

SPSWin - Tenant Manager & Data Exchange

Getting Started

STARTING TENANT MANAGER

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

- 1. Click Start MStart .
- 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.

🐂 SPSWin	Password		×				
E Welcome to	sPSWin - Te	enant Manag	ger!				
Please enter your password to open the application:							
×××××××	** d is required t	o run applica	ation				
<u>D</u> one	Cancel	<u>H</u> elp					

Figure 1: SPSWin Password Screen

The Main screen will appear (see Figure 2).

Unt Mode Reports Database Iools Help
1 🗰 🗲 🕘 🔜
Enter value(s) for records to modify:
Eull Name: JOYCE, JAMES
Name At Unit: JOYCE, JAMES
Directory Code: 555
Phone Number: 8185559883 Phone Number: 2135559884
Entry Code: 4456
Card Number: 44567
Access Level: Cleaning Crew
Units To Update:
Units Database: C:\Program Files\SPS\VIN\MY Database.mdb
Unit Comments
Charmont 1 code(s) modified
▲ Thousand Oaks Apts. No matching data was found to update, 0 code(s) modified
A Paradise Townhomes #1: Unit #1 No matching data was found to update, 0 code(s) modified
🕴 👘 🖉 Sanadian Taumhamaa #2:11/0it #2:11/0it matakina data usa faund ta undata. 🛛 aadafa) madifiad
Mode: EDIT DATA

Figure 2: Tenant Manager Main Screen

The Main Screen includes:

Menu Bar and Toolbars: Select a function from a menu's dropdown 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 MStart .
- 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**.

SPS₩in Pa	ssword		×			
_ Welcome to	SPSWin - Da	ata Exchange	ļ ———			
Please enter your password to open the application:						
	« d is required to	o run applicat	ion			
	a 10 10 quillo a 1	o rant approa				
<u>D</u> one	Cancel	<u>H</u> elp				

Figure 3: SPSWin Password Screen

The Main screen will appear (see Figure 4).

🗐 SP	S Data Exchange						_ 🗆 ×	
<u>U</u> nit	Tas <u>k</u> s <u>R</u> eports <u>D</u> atab	ase <u>T</u> ools j	<u>H</u> elp					
+=	🖅 🏣 🖉 🖉 🔶			2 🔏 🌾 🗍	د 🗠 ا 🔫	रु 🛃 🕻	2	
Units	To Contact							
Units	s = C:\Program Files\SPS\	WIN\MY Data	base.mdb	Transactions = I	D:\Program Fi	les\SPS\	VIN\TrxWin32.	
	Unit Name	Unit Type	Unit Number	Task	Option		Comments	
	Paradise Townhomes	Multi-Link	1	Send Change				
	Paradise Townhomes		2	Send Change				
	Paradise Townhomes		3	Send Change				
	Thousand Oaks Apts. Infinity Send Change							
1	x							
Selec	et Unit(s)					Select	Task(s)	
-	Unit Groups					🗖 Ser	nd Changes	
ė	Units					🔲 Ser	nd All	
	😟 🚽 LakeView Apart	ments - Multi-L	link			🔽 Red	ceive Settings	
	🕂 Paradise Townł	nomes - Multi-L	.ink			🔽 Red	ceive All	
	Test Unit - Infini	ty .				🗖 Tra	nsactions	
	IIIII Thousand Oaks	Apts Infinity	,				dd to Grid	

Figure 4: Data Exchange Main Screen

The Main Screen includes:

Menu Bar and Toolbars: Select a function from a menu's dropdown 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.

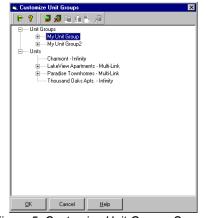


Figure 5: Customize Unit Groups Screen

- 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 ſ٩ 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.

OB LINITS							
Charmont							
	The following re	cord(s) will be affe		roceed with this action			
Unit	Full Name	Name At Unit	Directory Code	Phone Number	Entry Code	Card Number	Access L
Charmont		CLEMENS, SAM	555	5554366	4234	12122	No Restri
Charmont		CONRAD, JOE	334	8185550901	4321	47742	No Restri
Charmont	DONNE, JOHN	DONNE, JOHN	674	213555881	4332	44563	No Restr
Charmont	FAULKNER, WILLIAM	FAULKNER, WIL	778	8185559800	7738	03322	No Restri
Charmont	HOPKINS, GERARD M	JERRY HOPKIN:	445	5550131	4322	57734	No Restri
Charmont	JOYCE, JAMES	JOYCE, JAMES	744	5554637	1434	32231	No Restri
Charmont	KAFKA, FRANZ	KAFKA, FRANZ	487	5559844	3432	22312	No Restr
Charmont	LAWRENCE, DAVID H	LAWRENCE, DA	123	8185559899	5443	12344	No Restri
Charmont	MILTON, JOHN	MILTON, JOHN	678	5559087	1298	46372	No Restr
Charmont	TUDOR, ELIZABETH	TUDOR, ELIZA	565	5556211	2433	43434	No Restri
Charmont	YEATS, WILLIAM B.	W.B. YEATS	333	5559800	7885	47743	No Restri

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.** <u>Optional:</u> 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.** <u>Optional:</u> 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).

IAKE THE FC Phone Numb	ILLOWING CHANGE er> 213*	ES .					
	T	ne following record(s) will be a	affected if you proc	eed with this	action		_
Action	Unit	Full Name	Name At Unit	Directory Code	Phone Number	Entry Code	Ca Num
	Charmont	CONRAD, JOSEPH	CONRAD, JOE	334	8185550901	4321	477
	Charmont	FAULKNER, WILLIAM		778	8185559800	7738	033
	Charmont	LAWRENCE, DAVID H	LAWRENCE, DA	123	8185559899	5443	123
	Charmont	MILTON, JOHN	MILTON, JOHN	678	8185559087	1298	463
	Charmont	YEATS, WILLIAM B.	W.B. YEATS	333	8185559800	7885	477

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.

Select Unit(s)	Select Task(s)
Unit Groups ⊡Units ⊡LakeView Apartments - Multi-Link ⊡LakeView Apartments - Multi-Link	 Send Changes Send All Receive Settings Receive All Transactions
Thousand Oaks Apts Infinity	Add to Grid

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).

				Hansactions - C.	w rogram nie.	s\SPSWIN\Trx\
Unit Name	Jnit Name	Unit Type	Unit Number	Task	Option	Comment
Charmont	Charmont	Infinity		Send Changes		
Thousand Oaks.	housand Oaks Apts	s. Infinity		Send Changes		

Figure 9: Units to Contact Grid

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

<u>To change the merge option of a Receive command:</u> 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.

<u>To remove a task:</u> 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.

Unit Task Information Starting Task: Send Changes Creating revision #18 Unit #1 Preparing Data To Send To L pre-processing cards Do pre-processing directory cod unit time schedules Done unit directory codes writi unit entry codes	Init Unit #1 Done ne Jes Done e	<u>ح</u> ب
Comm Port Idle	Preparing Data	<u>50.0</u> 80%

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, communica tions 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 **N** on the toolbar to enable Auto Retry.
- 2. At the menu bar, click Tools >> Preferences.
- 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).

💕 SPSWin - Data Exchange Help			
Hide Back Forward	Print	© - Ωptions Sentex Website	
Contents Index Search			•
Geting Started Geting Started Gating S	-	SPSWin - Data Exchange Help	
		 About this Help System Tips for Using the Help Topics Using Left.Hand Tabs in the Help Viewer Contact and Copyright Information 	T

Figure 11: On-line Help

ASSIGNING AND START	ING TASKS				_ 🗆 ×
🧾 SPS Data Exchange					_ 🗆 🗵
<u>U</u> nit Tas <u>k</u> s Reports <u>D</u> atab	ase <u>T</u> ools <u>j</u>	<u>H</u> elp			
	DE 🐠	~ 8 K) <u>s</u> r	i 🕒 🗗 🛠	2
- Units To Contact				<u>ш. с ст</u>	
Units = C:\Program Files\SPS\	WIN\MY Data	base.mdb	Transaction	ns = C:\Program Files	
Unit Name	Unit Type	Unit Number	Task	Option	Commen
Select Unit(s) Unit Groups Units Units Paradise Townh Thousand Daks	ments - Multi-L	or unit gr ct the "Tl ty" unit. .ink .ink	oups.	I Se Re Re Tr	ask(s) and Changes and All acceive Settings acceive All ansactions

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 [7] 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.