Manufacturing Management Software

User Guide

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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:


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.
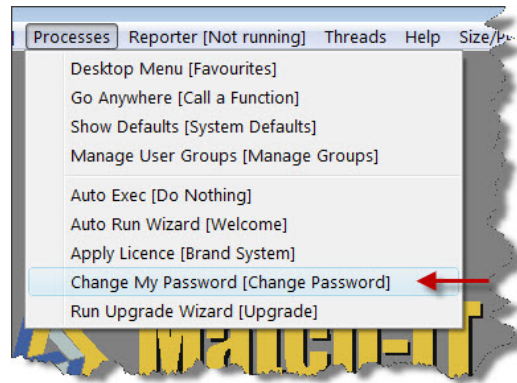
A panel like the one below will appear:
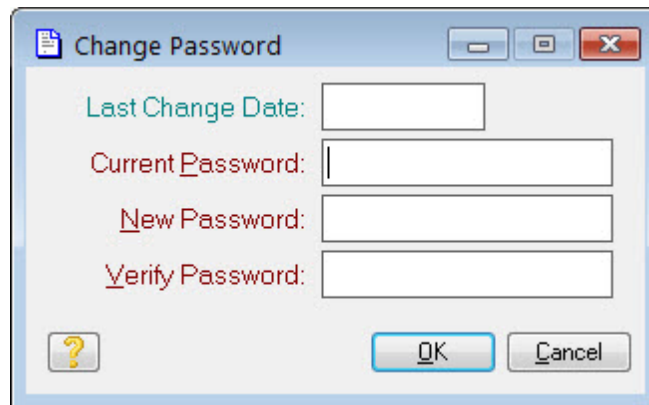
Type your initial password into `Current Password`, and the new one you want to use into `New Password` and again, as a confirmation, into `Verify Password`. The new password will become effective as soon as you press the **OK** button. If you typed your current password incorrectly or the new password 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:
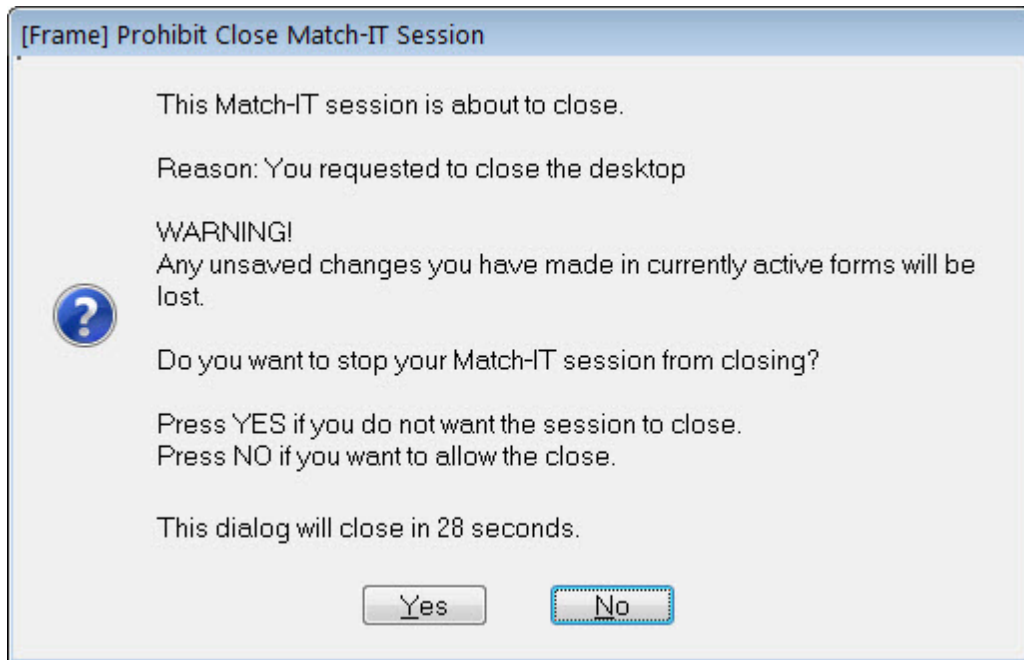
Press **No** to allow the close to proceed.

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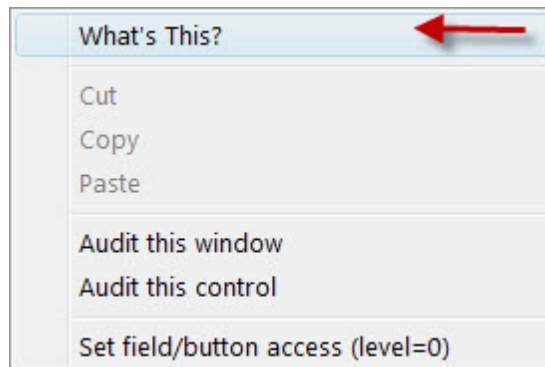
A message will pop-up that describes the item the mouse pointer is over. Tip: If you right-click on a column title on a browse list, you'll get a description of that column.

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:
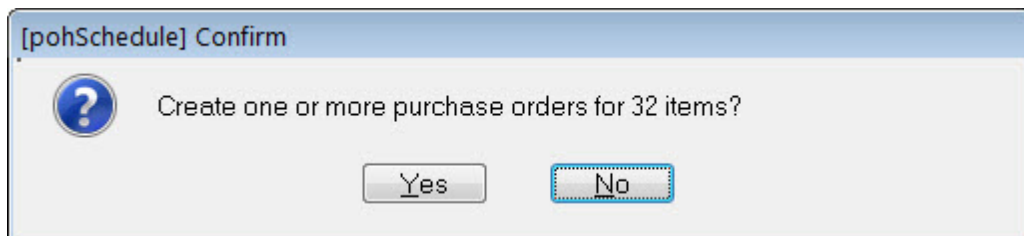

The next level is available by pressing the **F1** key, or the icon. This will show you a help page that is appropriate to the screen you are looking at.

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.
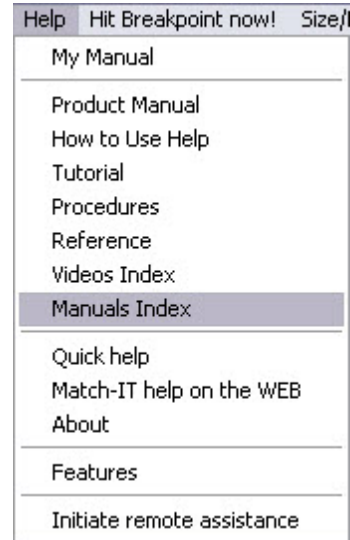
4.3 Training and support

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:
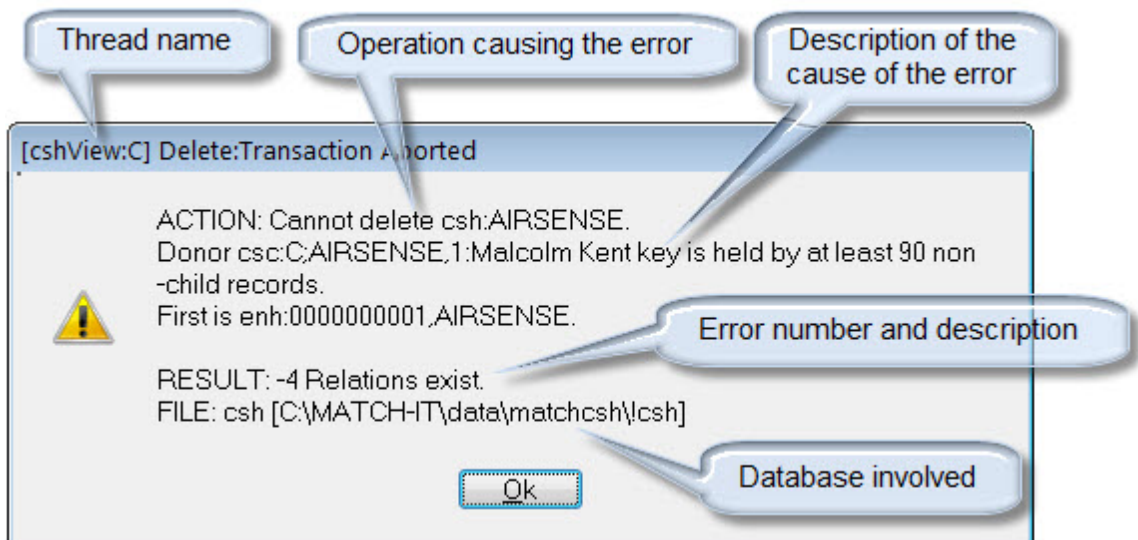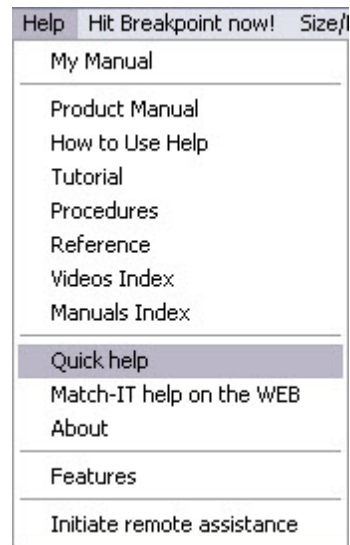
4.5 Adding your own help

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 `Quick help` system is provided for this purpose. The `Quick help` 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 [🔲] to show the quick help page for this window.
> You can add your own help information to the quick help page.

Secondly, you can select the `Quick help` 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.

Help   Hit Breakpoint now!   Size/
My Manual
Product Manual
How to Use Help
Tutorial
Procedures
Reference
Videos Index
Manuals Index
Quick help
Match-IT help on the WEB
About
Features
Initiate remote assistance

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**.

Quick Help [jsActiveTickles]

Double click here to edit this page.
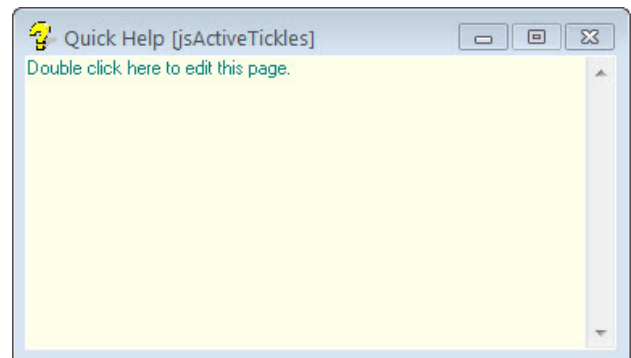
5 Moving Around

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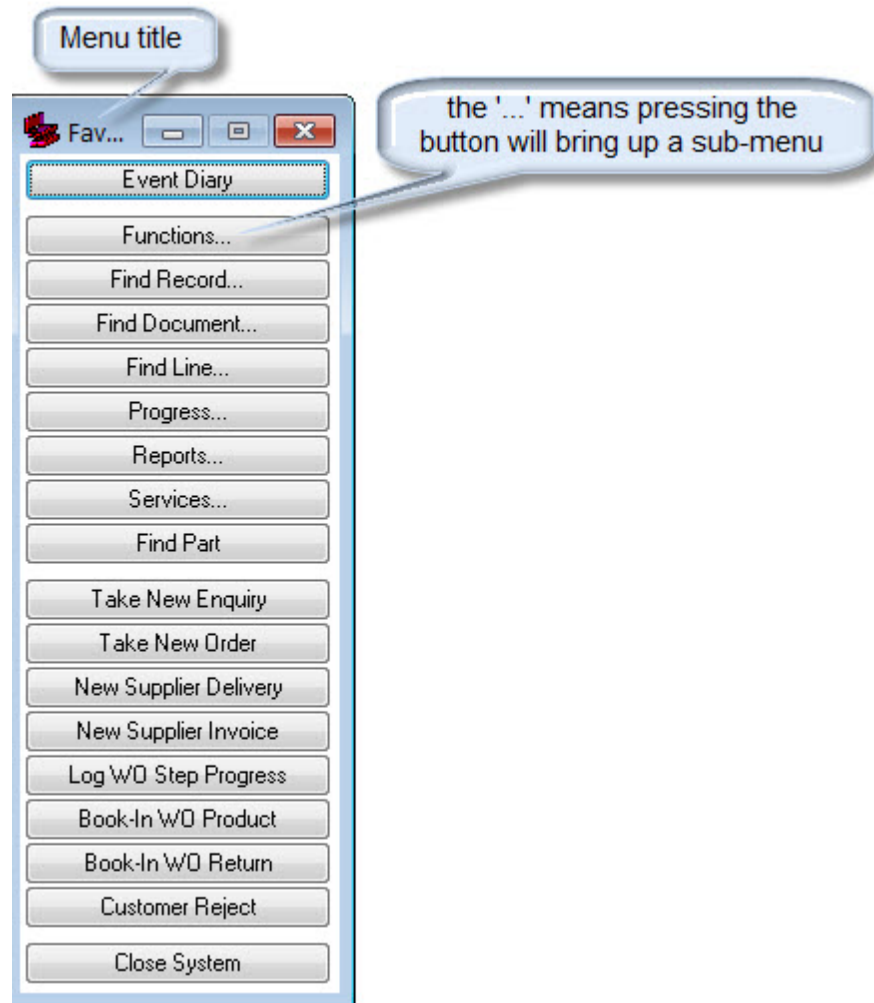
A ribbon menu is a vertical list of buttons. Pressing one will either bring up another sub-menu or open a browse or open a form or perform some action.

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:

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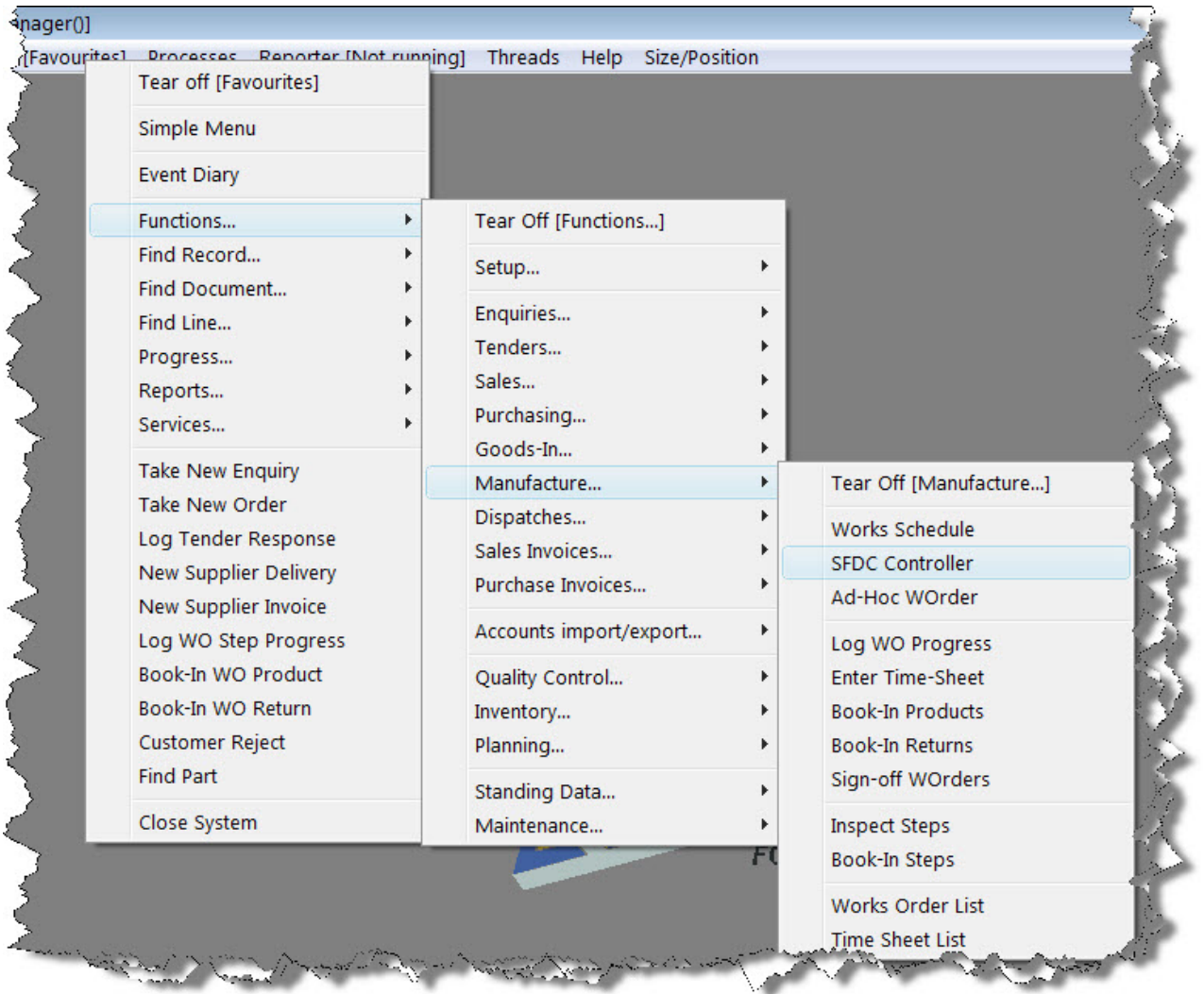
This is useful for quickly moving through the menu system. The `Tear Off` items, when selected, will place that sub-menu on your desktop as a *Ribbon Menu*. If they're still on your desktop when you log-out, they will be restored the next time you log-in to the same workstation.

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 `Show menu as popup menu` 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.

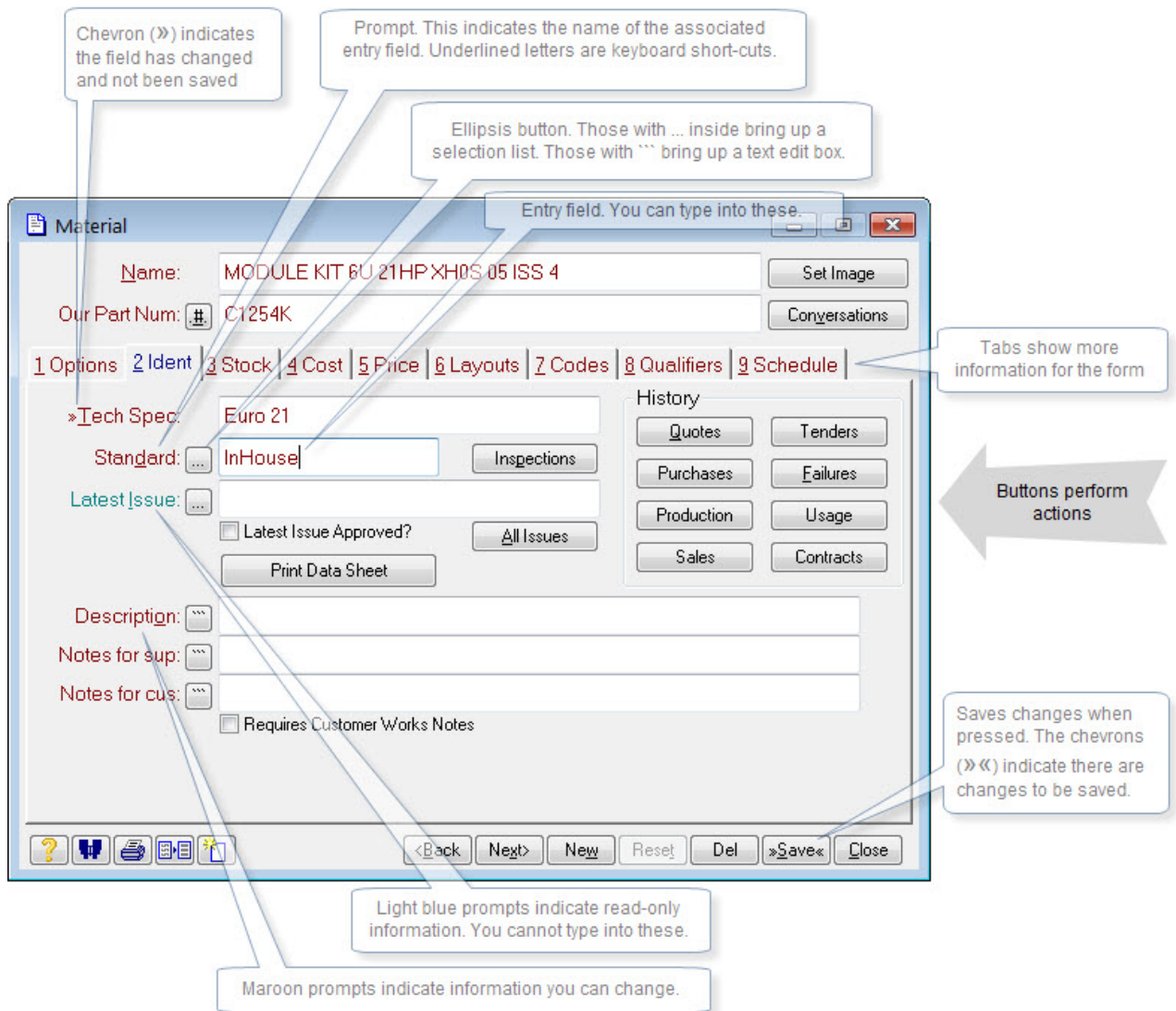## 5.2 Browse Lists

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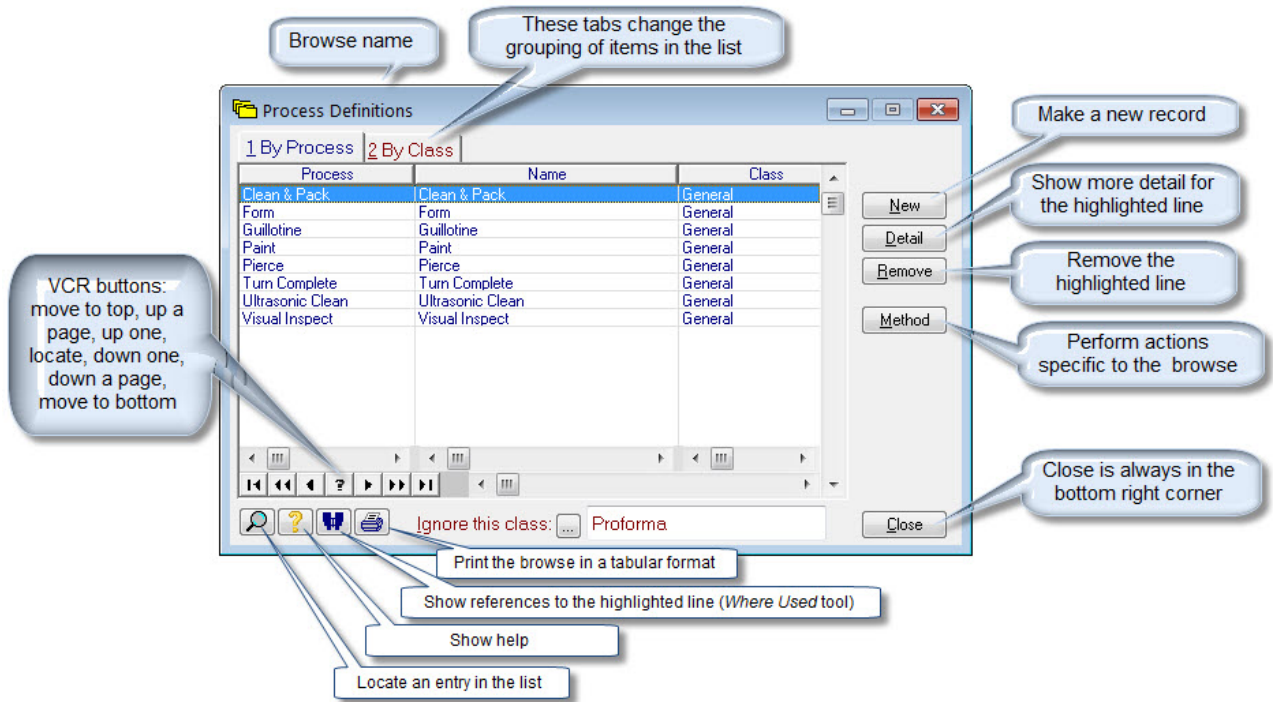
A browse is a tabular list of information. Pointing at a line in a browse, then doing some action on it is the normal way of doing things.

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 of the associated entry field. Underlined letters are keyboard short-cuts.

Ellipsis button. Those with ... inside bring up a selection list. Those with ``` bring up a text edit box.

Entry field. You can type into these.

Material

Name: MODULE KIT 6U 21HP XH0S 05 ISS 4   Set Image

Our Part Num: [#] C1254K   Conversations

1 Options | 2 Ident | 3 Stock | 4 Cost | 5 Price | 6 Layouts | 7 Codes | 8 Qualifiers | 9 Schedule

»Tech Spec: Euro 21   History

Standard: [...] InHouse   Inspections   Quotes   Tenders

Latest Issue: [...]   Purchases Failures

☐ Latest Issue Approved?   All Issues   Production Usage

Print Data Sheet   Sales   Contracts

Description: [```]

Notes for sup: [```]

Notes for cus: [```]

☐ Requires Customer Works Notes

[?] [W] [🖨] [▤] [*]   <Back | Next> | New | Reset | Del | »Save« | Close

Tabs show more information for the form

Buttons perform actions

Saves changes when pressed. The chevrons (» «) indicate there are changes to be saved.

Light blue prompts indicate read-only information. You cannot type into these.

Maroon prompts indicate information you can change.

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:

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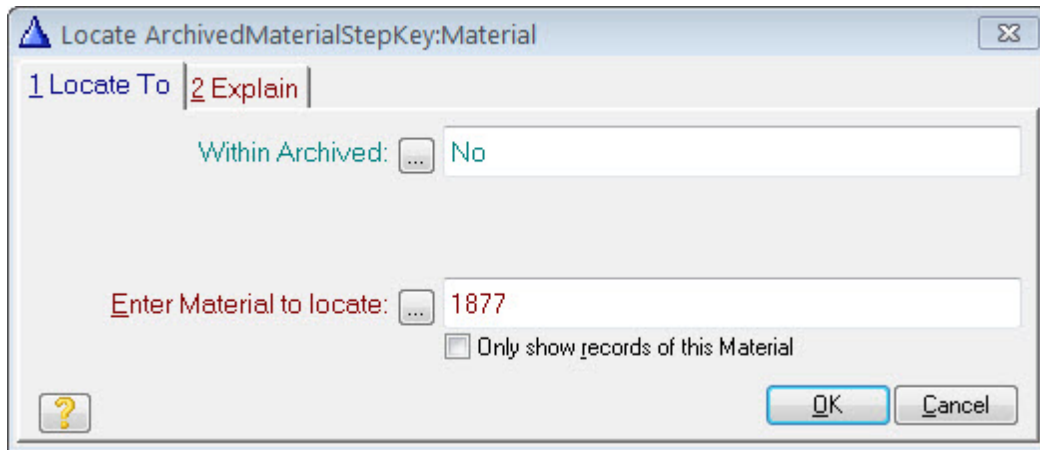
You can either type what you're looking for directly in the `Enter … to locate` field, or you can press its ⬚ to open a context specific selector or editor.

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.
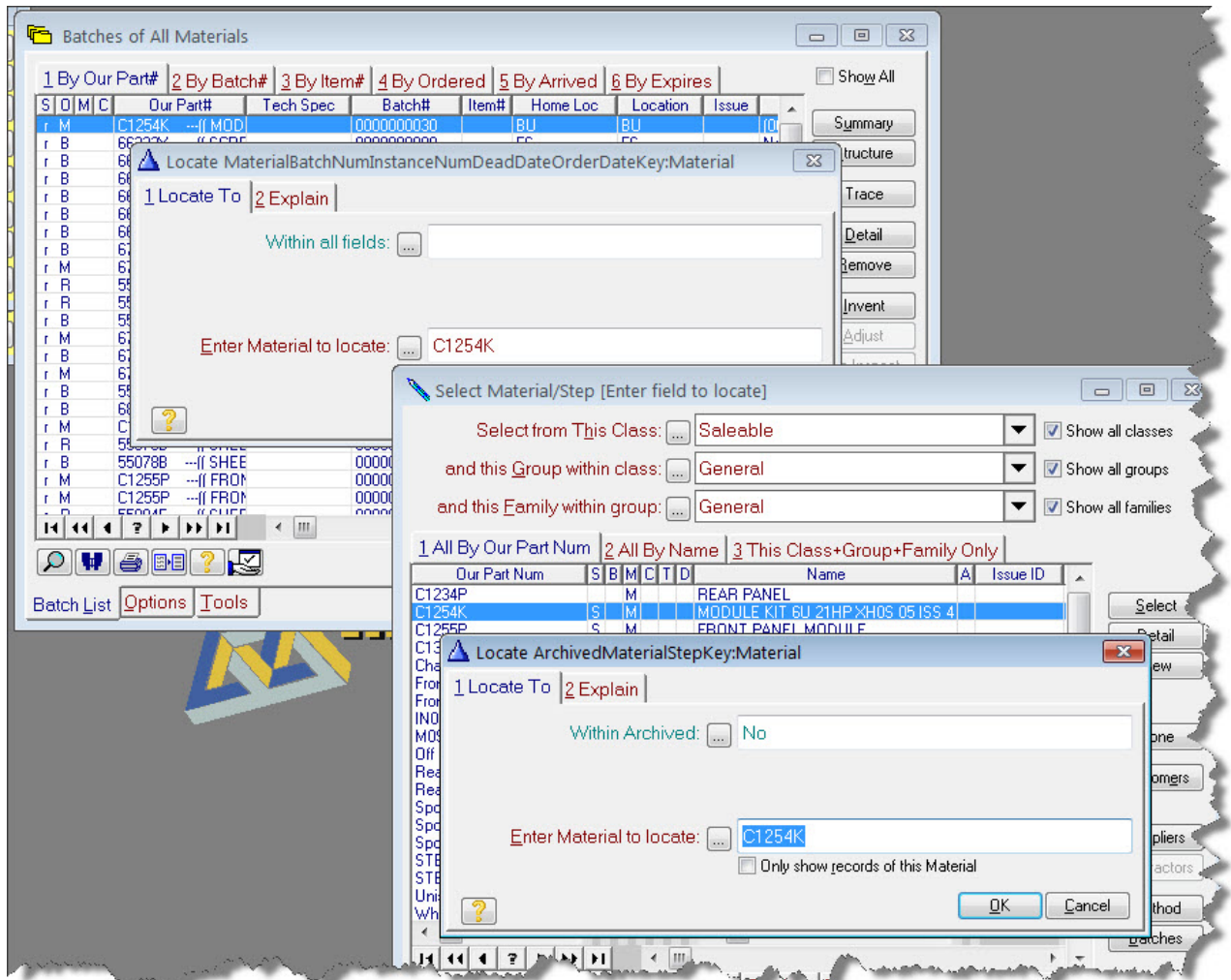
6.1 By text entry

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:

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 l*ocator* 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:
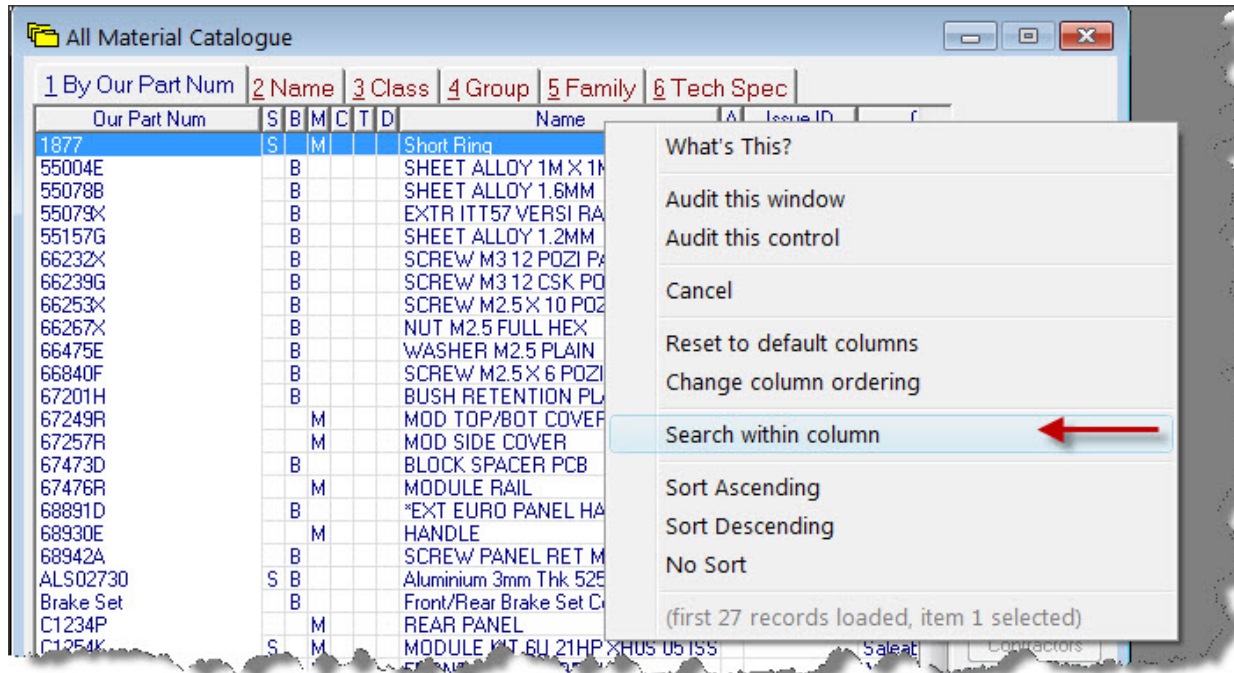
Select the `Search within column` item and a form like this will open:
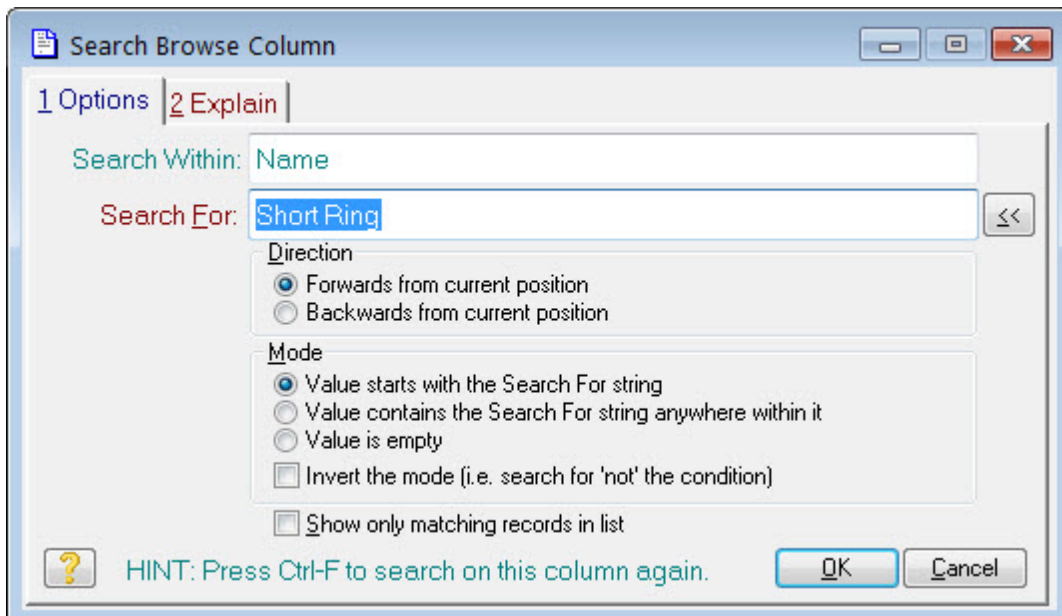
Just type something in the `Search For` field and press **OK**.. The list will move to the next entry that contains whatever you typed <u>anywhere</u> in the column you selected. If nothing is found, you will hear a beep noise and the list will move to the end. The search process can be very slow on 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.
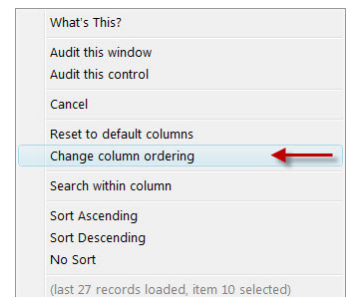
If you change the size of a screen containing a browse list, the list will expand to fill the space you've given it. This is useful when there are more columns in the list that you want to be able to see. You can also change the width of the individual columns in a list by dragging the column dividers 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.

| What's This? |
| Audit this window |
| Audit this control |
| Cancel |
| Reset to default columns |
| Change column ordering ← |
| Search within column |
| Sort Ascending |
| Sort Descending |
| No Sort |
| (last 27 records loaded, item 10 selected) |

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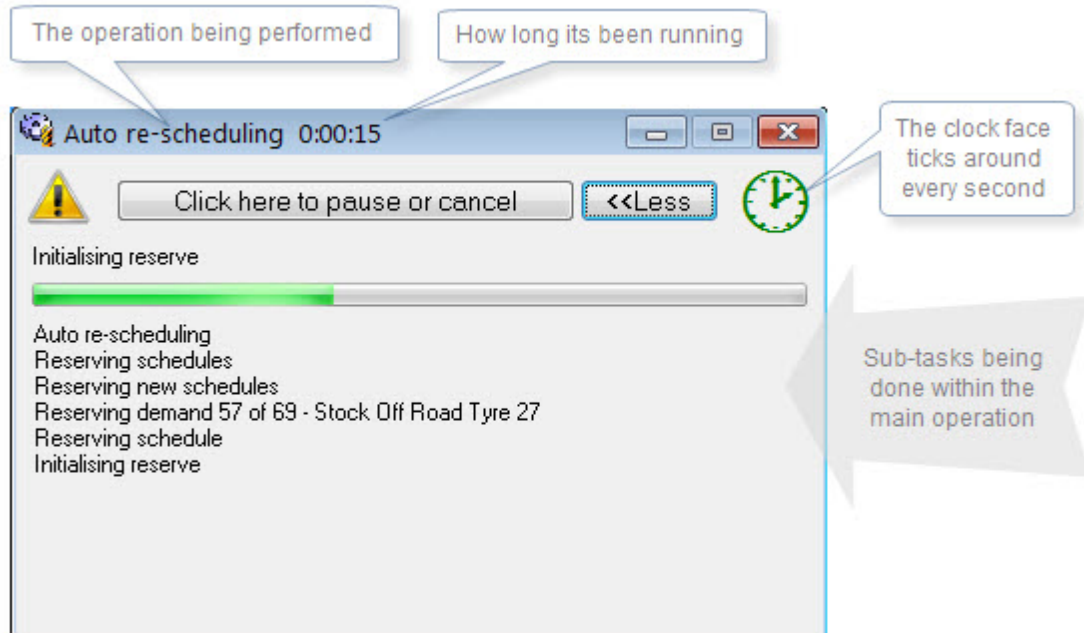
Pressing the **Click here to pause or cancel** button will pause the operation and present an option to cancel it. Like this:
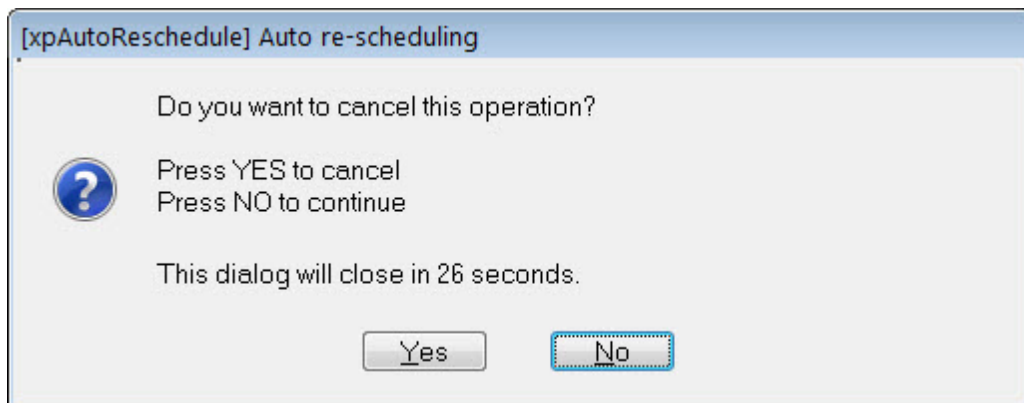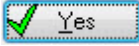

If the operation involves committing a transaction to the database it will automatically resume after a few seconds unless it's cancelled. If a transaction commit is cancelled, the whole transaction is *rolled-back* to the beginning.

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:
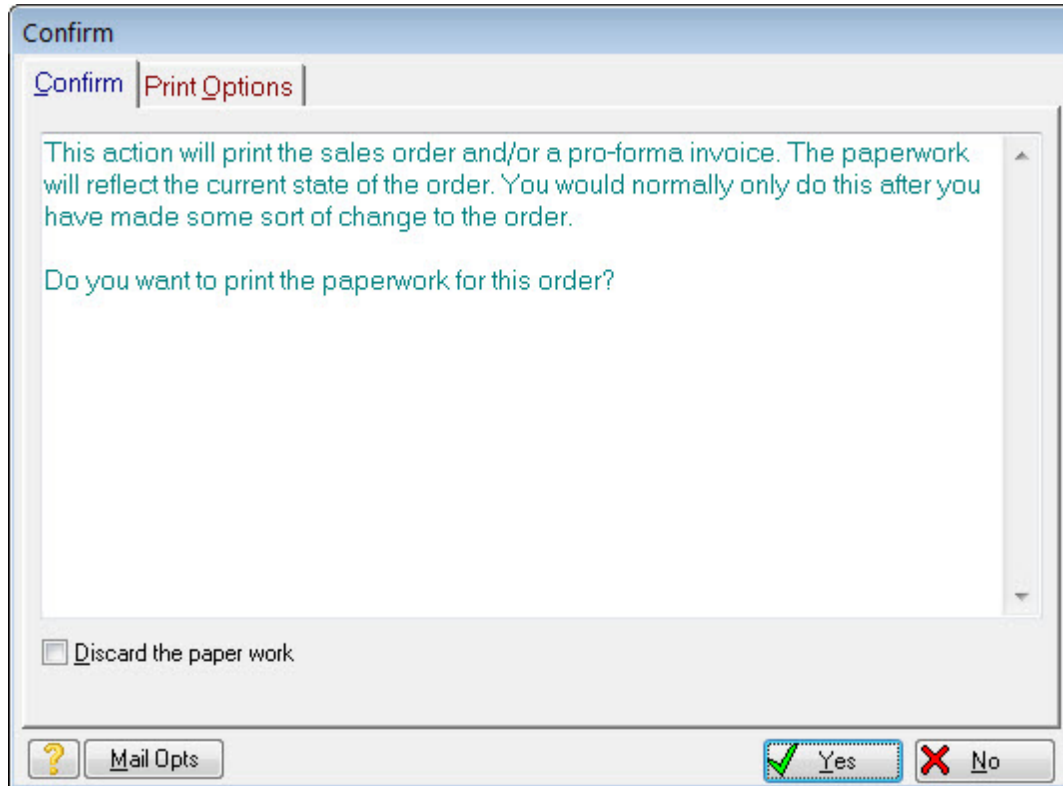

If you just select the document will be created and automatically sent to the usual printer nominated for the document type.

If you want it to go somewhere different this time, first select the `Print Options` tab. The options selector will be shown:
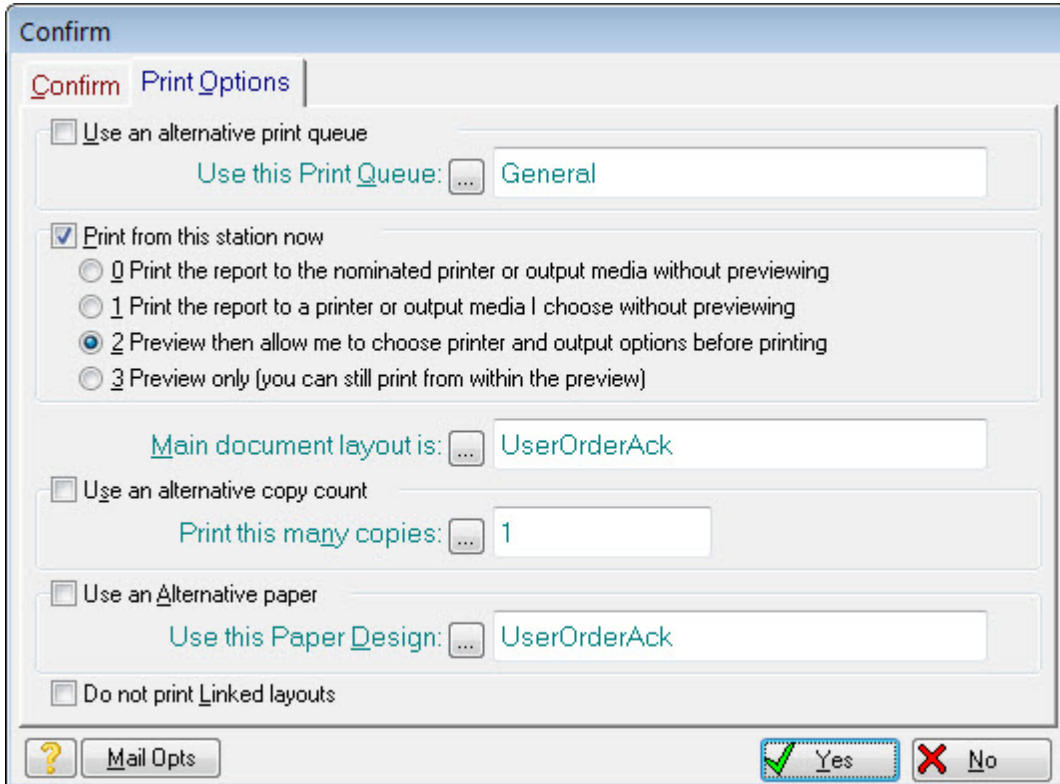
Check the `Use alternative print queue` option. When this is checked the `Use this Print Queue` prompt can be used to select another printer. Pressing its ellipsis will show you a list of print queues to choose from:
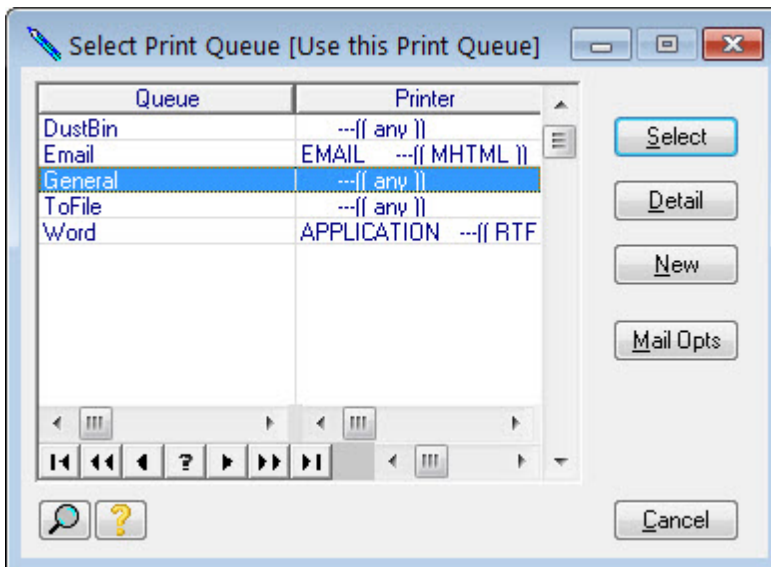
If the one you want is not in the list you can easily create a new one by pressing the **New** button. A form will be shown like this:

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:

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:
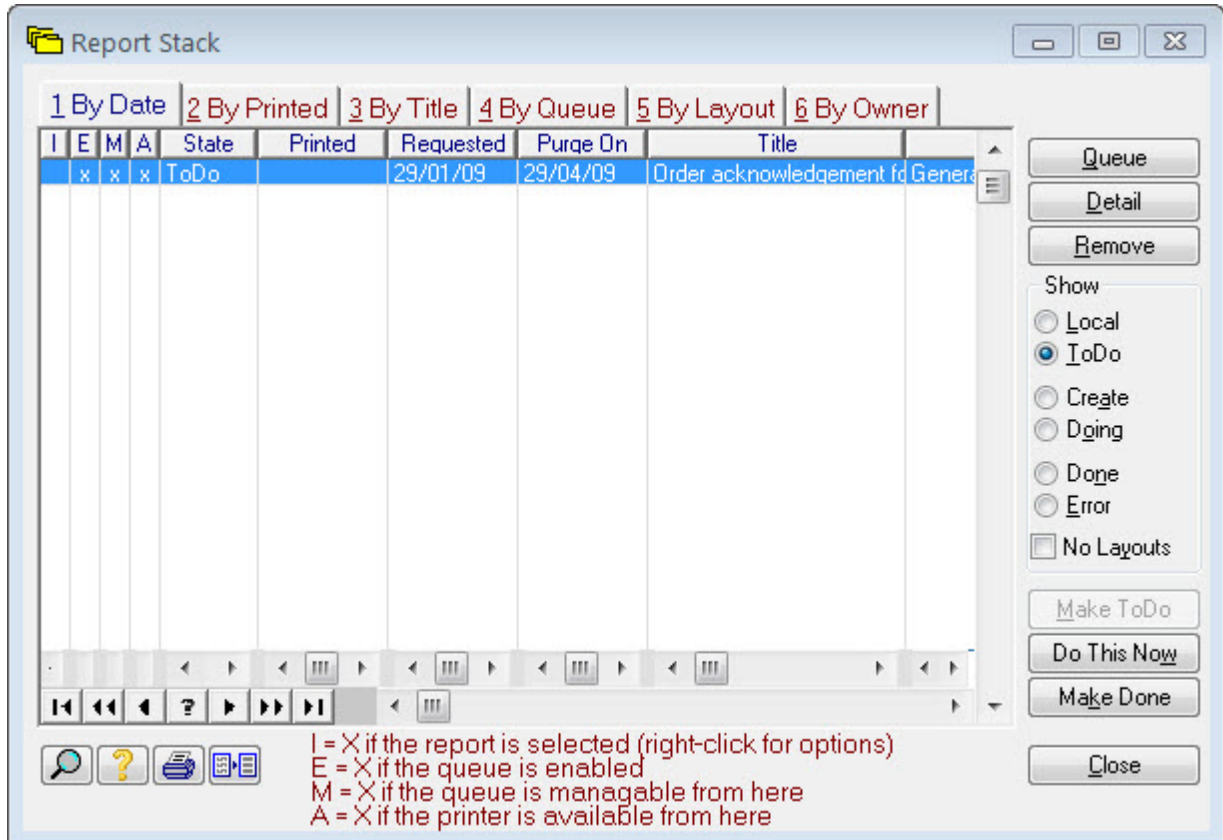
When reports are first entered into the report stack they are placed in the ToDo list. Selecting another option in the Show group will show you the other lists. When reports have been printed they are moved to the Done list. If an error occurred that prevented the report from being printed it is moved 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.