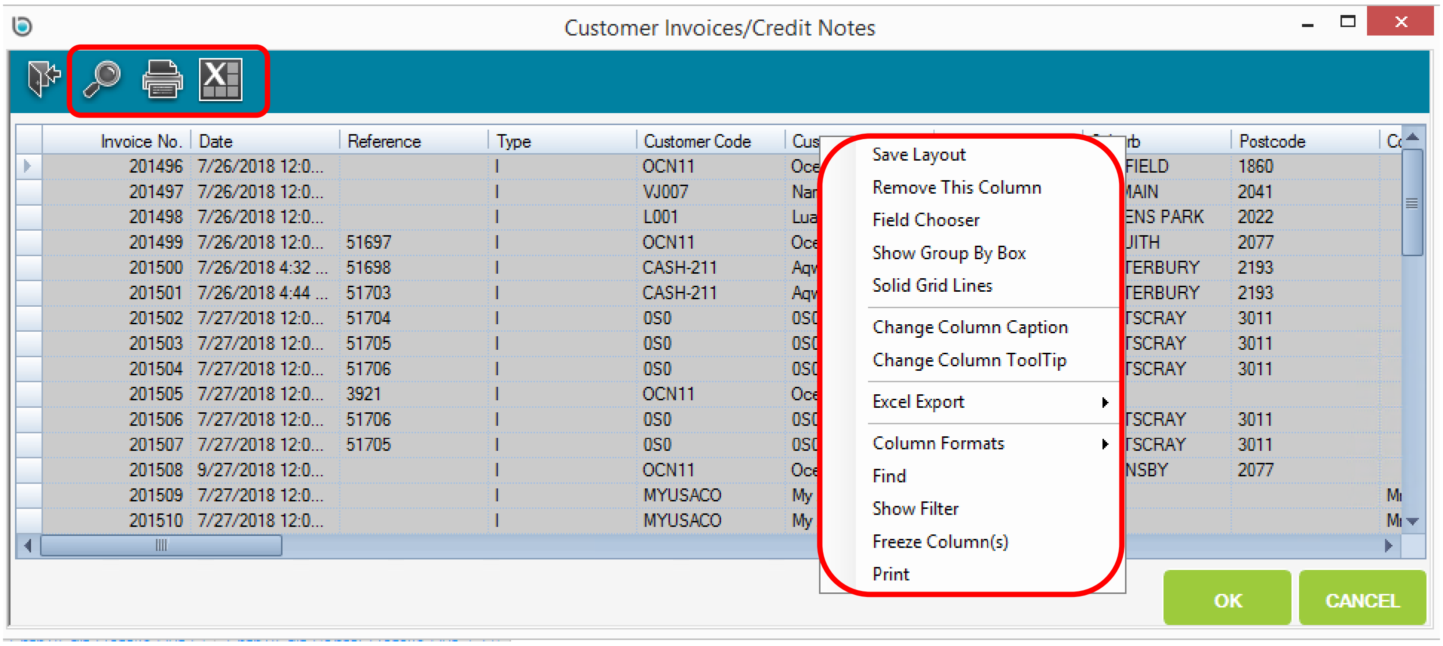
The Datasheet View includes the information that is shown on the screen in columns.

This view can be designed to a user's requirements in regards to the data that is relevant for a specific business process. Columns can be moved through drag and drop; they can be resized, deleted or grouped.

The available options for the Datasheet View design are shown in the below Menu. The design can be saved per user by using the option 'Save Layout' if user security permits.

Further options in the data sheet view are:

- Searching for specific records using search criteria
- Printing the records displayed
- Exporting the records displayed



5. Click CLOSE

This will display the screen from which the Datasheet View was initiated.

Please refer to the 'How to Customise Grid View' guide for more information.

GRID VIEW

The Grid View is displayed when viewing detail lines in the Details section of a transactional screen.

For example: Detail lines for a purchase order or detail lines for a rental contract.

The Grid View can be customised in the same way as the Datasheet View, including using the drag and drop functionality to move columns.

Please refer to the 'How to Customise Grid View' guide for more information.

REPORTS

Baseplan Enterprise reports are available under the respective modules.

For example: Customer related reports are listed under the Customers module. Equipment related reports are listed under the Equipment Management module.

Note: Bespoke reports (created by customers) are available under the User Reports Menu of the relevant module.

Please refer to the 'How to Add and Update SSRS Reports' guide for more information on creating and editing SSRS reports.

Generating Reports

1. From the Menu, select the relevant module
2. Click on the Reports Menu

This will expand display all the reports available under the selected module.

3. Select the relevant report

This will display the *SSRS Reports* screen, allowing the user to select the required scoping options.

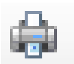
For example: Generating a Suppliers Control Summary report for the relevant period.

4. Select the scoping criteria
5. Click VIEW REPORT

This will display the required report in the *SSRS Reports* screen.

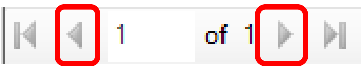
The date and time that the report was generated will be displayed to the right of the report name.

The generated report can be:

- Emailed 
- Printed 
- Exported to XML, CSV, PDF, MHTML, Excel, TIFF and Word files 
- Refreshed to sync the latest changes 
- Zoomed in or out to the desired resolution

- Searched for specific information within the report. Entering a keyword in the text box adjacent to the **Zoom** field will activate the FIND button. Clicking FIND will search the report for the keyword and highlight the first result. Clicking NEXT will highlight subsequent instances of the keyword.

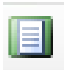
Multiple pages within the report can be accessed using the PREVIOUS and NEXT buttons:



First and last pages of the report can be accessed by clicking the FIRST PAGE and LAST PAGE buttons, respectively.

Note: The options to print, export, refresh, zoom, search and navigate pages are available only after a report is generated using the relevant scoping criteria.

Printing Reports

Prior to printing, users can preview the report by clicking on the PAGE LAYOUT button  . Clicking the button again will revert the report to Normal view.

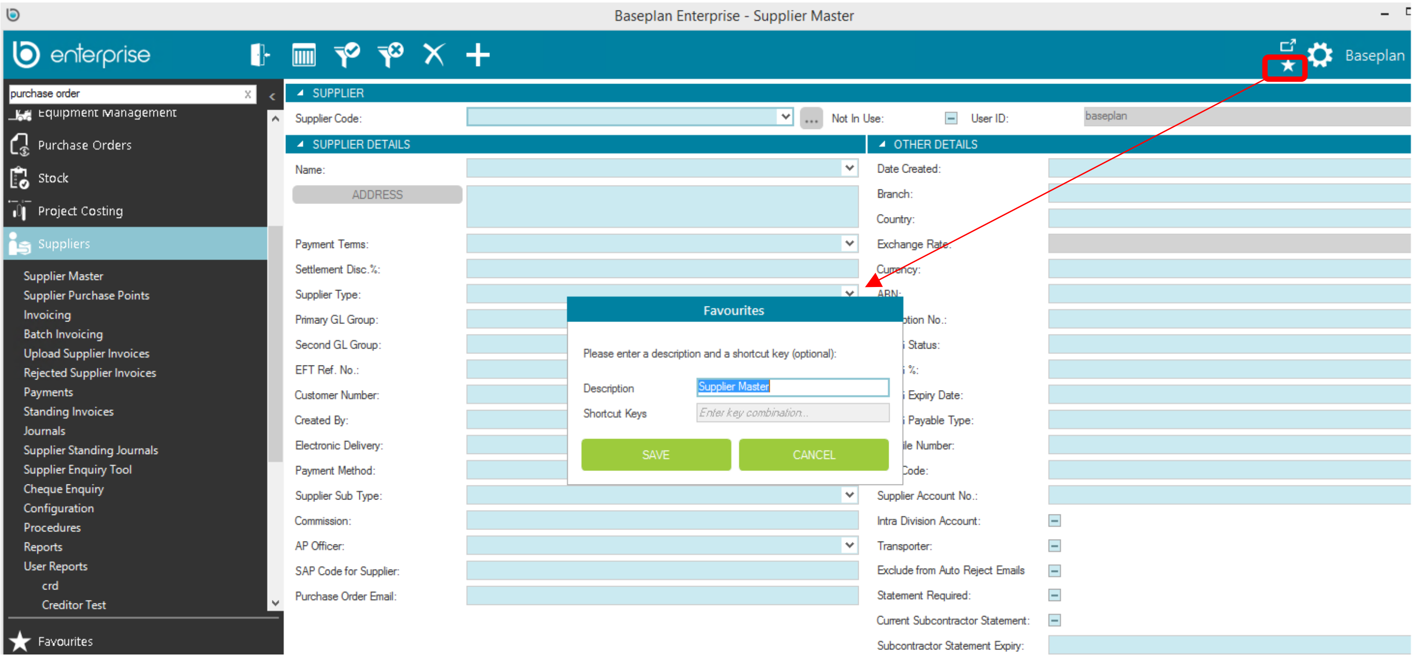
Print properties can be set by clicking the PAGE SETUP button . This will allow the user to configure:

- Paper size
- Source
- Page orientation
- Margins

FAVOURITES

Some screens are used more often than others. These can be marked as ‘Favourite’ so that the user can easily access them.

1. Display the relevant screen
2. Click the SAVE TO FAVOURITES button in the toolbar



This will display the *Favourites* screen.

3. Enter a new **Description** for the favourite entry, if required
4. Enter **Shortcut Keys**, if required
5. Click SAVE

This will add the selected screen to the Favourites section in the Menu.

Making Changes to Favourites

After adding favourite screens to the Favourites section, the user may apply changes if required.

1. Right click on the relevant screen in the Favourites section

The following options will be displayed:

- Show All Hotkeys
- Edit Favourite
- Delete Favourite

Show All Hotkeys

Selecting this option will display the *Favourites* screen, displaying the set of hotkeys available for each of the favourite screens.

Edit Favourite

Selecting this option will display the *Favourites* screen, allowing the user to edit the **Description** and **Shortcut Keys** for the favourite entry.

Note: To enter the **Shortcut Keys**, click in the field and action the shortcut which will then be recorded in the field.

Delete Favourite

Selecting this option will delete the relevant entry from the *Favourites* section.

LOGGING OUT

It is recommended to close all open screens before logging out from the application.

The user can either click 'x' on the top right side of the screen or the CLOSE button in the toolbar.

Click on the User icon at the top right side of the screen

The following options will be displayed:

- Logout
- Switch User
- Exit Application

Logout

1. Click **Logout**

Info: "You are about to exit, which will close all open windows. Are you sure you want to exit?"

2. Click YES

This will display the *Baseplan Enterprise Login* screen, allowing the user to log back as a different user or into a different database.

Exit Application

1. Click **Exit Application**

Info: "You are about to exit, which will close all open windows. Are you sure you want to exit?"

2. Click YES

This will close the application and return the user to the desktop.