

# Advocacy Organizer

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**Version 1.0**



## **User Manual**

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## 1. Overview

This document is the User Manual for OrganizerSoft Pty Ltd's AdvocacyOrganizer application.

AdvocacyOrganizer is an application specifically tailored to the needs of service organisations that provide advocacy services. It consists of core features applicable to any office environment, plus a number of extra features such as Wizards that have been specifically tailored to support the advocacy service industry.

AdvocacyOrganizer provides a user friendly environment for accessing and updating all information relating to the organisation's clients and services provided.

It works seamlessly with the Microsoft Office suite, streamlining functions such as secure document access and storage, template documents and mail merge, bulk emailing and the data export.

Client based documents such as Case Notes, Agreements and Contact Notes are able to be accessed and updated from within the application, while still using the familiar and powerful MS Word™ environment.

The nature of Client information requires that confidentiality be preserved. The application has built-in protection which ensures that access to all documents and functions are subject to strict security checking. This means that the user interface will vary depending upon the assigned role and access privilege of the individual User.

All information is held in Microsoft's highly secure SQL Server database.

The application strongly supports the notion that the major function of the organisation is to provide service to its stakeholders, and that this service is delivered via a number of Service Programs.

Service Programs are particular to each specific organisation and are tailored by the Application Administrator to suit the organisation.

The application supports two broad service delivery models. They are an ongoing, or Business as Usual (BAU) model, and a Project model.

With each of these delivery models both the costs incurred, and the service hours delivered, can be progressively recorded and accessed for service program reporting.

The BAU model is best characterised as a long term arrangement for providing a particular service. It would normally have an annual budget and a permanent delivery team. An example of a service that is provided via the BAU model is the Public Enquiry Service.

The Project delivery model is best characterised as a series of separate, targeted deliveries, each wholly managed as individual Projects.

Examples of services provided via the Project model include individual advocacy projects, running of annual conferences, upgrading the office computer system etc.

## 2. Functionality Tour

### 2.1. Product Customisation

The Product Licensee is the person or organisation who purchased a licence to use the product to assist with the management of the day to day work of its organisation.

The product can be customised and/or configured to accurately fit the licensee's business.

The following list includes the key areas of customisation provided:

- All reports can include the Licensee's company logo
- All staff members and contractors can be recorded and assigned to predefined roles within the organisation
- Licensee details including name, address, primary contact, current user name etc, are available for mail merge for outgoing correspondence
- Licensee email server details can be recorded to allow sending of emails, including bulk emails, from within the application
- Most pick lists can be edited and/or extended to ensure that the terminology used matches that familiar to the organisation
- Security for all Notes, Documents and Communications can be specified so that access is limited to only those whose Role justifies their access to personal and/or private records
- Application functionality can be restricted to those whose Roles justify access to particular functions. For example, only those users granted "Administrator" privilege via their Role can make changes to the application's configuration settings
- Templates for correspondence and associated documents can be prepared and then used whenever outgoing communications are required
- Templates for Projects can be prepared which identify standard Action lists, Costs, Deliverables, Roles and Stakeholder Groups. These can be used when initiating new projects to simplify setup and also to ensure that good work practice and cost capture is enshrined in new Projects when they are established
- Templates for the various different types of Enquiry can be prepared to help ensure that information collection and follow-up actions are appropriate and consistent

### 2.2. Licensee Facilities and Assets

The application allows the creation of an inventory of all Sites and Buildings owned or occupied by the Licensee. It also allows an inventory of all Assets including their location.

Each Site and/or Building can be subdivided into three levels of hierarchy. For example a building could be divided into Floors, Rooms and Cupboards.

Once the spaces have been defined, the Licensee's Assets can be documented.

Information such as Asset number, Classification, photographs, where they are currently located etc can be recorded.

Such information can then be used to produce reports.

### **2.3. Contacts**

The application provides a rich set of capabilities for recording all people and organisations that have any dealings with the business.

The following list includes the key areas of functionality provided:

- Contacts can be Added, Modified, Archived, Reinstated, Tagged and Reported
- The application supports the capture of Personal or Organisational details; Physical and/or Postal Address information; Communications details including phone numbers and email addresses; Photograph etc
- Contacts are classified based upon their involvement with the Licensee of the product. They may be Employees, Clients, Suppliers, Community Groups etc
- A Contact can be classified into more than one category. For example, a Contact may be both a Client and a Contractor
- Personal relationships between people such as Father/Son, Husband/Wife etc, can be recorded
- Each Organisation can be associated with the Individuals who work for/or represent that organisation
- Clients can be enrolled to receive a Service
- Certifications and Qualifications can be recorded for Staff and Contractors
- All Notes, Documents and Communications to and from Contacts can be recorded and associated with the involved Contact(s)

### **2.4. Enquiries**

The application provides the capability to document and track all Enquiries that are received by the organisation.

The following list includes the key areas of functionality provided:

- Enquiries can be Added, Modified, Completed, Closed and Reported
- The application supports the capture of the Enquiry made, the individual making the Enquiry including any of Name, Phone, Email, Postcode or Address
- Recording of all time and/or costs expended in the course of providing a response to the Enquiry
- Status tracking for outstanding Enquiries
- Recording of all Notes, Documents and Communications generated in the process of responding to a Enquiry

## 2.5. Projects

The application provides a rich set of capabilities for creating, managing and documenting Projects.

The following list includes the key areas of functionality provided:

- Projects can be Added, Modified, Archived, Reinstated, Completed and Cancelled
- The application supports the capture of project details including the Project Name, Goal, Strategy, Coordinator, Status, Start Date, Finish Date etc
- Projects are classified according to their nature. Examples include Advocacy, Outreach, Information, Systemic Advocacy, Works Program etc
- Access can be based upon Project Classification. This means that staff members with different responsibilities can conveniently access work associated with their area of responsibility. In addition, it allows the user interface to be simplified and/or augmented to suit the Project class and only show those buttons which apply to the Role assigned to a particular Staff member
- All Stakeholders associated with a Project can be recorded as such
- Project Personnel and Stakeholders can be allocated into Roles and Groups appropriate to the activities undertaken by the Project
- An Action list specifying all required activity to be undertaken over the course of the project can be documented and separately costed
- All Notes, Documents and Communications generated in the course of a Project can be filed with the Project
- Advocacy and Outreach projects have been provided with a start up Wizard which assists with the initial project definition.
- All Projects can be built from predefined Templates to ensure that best practice is followed

## 2.6. Licensing

The application licensing is based upon the concept of concurrent usage. This means that while the application can be installed on any number of computers in the organisation, the number of Users able to access the application at the same time is limited by the number of licences held by the organisation.

## 3. Understanding the User Interface

### 3.1. Starting the Application

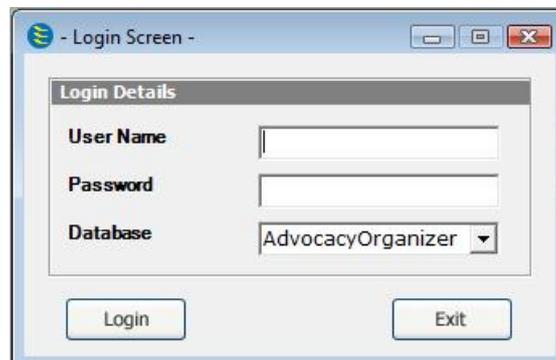
AdvocacyOrganizer is launched from the desktop by double clicking on the application icon.



Alternately, the "Advocacy Organizer" option can be chosen from the list of "All Programs" available in the Windows Start Menu.

Access to the AdvocacyOrganizer application is restricted to authorised users. Consequently, a Login Screen is presented which must be successfully completed before access is allowed to the application.

The following panel is presented for the Login verification



Your System Administrator will advise your Username and initial password.

Your password can be changed at any time as described in the section on Administration functions – [Changing Passwords](#). It is recommended, for security reasons that this be done the first time you log in.

If you forget your password you should contact your Administrator who can reset it and advise a new initial password.

From the Login screen, it is also possible to choose the Database to be used for the session. Normally, there will be only one operational Database but there may also be a Training Database available for general use.

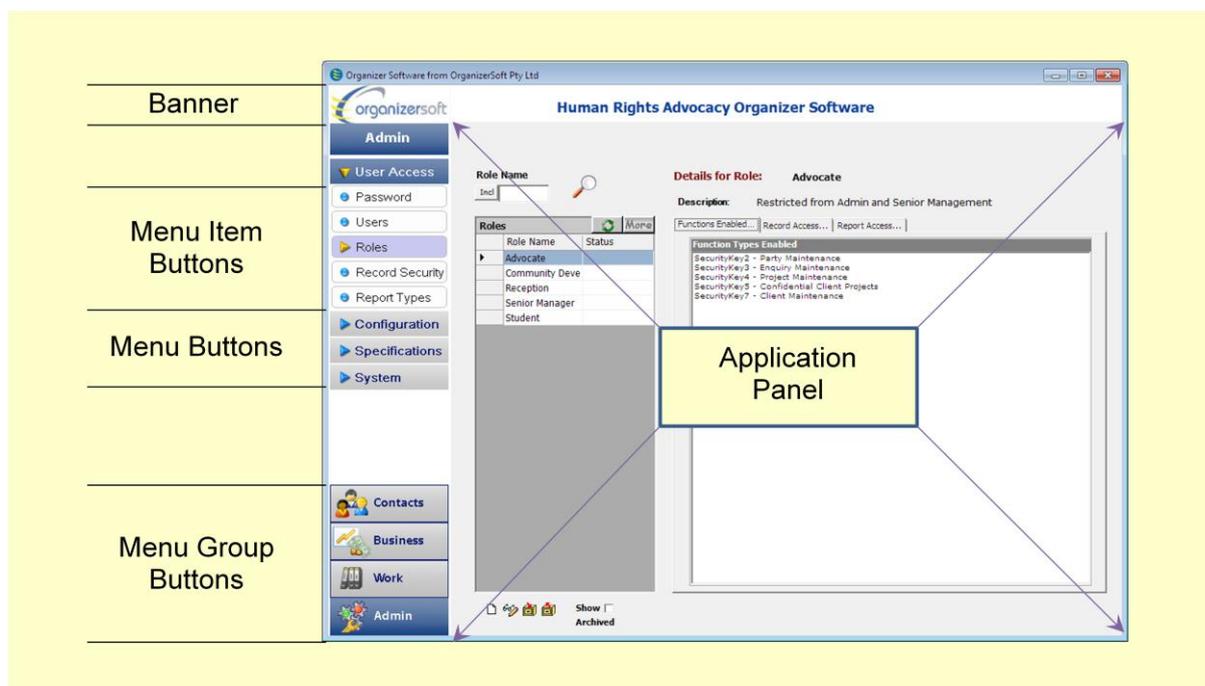
A successful login results in the Front Page similar to the one illustrated below being presented.



The Front Page acts as a Menu to the rest of the application.

### 3.2. Finding Your Way Around

The Front Page of the application consists of a Menu area down the left side and a larger rectangular application panel to the right of the menu.



The Menu area consists of four menu group buttons being Contacts, Business, Work, and Admin.

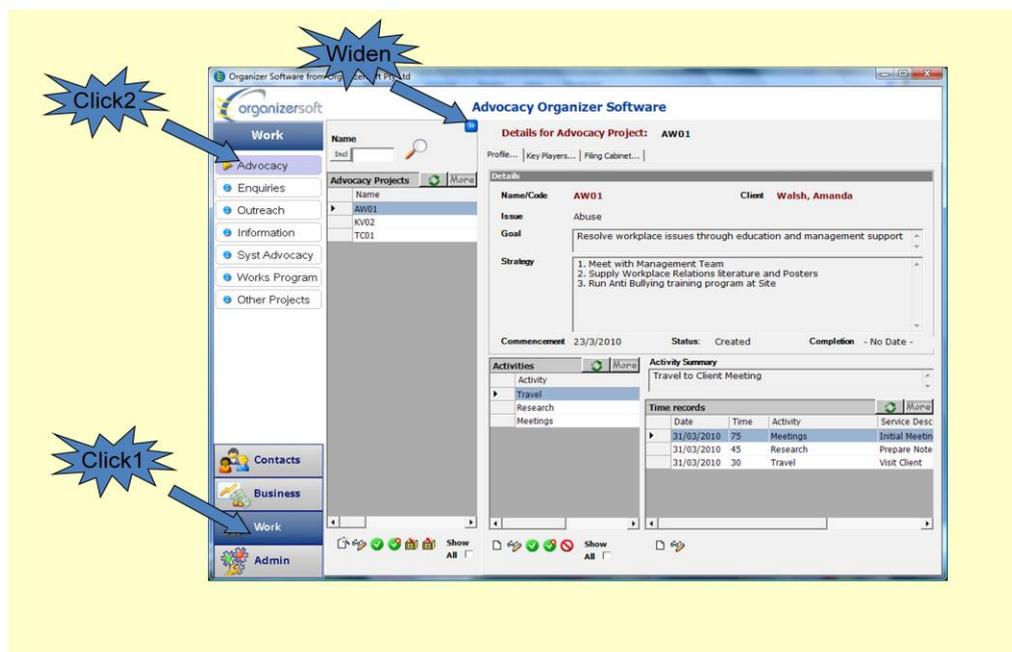
On clicking a menu group button, the white space above the menu group buttons will show the relevant menu and possibly sub-menus. For example, clicking the Admin Menu Group button followed by the System Menu button reveals the sub menu containing the Backup, Restore, Import Data and Licence menu items.

Refer to the illustration below:



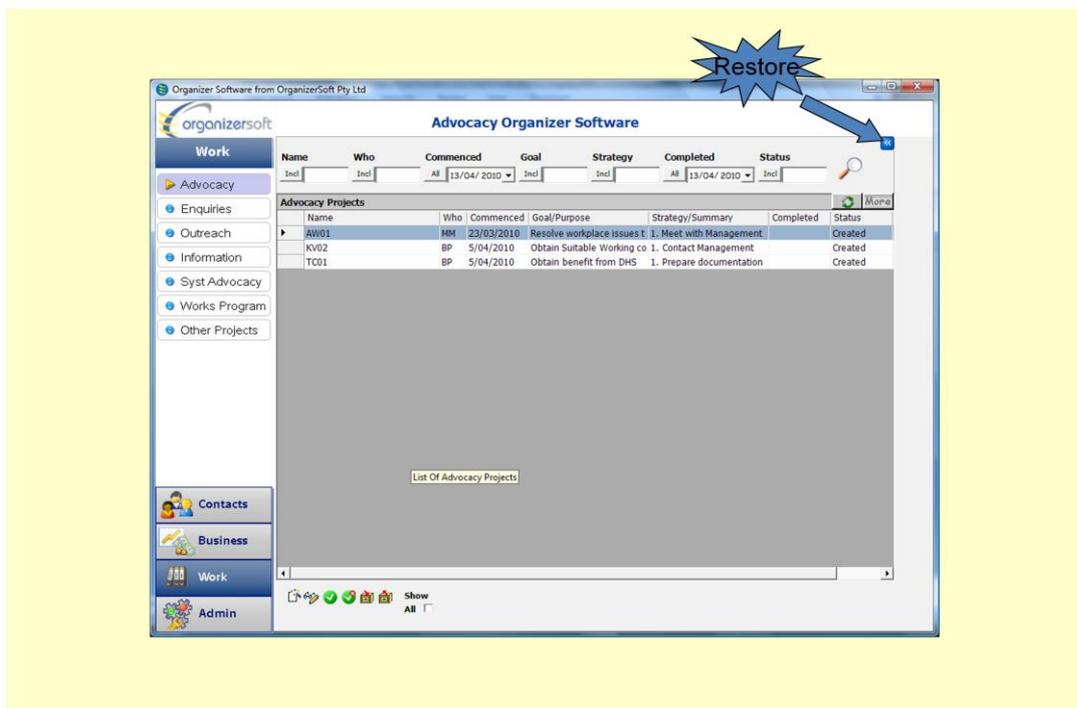
Upon clicking a Menu Item, the Application Panel will show a Manager Panel associated with the Menu Item.

The illustration below shows the Advocacy Manager Panel with the first case preselected.



To widen the Finder Grid, click the "Expand Right" button . This will result in more columns of the Finder being revealed and offer additional filters to assist in finding the desired row.

Refer to the illustration below:

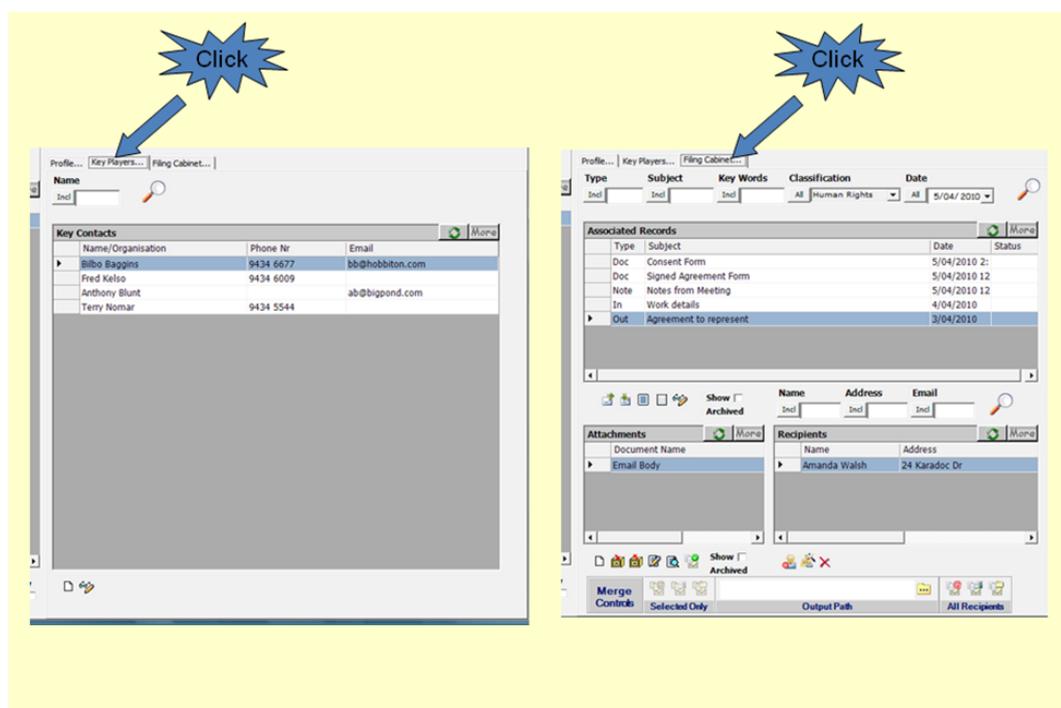


To restore the Finder to its original width and reveal the selected row detail information, click the "Restore Left" button

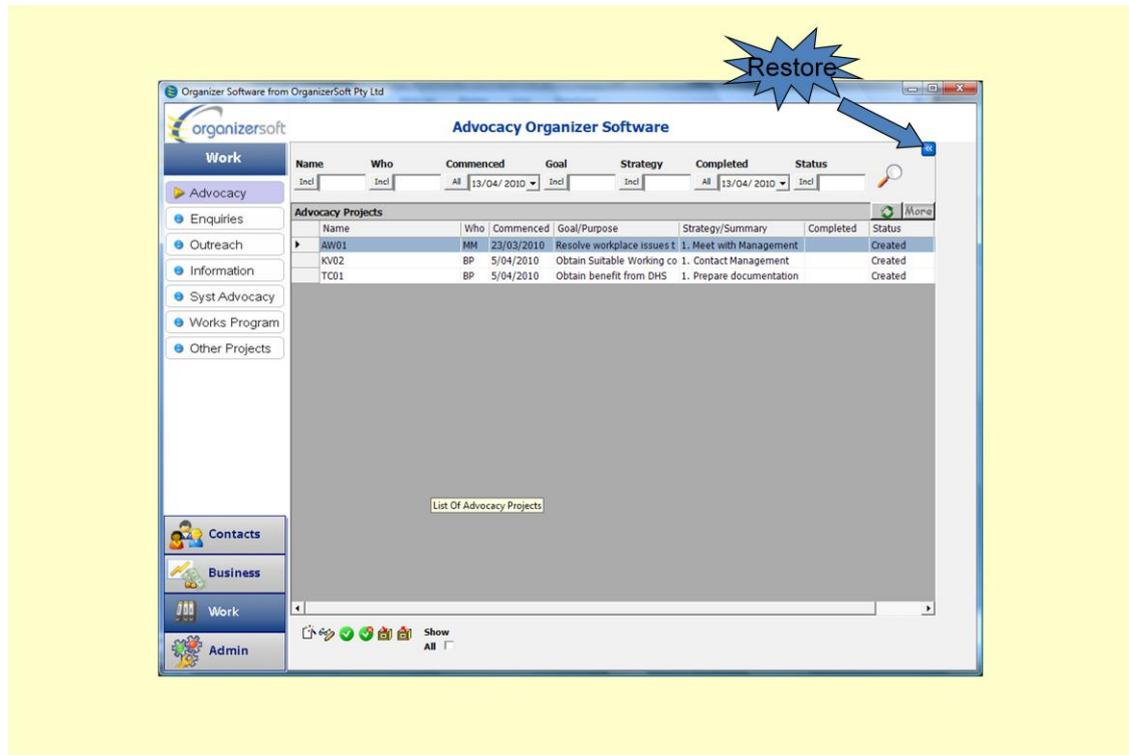
In the non expanded mode, there is a Tab Control which, in the case of the Advocacy Manager, presents three tabs. They are "Profile", "Key Players" and "Filing Cabinet".

To see the contents of the other tab pages, simply click on the labelled Tab at the top of the panel. This will cause the desired page to "come to the front".

Refer to the illustration below:



To review the details of any of the entries in the List, select the desired entry by clicking the grey section on the left side of the list. The relevant details will be displayed immediately in the Details area as illustrated below:



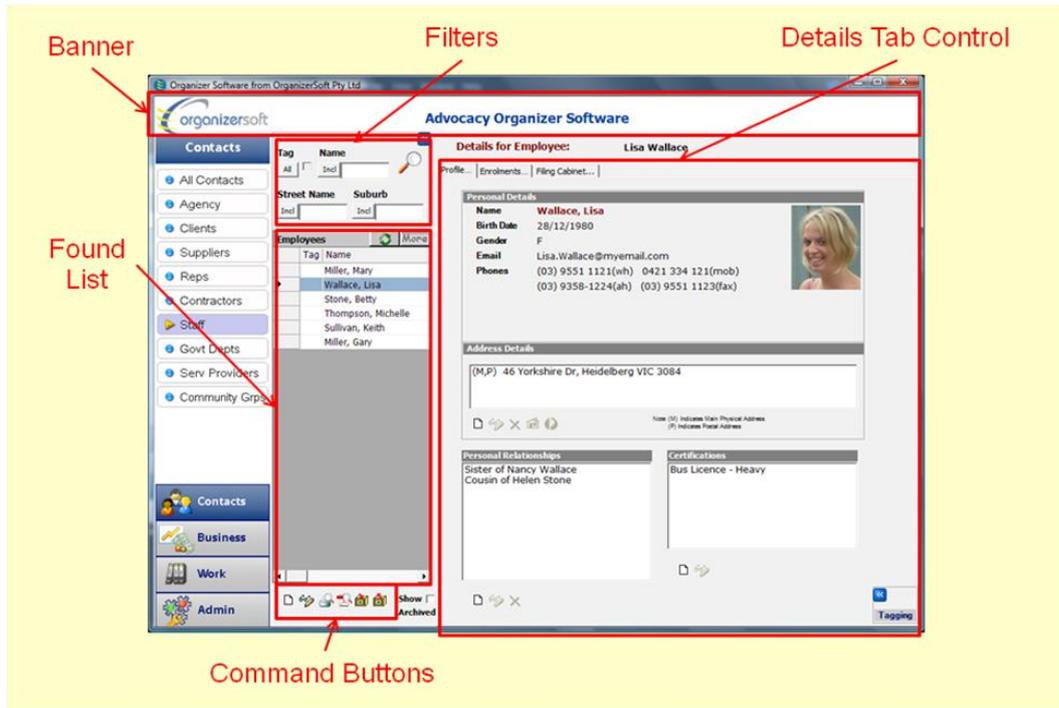
The functions available on each of the Manager Panels vary. They are accessed via the small command buttons immediately under the various List. The functions are discussed separately in the relevant section of the [Functionality Reference](#) section of this User Manual.

### 3.3. User Interface Components

Within the Advocacy Organizer application the User Interface uses standard layouts for similar functions and a number of special purpose components to achieve the required functionality.

To illustrate these features, the Manage and Maintain Employee Details Panels will be reviewed in detail.

The Manage Employee Details Panel can be accessed by clicking the Staff button in the Contacts Menu on the Front page. The resulting Management form is illustrated below:



The Employee Management Panel is representative of all of the Manager panels in the User Interface. Once each of the sub-panels in the Layout is understood the whole User Interface becomes very familiar and convenient to use.

Manager Panels normally consist of four sub-panels being:

[Banner](#)

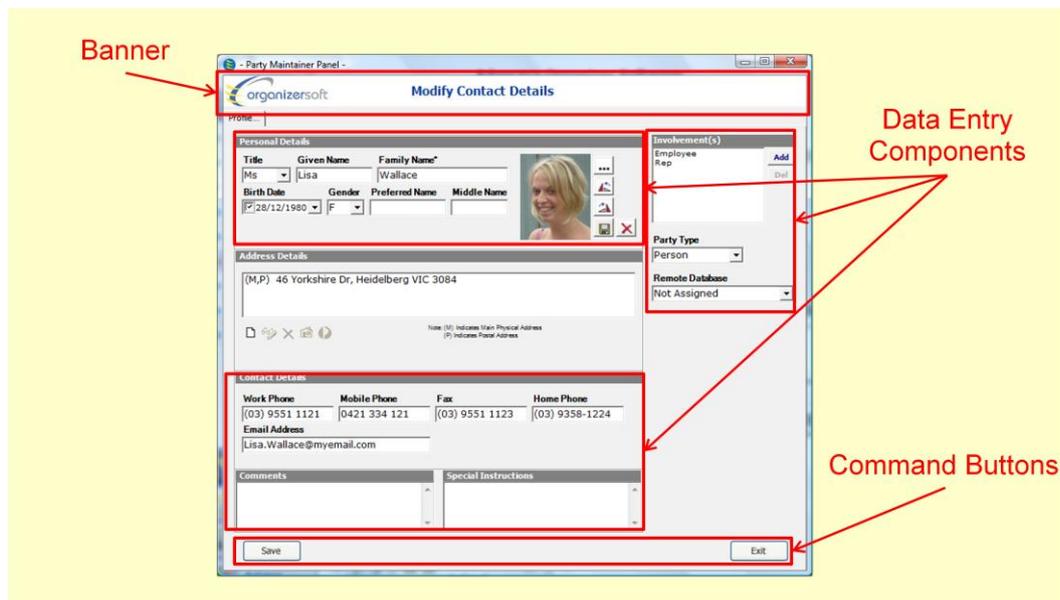
[Filters](#)

[Found List](#)

[Command Buttons](#)

[Details Tab Control](#)

The Maintain Contacts form is accessed from the Add or Modify command buttons of the Employee Manager Panel. The resulting Maintain Contacts form is illustrated below:



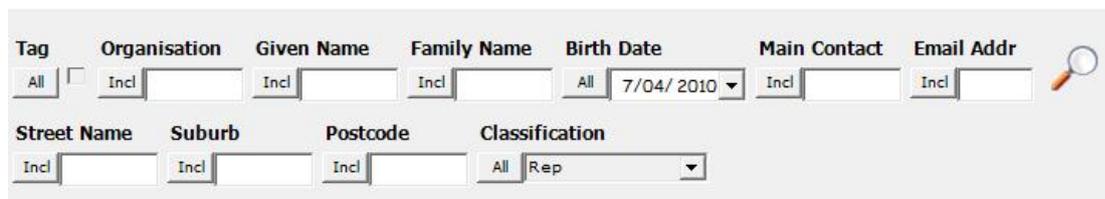
Each of the Sub-panels identified in the above form is illustrated and described in further detail in the sections below.

### 3.3.1. Banner



The Banner provides no active components; it simply provides a point of reference to clearly identify the primary function of the form.

### 3.3.2. Filters



The Finder Control contains a number of User Interface components known as Filter Controls and a Find Button.

There are five different types of Filter Controls used within Advocacy Organizer. They are known as:

[Text Filter](#)

[Date Filter](#)

[Classification Filter](#)

[Yes/No Filter](#)

[Show Filter](#)

Each Filter is used to limit or control which records from the database are to appear in the Found List. All Filters work together so that it is possible to create a list of records such as "All Female Clients who live in the Suburb of Toorak aged between 12 and 14 Years of Age"

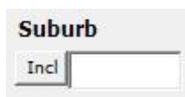
A desired record selection is achieved by setting each of the Filter Controls as required and then clicking the Find Button. The application will retrieve only those records from the database which match the combined Filter criteria and present them in the Found List.

When a Filter is active and affecting the results appearing in the Found List, either its value, or its Label, will be highlighted in a Yellow colour so that it is apparent that some level of filtering is in operation.

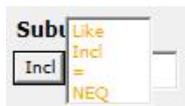
Each of the Filter Controls is discussed in more detail in the following sections.

### 3.3.2.1. Text Filter

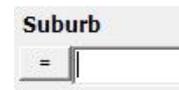
A Text Filter consists of a Criteria Button and a Text Entry Field as illustrated below:



Clicking the Criteria Button results in a drop down list of criteria being offered allowing the choice of "Like", "Incl"(Includes), "=" or "NEQ" (Not Equal)



Choosing "=" updates the Criteria Button



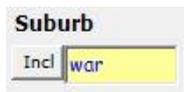
Entering a value into the Text Entry Field completes the filter definition.



Note that when the Text Field is not blank, it is highlighted to indicate that it will cause the contents of the Found List to be filtered in accordance with the criteria.

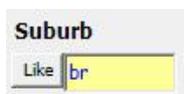
In the case illustrated above, the Found List will be restricted to only include Clients whose address includes the Suburb name equal to "Toorak"

The "Incl" criterion provides a less strict matching option. For example



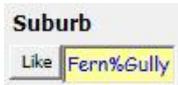
would include Warrandyte, Narre Warren, Langwarren and any other suburb name which contains the consecutive letter sequence "war". Filtering with partial matches like this can often find misspelled names and locations which may otherwise go undetected.

The "Like" criterion also provides a less strict matching option. For example



would include any suburb that starts with the letters Br, this would include Brunswick, Broadmeadows, Brookfield, Brighton, etc.

Including a percent sign “%” in the Text Field, means match any combination of characters in place of the “%” sign. For example



would include any suburb which commences with the letters “Fern” followed by any other letters then the letters “Gully” followed by any other letters. This would include FernGully, FernyGully, FerntreeGully, FernGully South, etc.

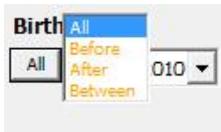
The “Like” option has an implied “%” at the end of the letters entered, while the “Incl” option has an implied “%” at both the start and the end of the letters entered.

**3.3.2.2. Date Filter**

A Date Filter consists of a Criteria Button and either one or two Date Entry Fields as illustrated below:



Clicking the Criteria Button results in a drop down list of criteria being offered allowing the choice of “All”, “Before”, “After” or “Between”:



Choosing “All” means don’t filter by Date, i.e. Include All records.

Choosing “Before” or “After” means only include Dates that fall Before or After the entered Date.

Choosing “Between” results in a second Date entry field appearing, and the records are filtered to only include dates which fall between the entered Dates.

**3.3.2.3. Classification Filter**

A Classification Filter consists of a Criteria Button and a Dropdown selection List known as a Combo Box as illustrated below:



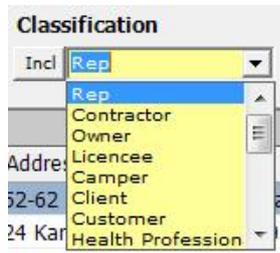
Clicking the Criteria Button results in a drop down list of criteria being offered allowing the choice of “All” or “Incl” (Includes)



Choosing “All” means don’t limit using this filter, this is further indicated by the fact that the value in the Combo Box is Greyed out.

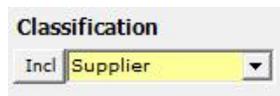
Choosing "Incl" means only include Records which include the nominated classification in their Classification List.

Choose the required Classification by clicking the down arrow on the Combo Box. A list of options is provided as illustrated below:



Choosing an entry in the list is achieved by moving the mouse pointer to the required entry and clicking the button. This completes the filter definition.

For example



would only allow Suppliers to be included in the Found List

### 3.3.2.4. Yes/No Filter

A Yes/No Filter consists of a Criteria Button and a tickable field known as a Check Box as illustrated below:



Clicking the Criteria Button results in it changing between showing "All" and "-->"



Choosing "All" means don't limit using this filter, i.e. include all records irrespective of the current setting of the Check Box.

Choosing "-->" means only include Records that match the criteria selected. For example



would only allow records where Tag was not ticked to be included in the Found List

### 3.3.2.5. Show Filter

A Show Filter consists of a tickable field known as a Check Box as illustrated below:



A Show Filter is different to the other Filters in that it is normally active.

For example in the case illustrated, archived records are normally filtered out of the view. To show archived records, you must click the Check box as illustrated below:



### 3.3.3. Found List

Employees								More
Tag	Name	Gender	Birth Date	Involvement	Address	Work Phone	Mobile I	
▶	Wallace, Lisa	F	28/12/1980	Multi	46 Yorkshire Dr, Heidelberg 3084	(03) 9551 1121	0421 35	
	Stone, Betty	F	12/08/1983	Multi	9 Woodlands Hts, Belmont 3124	(03)5987 2692	0421 47	
	Thompson, Michelle	F	17/04/1994	Multi	46 Yorkshire Dr, Torloo Arm, Lakes Entra			
	Sullivan, Keith	F	17/06/1993	Multi	3 Derna Rd, Glenroy 3046			
	Miller, Gary	M		Multi	Hicksville 3444			

The Found List is where the records that match the filter criteria are placed when the Manager Panel is opened or after the Find Button is clicked.

If the number of records exceeds the amount that will fill the List Panel, a scrollbar appears on the right hand side of the list. Simply dragging the slider with the mouse will cause the list to be scrolled up and down as required.

Sometimes it is convenient to change the order of presentation of the records. For example, you may prefer to have them sorted alphabetically by Surname or by Suburb or Postcode. To sort by any column, simply click the button which acts as the list heading. This will result in the list being sorted.

A second click to the list heading will result in the reversal of the sort order, i.e. ascending becomes descending.

To refresh the list, simply click the Refresh Button on the top right hand corner of the Found List. This will request a fresh extract of data from the database for the current filter conditions and will remove any sorting that has been applied. See the illustration of the button below.



If the number of records that would be retrieved based upon the filter criteria exceed 50 then only the first 50 records will be retrieved and displayed. Under these circumstances, the "More" button at the top right hand side of the grid will be enabled. To retrieve additional records, keep clicking the "More" button until the Button is disabled indicating that all records have been retrieved. See the illustration of the button below:



The records in the Found List can be selected either singly by clicking on the grey button to the left of the List, or in multiples by clicking and dragging, or holding down either the shift or control key, while clicking additional records.

Double clicking an entry will normally open a Maintainer Form allowing the record to be edited provided that Modify access is available to the current user.

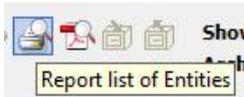
### 3.3.4. Command Buttons



The command buttons associated with the People Manager Panel are illustrated above.

During the operation of the application some buttons will become disabled depending upon the current selection status within the Found list. For example in the illustration above there are three disabled buttons. The prerequisites for each button being enabled are specified with the particular button description.

Each Button has an associated tooltip which appears when the Mouse Pointer is moved in the vicinity of the button. An example is illustrated below



The following table contains a brief description of all buttons and their icons that appear on the People Manager Panel:

**3.3.4.1. Add New Button**



Add New Button – Presents a Form that allows a New record to be added

**3.3.4.2. Modify Button**



Modify Button – Presents a Form that allows the details of the selected record to be Modified

**3.3.4.3. Print Preview Button**



Print Preview Button – Presents a preview of the current content of the Found List ready for printing. To complete the Print action, select Print from the File Menu

Alternately, to save the list to Excel choose the Export to Excel option.

**3.3.4.4. Print Preview to PDF Button**



PDF Preview Button – Presents a preview of the current content of the Found List as a PDF document ready for saving. To complete the Save action select Save from the File Menu

**3.3.4.5. Archive Button**



Archive Button – Causes the currently selected record to be Archived

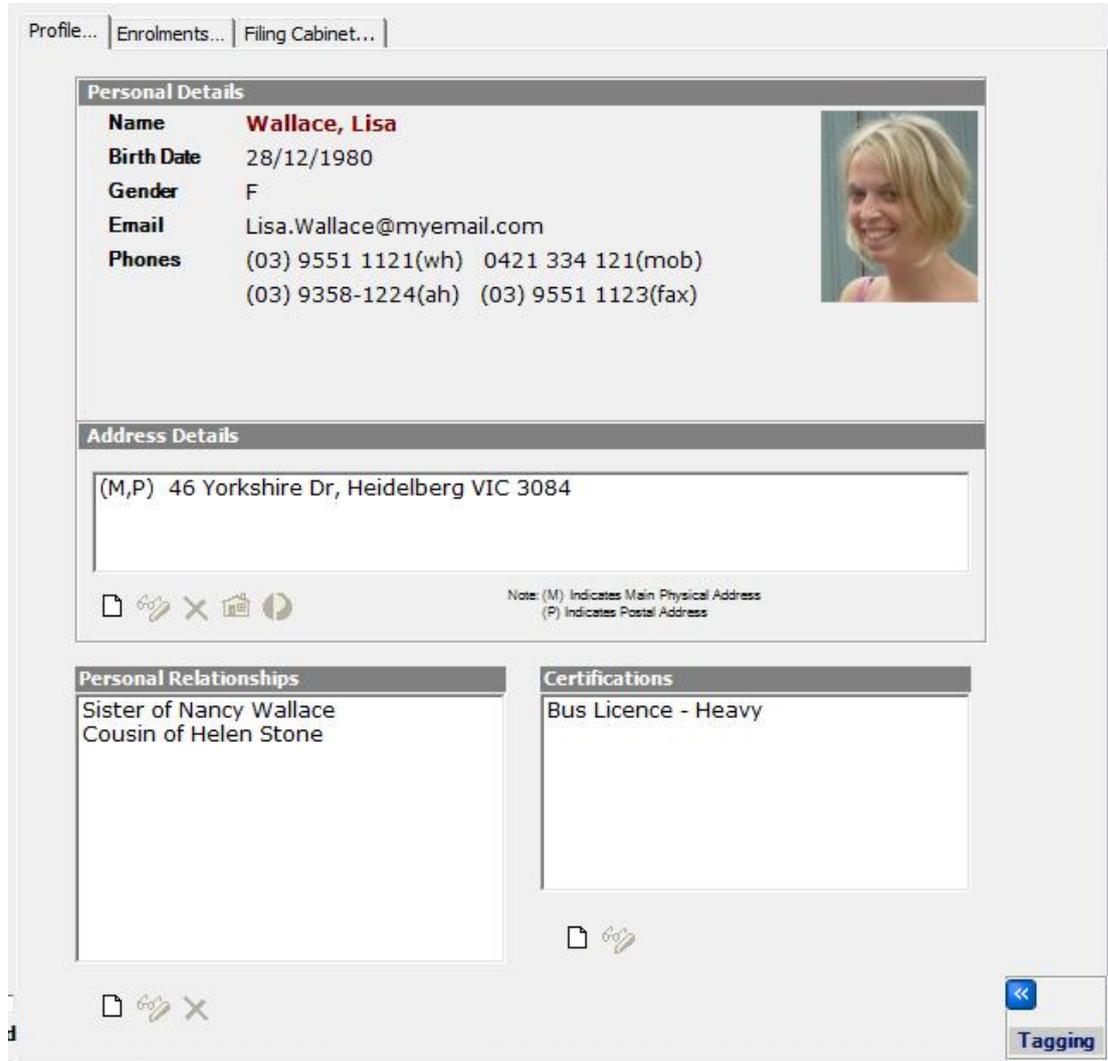
**3.3.4.6. Reinstate Button**



Reinstate Button – Causes the currently selected archived record to be reinstated. Note to view archived records you must tick the Show Archived [Show Filter](#)

### 3.3.5. Details Tab Control

The Details Tab Control is used to present relevant details pertaining to the selected entry in the Found List. The details are normally summarised or presented as lists which can be further explored, as illustrated below:



Refer to the sections below for further discussion on:

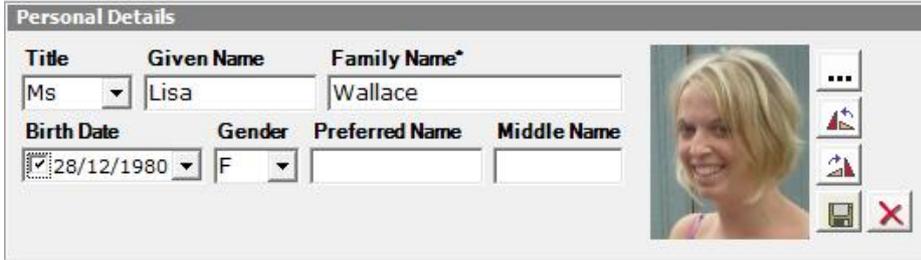
[Maintaining Addresses](#)

[Maintaining Personal Relationships](#)

Certifications

### 3.3.6. Data Entry Components

All Maintenance Forms carry a number of data entry fields, an example of which is illustrated below.



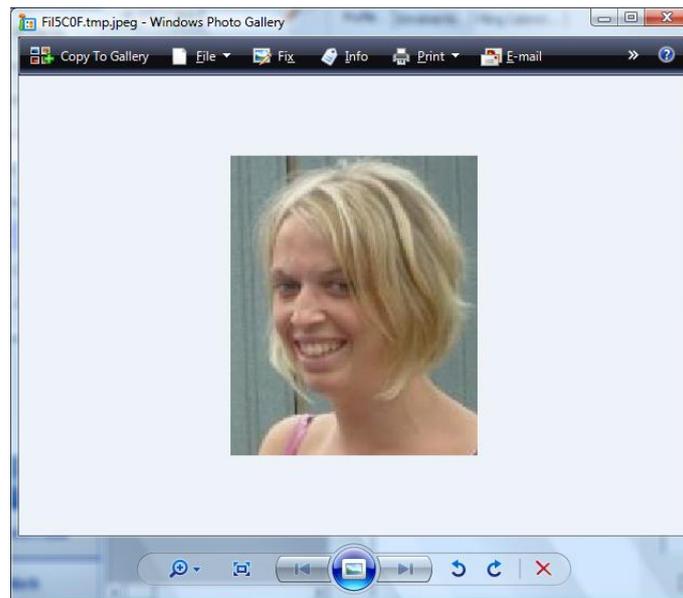
Title	Given Name	Family Name*	Image		
Ms	Lisa	Wallace			
Birth Date	Gender	Preferred Name	Middle Name		
28/12/1980	F				

To change any of the values in the data entry fields, the user must either move the cursor into the field by clicking it with the mouse, or navigate to the field using successive Tab key strokes.

Once the cursor is positioned at the desired field any required updates can be made.

To load a photograph into an Image entry component, click the  Locate Button. Loaded Images can be rotated  90 degrees left or  90 degrees right,  saved out to the File system using the Save Button, or deleted using the  Delete Button.

To see an enlarged view of any Image, Double Click the image and it will be presented in an Image viewer.



Note: Changes made via any of the Data Entry Components are not updated into the database until the Save button is clicked. If the Exit button is clicked without first clicking the Save button, a warning message will be presented and the user will be given to option to not proceed with the Exit, or to abandon the changes and Exit.

### 3.4. Exiting the Application

Finally, to exit the application completely, click the Close button on the top right hand side of the Application's main Panel.

