

**SPSWin - Tenant Manager & Data Exchange**

**Getting Started**

**STARTING TENANT MANAGER**

From the **Desktop** (if a shortcut exists), double-click the Tenant Manager icon OR from the **Start** menu:

1. Click **Start** .
2. From the fly-up Start menu, select **Programs >> Sentex Applications >> SPSWin - Tenant Manager**.
3. If the **SPSWin Password** screen appears (see Figure 1), enter the password and click **Done**.



Figure 1: SPSWin Password Screen

The Main screen will appear (see Figure 2).

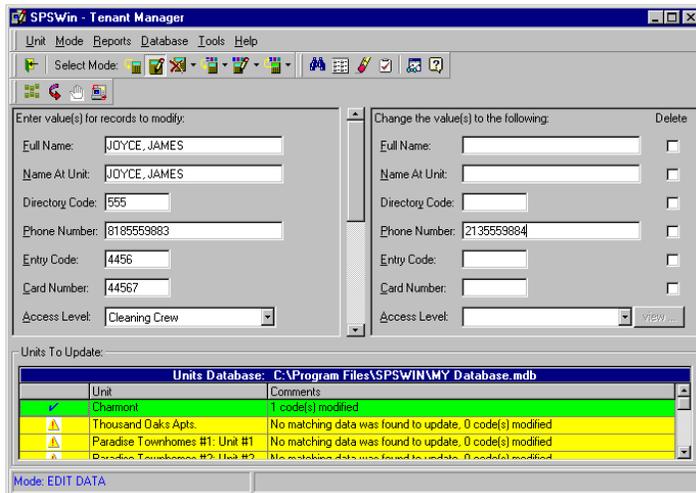


Figure 2: Tenant Manager Main Screen

**The Main Screen includes:**

**Menu Bar and Toolbars:** Select a function from a menu's drop-down list or by clicking a button on a toolbar.

**Tenant Record Fields:** These fields allow you to add, edit, or delete tenant record data.

**Units to Update Grid:** Displays the selected units and indicates success or failure when updating the SPSWin database with the Apply Changes button.

**STARTING DATA EXCHANGE**

From the **Desktop** (if a shortcut exists), double-click the Data Exchange icon OR from the **Start** menu:

1. Click **Start** .
2. From the fly-up Start menu, select **Programs >> Sentex Applications >> SPSWin - Data Exchange**.
3. If the **SPSWin Password** screen appears (see Figure 3), enter the password and click **Done**.



Figure 3: SPSWin Password Screen

The Main screen will appear (see Figure 4).

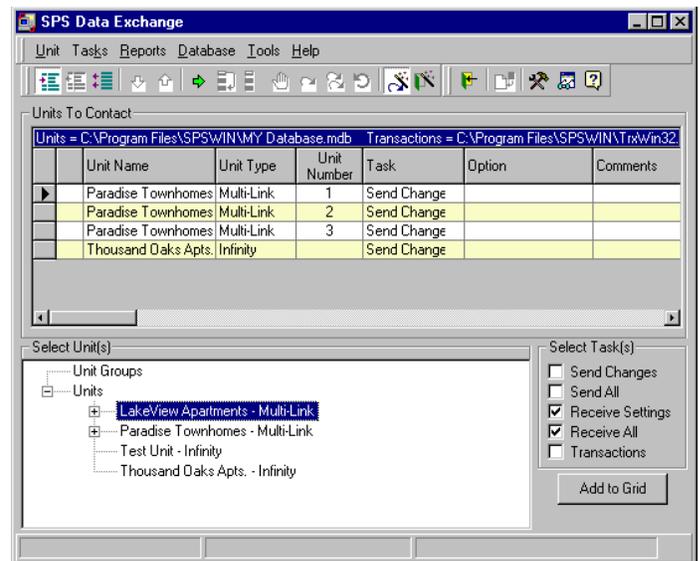


Figure 4: Data Exchange Main Screen

**The Main Screen includes:**

**Menu Bar and Toolbars:** Select a function from a menu's drop-down list or by clicking a button on a toolbar.

**Units to Contact Grid:** This grid displays the assigned tasks and their respective units.

**Select Unit(s) Area:** When assigning tasks to units, select the units and/or unit groups from this area.

**Select Task(s) Area:** After selecting one or more units and/or unit groups, assign one or more tasks from this area.

## Customizing Unit Groups

### CREATING A UNIT GROUP

A Unit Group allows you to add, edit, or delete the same set of access code data for a group of units. Changing access code data in a Unit Group will affect all of the units within the group.

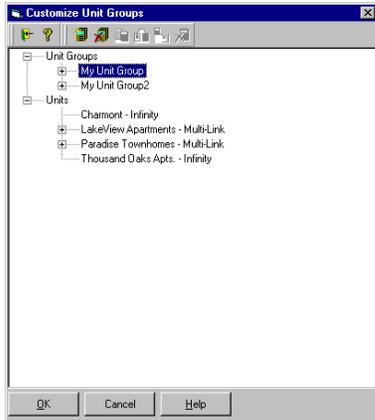


Figure 5: Customize Unit Groups Screen

1. From the menu bar, select **Unit >> Customize**.
2. At the Customize Unit Groups screen (see Figure 5), click the **New Unit Group** button (see right).
3. At the **Create New Unit Group** window, enter the new unit group name.
4. Click **OK**.

### ADDING (COPYING) UNITS TO A UNIT GROUP

You may add (or copy) a unit to a unit group in one of two ways: Copying a unit from the Units directory tree and pasting it into a Unit Group or copying a unit from a Unit Group and pasting it into another Unit Group.

1. From the menu bar, select **Unit >> Customize**.
2. At the Customize Unit Groups screen (see Figure 5), select the unit(s) you wish to add to a unit group.  
**Tip:** To select more than one unit, hold down the [Ctrl] or [Shift] keys on your keyboard.
3. Click the **Copy Unit** button (see right).
4. Select the **Unit Group** where the unit(s) will be pasted.
5. Click the **Paste Unit** button (see right).
6. Click **OK**.

### OTHER UNIT GROUP CUSTOMIZATION OPTIONS

**Moving Units Between Unit Groups:** Use the **Move Unit** and **Paste Unit** buttons (see right) to accomplish this task. You may only move units from one unit group to another. You cannot move a unit from the Units directory tree to a unit group.

**Deleting (Removing) a Unit Group:** If you no longer need the unit group, you may delete it. Use the **Remove Unit Group** button (see right) to accomplish this task.

**Deleting (Removing) Units from a Unit Group:** Use the **Remove Unit** button (see right) to remove a unit from a unit group.

## Managing Tenant Record Data

### SELECTING UNITS OR UNIT GROUPS

You will not be able to view, add, edit, or delete tenant records until you select at least one unit or unit group from the current SPSWin database.

1. At the main screen, click the **Select Unit(s) and/or Unit Group(s)** button (see right).
2. At the **Select Units to Update** screen, select one or more units and/or unit groups.  
**Note:** If no units or unit groups appear, Tenant Manager may not be pointing to a database or the current database has no units defined. For more information about creating unit definitions, refer to the SPSWin User's Guide or On-line Help.  
**Tip:** To select more than one unit, hold down the [Ctrl] or [Shift] keys on your keyboard.
3. Click **OK**.

### FIND MATCHING DATA

This feature allows you to search the SPSWin database for data matching that which you enter into the tenant record fields. Once Tenant Manager performs a search, it will display all of the matching records on a grid where you may select one to edit or delete.

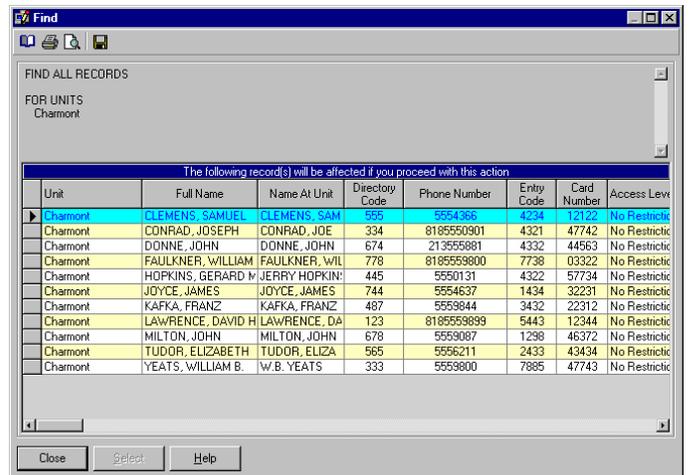


Figure 6: Find Screen

1. Select the unit(s) or unit group(s) to search (see above).
2. Select the add, edit, or delete mode.
3. Enter one or more values into the tenant record fields. Tenant Manager will search for data that matches what you enter into the fields.
4. From the toolbar, click the **Find Matching Data** button.
5. The **Find** screen will appear (see Figure 6).
6. To select a record, click the box under the left-most column next to the record you wish to select. Then click the **Select** button.

## Tenant Manager

### ADDING, EDITING, OR DELETING DATA

1. Select the unit(s) and/or unit group(s) where the record will be added, edited, or deleted (see page 2).
2. Select the add, edit, or delete mode.
3. **If you are adding data . . .**

Enter the new access code values.

**If you are editing data . . .**

3a. **Optional:** Use the **Find Matching Data** feature to select a record you want to edit (see page 2). Use this option only when editing a single record.

3b. If you did not perform step 3a, in the left-hand pane, enter the access code values that will be edited.

3c. Enter the new access code values in the right-hand pane.

**If you are deleting data . . .**

3a. **Optional:** Use the **Find Matching Data** feature to select a record you want to delete (see page 2). Use this option only when deleting a single record.

3b. If you did not perform step 3a, in the left-hand pane, enter the access code values of the record(s) that will be deleted.

4. Click the **Apply Changes** button. 

### PREVIEWING EFFECTS OF CHANGES

Before Tenant Manager updates the SPSWin database, you have the opportunity to review the changes and accept or reject the before they are implemented. This is possible on the Preview Updates screen (see Figure 7).

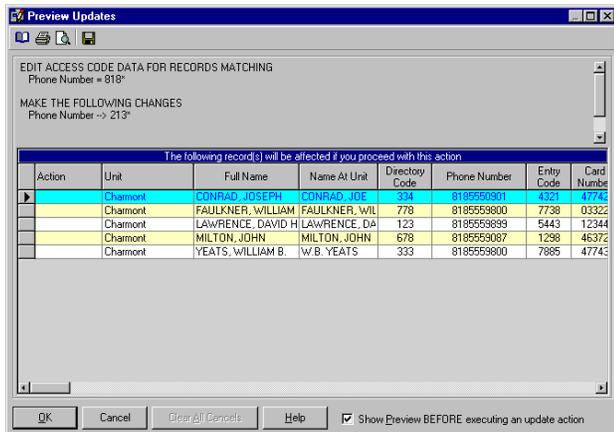


Figure 7: Preview Updates Screen

After clicking the Apply Changes button, the Preview Updates screen will appear if:

The **Preview** option  is enabled under the Tools menu. OR The **Show Preview BEFORE Executing an Update Action** checkbox is enabled on the Preview Updates screen.

To accept the changes, click **OK**.

To cancel all of the changes, click **Cancel**.

To cancel an individual change:

1. Double-click inside the cell (under the "Action" column) of the action you wish to cancel until you see the cancel icon.
2. Click outside the cell. The row should be highlighted in red.
3. Click **OK**.

## Data Exchange

### Assigning and Starting Tasks

#### ABOUT TASKS

Tasks enable you to perform Data Exchange commands such as sending data to a unit, receiving data from a unit, or retrieving unit transactions. One or multiple tasks may be assigned to a unit or unit group.

#### INSERTING TASKS

You may insert one or more tasks for each unit or unit group.



Figure 8: The Select Unit(s) and Select Task(s) Area

1. From the **Select Unit(s)** area (see Figure 8), select a unit or unit group.
2. From the **Select Task(s)** area, select the task(s) for the selected unit or unit group.
3. Click the **Add to Grid** button. The task(s) will appear in the Units to Contact grid (see Figure 9).
4. Repeat steps 1-3 as necessary.

#### EDITING THE TASK GRID

Tasks or task options may be edited manually within the grid before starting the task transmission process. Task options may be changed for Receive commands (e.g., the merge options) or the Retrieve Transactions task (date limited).

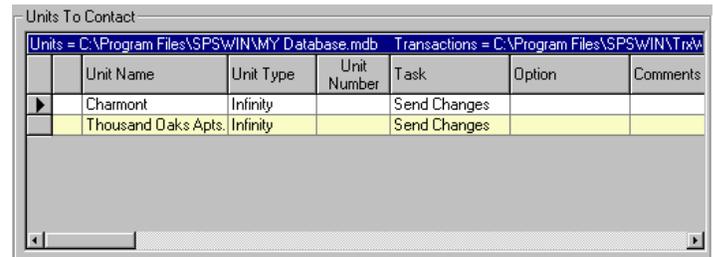


Figure 9: Units to Contact Grid

**To change a task:** Click the desired cell under the **Task** column, click the drop-down arrow, and select a new task from the drop-down list.

**To change the merge option of a Receive command:** Click the desired cell under the **Option** column, click the drop-down arrow, and select a new merge option from the drop-down list.

**To enter a Retrieve Transactions date:** Click the desired cell under the **Option** column, click the drop-down arrow, and enter a date or click the drop-down arrow to select a date from the drop-down calendar.

## Data Exchange

### ARRANGING TASKS

When Data Exchange starts its assigned tasks, it will perform them based on the order of the Units to Contact grid (top to bottom). You may rearrange the order as needed.

1. Select a unit/task from the grid.
2. Use the up/down arrow buttons to rearrange it. 

### DELETING TASKS

Tasks may be removed from the grid before you start the transmission.

**To remove a task:** Select it from the left-most column and click **Delete Selected Task(s)** button. 

**To remove all the tasks from the grid:** Click the **Delete All Tasks** button. 

### STARTING TASKS

To start the task(s), click the **Start** button  on the toolbar. Data Exchange will then attempt to perform each task listed on the grid, beginning with the top-most row. The Unit Task Information area (Figure 10) will display communications data for each task.

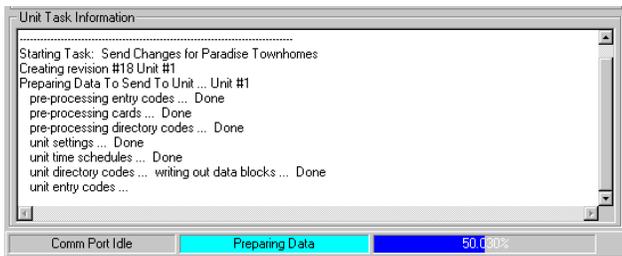


Figure 10: Unit Task Information Window

 Once the task(s) begin, you may skip over a task or abort the entire transmission. When a task is skipped, communications will begin with the next task on the grid.

### RETRYING OR RESETTING TASKS

Skipped or failed tasks may be manually or automatically retried.

**Auto Retry:** When a Data Exchange task fails during the transmission process, the Auto Retry feature allows you to configure the number of automatic attempts to re-transmit the data and complete the task.

1. Click the **Is Auto Retry Enabled** button  on the toolbar to enable Auto Retry.
2. At the menu bar, click **Tools >> Preferences**.
3. At the SPSWin Data Exchange Preferences screen - Tasks, in the **Auto Retry** box, enter the total number of times Data Exchange will attempt a retry before discontinuing.

**To manually retry a single task:** Select the failed or skipped task from the grid and click the **Retry Task** button. 

**To manually retry all remaining tasks:** Click the **Retry Remaining Tasks** button. 

**To reset all tasks:** Click the **Reset All Tasks** button. 

## Getting Help

### On-line Help and Tutorials

Tenant Manager and Data Exchange Help is available with the HTML-driven On-line Help or the Flash Tutorials. The On-line Help is all encompassing - it covers all of the applications' functions and features. The Flash Tutorials are task specific and more interactive - run them when you need more focused guidance about specific features (e.g., Assigning and Starting Tasks in Data Exchange).

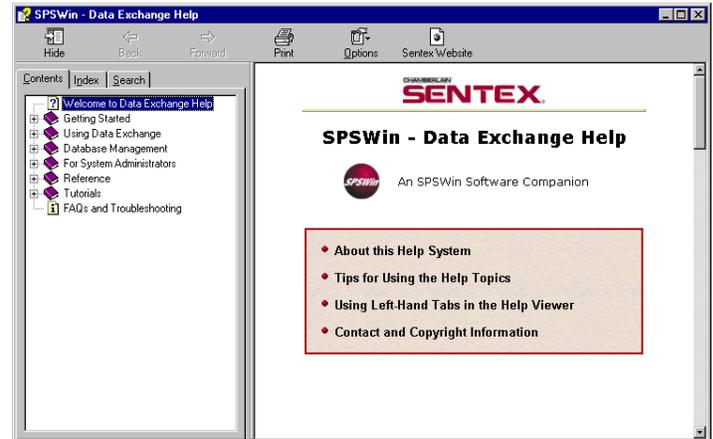


Figure 11: On-line Help

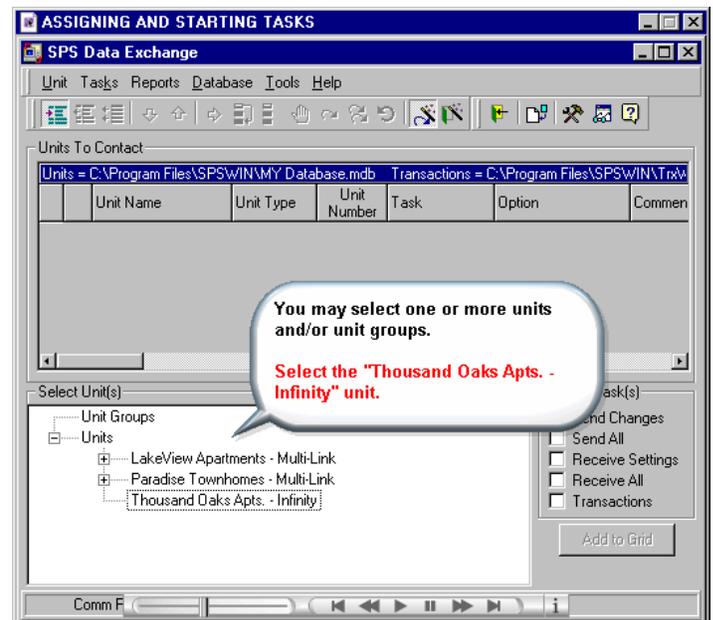


Figure 12: Tutorial

### RUNNING THE ON-LINE HELP OR TUTORIALS

To run the On-line Help, hit [F1] on your keyboard at any time or click the Help icon  on the toolbar.

To run a Tutorial, at the menu bar, select one from **Help >> Tutorials**. You may also run the tutorials from the On-line Help in the **Contents** tab >> **Tutorials** book.