

Manufacturing Management Software

User Guide

Making IT Work

Save Time

Save Money

Improve Performance

Comprehenisve - Proven - Affordable



www.match-it.com

Table of Contents

User Guide

1	Logging-In	
2	Changing Your Password	5
3	Logging-Out	5
4	Getting Help	3
	4.1 In-context Help	8
	4.2 Manuals	
	4.3 Training and support	9
	4.4 Error message structure	9
	4.5 Adding your own help1	
5	Moving Around	L
	5.1 Ribbon menus	1
	5.1.1 Setting your menu preferences	
	5.2 Browse Lists	4
	5.3 Forms	5
	5.4 Form/browse hybrids 1	6
6	Locating an item	7
•	5.1 By text entry	7
	5.2 By selecting	
	5.3 Tips and techniques1	
7	Searching for an item	
-		
8	Setting your window layout preferences 20	J
9	Interrupting long operations	L
10	Overriding printer locations 22	
11	Printing documents in the report stack ······ 2!	5

5

3

User Guide

This section shows you the minimum you need to know to allow you to use the system.

This covers how to:

- log-in,
- change your log-in password,
- move around the system,
- get help,
- find information,
- customise the window layouts,
- print documents,
- log-out.

EVERYBODY that is going to use the system should be familiar with these procedures.

Before using the system, you should be familiar with the *Windows*[™] environment and its conventions. Match-IT is a true *Windows* programme and fully conforms to all its conventions. If you are not familiar with these, you will find using the system hard going.

1 Logging-In

When you start Match-IT, you will be asked to log-in. This identifies you as a bona fide user of the system. The log-in panel will look similar to the one below:

💪 LIVE:Match-IT Login	- • •
Enter your <u>I</u> D:	Manager
Enter your <u>p</u> assword:	
	<u>O</u> K <u>C</u> ancel
IMPORTANT: Use of this software const licence terms and condition	

Enter the user ID your supervisor gave you into the Enter your ID field. If nobody has logged into this station before, the initial ID offered will be Manager. Thereafter, it'll remember who logged in here last and offer that. The first time you log-in, your password will be the same as your user ID. Click on the Enter your password field and type your password. You should change your password to something only known by you as soon as you log-in the first time. How to do that will be described in a moment. Note: as you type your password *'s are shown. This is a security measure to prevent others seeing what you type.

Press **OK** and the system will finish loading and, after a short pause, you will see the desktop appear. If you typed anything incorrectly, you will hear a beep sound and be invited to try again. If you don't succeed within 3 tries, or 2 minutes, the system will shutdown and you'll need to re-start it to try again. This fussy procedure is deliberate to hinder hacking attempts.

2 Changing Your Password

The first time you log-in, you should change your password to something only known by you. Make sure you can remember it! If you forget it there is no back door; you will be locked out. To recover from forgetting your password will require assistance from your Match-IT supplier and there may be a fee chargeable.

To change your password, select Processes from the menu line just below the desktop title and then the Change My Password item.



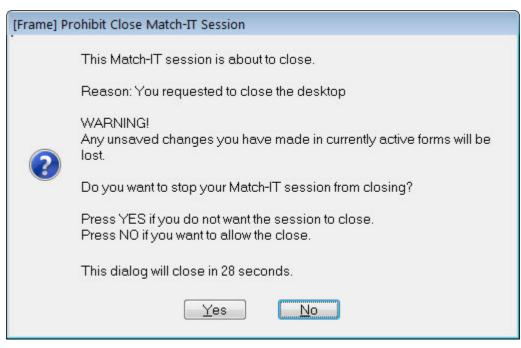
A panel like the one below will appear:

🖹 Change Password	- • 💌
Last Change Date:	
Current <u>P</u> assword:	
New Password:	
⊻erify Password:	
?	<u>OK</u> <u>Cancel</u>

Type your initial password into Current Password, and the new one you want to use into New Password and again, as a confirmation, into Verify Password. The new password will become effective as soon as you press the **OK** button. If you typed your current password incorrectly or the new password and the verify password are not the same, the new password will not be accepted. You must correct the entries and try again. Notice that as you type, *s are shown not the actual characters you type. This is a security feature to prevent onlookers from seeing what you are doing.

3 Logging-Out

To log-out, just close the program like any other *Windows*[™] program. The simplest way is just to press **Alt-F4**. This is the standard Windows close keyboard short-cut, or you can press the **X** in the top right corner of the desktop, or select the **Exit** item from the **File** menu. In all cases, you will be asked to confirm the close:



Press No to allow the close to proceed.

There are some system actions that will force you to be logged-out. In such cases, you will see this confirm dialog pop-up and the Reason line will describe why you are being logged off. A typical reason would be if the system were being upgraded to a newer version from some other workstation.

Any screens and menus you have open on your desktop when you log-out will be re-opened in the same place and at the same size the next time you log-in on the same station.

4 Getting Help

There are various methods available to obtain useful information while learning the software. But perhaps the best method is to just experiment. If you are not sure what something does, just try it. For significant actions you will get a description of what is about to happen and the option to back out. You should feel comfortable just exploring. With very few exceptions, any action has an equal and opposite re-action, i.e. you can undo any action you did not intend.

4.1 In-context Help

At its simplest, there is brief descriptive help about individual items. This is accessed by right-clicking on an item then selecting the What's This? menu item that appears:

What's This?
Cut
Сору
Paste
Audit this window
Audit this control
Set field/button access (level=0)

A message will pop-up that describes the item the mouse pointer is over. Tip: If you right-click on a column title on a browse list, you'll get a description of that column.

Also, most operations you request will show you a confirmation message before you commit to it. This will describe the operation and allows you to change your mind if you decide it is not what you intend. A typical confirmation message is shown below:

[pohSchedule] Confirm					
?	Create one or more purchase orders for 32 items?				
	Yes No				

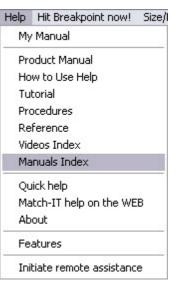
The next level is available by pressing the **F1** key, or the *icon*. This will show you a help page that is appropriate to the screen you are looking at.

4.2 Manuals

All the sections of the overall product manual are also available on-line as separate printable documents.

To access these, select the Help item from the menu line just below the desktop title and then Manuals Index.

The index provides a single paragraph summary of all the available manual sections. Use this to find the one you want to print. Use the link to open the document. It'll open in your PDF viewer and from there you can print it.



Getting Help

4.3 Training and support

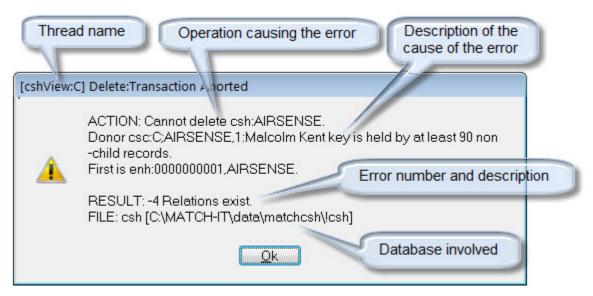
If you have purchased a full implementation package, that package will include one-on-one training courses tailored to your needs.

An abbreviated training course is outlined in the *Training Workbook* listed in the Manuals Index. Also worth looking at is the Tutorial item you'll see in the Help menu.

The final help option is to send an email to support@make247.co.uk, or if it's urgent and you have subscribed to the support programme, telephone for support on the number you will have been given when joining the support program. You will learn better if you try to resolve problems yourself before telephoning for support.

4.4 Error message structure

The software always tries to verify your actions are sensible and safe. If a problem is detected it will abandon the operation and show you a message. There is a lot of information in these messages that is helpful in diagnosing the problem. If you are seeking telephone support as a result of one of these it is very important you note the exact and complete message. A typical error message is shown below:



4.5 Adding your own help

The help described so far is generic and applies to all Match-IT systems. You will typically implement the system in a way that is very specific to you. You must integrate it with all your other business processes and your staff must know how to use it in that context. The <u>Quick help</u> system is provided for this purpose. The <u>Quick help</u> system allows you to write a page of your own information for each screen.

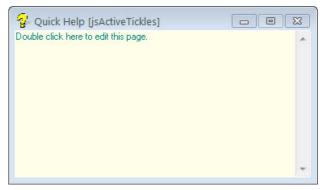
This information can be shown to you in two ways. Firstly, by pressing the **F1** key, or the icon, you will be shown the generic help page for the screen, and from there you will find a link to the associated Quick help page. The link will look like this:

, Click here stow the quick help page for this window. You can add your own help information to the quick help page.

Secondly, you can select the <u>Quick help</u> option from the desktop menu (as left). When you do this, the appropriate quick help page is automatically displayed in its own window as you navigate around the system.



Initially all the quick help pages will be empty, showing just a hint on how to change them (as left). To edit a quick help page, just double-click anywhere in the yellow area and an editor will be shown. Just enter the text you want and press **Save**.



5 Moving Around

There are three main types of screen you will see; they are *Ribbon Menus*, *Browses* and *Forms*. You will also see hybrid forms that also contain browses. Moving around is just a matter of pressing the correct button to go to the part of the system you want. You will learn which button is the 'correct' one for the task you wish to perform as you discover more about the system.

5.1 Ribbon menus

This is a typical *ribbon menu*:

Menu title	
🏂 Fav 🗖 🗉 💌	the '' means pressing the button will bring up a sub-menu
Event Diary	
Functions	
Find Record	
Find Document	
Find Line	
Progress	
Reports	
Services	
Find Part	
Take New Enquiry	
Take New Order	
New Supplier Delivery	
New Supplier Invoice	
Log WO Step Progress	
Book-In WO Product	
Book-In WO Return	
Customer Reject	
Close System	

A ribbon menu is a vertical list of buttons. Pressing one will either bring up another sub-menu or open a browse or open a form or perform some action.

The ribbon menus are part of the configuration of the system. You can tailor them to your preferences. See Setting your menu preferences for information on how to do that.

To navigate the menus, just press one of its buttons.

You can move a menu to any position on your desktop by dragging its title bar. You can also change its 'shape' by resizing it. When you do this, the menu will 'fold' around the small gaps in the menu. If you make the example above wider it will re-arrange itself like this:

User Guide

vourites			
Event Diary	Functions	Take New Enquiry	Close System
	Find Record	Take New Order	
	Find Document	New Supplier Delivery	
	Find Line	New Supplier Invoice	
	Progress	Log WO Step Progress	
	Reports	Book-In WO Product	
	Services	Book-In WO Return	
	Find Part	Customer Reject	

The position and 'shape' you leave it will be remembered as your personal preference; it will re-open in the same place and in the same shape as you left it. These position preferences are personal to you; other people's position preferences will not affect yours.

When a sub-menu is opened, the parent menu will stay open; the new menu will initially open cascaded to the left. All ribbon menus that are open when you close the system will be noted and they will be re-opened in the same position and shape the next time you log-in.

5.1.1 Setting your menu preferences

Your initial menu can be navigated either by pressing its buttons to open sub-menus as described in Ribbon menus, or from the My Menu item in the top menu bar. If you press the My Menu item, you get a conventional *Windows*[™] drop-down menu that can be navigated by just moving the mouse around, as shown below:

User Guide

Tear off [Favourites]		
Simple Menu		
Event Diary		
Functions	Tear Off [Functions]	
Find Record Find Document	Setup	•
Find Line Progress Reports Services	 Enquiries Tenders Sales Purchasing Goods-In 	
Take New Enquiry	Manufacture	Tear Off [Manufacture]
Take New Order Log Tender Response	Dispatches	Works Schedule
New Supplier Delivery	Sales Invoices	SFDC Controller
New Supplier Invoice	Purchase Invoices	Ad-Hoc WOrder
Log WO Step Progress	Accounts import/export	Log WO Progress
Book-In WO Product	Quality Control	Enter Time-Sheet
Book-In WO Return	Inventory	Book-In Products
Customer Reject	Planning	Book-In Returns
Find Part	Standing Data	Sign-off WOrders
Close System	Maintenance	 Inspect Steps
		FC Book-In Steps
		Works Order List

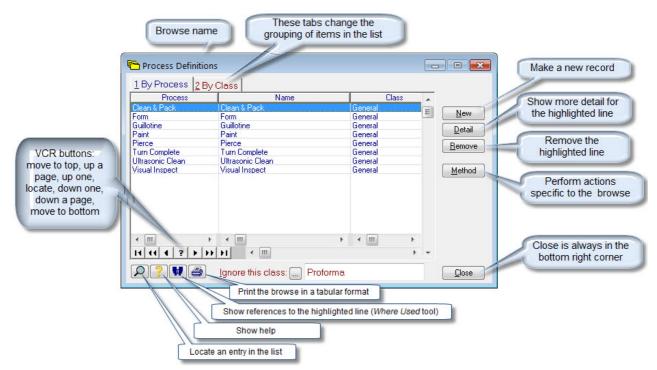
This is useful for quickly moving through the menu system. The **Tear Off** items, when selected, will place that sub-menu on your desktop as a *Ribbon Menu*. If they're still on your desktop when you log-out, they will be restored the next time you log-in to the same workstation.

Your can also access the sub-menus of ribbon menus already on your desktop in a conventional *Windows*[™] way. To do this, move the mouse over a ribbon menu and press the right mouse button. A small menu will pop-up. Select the <u>Show menu as popup menu</u> item. This will convert the menu you're on, and its sub-menus, to a conventional *Windows*[™] one, which can be navigated by just moving the mouse over it.

Right-clicking on a ribbon menu will also bring up a set of tools you can use to change or extend your menus. Extensions can be made available to everybody or they can be restricted to a specific user. See Building user specific menus for more information.

5.2 Browse Lists

A typical browse looks like this:



A browse is a tabular list of information. Pointing at a line in a browse, then doing some action on it is the normal way of doing things.

The total lines in a browse can be very large; for example, you may have many thousands of products in your product catalogue. Nearly all browses have a locator function that allows you to quickly find the relevant part of the list. See Locating an item for information on how to do this.

5.3 Forms

A typical form looks like this:

Chevron (») indicates the field has changed and not been saved	Prompt. This indicates the name entry field. Underlined letters are b			
	Ellipsis button. Thos selection list. Those w	e with inside bring ith ``` bring up a text e	up a dit box.	
🖹 Material	Entry field. Y	ou can type into thes	e	
<u>N</u> ame: MODUL	E KIT 60 21 HP XH05 05 ISS 4		Set Image	
Our Part Num: 🏨 C1254K			Con <u>v</u> ersations	
» <u>T</u> ech Spec: Euro 21 Stan <u>d</u> ard: InHouse Latest <u>I</u> ssue: □ Latest	Cost <u>5</u> Price <u>6</u> Layouts <u>7</u> Codes Inspections ssue Approved? <u>All Issues</u> It Data Sheet	8 Qualifiers 9 Sch History	edule Tenders Eailures Usage Contracts	Tabs show more information for the form Buttons perform actions
Requir	es Customer Works Notes			Saves changes when pressed. The chevrons (» «) indicate there are changes to be saved.
	Light blue prompts indicate re information. You cannot type in n prompts indicate information you can	ead-only to these.	ave« <u>C</u> lose	

A form shows you the fields in a record within a database. Some fields you can change, and some are just for your information. Most fields are presented as a *prompt, ellipsis, entry* triplet. The *ellipsis*, when pressed will usually bring up a pick list of options for the field. Selecting one will automatically fill in the associated entry. Or you can just type into the entry area. If what you type is not recognised, the select list will be shown automatically.

5.4 Form/browse hybrids

A typical hybrid form with a browse looks like this:

Sales Order Eorm area	
Our Order Num: 0000000001 State: New	
Customer:, HoneyComb PLC V Approved? Taken On:	29/01/09 Form part
Primary Contact:, Roger	Manager
Their Order Num: Their Order Date:	
1 Lines 2 Terms 3 Carriage 4 Addr/Notes 5 Actions 6 Profit 7 Audit 8 Qualit	fiers Add a new line
DICIEIX Line im Rel Their Part Num Our Part Num Ordered Qty Be	to the form
1 Item 1 1877 1877([Short Rin: 100 Each 26/] 2 Item 2 C1254K C1254K([MODUL 1 Each 3/C 3 Item 3 C1255P C1255P([EBONT 1 Each 27/]	New
	Cancel
	Browse
II II I I I I I I I I I I I I I I I I	Trace
D = X if the line is fully dispatched C = X is line is cancelled E = X if the line has been edited X = X if extra discount applies	E <u>v</u> ents
Form scroll c	
Per Carlo Ca	Save Close Form part
Move to the previous Move to the next form Add a new Dele	te the
more to the previous	record

These hybrid forms are typically used for creating documents. In these cases, the form part is concerned with the document *header* and the browse part is concerned with the document *lines*. For example, a sales order *header* will define the customer, order date, and other information relevant to the whole order; and a *line* will give the details of each item being ordered.

6 Locating an item

Many operations involve pointing at a line in a browse list and performing an action on it. When the list is short, you can easily find the entry you want by just scrolling to it. When the list is very large, it's much

quicker to directly locate the entry you want. You do this by pressing the 🔎 icon. This will bring up the locator; it looks like this:

🛆 Locate ArchivedMaterialStepKey:Material	23
1 Locate To 2 Explain	
Within Archived: No	
Enter Material to locate: 1877	
	icel

You can either type what you're looking for directly in the Enter ... to locate field, or you can press its to open a context specific selector or editor.

Depending on the context, the Enter ... to locate field will expect .a text entry or a record selection or a date or whatever is appropriate. The prompt name will change to indicate what is expected.

6.1 By text entry

Finding an entry in your materials catalogue is an example of locating by text entry.

Initially, the Enter ... to locate field will contain the name of the entry that was highlighted in the list when you pressed the locator. To locate to another entry, just type the first few characters of the entry you wish to locate and press the **OK** button. The list will then select the first item whose name begins with whatever you typed. So, if you typed c, the list will select the first entry that begins with c.

6.2 By selecting

Finding batches of a specific material in your stock list while it's grouped by *Our Part#* is an example of locating by selecting.

Initially, the Enter ... to locate field will contain the name of the entry that was highlighted in the list when you pressed the locator. To locate to another entry, press the ... to open the material selector, and then press the ... icon again to open another locator, this time to find an entry in the materials catalogue. You'll have a screen similar to that shown below:

User Guide

Batches of All Materials 1 By Our Part# 2 By Batch# 3 By Item# 4 By Ordered 5 By Arrived 6 By Expires Show All S D M C Our Part# Tech Spec Batch# Item# Home Loc Location Issue Summary r M C1254K	
r R S Enter Material to locate: C1254K r M G F Adjust r M G Select Material/Step [Enter field to locate] Invent r M G Select Material/Step [Enter field to locate] Invent r M C1255P Select from This Class: Saleable Invent r M C1255P If FR0h 00000 and this Group within class: General Invent r M C1255P If FR0h 00000 and this Family within group: General Invent Int	groups
Cia AcchivedMaterialStepKey:Material ▲ Locate ArchivedMaterialStepKey:Material ▲ Locate To 2 Explain ↓ Locate To 2 Explain ↓ Uocate To 2 Explain ↓ Within Archived: No 00000000000000000000000000000000	ew one omers pliers actors thod

Fill-in the second locator as described in Locating by text entry and press **OK**. This will locate you to an entry in your materials catalogue. Then press **Select** there to return to the first locator, then **OK** a second time to return to your original list. If an appropriate record exists, the list will locate to it.

6.3 Tips and techniques

If you just start typing when a browse list is active, the software will assume you want to locate to something. The appropriate locator will pop-up with the keys you typed pre-loaded, just as if you'd pressed the locator button first.

The same selection mechanism is used for locating, as described in Locating by selecting, when you press the ellipsis buttons on forms. You can exploit this to *'drill-down'* to detail from almost anywhere. Pressing a *locator* or an ellipsis will typically bring up a selection list. From there you can press **Detail** to show the associated form, and then press another ellipsis on that to go deeper, and so on.

7 Searching for an item

Locating an item as described in Locating by selecting is <u>very fast</u> and will find an entry instantly, no matter how long the list is. This is the preferred mechanism to find things when you know what it begins with.

When you do not know what something begins with, but you do know another part of a name you are looking for, then you can use another mechanism – search within column. The ability to search for any part of something in any column of a list is available in most lists. You access this facility by right-clicking on a column title. A menu like this appears:

1 By Our Part Num	2 Name 3	Class 4 Group 5 Family	6 Tech Spec
Our Part Num	SBMC		
877	S M	Short Ring	What's This?
55004E	B	SHEET ALLOY 1M X 1N	
55078B	B	SHEET ALLOY 1.6MM	Audit this window
55079X	B	EXTR ITT57 VERSI RA	Addit this window
55157G	B	SHEET ALLOY 1.2MM	Audit this control
6232X	B	SCREW M3 12 POZI PA	
6239G	B	SCREW M3 12 CSK PO	Cancel
6253X	B	SCREW M2.5 X 10 P02	cancer
6267X	B	NUT M2.5 FULL HEX	Breakly defendence
6475E	B	WASHER M2.5 PLAIN	Reset to default columns
6840F	B	SCREW M2.5 X 6 POZI	Change column ordering
57201H	B	BUSH RETENTION PL	enange column or dening
37249R	M	MOD TOP/BOT COVER	Consult within column
37257R	M	MOD SIDE COVER	Search within column
67473D	B	BLOCK SPACER PCB	lan over an
67476R	M	MODULE RAIL	Sort Ascending
8891D	B	*EXT EURO PANEL HA	Sort Descending
68930E	M	HANDLE	Sort Descending
68942A	B	SCREW PANEL RET M	No Sort
ALS02730	SB	Aluminium 3mm Thk 525	
Brake Set	B	Front/Rear Brake Set C	(first 27 records loaded, item 1 selected)
C1234P	M	REAR PANEL	(Inst 27 records loaded, item 1 selected)

Select the Search within column item and a form like this will open:

🖹 Search Browse	Column 🗖 🗖 💌				
1 Options 2 Expl	ain				
Search Within:	Name				
Search <u>F</u> or:	Short Ring				
	Direction Forwards from current position Backwards from current position 				
<u>M</u> ode ● Value starts with the Search For string ○ Value contains the Search For string anywhere within it ○ Value is empty					
	Invert the mode (i.e. search for 'not' the condition)				
	Show only matching records in list				
HINT: Pre	ss Ctrl-F to search on this column again.				

Just type something in the <u>Search</u> For field and press **OK**.. The list will move to the next entry that contains whatever you typed <u>anywhere</u> in the column you selected. If nothing is found, you will hear a beep noise and the list will move to the end. The search process can be very slow on long lists because every record has to be loaded and examined.

8 Setting your window layout preferences

When you first open a screen it will open at its smallest size and in the middle of your desktop. The only exceptions to this are the ribbon menus. They will initially open cascaded to the right of each other.

You can move the screens within the desktop and change their size using the normal *Windows*[™] dragging conventions. The system will remember your preferences and the next time you open the screen it will open in the position and size you set previously.

If you change the size of a screen containing a browse list, the list will expand to fill the space you've given it. This is useful when there are more columns in the list that you want to be able to see. You can also change the width of the individual columns in a list by dragging the column dividers and these settings will be remembered too. This is useful if the initial column is not wide enough to show the whole field; in this case just make the column wider. It is also useful if you're not interested in a column; just set its width very small. The column widths you set will be restored the next time you open the screen. The widths you set will also be used when the list is printed. You can use this to juggle things so they fit nicely on the printed page.

The position and size preferences you set are specific to you **and** the station you are working on. This means other people's settings will not interfere with yours. The settings are station specific because what looks good on a station with a big 19" monitor is likely to be unusable on a station with only a 15" one.

Most of the lists can also be edited to change the order of the columns shown and you can even remove columns completely. Right-clicking any of the column headings in a list accesses this facility.

A pop-up menu like this will be shown:

Selecting Change column ordering takes you to an editor where you can move and/or remove columns. The edits you make can be saved as the overall system default layout, or the default for specific users, or just your personal preference.



9 Interrupting long operations

Some operations can take a long time to complete. For example, a complete re-schedule of your whole order book could take as much as an hour if you have thousands of orders active. The system employs a device called a *monitor* whenever it performs an operation that is likely to take more than a few seconds. The *monitor* gives you feedback on the progress of the operation so you can see it is working and not just 'stuck', and also allows you to pause or cancel the operation. A typical monitor is shown below:

The operation being performed How long its been running	
Auto re-scheduling 0:00:15 Click here to pause or cancel Click here to pause or cancel Click here to pause or cancel Click here to pause or cancel Click here to pause or cancel Click here to pause or cancel Click here to pause or cancel Click here to pause or cancel Click here to pause or cancel Click here to pause or cancel Click here to pause or cancel Click here to pause or cancel Click here to pause or cancel Click here to pause or cancel Click here to pause or cancel Click here to pause or cancel Click here to pause or cancel Click here to pause or cancel Click here to pause or cancel Click here to pause or cancel Click here to pause or cancel Click here to pause or cancel Click here to pause or cancel Click here to pause or cancel Click here to pause or cancel Click here to pause or cancel Click here to pause or cancel Click here to pause or cancel Click here to pause or cancel Click here to pause or cancel Click here to pause or cancel Click here to pause or cancel Click here to pause or cancel Click here to pause or cancel Click here to pause or cancel Click here to pause or cancel Click here to pause or cancel Click here to pause or cancel Click here to pause or cancel Click here to pause or cancel Click here to pause or cancel Click here to pause or cancel Click here to pause or cancel Click here to pause or cancel Click here to pause or cancel Click here to pause or cancel Click here to pause or cancel Click here to pause or cancel Click here to pause or cancel Click here to pause or cancel Click here to pause or cancel Click here to pause or cancel Click here to pause or cancel Click here to pause or cancel Click here to pause or cancel Click here to pause or cancel Click here to pause or cancel Click here to pause or cancel Click here to pause or cancel Click here to pause or cancel Click here to pause or cance	The clock face ticks around every second
Initialising reserve Auto re-scheduling Reserving schedules Reserving new schedules Reserving demand 57 of 69 - Stock Off Road Tyre 27 Reserving schedule Initialising reserve	Sub-tasks being done within the main operation

Pressing the **Click here to pause or cancel** button will pause the operation and present an option to cancel it. Like this:

[xpAutoRe	schedule] Auto re-scheduling			
	Do you want to cancel this operation?			
?	Press YES to cancel Press NO to continue			
	This dialog will close in 26 seconds.			
2	Yes No			

If the operation involves committing a transaction to the database it will automatically resume after a few seconds unless it's cancelled. If a transaction commit is cancelled, the whole transaction is *rolled-back* to the beginning.

10 Overriding printer locations

Whenever you perform an action that will cause a document to be created, a confirm dialog will be shown similar to this:

Confirm	
Confirm Print Options	
This action will print the sales order and/or a pro-forma invoice. The paperwork will reflect the current state of the order. You would normally only do this after you have made some sort of change to the order.	*
Do you want to print the paperwork for this order?	
	4
Discard the paper work	
Mail Opts ✓ Yes X No)

If you just select <u>Yes</u> the document will be created and automatically sent to the usual printer nominated for the document type.

If you want it to go somewhere different this time, first select the **Print Options** tab. The options selector will be shown:

User Guide

Confirm
Confirm Print Options
🔄 Use an alternative print queue
Use this Print <u>Q</u> ueue: General
Print from this station now
O Print the report to the nominated printer or output media without previewing
1 Print the report to a printer or output media I choose without previewing
Q Preview then allow me to choose printer and output options before printing Q Preview then allow me to choose printer and output options before printing A Preview then allow me to choose printer and output options before printing A Preview then allow me to choose printer and output options before printing A Preview then allow me to choose printer and output options before printing A Preview then allow me to choose printer and output options before printing A Preview then allow me to choose printer and output options before printing A Preview then allow me to choose printer and output options A Preview then allow me to choose printer and output options A Preview then allow me to choose printer and output options A Preview then allow me to choose printer and output options A Preview then allow me to choose printer and output options A Preview then allow me to choose printer and output options A Preview then allow me to choose printer and output options A Preview then allow me to choose printer and A Preview then allow me to choose printer and A Preview then allow me to choose printer and A Preview then allow me to choose printer and A Preview then allow me to choose printer and A Preview then allow me to choose printer and A Preview then allow me to choose printer and A Preview then allow me to choose printer and A Preview then allow me to choose printer and A Preview then allow me to choose printer and A Preview then allow me to choose printer and A Preview then allow me to choose printer and A Preview then allow me to choose printer and A Preview then allow me to choose printer and A Preview then allow me to choose printer and A Preview then allow me to choose printer and A Preview then allow me to choose printer and A Preview then allow me to choose printer and A Preview then allow me to choose printer and A Preview then allow me to choose printer and A Preview then a
○ <u>3</u> Preview only (you can still print from within the preview)
Main document layout is: UserOrderAck
Use an alternative copy count
Print this ma <u>n</u> y copies: 1
Use an Alternative paper
Use this Paper <u>D</u> esign: UserOrderAck
Do not print Linked layouts
Mail Opts ✓ Yes X No

Check the Use alternative print queue option. When this is checked the Use this Print Queue prompt can be used to select another printer. Pressing its ellipsis will show you a list of print queues to choose from:

Queue	Printer		
DustBin Email	((any)) EMAIL((MHTML))	E	<u>S</u> elect
General	((any))		
ToFile	([any]]		<u>D</u> etail
Word	APPLICATION ((RT	F	
			New
			Mail Opts
< III >>	4 III >		
I4 44 4 2 F H	H ()	-	

If the one you want is not in the list you can easily create a new one by pressing the **New** button. A form will be shown like this:

🖹 Print Queue		- • •		
»Full <u>N</u> ame:	John's FAX			
» <u>Q</u> ueue ID:	John's FAX	Ena <u>b</u> led		
S <u>i</u> te:	Head Office			
St <u>a</u> tion:		(You are: DCN1)		
Leave blank if available from all stations »Send To: Fax —((Ne01:)) Leave blank to use your windows default printer				
<u>N</u> otes: 📺				
<u>?</u> < <u>B</u> a	ack Next> Ne <u>w</u> « Res	e <u>t Del »Save</u> « <u>C</u> lose		

You should use a Full Name and Queue ID that makes it clear that this is a special entry and not for general use. You can usually leave the Site and Station fields as they are. Select where you want entries in the queue to be sent to by pressing the **Send To** ellipsis. A form will be shown like this:

Select Output DestinationSend To				
1 Printer 2 Email 3 Application 4 Folder				
Printed output will be sent to a physical printing device (including a FAX).				
Select Printer:				
Leave blank to use your default printer Note				
If pressing the Printer ellipsis appears to have no effect, the most likely reason is that there are no printers installed on this PC.				
<u> OK</u> <u> Cancel</u>				

Pick the printer you want by pressing the **Select Printer** ellipsis.

You will be presented with the usual Windows printer selection screen. Select the printer you want to use, then press OK to get back to the Print Queue screen. Then press **Save** and **Close**. Your new entry will now appear in the list of print queue options.

The above procedure will ensure your document is entered into the correct queue when it's placed in the report stack. If your reporter is running, the document will be printed automatically. If not you can print it manually as described in Printing documents in the report stack or you can select the **Print from this station** now option before confirming the action.

11 Printing documents in the report stack

The *reporter* will automatically print documents entered into the *report stack* if it is running. If it is not running, or you want to re-print a document, you can select reports manually from the report stack for immediate printing.

If you're running the standard menu you can get to the report stack by selecting **Services...** then **Report Stack** from the ribbon menu. The list of reports waiting to be printed will be shown to you. It will look similar to this:

1 By Date 2 By Printed 3 By Title 4 By Queue 5 By Layout 6 By Owner 1 E M A State Printed Requested Purge On Title Queue 2 By Date 2 By Printed Requested Purge On Title Queue 2 By Color 29/01/09 29/04/09 Order acknowledgement for Genery Queue Queue Date 29/01/09 29/04/09 Order acknowledgement for Genery Queue Queue Date 29/01/09 29/04/09 Order acknowledgement for Genery Queue Queue Date 1 Bemove Show Local Date I a color Creagte Date Date Date Title I a color Creagte Date Date Date Title Date I a color I a color I a color I color I color Date Date I a color I a color I a color I color I color I color I color I a color I a color I a color I a color I color I color I color </th <th>Report Stack</th> <th></th> <th></th> <th>(</th> <th></th>	Report Stack			(
x x x x x ToDo 29/01/09 29/04/09 Order acknowledgement fd Generating Detail Detail Bemove Show Local Idetail Output Show Local Idetail Output Idetail Idetail Open Emove Show Doing Oping Oping Oping Oping Oping Oping Oping Oping Oping Oping I I Image:							
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M = X if the queue is managable from here A = X if the printer is available from here	🔎 🥐 🎒 🗗	E = X if the queue	is enabled	n options)	<u>C</u> lose		
		M = X if the queue A = X if the printer	is managable from he is available from here	re			

When reports are first entered into the report stack they are placed in the **ToDo** list. Selecting another option in the **Show** group will show you the other lists. When reports have been printed they are moved to the **Done** list. If an error occurred that prevented the report from being printed it is moved instead to the **Error** list. You can find out what the error was by pressing the **Detail** button and reading the **Messages** in the form shown to you.

To print or re-print any report from any of the lists, select the report you wish to print and press the **Do This Now** button. You will be presented with a confirmation dialog as shown in Overriding printer locations. Press **Yes** to confirm the print.