


01b – CYMS Quick Guide – Navigation Hints (10.3 - Updated May 2011)

USEFUL KEYS ON YOUR KEYBOARD

- F1** Opens CYMS / Rectrac **Help Screens via the internet**. Help is always current to the release you are running. In the past, Help was current to the day you ran the initial install.
Along with the field definitions and hints you can view samples of each report, print/preview/download embedded topic docs and hardware docs and has a direct email link to VSI support on every page!
- F8** Clears the contents of a date or number field. Click anywhere in the field, and then hit your F8 key.
- F9** Displays a picklist (after you have clicked in a green field )
- SHIFT** Lets you “multi-select” consecutive items in many CYMS picklists. Highlight the first item, hold down the Shift key, then highlight the last item – everything in between will be selected.
- CTRL** Lets you “multi-select” non-consecutive items in many CYMS picklists. Hold down the Control key and highlight the items you want. To “de-select” a highlighted item, hold down the Control key and click the item.
- CTRL-C** Copies information entered in a data field. Highlight the data, then hold down your Control key and the letter C to copy. This also works with dates! You can paste what you saved multiple times.
- CTRL-V** Pastes the information you copied. Tab or click into a data field (make sure the field is highlighted blue or your cursor is at the beginning of the field, then hold down your Control key and the letter V to paste in the saved data.
- ENTER** Selects an item you have highlighted on a picklist. Note: Double clicking on an item is an even faster way to “select” what you want from a picklist!
- ESC** Moves you backward one screen at a time until you reach the Main CYMS Menu
- TAB** Moves you to the next data field on a screen. This is much faster and easier than struggling to position your cursor in the correct place within a field. When you tab into a data field (especially a number or date field)


you are at the perfect location to start typing. Note: When a newly entered field is highlighted blue, just start typing – you do not need to “delete” the blue first!!

SHIFT TAB Moves you back one data field.

F5 Refreshes a picklist. After you select an item from a picklist, you are returned to the main list just below the item you selected. You cannot scroll to get back to the top of the list. Hit F5 to make the full list “reappear”!

USEFUL TRICKS WITH YOUR MOUSE

DOUBLE CLICK Selects an item on any picklist. This is much faster than highlighting the item and then moving your mouse down to click the “Select” button on the screen. This also works for selecting dates on a calendar. Double click on the date you want.

RIGHT CLICK Brings up a picklist (or a calendar) in a green field 
Note: The arrow at the right of the box does nothing! Put your cursor anywhere in the green box and right click.

SORT Most browser screens are now customizable. What is a browser screen? A browser is a list of records in a scrollable box. For instance, the first screen you see when you go into any File Maintenance program is a browser. When you go into a report the Browser Only option refers to a browser. In Global Sales, when you right click or choose F9 to see a picklist the screen that appears is a browser. These are all customizable in the sense that you can move columns, lock columns, change the sort, save different views, etc.

To learn more about customizing your browsers, choose F1 from any File Maintenance program and click the **Custom Column Sorting** link.

HINTS FOR WORKING WITH DATES IN CYMS

- Hint: **Right click** in the green Date field to make a calendar appear! You can also click anywhere in the green Date field and then hit your **F9** key to get the calendar.
- Hint: **Double-click** on a date in the calendar to select it.
- Hint: Using your **Tab** (instead of your mouse) to move into a date field puts you in exactly the right place to start typing. When you see the **blue highlight**, just start putting in your numbers.

- Hint: If you make a mistake on a date, click anywhere in the field and hit your **F8** key to clear the date.
- Hint: If you prefer to type in a date, you can also use some shortcuts:
 - For dates in the current year, you do not need to type in the year. For single-digit months, you do not need to put in the zero.
(Typing **2/2** and hitting enter will give you **02/02/20xx** – where **xx** equals the current year)
 - For future years, you only need to type in the **last two year digits**
(Typing **3/12/08** and hitting enter will give you **03/12/2008**)
- Hint: To copy a date, highlight it – then hold down the **CTRL** key and hit the **C** key. To paste the date into another field, tab or click into the new Date field and hit **CTRL-V**. The date will be saved in a buffer and be able to be reused again and again (until you save something else).

ON SCREEN NAVIGATION

MAIN MENU - FUNCTION BUTTONS

The Function buttons define the key processes in CYMS and control what options you see on your pull down menus:

Files	File maintenance -- setting up or changing data
Inquiry	Lookup only – you can't change anything here!
Daily	Routine operational processes – taking payments, swiping in children, issuing passes, enrolling in classes, etc.
Period End	Closeout procedures – end of day, month, year, purges, etc.
Reports	Hundreds of ways to print and/or view your data!
Utilities	Things like conversions and fix-it programs reside here. These menu items are usually reserved for your system administrators

MAIN MENU - MENU BAR

The words in the grey bar at the top of the Main Menu screen (**Function, Global, Activity, Facility, CYS, etc**) represent the different topical “modules” in CYMS.

Used in conjunction with the Function Buttons, you have access to a wide range of operational procedures.

Exercise – Click on File Maintenance and then CYS. Then click on Inquiry and CYS. See how the menu items change?

Depending on security levels and regular operational duties – different Menu items may or may not be accessible to different users.

MAIN MENU - HOT BUTTONS

The brightly colored buttons in the middle portion of the screen give you “quick access” to the most commonly performed procedures. It doesn’t matter which Function button is highlighted – when you use a Hot Button you totally bypass the Function buttons and go straight to the procedure.

Users are linked to Hot Button menus based on their job requirements:

- Manager menus will look different than Clerk menus and look different than Trainer menus, etc.

SUB MENUS - HOT BUTTONS

In 10.1 and 10.2 you were limited to a Main Menu with Hot Buttons and when you pressed F12 you were presented with a Hot Key Menu that also had Hot Buttons. For users with many hats it was difficult to keep the menus functional while still maintaining a sense of order.

In 10.3 F12 is no longer a valid option but you are allowed to have Sub Menus which essentially allows you to have several ‘Main’ Menus with Hot Buttons.

For instance, a Clerk might have a Home screen with programs like Global Sales and Visit processing and Current Attendance, etc. Then they might have a sub menu for all things Hourly (Hourly Reservations, Cancel/Change, Reservation Inquiry, Hourly Reports, etc). Then another menu all things for End of Shift related and another for Reports, etc.

MAIN MENU/SUB MENUS - LOGIN AS A NEW USER BUTTON UNDER FUNC MENU

Under **Func** (top left corner of any main menu or sub menu) there is an option to **Login As New User**. For security reasons, you should ALWAYS click this button when you end your shift or when you leave the computer for an extended period of time. This forces the next user to sign in with his/her own User ID. You want to protect your ID from any unauthorized transactions.

CAUTION: Never share your User ID or Password with anyone! CYMS keeps audit logs of all transactions by User ID. You don’t want to end up “responsible” for mistakes someone else made while they were logged in as you!

NAVIGATION BUTTONS

At the bottom of every screen (or sometimes even within sub-divisions of a screen) you will see several gray buttons giving you instructions on how to move around in CYMS.

You will see titles like: **Select, Next, Done, Exit, Payment, Cancel, Print, No Print, View Current, View Previous, etc.**

On Lookup / Browser Screens you will also see navigation buttons giving you different ways to search for information.

You will see titles giving you choices like: **Sponsor Name, Family Member, Home Phone, Address, Household ID Number, etc.**

Note: You should never use the “X” at the top right corner of the screen to back out of a process or to close down CYMS. Always use the EXIT buttons instead! Hint: You can use your ESCAPE key to move backwards from a process screen to the Main CYMS Menu screen – but you must use the EXIT button to close down your CYMS at the end of the day!

Note: You should never use CTRL-ALT-DEL or turn the computer off in the middle of a CYMS process. This can cause serious problems with your financial records. Always complete the process and then use the proper buttons to navigate your way out of CYMS before you shut down!

If your computer freezes up in the middle of a process, please make a written note of the process you were trying to complete, write down any message that may be on screen and contact your local system administrator (or call the CYMS help line if your administrator is not available).

WORKING WITH CYMS BROWSERS (LOOKUP SCREENS, FILE MAINTENANCE SCREENS, REPORT SCREENS, ETC)

A browser is a list of records in a scrollable box. The hints below can be used with all browsers in CYMS.

- When searching for a household to work with you can narrow down the browser list from the initial **Lookup Screen**.

The screenshot shows a software interface titled "Global Sales Household Selection". At the top, there is a blue header bar with the title. Below the header, there is a "Lookup" field with the text "messier." entered. Underneath the field, there are several buttons arranged in a grid. The buttons are: "Sponsor Name", "Secondary Name", "H/H ID Number", "Home Phone", "Work Phone", "Cell Phone", "Family Member", "Household Email", "Organization Name", "Address", "New Household", "Print Last Rcpt", and "Exit".

- If I am trying to find John Messier in my Household browser listing, I can type all or part of the name in the **Lookup** field.

- o I typed in: messier,j
 - o Note1: Capital letters do not matter here
 - o Note2: Do not leave a space between the comma and the first name or first initial
- When I hit my **Enter** key CYMS takes me to the name that comes closest to the data I typed in.

Family Member Listing									
Last Name	First Name	Birthdate	Gender	Primary Guardian	Res	Grade	Status	Cell Phone	Email Address
Messier	Jason		Female	Jason Messier	Yes	0.00	Active	(802)555-6379	
Messier	John		Female	John Messier	Yes	0.00	Active	(802)555-3133	
Messier	Kathy		Male	John Messier	Yes	0.00	Active	(802)555-2437	
Messier	Liam	08/24/2005	Male	John Messier	Yes	0.00	Active	(802)555-4486	
Messier	No		Male	Jason Messier	Yes	0.00	Active	(802)555-8120	
Metheney	Shauna		Male	Shauna Metheney	Yes	0.00	Active	(802)555-6598	
Metheney	Tamika		Female	Shauna Metheney	Yes	0.00	Active	(802)555-9747	
Mette	Joey		Male	David Mette	Yes	0.00	Active	(802)555-8081	
Metz	Jaquashia	03/06/1992	Female	Danette Wiltshire	Yes	0.00	Active	(802)555-3675	
Metzgar	Rebecca		Female	Edwin Metzgar	Yes	0.00	Active	(802)555-9217	
Metzger	Michael		Male	Michael Metzger	Yes	0.00	Active	(802)555-6272	
Metzger	Monica		Female	Michael Metzger	Yes	0.00	Active	(802)555-0679	
Metzger-Morris	Jeremy		Female	Jeremy Metzger-Morris	Yes	0.00	Active	(802)555-6528	
Metzler	Joseph		Male	Joseph Metzler	Yes	0.00	Active	(802)555-4729	
Meyer	Jennifer		Female	John Meyer	Yes	0.00	Active	(802)555-5079	
Meyer	John		Male	John Meyer	Yes	0.00	Active	(802)555-1598	
Meyer	Joyce		Female	Daniel Meyer	Yes	0.00	Active	(802)555-6442	
Meyer	Melanie	06/17/2005	Female	Daniel Meyer	Yes	0.00	Active	(802)555-5632	
Meyer	Unborn	05/14/1990	Female	John Meyer	Yes	10.00	Active	(802)555-7183	
Meyer	Vanessa		Female	George Meyer	Yes	0.00	Active	(802)555-3399	
Meyers	Jasmine	02/25/2005	Female	Ethan Meyers	Yes	0.00	Active	(802)555-8288	
Meyers	Joseph		Male	Joseph Meyers	Yes	0.00	Active	(802)555-6518	
Meyers	Jules	03/05/2004	Male	Ethan Meyers	Yes	0.00	Active	(802)555-3078	

Household ==> Jason Messier Current Bal: 100.00 Previous Bal: 0.00

Select Update HH Mar/ New HH Auto New HH Details <<Name Lookup

- If you can't find the name you were looking for, you might have gone too far or made a typing mistake – just hit your F5 key to refresh the screen. This will take you to the top of the listing.

Family Member Listing									
Last Name	First Name	Birthdate	Gender	Primary Guardian	Res	Grade	Status	Cell Phone	Email Address
Aaron-Dixon	Jeanne	01/29/2002	Female	Christopher Dixon	Yes	0.00	Active	(802)555-3229	
Abalos	Angela		Female	Timothy Abalos	Yes	0.00	Active	(802)555-7115	
Abalos	Colby	08/16/2006	Male	Timothy Abalos	Yes	0.00	Active	(802)555-9721	
Abalos	Savion	08/25/2004	Male	Timothy Abalos	Yes	0.00	Active	(802)555-4483	
Abalos	Timothy		Male	Timothy Abalos	Yes	0.00	Active	(802)555-5167	
Abbas	Alexander	09/03/1999	Male	Carol Abbas	Yes	4.00	Active	(802)555-3819	
Abbas	Carol		Female	Carol Abbas	Yes	0.00	Active	(802)555-0139	
Abbas	Gabrielle	01/06/2003	Female	Carol Abbas	Yes	0.00	Active	(802)555-7955	
Abbas	No		Female	Carol Abbas	Yes	0.00	Active		
Abbott	Amber		Female	Pharoah Abbott	Yes	0.00	Active	(802)555-0413	
Abbott	Antonio	08/21/1998	Male	Jeremy Abbott	Yes	1.00	Active	(802)555-2406	
Abbott	Jayden	12/23/1993	Male	Jerord Mancha	Yes	8.00	Active	(802)555-5781	
Abbott	Jeremy		Male	Jeremy Abbott	Yes	0.00	Active	(802)555-9146	
Abbott	Jessica		Female	Jeremy Abbott	Yes	0.00	Active	(802)555-5071	
Abbott	Pharoah		Male	Pharoah Abbott	Yes	0.00	Active	(802)555-0218	
Abdellatah	Annabelle		Female	Gregory L. Abdellatah	Yes	0.00	Active	(802)555-7524	
Abdellatah	Gregory L.		Male	Gregory L. Abdellatah	Yes	0.00	Active	(802)555-3200	
Abdellatah	Timothy	04/16/1996	Male	Gregory L. Abdellatah	Yes	3.00	Active	(802)555-6917	
Abdul	James		Male	James Abdul	Yes	0.00	Active	(802)555-3980	
Abdul	Marvin	12/26/2001	Male	James Abdul	Yes	0.00	Active	(802)555-2476	
Abdul	Tina		Female	James Abdul	Yes	0.00	Active	(802)555-0319	
Abdullah	Davin		Male	Davin Abdullah	Yes	0.00	Inactive	(802)555-6762	
Abdullah	Jimmy		Female	Rowdy Abdullah	Yes	0.00	Active	(802)555-2362	

Household ==> Christopher Dixon Current Bal: 224.00 Previous Bal: 0.00

Select Update HH Mar/ New HH Auto New HH Details <<Name Lookup

- To begin your search again, simply click on the column heading you wish to search by (for instance, **Last Name**) and start typing the last name of the person you are trying to find.

- As you type, the list will be moved to the first occurrence of your letter sequence. For instance, if you type 'm' the list will move to the first last name that begins with the letter 'm'. If you type 'messier' the list will move to the first person in the database with a last name of messier.

Family Member Listing									
Last Name	First Name	Birthdate	Gender	Primary Guardian	Res	Grade	Status	Cell Phone	Email Address
Messier	Christopher		Male	Jason Messier	Yes	0.00	Active	(802)555-0787	
Messier	Jason		Female	Jason Messier	Yes	0.00	Active	(802)555-6379	
Messier	John		Female	John Messier	Yes	0.00	Active	(802)555-3133	
Messier	Kathy		Male	John Messier	Yes	0.00	Active	(802)555-2437	
Messier	Liam	08/24/2005	Male	John Messier	Yes	0.00	Active	(802)555-4486	
Messier	No		Male	Jason Messier	Yes	0.00	Active	(802)555-8120	
Metheney	Efrain III	06/26/2006	Male	Shauna Metheney	Yes	0.00	Active	(802)555-5641	
Metheney	Shauna		Male	Shauna Metheney	Yes	0.00	Active	(802)555-6598	
Metheney	Tamika		Female	Shauna Metheney	Yes	0.00	Active	(802)555-9747	
Mette	Abigail	11/15/2001	Female	David Mette	Yes	0.50	Active	(802)555-7344	
Mette	Antonio	01/06/2006	Male	David Mette	Yes	0.00	Active	(802)555-6811	
Mette	David		Male	David Mette	Yes	0.00	Active	(802)555-8874	
Mette	Joey		Male	David Mette	Yes	0.00	Active	(802)555-8081	
Metz	Jaquashia	03/06/1992	Female	Danette Wilshire	Yes	0.00	Active	(802)555-3675	
Metzgar	Catherine	10/07/1993	Female	Edwin Metzgar	Yes	0.00	Active	(802)555-8842	
Metzgar	Edwin		Male	Edwin Metzgar	Yes	0.00	Active	(802)555-9450	
Metzgar	Rebecca		Female	Edwin Metzgar	Yes	0.00	Active	(802)555-9217	
Metzger	Andre'	08/11/2002	Male	Michael Metzger	Yes	0.00	Active	(802)555-5334	
Metzger	Haven	07/23/2000	Female	Jeremy Metzger-Morris	Yes	2.00	Active	(802)555-8053	
Metzger	Michael		Male	Michael Metzger	Yes	0.00	Active	(802)555-6272	
Metzger	Monica		Female	Michael Metzger	Yes	0.00	Active	(802)555-0679	
Metzger-Morris	Jeremy		Female	Jeremy Metzger-Morris	Yes	0.00	Active	(802)555-6528	
Metzler	Gwen		Female	Joseph Metzler	Yes	0.00	Active	(802)555-0898	

Household ==> Jason Messier Current Bal: 100.00 Previous Bal: 0.00

- Remember, if you mistype the name you can always press the F5 key to begin again from the top. Also, most browsers will allow you to search or filter your lists in multiple ways.

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