



# System Setup



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Springbrook Software

[www.springbrooksoftware.com](http://www.springbrooksoftware.com)

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# Application Wide


## Springbrook Dashboard

### Summary

The Springbrook Dashboard is used to display a customizable collection of dashboard components that provide information from and access to different elements of the application. Components can be added, removed and arranged by each user.

### Step by Step



#### 1 Launch the Springbrook Dashboard.



- The Springbrook Dashboard can be launched in two ways:
  - Click the System Tray icon  and select Open Dashboard.
  - Click the Dashboard menu item in the Dashboard palette (SS> Dashboard> Dashboard).
- The Springbrook Dashboard can also be configured to launch by default when a user clicks the shortcut to the Springbrook Enterprise Application. This option is enabled by selecting Dashboard or Dashboard and Desktop (if you would like both

the Dashboard and the standard application to open simultaneously) from the Default Form field on the User Preferences window.

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## 2 Add Components to the Dashboard.

- Click the Add Components icon  to launch the Dashboard Components window.
    - The Dashboard Components window will display all of the dashboard components that are available for the current user.
      - Dashboard components are created and configured on the Component Maintenance window (SS> Dashboard> Component).
      - Some dashboard components can be configured directly from the component itself. Once a component has been added to the dashboard, click the Component Settings icon  in the top right corner to open the Component Settings pop-up window and update the filtering options for that component.
        - If the component has been locked on the Component Maintenance window, the filters will be disabled and cannot be configured from the Dashboard.
        - The Component Settings pop-up window will also display the refresh and data generation frequency of the component.
    - Add the **Favorites** component.
      - The Favorites component is used to add links to the dashboard that directly launch windows from within the application.
-

- To add a favorite to the component, open the application window you would like to add and click the Favorites icon . Once clicked, the icon will turn yellow  and a link will be added to the dashboard component.
  - This component does not require an individual maintenance window.
  - Add the **My Tasks** component.
    - The My Tasks component is used to display the tasks assigned to the current user. This component will automatically refresh every five minutes.
  - Add the **Out of Office** component.
    - The Out of Office component is used to display a list of employees and their out of office status. Included employees can be filtered by department.
  - Add the **Remaining Budget** component.
    - The Remaining Budget component is used to display the percentage of the budget expended for budgetable accounts. Included accounts can be filtered by fund and department.
  - Add the **Revenue by Account Type** component.
    - The Revenue by Account Type component is a pie chart component that displays aggregate revenue balances by account type. This component can be filtered by fiscal year, fund and department.
  - Add the **Revenue vs. Expense** component.
    - The Revenue vs. Expense component is used to display activity in revenue and expense accounts for a range of fiscal periods summarized by
-


fund.

- Add the **RSS Feeds** component.
    - The RSS Feed component is used to display a user-defined RSS feed on the dashboard.
  - Add the **Section Type Balance** component.
    - The Section Type Balance component is a line graph component that displays an aggregate balance across GL accounts in specified section types. The graph will display one trend line for the past year (ending with the previous month) and one trend line for the previous year for comparison.
  - Add the **Service Requests by Code** component.
    - The Service Requests by Code component is a bar graph component that displays the number of UB service requests created in the current month or current year. These service requests are filtered by service request code.
  - Add the **Service Requests by Week** component.
    - The Service Requests by Week component is used to display the total number of service requests by type for each week that falls within the specified date range.
  - Add the **Supervisor Timesheet Hours** component.
    - The Supervisor Timesheet Hours component is used to display the current number of hours entered by a supervisor's employees for the current pay period. This component will only display data for a dashboard user set up as a supervisor in the application.
-



- Add the **UB Payments** component.
    - The UB Payments component is used to display UB payments by month. Displayed payments can be filtered by date and Service Type.
  - Add the **WO Queue** component.
    - The WO Queue component is used to display all the work orders assigned to a queue or role the current user is associated with. These work orders can also be filtered by status.
  - Click the Delete Component icon **✕** to remove the component from the dashboard.
- 

### 3 Arrange the dashboard components.

- Once the dashboard is populated with components, those components can be arranged by grabbing the top of a component and dragging it to the desired area of the dashboard. When the component is held over one of the directional Dashboard Location icons , the system will generate a preview of where that component will be arranged if placed there.
  - The four Dashboard Location icons around the edges of the dashboard are used to place the component along the edge, while the five in the center are used to place the dashboard within the selected section.
  - A dashboard component can also be placed outside the dashboard by dragging the component away from the dashboard and releasing it.
-

# SS> Dashboard> Component

## My Tasks Component


### Summary




The My Tasks Dashboard Component is used to display the tasks assigned to the current user. This component will automatically refresh every five minutes. This is a Premium Component.

These tasks are also displayed on the My Tasks window of the application.

### Step by Step

1 Open the Component Selection window.

- The **Component Selection** window (SS> Dashboard> Component) displays all the available dashboard components created in the application.
- Enter information in the fields in the Search Criteria section of the window and click the Refresh icon  to filter the components that will display in the window.

- Highlight a component and click the Delete icon  or press DELETE to delete the selected component.
    - If the selected component is installed on an employee's dashboard, you will need to confirm that the component should be deleted and removed from any dashboard on which it is installed.
  - Highlight a component and click the Modify icon  or press ENTER to edit the selected component.
  - Click the Create icon  or press INSERT to create a new dashboard component. This will open the **Component Maintenance** window.
- 


## 2 Configure the new dashboard component.

- Select My Tasks from the **Type** drop-down menu.
  - Enter a **Name** for the new dashboard component.
    - This name will appear on the Dashboard Components Selection window when a user adds a new component to their dashboard, so be as descriptive as possible.
    - This field is limited to 32 alphanumeric characters. Once the component is saved the name cannot be edited.
  - Enter a **User Group Code** or click the field label to select one from a list.
    - User groups allow you to create menu and database security at a group level and then assign that security to users. Only those users that are part of the
-

selected User Group will have access to the new dashboard component.

- User groups are created and maintained on the User Group Maintenance window (SS> Security> User Group).
  - The **Schedule**, **Start Date** and **Last Run** fields will be disabled as they are not used with the Out of Office component.
- 

### 3 Set the Component Filters.

- The Component Filters section is used to set filters for the dashboard component.
  - The **Show Read** tab is used to specify whether or not the component will display tasks flagged as read.
    - The **Locked** toggle is used to lock the filters. Locked filters can be updated on the Component Maintenance window but cannot be updated from the dashboard itself. If the Locked toggle is not checked, dashboard users will be able to update component filters from the Component Settings window on the dashboard component itself.
    - Every component filter below can be locked as well.
  - The **Show Expired** tab is used to specify whether or not the component will display tasks flagged as expired.
  - Click the Save icon  to save the new dashboard component.
-

# SS> Dashboard> Component



## Out of Office Component



### Summary

The Out of Office Dashboard Component is used to display a list of employees and their out of office status. Included employees can be filtered by department.

### Step by Step

1 Open the Component Selection window.


- The **Component Selection** window (SS> Dashboard> Component) displays all the available dashboard components created in the application.
- Enter information in the fields in the Search Criteria section of the window and click the Refresh icon  to filter the components that will display in the window.
- Highlight a component and click the Delete icon  or press DELETE to delete the selected component.
  - If the selected component is installed on an employee's dashboard, you will need to confirm that the component should be deleted and removed from any dashboard on which it is installed.

- Highlight a component and click the Modify icon  or press ENTER to edit the selected component.
  - Click the Create icon  or press INSERT to create a new dashboard component. This will open the **Component Maintenance** window.
- 

## 2 Configure the new dashboard component.

- Select Out of Office from the **Type** drop-down menu.
  - Enter a **Name** for the new dashboard component.
    - This name will appear on the Dashboard Components Selection window when a user adds a new component to their dashboard, so be as descriptive as possible.
    - This field is limited to 32 alphanumeric characters. Once the component is saved the name cannot be edited.
  - Enter a **User Group Code** or click the field label to select one from a list.
    - User groups allow you to create menu and database security at a group level and then assign that security to users. Only those users that are part of the selected User Group will have access to the new dashboard component.
    - User groups are created and maintained on the User Group Maintenance window (SS> Security> User Group).
  - The **Schedule**, **Start Date** and **Last Run** fields will be disabled as they are not used with the Out of Office component.
-

### 3 Set the Component Filters.

- The Component Filters section is used to set filters for the dashboard component.
  - The **Department** tab is used to filter the included employees by department.
    - Departments are created and maintained on the Department Maintenance window (SS> Maintenance> Department).
    - Employees are added to departments on the Employee Maintenance window (PR> Maintenance> Employee> General tab> Department field).
    - The **Locked** toggle is used to lock the filters. Locked filters can be updated on the Component Maintenance window but cannot be updated from the dashboard itself. If the Locked toggle is not checked, dashboard users will be able to update component filters from the Component Settings window on the dashboard component itself.
    - Every component filter below can be locked as well.
  - The **Hide In Office** tab is used to specify how in office employees are displayed.
    - Select No to display both out of office and in office employees. Select Yes to only display those employees that are currently out of office.
    - Employees set their out of office status on the User Preferences window.
    - Employees can also be set to out of office status through the Out of Office Utility (SS> Utilities> Out of Office).
  - Click the Save icon  to save the new dashboard component.
-

# SS> Dashboard> Component



## Remaining Budget Component

### Summary



The Remaining Budget Dashboard Component is used to display the percentage of the budget expended for budgetable accounts. Percentage progress bars will display in green until the budget only has 25% remaining, yellow when the budget has between 24.99% and 0.01% remaining, and red once the remaining budget hits zero. Included accounts can be filtered by fund and department.

### Step by Step

1 Open the Component Selection window.

- The **Component Selection** window (SS> Dashboard> Component) displays all the available dashboard components created in the application.
- Enter information in the fields in the Search Criteria section of the window and click the Refresh icon  to filter the components that will display in the window.
- Highlight a component and click the Delete icon  or press DELETE to delete the selected component.



- If the selected component is installed on an employee's dashboard, you will need to confirm that the component should be deleted and removed from any dashboard on which it is installed.
  - Highlight a component and click the Modify icon  or press ENTER to edit the selected component.
  - Click the Create icon  or press INSERT to create a new dashboard component. This will open the **Component Maintenance** window.
- 


## 2 Configure the new dashboard component.

- Select Remaining Budget from the **Type** drop-down menu.
  - Enter a **Name** for the new dashboard component.
    - This name will appear on the Dashboard Components Selection window when a user adds a new component to their dashboard, so be as descriptive as possible.
    - This field is limited to 32 alphanumeric characters. Once the component is saved the name cannot be edited.
  - Enter a **User Group Code** or click the field label to select one from a list.
    - User groups allow you to create menu and database security at a group level and then assign that security to users. Only those users that are part of the selected User Group will have access to the new dashboard component.
-

- User groups are created and maintained on the User Group Maintenance window (SS> Security> User Group).
  - The **Schedule** field is used to specify the update frequency for the Remaining Budget component.
    - This schedule will determine how frequently the system generates the data that will be displayed in the dashboard component.
    - By default this component is set to update weekly, but the update schedule can be changed to monthly if desired.
  - The **Start Date** field is used to specify when the component data should first be updated.
    - The system will create a job on the job scheduler for the specified date. When the job is processed, relevant data for the year prior to the date will be generated for display in the dashboard component. This field will default to today's date.
    - Once the job is complete, a new job will be scheduled at every interval specified in the Schedule field above.
  - The **Last Run** field displays the date that the component was last updated.
- 

### 3 Set the Component Filters.

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- The Component Filters section is used to set filters for the dashboard component.
  - The **Fund** tab is used to filter the included budgetable accounts by fund.
    - When using a uniform chart of accounts, funds are created and maintained on the Section Maintenance window (GL> Maintenance> Section).
    - When not using a uniform chart of accounts, funds are created and maintained on the Account Header One Maintenance window (GL> Maintenance> Account Header One).
    - The **Locked** toggle is used to lock the filters. Locked filters can be updated on the Component Maintenance window but cannot be updated from the dashboard itself. If the Locked toggle is not checked, dashboard users will be able to update component filters from the Component Settings window on the dashboard component itself.
  - The **Department** tab is used to filter the included budgetable accounts by department.
    - Departments are created and maintained on the Department Maintenance window (SS> Maintenance> Department).
  - The **Include Uncommitted** tab is used to specify whether or not uncommitted journal entries will be included in component data.
  - Click the Save icon  to save the new dashboard component.
-

# SS> Dashboard> Component



## Revenue by Account Type Component

### Summary



The Revenue by Account Type component is a pie chart component that displays aggregate revenue balances by account type. This component can be filtered by fiscal year, fund and department.

### Step by Step

1 Open the Component Selection window.

- The **Component Selection** window (SS> Dashboard> Component) displays all the available dashboard components created in the application.
- Enter information in the fields in the Search Criteria section of the window and click the Refresh icon  to filter the components that will display in the window.
- Highlight a component and click the Delete icon  or press DELETE to delete the selected component.
  - If the selected component is installed on an employee's dashboard, you will need to confirm that the component should be deleted and removed from any

dashboard on which it is installed.

- Highlight a component and click the Modify icon  or press ENTER to edit the selected component.
  - Click the Create icon  or press INSERT to create a new dashboard component. This will open the **Component Maintenance** window.
- 

## 2 Configure the new dashboard component.


- Select Revenue by Account Type from the **Type** drop-down menu.
  - Enter a **Name** for the new dashboard component.
    - This name will appear on the Dashboard Components Selection window when a user adds a new component to their dashboard, so be as descriptive as possible.
    - This field is limited to 32 alphanumeric characters. Once the component is saved the name cannot be edited.
  - Enter a **User Group Code** or click the field label to select one from a list.
    - User groups allow you to create menu and database security at a group level and then assign that security to users. Only those users that are part of the selected User Group will have access to the new dashboard component.
    - User groups are created and maintained on the User Group Maintenance window (SS> Security> User Group).
-

- The **Schedule** field is used to specify the update frequency for the Revenue by Account Type component.
    - This schedule will determine how frequently the system generates the data that will be displayed in the dashboard component.
    - By default this component is set to update monthly, but the update schedule can be changed to weekly if desired.
  - The **Start Date** field is used to specify when the component data should first be updated.
    - The system will create a job on the job scheduler for the specified date. When the job is processed, relevant data for the year prior to the date will be generated for display in the dashboard component. This field will default to today's date.
    - Once the job is complete, a new job will be scheduled at every interval specified in the Schedule field above.
  - The **Last Run** field displays the date that the component was last updated.
- 

### 3 Set the Component Filters.

- The Component Filters section is used to set filters for the dashboard components.
  - The **Fiscal Year** tab is used to specify the fiscal year for the revenue data that will display in the dashboard component.
    - The **Locked** toggle is used to lock the filters. Locked filters can be updated on the Component Maintenance window but cannot be updated from the
-

dashboard itself. If the Locked toggle is not checked, dashboard users will be able to update component filters from the Component Settings window on the dashboard component itself.

- Every component filter below can be locked as well.
  - The **Fund** tab is used to filter the included accounts by fund.
    - When using a uniform chart of accounts, funds are created and maintained on the Section Maintenance window (GL> Maintenance> Section).
    - When not using a uniform chart of accounts, funds are created and maintained on the Account Header One Maintenance window (GL> Maintenance> Account Header One).
  - The **Department** tab is used to filter the included accounts by department.
    - Departments are created and maintained on the Department Maintenance window (SS> Maintenance> Department).
  - Click the Save icon  to save the new dashboard component.
-

# SS> Dashboard> Component



## Revenue vs. Expense Component

### Summary



The Revenue vs. Expense Dashboard Component is used to display activity in revenue and expense accounts for a range of fiscal periods summarized by fund.

### Step by Step

1 Open the Component Selection window.

- The **Component Selection** window (SS> Dashboard> Component) displays all the available dashboard components created in the application.
- Enter information in the fields in the Search Criteria section of the window and click the Refresh icon  to filter the components that will display in the window.
- Highlight a component and click the Delete icon  or press DELETE to delete the selected component.
  - If the selected component is installed on an employee's dashboard, you will need to confirm that the component should be deleted and removed from any dashboard on which it is installed.



- Highlight a component and click the Modify icon  or press ENTER to edit the selected component.
  - Click the Create icon  or press INSERT to create a new dashboard component. This will open the **Component Maintenance** window.
- 

## 2 Configure the new dashboard component.


- Select Revenue vs Expense from the **Type** drop-down menu.
  - Enter a **Name** for the new dashboard component.
    - This name will appear on the Dashboard Components Selection window when a user adds a new component to their dashboard, so be as descriptive as possible.
    - This field is limited to 32 alphanumeric characters. Once the component is saved the name cannot be edited.
  - Enter a **User Group Code** or click the field label to select one from a list.
    - User groups allow you to create menu and database security at a group level and then assign that security to users. Only those users that are part of the selected User Group will have access to the new dashboard component.
    - User groups are created and maintained on the User Group Maintenance window (SS> Security> User Group).
  - The **Schedule** field is used to specify the update frequency for the Revenue vs Expense component.
-

- This schedule will determine how frequently the system generates the data that will be displayed in the dashboard component.
  - By default this component is set to update daily, but the update schedule can be changed to weekly or monthly if desired.
  - The **Start Date** field is used to specify when the component data should first be updated.
    - The system will create a job on the job scheduler for the specified date. When the job is processed, relevant data for the year prior to the date will be generated for display in the dashboard component. This field will default to today's date.
    - Once the job is complete, a new job will be scheduled at every interval specified in the Schedule field above.
  - The **Last Run** field displays the date that the component was last updated.
- 

### 3 Set the Component Filters.

- The Component Filters section is used to set filters for the dashboard components.
  - The **Funds** tab is used to filter the activity that will display in the dashboard component by fund.
    - The **Locked** toggle is used to lock the filters. Locked filters can be updated on the Component Maintenance window but cannot be updated from the dashboard itself. If the Locked toggle is not checked, dashboard users will be able to update component filters from the Component Settings window on the
-

dashboard component itself.

- Every component filter below can be locked as well.
  - The **Period From** and **Period To** tabs are used to filter the activity that will display in the dashboard component by period range.
  - The **Include Uncommitted** tab is used to specify whether or not uncommitted journal entries will be included in component activity data.
  - Click the Save icon  to save the new dashboard component.
-

# SS> Dashboard> Component



## RSS Feed Component



### Summary

The RSS Feed Dashboard Component is used to display a user-defined RSS feed on the dashboard.

### Step by Step

1 Open the Component Selection window.


- The **Component Selection** window (SS> Dashboard> Component) displays all the available dashboard components created in the application.
- Enter information in the fields in the Search Criteria section of the window and click the Refresh icon  to filter the components that will display in the window.
- Highlight a component and click the Delete icon  or press DELETE to delete the selected component.
  - If the selected component is installed on an employee's dashboard, you will need to confirm that the component should be deleted and removed from any dashboard on which it is installed.

- Highlight a component and click the Modify icon  or press ENTER to edit the selected component.
  - Click the Create icon  or press INSERT to create a new dashboard component. This will open the **Component Maintenance** window.
- 

## 2 Configure the new dashboard component.

- Select RSS Feed from the **Type** drop-down menu.
  - Enter a **Name** for the new dashboard component.
    - This name will appear on the Dashboard Components Selection window when a user adds a new component to their dashboard, so be as descriptive as possible.
    - This field is limited to 32 alphanumeric characters. Once the component is saved the name cannot be edited.
  - Enter a **User Group Code** or click the field label to select one from a list.
    - User groups allow you to create menu and database security at a group level and then assign that security to users. Only those users that are part of the selected User Group will have access to the new dashboard component.
    - User groups are created and maintained on the User Group Maintenance window (SS> Security> User Group).
  - The **Schedule**, **Start Date** and **Last Run** fields will be disabled as they are not used with the RSS Feed component.
-

### 3 Set the Component Filters.

- The Component Filters section is used to set filters for the dashboard component.
  - The **URL** tab is used to enter the URL address of the RSS feed that will be displayed in the component. The URL format for RSS feeds can differ, but generally appears as `http://website.com/feed/`. Refer to the website you would like to follow for exact URL formatting.
  - Click the Save icon  to save the new dashboard component.
-

# SS> Dashboard> Component



## Section Type Balance Component



### Summary

The Section Type Balance component is a line graph component that displays an aggregate balance across GL accounts in specified section types. The graph will display one trend line for the past year (ending with the previous month) and one trend line for the previous year for comparison.

### Step by Step

1 Open the Component Selection window.

- The **Component Selection** window (SS> Dashboard> Component) displays all the available dashboard components created in the application.
- Enter information in the fields in the Search Criteria section of the window and click the Refresh icon  to filter the components that will display in the window.
- Highlight a component and click the Delete icon  or press DELETE to delete the selected component.

- If the selected component is installed on an employee's dashboard, you will need to confirm that the component should be deleted and removed from any dashboard on which it is installed.
  - Highlight a component and click the Modify icon  or press ENTER to edit the selected component.
  - Click the Create icon  or press INSERT to create a new dashboard component. This will open the **Component Maintenance** window.
- 

## 2 Configure the new dashboard component.


- Select Section Type Balance from the **Type** drop-down menu.
  - Enter a **Name** for the new dashboard component.
    - This name will appear on the Dashboard Components Selection window when a user adds a new component to their dashboard, so be as descriptive as possible.
    - This field is limited to 32 alphanumeric characters. Once the component is saved the name cannot be edited.
  - Enter a **User Group Code** or click the field label to select one from a list.
    - User groups allow you to create menu and database security at a group level and then assign that security to users. Only those users that are part of the selected User Group will have access to the new dashboard component.
-



- User groups are created and maintained on the User Group Maintenance window (SS> Security> User Group).
  - The **Schedule** field is used to specify the update frequency for the Section Type Balance component.
    - This schedule will determine how frequently the system generates the data that will be displayed in the dashboard component.
    - This component updates monthly.
  - The **Start Date** field is used to specify when the component data should first be updated.
    - The system will create a job on the job scheduler for the specified date. When the job is processed, relevant data for the year prior to the date will be generated for display in the dashboard component. This field will default to today's date.
    - Once the job is complete, a new job will be scheduled at every interval specified in the Schedule field above.
  - The **Last Run** field displays the date that the component was last updated.
- 

### 3 Set the Component Filters.

- The Component Filters section is used to set filters for the dashboard components.
  - The **Component Title** tab is used to specify the title that will display above the component graph. This title is limited to 128 alphanumeric characters.
-

- The **Locked** toggle is used to lock the filters. Locked filters can be updated on the Component Maintenance window but cannot be updated from the dashboard itself. If the Locked toggle is not checked, dashboard users will be able to update component filters from the Component Settings window on the dashboard component itself.
  - Every component filter below can be locked as well.
  - The **Account Section** tabs are used to specify which section types will be displayed on the component. Each Account Section tab can accommodate one section type.
    - Section types are groups of section headers and are maintained on the Section Type Maintenance window (GL> Maintenance> Section Type).
  - Click the Save icon  to save the new dashboard component.
-

# SS> Dashboard> Component



## Service Requests by Code Component

### Summary



The Service Requests by Code component is a bar graph component that displays the number of UB service requests created in the current month or current year. These service requests are filtered by service request code.

### Step by Step

1 Open the Component Selection window.

- The **Component Selection** window (SS> Dashboard> Component) displays all the available dashboard components created in the application.
- Enter information in the fields in the Search Criteria section of the window and click the Refresh icon  to filter the components that will display in the window.
- Highlight a component and click the Delete icon  or press DELETE to delete the selected component.
  - If the selected component is installed on an employee's dashboard, you will need to confirm that the component should be deleted and removed from any

dashboard on which it is installed.

- Highlight a component and click the Modify icon  or press ENTER to edit the selected component.
- Click the Create icon  or press INSERT to create a new dashboard component.

This will open the **Component Maintenance** window.

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## 2 Configure the new dashboard component.

- Select UB Service Requests from the **Type** drop-down menu.
  - Enter a **Name** for the new dashboard component.
    - This name will appear on the Dashboard Components Selection window when a user adds a new component to their dashboard, so be as descriptive as possible.
    - This field is limited to 32 alphanumeric characters. Once the component is saved the name cannot be edited.
  - Enter a **User Group Code** or click the field label to select one from a list.
    - User groups allow you to create menu and database security at a group level and then assign that security to users. Only those users that are part of the selected User Group will have access to the new dashboard component.
    - User groups are created and maintained on the User Group Maintenance window (SS> Security> User Group).
-

- The **Schedule** field is used to specify the update frequency for the UB Service Requests component.
    - This schedule will determine how frequently the system generates the data that will be displayed in the dashboard component.
    - By default this component is set to update daily, but the update schedule can be changed to weekly or monthly if desired.
  - The **Start Date** field is used to specify when the component data should first be updated.
    - The system will create a job on the job scheduler for the specified date. When the job is processed, relevant data for the year prior to the date will be generated for display in the dashboard component. This field will default to today's date.
    - Once the job is complete, a new job will be scheduled at every interval specified in the Schedule field above.
  - The **Last Run** field displays the date that the component was last updated.
- 

### 3 Set the Component Filters.

- The Component Filters section is used to set filters for the dashboard components.
  - The **Date Range** tab is used to specify the date range for the service requests that will display in the dashboard component. The graph can display service requests created in the current month to date or the current year to date.
-

- The **Locked** toggle is used to lock the filters. Locked filters can be updated on the Component Maintenance window but cannot be updated from the dashboard itself. If the Locked toggle is not checked, dashboard users will be able to update component filters from the Component Settings window on the dashboard component itself.
  - Every component filter below can be locked as well.
  - The **Request Codes** tab is used to specify which UB service request codes will be displayed on the component. Each service request code must be separated by a comma when entering more than one code.
    - You must enter the UB service request code name exactly as it appears on the UB Service Request Code Maintenance window (UB> Maintenance> Service Request Code> Request Code field).
  - Click the Save icon  to save the new dashboard component.
-

# SS> Dashboard> Component



## Service Requests by Week Component



### Summary

The Service Requests by Week component is used to display the total number of service requests by type for each week that falls within the specified date range.

### Step by Step

1 Open the Component Selection window.

- The **Component Selection** window (SS> Dashboard> Component) displays all the available dashboard components created in the application.
- Enter information in the fields in the Search Criteria section of the window and click the Refresh icon  to filter the components that will display in the window.
- Highlight a component and click the Delete icon  or press DELETE to delete the selected component.
  - If the selected component is installed on an employee's dashboard, you will need to confirm that the component should be deleted and removed from any dashboard on which it is installed.

- Highlight a component and click the Modify icon  or press ENTER to edit the selected component.
  - Click the Create icon  or press INSERT to create a new dashboard component. This will open the **Component Maintenance** window.
- 

## 2 Configure the new dashboard component.

- Select Service Requests by Week from the **Type** drop-down menu.
  - Enter a **Name** for the new dashboard component.
    - This name will appear on the Dashboard Components Selection window when a user adds a new component to their dashboard, so be as descriptive as possible.
    - This field is limited to 32 alphanumeric characters. Once the component is saved the name cannot be edited.
  - Enter a **User Group Code** or click the field label to select one from a list.
    - User groups allow you to create menu and database security at a group level and then assign that security to users. Only those users that are part of the selected User Group will have access to the new dashboard component.
    - User groups are created and maintained on the User Group Maintenance window (SS> Security> User Group).
  - The **Schedule** field is used to specify the update frequency for the Service Requests by Week component.
-




- This schedule will determine how frequently the system generates the data that will be displayed in the dashboard component.
  - By default this component is set to update weekly, but the update schedule can be changed to monthly if desired.
  - The **Start Date** field is used to specify when the component data should first be updated.
    - The system will create a job on the job scheduler for the specified date. When the job is processed, relevant data for the year prior to the date will be generated for display in the dashboard component. This field will default to today's date.
    - Once the job is complete, a new job will be scheduled at every interval specified in the Schedule field above.
  - The **Last Run** field displays the date that the component was last updated.
- 

### 3 Set the Component Filters.

- The Component Filters section is used to set filters for the dashboard component.
  - The **Begin Date** and **End Date** tabs are used to specify the date range for the service requests that will display in the dashboard component.
    - If the **Locked** toggle is not checked, users will be able to update these dates from the dashboard component itself.
  - The **Request Code 1** and **Request Code 2** tabs are used to filter the service requests that will display in the dashboard component by the associated service
-

request code.

- Service request codes are created and maintained on the Service Request Code Maintenance window (UB> Maintenance> Service Request Code).
  - Click the Save icon  to save the new dashboard component.
-

# SS> Dashboard> Component



## Supervisor Timesheet Hours Component

### Summary



The Supervisor Timesheet Hours component is used to display the current number of hours entered by a supervisor's employees for the current pay period. This component will only display data for a dashboard user set up as a supervisor in the application.

### Step by Step

1 Open the Component Selection window.

- The **Component Selection** window (SS> Dashboard> Component) displays all the available dashboard components created in the application.
- Enter information in the fields in the Search Criteria section of the window and click the Refresh icon  to filter the components that will display in the window.
- Highlight a component and click the Delete icon  or press DELETE to delete the selected component.
  - If the selected component is installed on an employee's dashboard, you will need to confirm that the component should be deleted and removed from any

dashboard on which it is installed.


- Highlight a component and click the Modify icon  or press ENTER to edit the selected component.
  - Click the Create icon  or press INSERT to create a new dashboard component. This will open the **Component Maintenance** window.
- 

## 2 Configure the new dashboard component.

- Select Supervisor Timesheet Hours from the **Type** drop-down menu.
  - Enter a **Name** for the new dashboard component.
    - This name will appear on the Dashboard Components Selection window when a user adds a new component to their dashboard, so be as descriptive as possible.
    - This field is limited to 32 alphanumeric characters. Once the component is saved the name cannot be edited.
  - Enter a **User Group Code** or click the field label to select one from a list.
    - User groups allow you to create menu and database security at a group level and then assign that security to users. Only those users that are part of the selected User Group will have access to the new dashboard component.
    - User groups are created and maintained on the User Group Maintenance window (SS> Security> User Group).
-

- The **Schedule** and **Start Date** fields will be disabled as they are not used with the Supervisor Timesheet Hours component.
  - The **Last Run** field displays the date that the component was last updated.
- 

### 3 Set the Component Filters.

- The Component Filters section is used to set filters for the dashboard component.
  - The **Supervisor** field is used to filter the employees displayed in the component by a specific supervisor.
    - The **Locked** toggle is used to lock the filters. Locked filters can be updated on the Component Maintenance window but cannot be updated from the dashboard itself. If the Locked toggle is not checked, dashboard users will be able to update component filters from the Component Settings window on the dashboard component itself.
  - Click the Save icon  to save the new dashboard component.
-

# SS> Dashboard> Component



## UB Payments Component



### Summary

The UB Payments component is used to display UB payments by month. Displayed payments can be filtered by date and Service Type.

### Step by Step

1 Open the Component Selection window.

- The **Component Selection** window (SS> Dashboard> Component) displays all the available dashboard components created in the application.
- Enter information in the fields in the Search Criteria section of the window and click the Refresh icon  to filter the components that will display in the window.
- Highlight a component and click the Delete icon  or press DELETE to delete the selected component.
  - If the selected component is installed on an employee's dashboard, you will need to confirm that the component should be deleted and removed from any dashboard on which it is installed.

- Highlight a component and click the Modify icon  or press ENTER to edit the selected component.
  - Click the Create icon  or press INSERT to create a new dashboard component. This will open the **Component Maintenance** window.
- 

## 2 Configure the new dashboard component.


- Select UB Payments from the **Type** drop-down menu.
  - Enter a **Name** for the new dashboard component.
    - This name will appear on the Dashboard Components Selection window when a user adds a new component to their dashboard, so be as descriptive as possible.
    - This field is limited to 32 alphanumeric characters. Once the component is saved the name cannot be edited.
  - Enter a **User Group Code** or click the field label to select one from a list.
    - User groups allow you to create menu and database security at a group level and then assign that security to users. Only those users that are part of the selected User Group will have access to the new dashboard component.
    - User groups are created and maintained on the User Group Maintenance window (SS> Security> User Group).
  - The **Schedule** field is used to specify the update frequency for the UB Payments component.
-

- This schedule will determine how frequently the system generates the data that will be displayed in the dashboard component.
  - By default this component is set to update weekly, but the update schedule can be changed to monthly if desired.
  - The **Start Date** field is used to specify when the component data should first be updated.
    - The system will create a job on the job scheduler for the specified date. When the job is processed, relevant data for the year prior to the date will be generated for display in the dashboard component. This field will default to today's date.
    - Once the job is complete, a new job will be scheduled at every interval specified in the Schedule field above.
  - The **Last Run** field displays the date that the component was last updated.
- 

### 3 Set the Component Filters.

- The Component Filters section is used to set filters for the dashboard components.
  - The **Begin Date** and **End Date** tabs are used to specify the date range for the UB payments that will display in the dashboard component.
    - If the **Locked** toggle is not checked, users will be able to update these dates from the dashboard component itself.
  - The **Service Name** tab is used to specify which UB service will be displayed on the component.
-



- You must enter the UB service name exactly as it appears on the UB Service Maintenance window (UB> Maintenance> Service> Service Name field).
  - Click the Save icon  to save the new dashboard component.
-

# SS> Dashboard> Component



## WO Queue Component

### Summary



The WO Queue Dashboard Component is used to display all the work orders assigned to a queue or role the current user is associated with. These work orders can also be filtered by status.

### Step by Step

1 Open the Component Selection window.

- The **Component Selection** window (SS> Dashboard> Component) displays all the available dashboard components created in the application.
- Enter information in the fields in the Search Criteria section of the window and click the Refresh icon  to filter the components that will display in the window.
- Highlight a component and click the Delete icon  or press DELETE to delete the selected component.
  - If the selected component is installed on an employee's dashboard, you will need to confirm that the component should be deleted and removed from any

dashboard on which it is installed.

- Highlight a component and click the Modify icon  or press ENTER to edit the selected component.
  - Click the Create icon  or press INSERT to create a new dashboard component. This will open the **Component Maintenance** window.
- 


## 2 Configure the new dashboard component.

- Select WO Queue from the **Type** drop-down menu.
  - Enter a **Name** for the new dashboard component.
    - This name will appear on the Dashboard Components Selection window when a user adds a new component to their dashboard, so be as descriptive as possible.
    - This field is limited to 32 alphanumeric characters. Once the component is saved the name cannot be edited.
  - Enter a **User Group Code** or click the field label to select one from a list.
    - User groups allow you to create menu and database security at a group level and then assign that security to users. Only those users that are part of the selected User Group will have access to the new dashboard component.
    - User groups are created and maintained on the User Group Maintenance window (SS> Security> User Group).
-

- The **Schedule** field will be disabled as the WO Queue component is set to refresh weekly.
  - The **Start Date** field is not used by the WO Queue component.
  - The **Last Run** field displays the date that the component was last updated.
- 

### 3 Set the Component Filters.

- The Component Filters section is used to set filters for the dashboard components.
  - The **Assigned To Type** tab is used to filter the work orders displayed on the component by the assigned to type of queue, role or user.
    - The **Locked** toggle is used to lock the filters. Locked filters can be updated on the Component Maintenance window but cannot be updated from the dashboard itself. If the Locked toggle is not checked, dashboard users will be able to update component filters from the Component Settings window on the dashboard component itself.
    - Every component filter below can be locked as well.
  - The **Assigned To** tab is used to filter the work orders by a specific type.
    - If no Assigned To value is specified, the component will display all work orders associated with every queue, roll or user that the current user is attached to.
  - The **Show New**, **Show Not Started**, **Show In Progress**, **Show Completed**, **Show Closed** and **Show Void** tabs are used to specify whether or not the component will display work orders in those statuses.
-

- These tabs will default to No.
  - Click the Save icon  to save the new dashboard component.
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# SS> Maintenance> Associate Reimbursements

## Associate Reimbursements

### Summary


The Springbrook reimbursements process writes all checks from a single bank account, and then generates checks drawn on other bank accounts to reimburse the primary bank account. The Associate Reimbursements process allows you to associate these reimbursement accounts with the primary account.



### Step by Step

- 1 Open the Associate Reimbursement Bank Accounts window.
    - The **Associate Reimbursement Bank Accounts** window (SS> Maintenance> Associate Reimbursements) displays all of the bank accounts set up in the application.
      - Click and drag any of the column headers to the area above the data grid to organize the displayed accounts by that header.
-

- Click the **Bank Acct Code** field label to select a bank account code from a list. This is the bank account that will be associated with the accounts in the fund selected below.
    - Bank account codes are created and maintained on the Bank Maintenance window (SS> Maintenance> Bank).
  - Click the **Fund** field label to select a fund from a list. This is the fund that will be associated with the account selected above.
    - Funds are created and maintained on the Account Header One Maintenance window (GL> Maintenance> Account Header One).
    - The field label associated with this field is user defined and may not match the example referenced here. Field labels are created and maintained on the Miscellaneous Field Label Maintenance window (SS> Utilities> Miscellaneous Field Labels).
  - Select the **Fiscal Year** you would like to display.
    - This will default to the current fiscal year.
- 

## 2 Associate the reimbursement accounts.

- Click the Generate icon  to associate the selected bank account code with the selected fund. All of the accounts in the specified Fund will be associated with the specified Bank Account Code. The Bank Code column will update to reflect this new association.
-

- Click the Bank Code column on an individual account to edit or delete the Bank Account Code association. You can also click the Refresh icon  to remove the associated bank account from all of the accounts in the selected fund.
  - Click the Save icon  when complete.
  - When you create a new fiscal year in GL> New Budget Information> Create New Fiscal Year, the banks that were attached to the current fiscal year will be copied to the new general ledger accounts.
-



# SS> Maintenance> Bank Account




## Bank Account Maintenance

### Summary

The Bank Account Maintenance window is used to create and maintain bank accounts. After banks have been created (SS> Maintenance> Bank), you can create bank accounts for those banks using the Bank Account Maintenance window. Before creating the bank account you should also create the GL cash account if it has not already been created (GL accounts are created in GL> Maintenance> Chart of Accounts).

### Step by Step

#### 1 Maintain a bank account.

- Open the **Bank Account Selection** window (GL> Maintenance> Bank Account).
- Select a bank account and click the Delete icon  or press DELETE to delete the selected bank account.
- Select a bank account and click the Modify icon  to edit an existing bank account.
- Click the Create icon  or press INSERT to create a new bank account. This will open the **Bank Account Maintenance** window.


## 2 Create a bank account.



- Enter an **Account Code**.
    - The bank account code can be up to eight alphanumeric characters long.
    - After the bank account has been saved, you cannot change the bank Account Code, selected Bank Code, or Account Number.
  - Click the **Bank Code** field label to select a bank code from a list.
    - Bank codes must be created before associated bank accounts can be set up.
    - Bank codes are created and maintained on the Bank Maintenance window (SS> Maintenance> Bank).
  - Enter the **Bank Account Number**.
    - The bank account number can be up to 20 numeric characters long.
    - You can set up database security on this field using the Maintain DB Security window (SS> Maintenance> DB Security). The bank account number field is titled Account Number and it is in the DB Bank Account table in the SS module.
  - Enter a **Bank Account Name**.
    - The bank account name can be up to 30 characters long and will be display on many reports.
  - Select an **Account Type** for the bank account.
    - Select Bank Account when creating a standard bank account in the system. This option will be selected by default.
-

- Select **Credit Card** when creating a credit card bank account in the system.
    - Credit Card bank accounts are most often set up in order to enable P-Card transaction processing. Each P-Card your organization uses must be set up with it's own bank account.
    - P-Card transactions are processed through the AP Manual Checks process, so the **Accounts Payable** toggle below must also be checked when setting up a Credit Card bank account for P-Cards.
    - When **Credit Card** is selected, the **Cash Account** below will change to a **Liability Account**.
  - Click the **Cash Account** field label to attach a general ledger account to the bank account. This is generally the GL account cash account that represents the balance of the bank account.
    - If **Credit Card** is selected in the **Account Type** field above, this field will be used to specify a **Liability Account** for the credit card.
  - Use the **Logo** field to add a bank logo to the account. Click on the field label to browse to the saved logo.
  - Check the **Accounts Payable** toggle if the bank account is used in the **Accounts Payable** module.
  - Check the **Accounts Receivable** toggle if the bank account is used in the **Accounts Receivable** module.
  - Check the **Payroll** toggle if the bank account is used in the **Payroll** module.
  - Check the **Utility Billing** toggle if the bank account is used in the **Utility Billing** module.
-

- Check the **Related Payroll** toggle if the bank account has a related payroll relationship to a parent account and should receive payroll from that parent account.
  - Check the **Related Revenue** toggle if the bank account has a related revenue relationship to a parent account and should receive revenue from that parent account.
    - The Related and Payroll and Related Revenue toggles are only enabled for organizations set up to use Multi-Muni relational databases. Only one bank account can be set up for each of these options.
- 

### 3 Add a Signature to the bank account. This is an optional step.

- The Signature section of the window is used to attach signatures to specified expenditure levels. If an AP or PR check exceeds a specified amount, the designated signature will be included on the check. For example, if a manager's signature is required for any checks exceeding \$5000, that signature could be attached to the account with an amount of \$5000.
  - More than one signature tier can be established. For example, if a manager's signature has already been attached to the account at the \$5,000 level, a Finance Director's signature could be attached to the account at the \$10,000 level.
  - Click the Create icon  to add a Signature line item to the bank account.
    - Enter an **Amount** for the new signature. Any amount above this amount will include the attached signature.
    - Enter a **Description** for the new signature.
-

- Click the Attachments icon  to open the Attachments Selection window.
    - This signature must be saved as a Bitmap (.bmp) file.
  - Once you have added a signature, the **Signature** toggle should be checked.
  - Click the Save icon  or press ENTER when complete to save the bank account.
-

# SS> Maintenance> Bank

## Bank Maintenance


### Summary

The Bank Maintenance window is used to create and maintain banks. In order to create a new bank account (SS> Maintenance> Bank Account), you must first create the bank record because it is used to store the routing number of the bank. The bank information is set up in a different table than the bank account information so that the bank information does not have to be entered on each bank account.


### Step by Step


#### 1 Maintain existing banks.

- Open the **Bank Maintenance** window (SS> Maintenance> Bank).
- Right click on the left section of the window and select Export grid contents to Excel to create an MS Excel spreadsheet of the information that displays in the window. This allows you to create a report of the bank and bank information in the database.
- Select a bank in the left section of the window and the fields in the Maintenance section of the window will update with the information attached to the selected bank.

- Highlight a bank and click the Delete icon  or press DELETE to delete the selected bank.
    - You cannot delete a bank that is attached to a bank account (SS> Maintenance> Bank Account> **Bank** field).
- 

## 2 Create a new bank.

- Click the Create icon  or press INSERT to create a new bank. This will create a new line item in the left section of the window and the fields in the Maintenance section will be blank in order to add the bank information.
  - Enter a **Bank Code**.
    - The bank code can be up to eight alphanumeric characters long.
    - Once you have created and saved a bank you will not be able to change the bank code.
  - Enter the **Bank Name** of the bank.
    - The Bank Name field can be up to 30 alphanumeric characters long and will display on most bank reports.
  - Enter a **Transfer Number**.
    - The transfer number is the first four digits of the nine digit bank routing number.
  - Enter a **Route Number**.
-

- The route number is digits five through eight of the nine digit bank routing number.
  - Enter a **Check Digit**.
    - The check digit is the ninth digit of the nine digit bank routing number.
  - Enter the bank address in the **Address 1, Address 2, City, State** and **Zip** fields.
  - Enter the **Fraction** form number for the bank.
    - The fraction form number is an outdated fractional code used to indicate the region where the bank is located. Most organizations will not need to use this optional field.
  - Check the **Used by this Organization** toggle if this bank is used by your organization for its own banking.
  - Check the **Used for Clearing House** toggle if this bank will be used for direct debit, direct deposits or electronic AP.
  - Click the Save icon  or press ENTER when complete to save the bank.
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# Customer Icon

## Customer Window

### Summary

The Customer window is the central location of all customer records and customer accounts.

The Customer window is used to create, maintain and view customer records. A customer record is a group of general customer information such as the customer's name and mailing address. When a customer account is created in a specific module (AR, UB, etc.), a customer record is attached to the account. This links all the customer's accounts to their customer record so that changes to the customer record will update to all of the customer's accounts. For example, if you would like to change the billing address of all of the UB module accounts attached to a customer record, change the mailing address of the customer record. New billing statements will be sent to the new address on the customer record. This will not work if there is an alternative address attached to the UB customer account (UB> Maintenance> Account> People tab> Alt Address tab) because the alternative address will override the mailing address on the customer record.


The Customer window is also used to open the customer accounts attached to a customer record. For example, if you would like to view all of the Utility Billing accounts attached to a






customer record, enter the customer number into the Customer window. The Customer window will display the customer accounts created in any module along with the customer record. You can open the customer account, or open the customer record.


The Customer window will also display the relationship between customer records and the UB module customer accounts attached to the customer record. If a customer account is a Utility Billing module account, the Customer window will display an *R*, *O*, or *B* in a column labeled *D*. The *D* column displays the relationship between the customer record and the customer account. An *R* means the customer record is the resident of the lot attached to the customer account. An *O* in the *D* column means the customer record is the owner of the lot but is not the resident. If the customer record is set up as the Owner and the Resident, the Customer window will display an *R* in the *D* column. A *B* in the *D* column means the customer record is set up as a bill to on the customer account but is not the owner or resident of the lot on the customer account. A customer record is set up as a bill-to on a UB module account on the Account Master Maintenance window (UB> Maintenance> Account> People tab> Bill-to sub-tab).

## Step by Step


### 1 View the existing customer records.

- Open the **Customer** window by clicking the Customer icon  at the top of the main application window.
-



- Enter information into the Search Criteria section and press ENTER to display the records that match the criteria in the window (Pressing ENTER is the same as clicking the Refresh icon ).
  - An icon will display in the bottom right corner of the window after the records have loaded in the window.
    - If the icon is a green star, the Complete icon , all of the records in the database that match the search criteria have loaded in the window.
    - If the icon is an orange container, the Incomplete icon , only a portion of the database records have populated in the window. This increases the performance of the window because only the data that closely matches the search criteria is displayed. Click on the Incomplete icon  if you would like all of the records in the database that match the criteria in the Search Criteria section to populate in the window.
      - NOTE - Springbrook Cloud users will not be able to click the Incomplete icon  to display all of the available records. Data grid filters will need to be refined in order to display all records that meet the filter criteria. However, Springbrook Cloud users can generate a .csv file that includes all the records in the database that meet the specified filter criteria via a data grid export.
  - The Customer window displays all of the customers that have been created in the application. This includes customers attached to Utility Billing accounts and customers used in other modules.
  - The **Accounts** section will display each of the accounts attached to the selected customer.
-

- To edit an attached account, highlight the account and select Modify Account from the Modify icon  drop-down menu. This will open the module-specific Account Maintenance window for the selected account.
  - Highlight a customer record and press ENTER to open the selected customer record. This will open the Customer Maintenance window.
  - Highlight a customer and press DELETE to delete the selected customer record. You cannot delete a customer record that is attached to a customer account, or has been used in a Cash Receipts module receipt.
  - Press INSERT to create a new customer record. This will open a blank Customer Maintenance window.
  - The **Contact Management** section on the Customer window is used in conjunction with the Contact Management module. The issues attached to a customer will display when a customer record is selected.
- 

## 2 Create a new customer record in the Customer Maintenance window.

- Enter information into any of the fields in the Customer Maintenance window and press ENTER to save. The Save icon  will become available as soon as any information is entered into the window, so none of the fields in the window are required.
  - The **Customer Number** field will display the customer number. This field will not be enabled.
-

- The Customer Number field will display 000000 if you are creating a new customer record. The customer record will be assigned the next available customer number when the customer record is saved.
  - When a UB module customer account is created, the UB customer account will be assigned a sequence number based on the customer record number. For example, if a UB module customer account is created for customer number 000001, the UB customer account will be numbered 000001-001.
  - If the customer record is attached to a UB module account, the mailing address fields will be used as the mailing address of the billing statements generated on the UB customer account.
    - If the UB module billing statements should be sent to a different address, you can set up an alternative billing address on the Account Master Maintenance window (UB> Maintenance> Account> People tab> Alternative Address sub-tab). The UB module billing statements for that account will be sent to the alternative address.
  - You can add security to the **Social Security** field using the DB Security feature (SS> Maintenance> DB Security).
    - Security can be set up on the Social Security field at the user or user group level by setting security on the SSN field in the Customer table.
  - The **Description** field can be used for general notes or information.
    - The Description field will display on the People tab of the Account Master Maintenance window (UB> Maintenance> Account> People tab).
  - Complete the Contact Information section with the customer contact data.
  - The **Confidential** toggle is used to flag the customer record as confidential. This allows you to incorporate the confidential tag in custom QBE and local reports.
-

- The Customer Miscellaneous tab is used to enter miscellaneous information on a customer record that is outside of the scope of the current application.
  - Press ENTER when complete to save the new customer record.
  - Click the Launch URL icon  drop-down menu and select a URL type code to transmit data from the customer or lot to the web site attached to the URL type code.
    - This icon is accessible from any tab on the Customer Maintenance window.
  - If your organization uses third-party web sites for tasks such as lot mapping or new customer background checks, URL type codes can help improve efficiency by reducing data entry.
  - URL type codes are created and maintained on the URL Setup window (SS> Maintenance> URL Setup).
  - Click the Audit Trail icon  to open the Audit Trail window. This window is used to track any changes made to the customer record.
    - Use the **Search Criteria** section to sort the displayed audit trail.
    - The **Audit Trail History** section will provide details about any changes made to the customer window including the date of the change, type of change made, user that made the change, and data table that was edited.
    - This icon will only be enabled after the customer has been created and saved.
-

# SS> Maintenance> Departments

## Department Maintenance

### Summary



The Department Maintenance window is used to create and maintain departments. Department codes are used to group employees together into departments and are attached to employee records using the Employee Maintenance window (PR> Maintenance> Employee).

Department codes can be used in the Payroll module to filter the employees that display on almost every report in the Payroll module. This allows you to generate Payroll reports by department and distribute those reports to department managers.

Departments can be used in the Human Resources module to control the wages and salaries of employees in a department. For example, you can use the Position Control feature to set up the positions that are available in each department. As employees are hired, employees will fill in open positions.

### Step by Step

- 1 View the departments.
-


- Highlight a department in the left section of the window and the fields in the Maintenance section will populate with the information attached to the selected department.
  - Highlight a department and click the Delete icon  or press DELETE to delete the selected department.
    - You cannot delete a department that is attached to an employee record. Remove the department for the employee records (PR> Maintenance> Employee) and then delete the department. If you do not know which employee is attached to a department, go to the Employee Selection window (PR> Maintenance> Employee) and sort the employees by department. This will display the employees that are attached to each department code.
  - Click the Create icon  or press INSERT to create a new department. This will create a new line item in the left section of the window.
- 

## 2 Create or modify a department.

- Enter a **Department Code**. The department code can be up to eight alphanumeric characters long.
  - Enter a **Description**. The description can be up to 30 characters long.
  - The **Account Sections** field is used when creating requisitions.
  - Enter a **Location** for the department or click the field label to select a location from
-



a list.

- Click the Save icon  or press ENTER when complete.
-

# SS> Maintenance> Email Template


## Email Template Maintenance





### Summary

The Email Template Maintenance window is used to create standard email templates that will be used to generate personalized emails for various processes within the application.

Email templates are currently used in the User Registration and Open Enrollment processes of the Employee Self Service online application.


### Step by Step

- 1 Open the Email Template Selection window (SS> Maintenance> Email Template).
  - The **Email Template Selection** window will display all of the existing email templates created in the application.
  - Enter the desired template details in the Search Criteria section and click the Refresh icon  to filter the templates displayed in the data grid below.


- Highlight an email template and click the Delete icon  or press DELETE to delete the selected template.
  - Highlight an email template and click the Modify icon  or press ENTER to edit the selected template.
    - This will open the selected template in the Email Template Maintenance window.
  - Highlight an email template and click the Copy icon  to create a copy of the selected template.
    - This will create an exact copy of the selected template. You will be required to specify a new, unique email template name in order to save the copied template.
  - Click the Create icon  or press INSERT to create a new email template. This will open the Email Template Maintenance window.
- 

## 2 Create a new Email Template.

- Enter a unique **Template Name** for the new email template. This field can be up to 32 characters in length.
  - Enter an optional **Description** for the new email template. The description can be up to 64 characters long.
  - Select the **System** that the email template will be used with. Your selection in this field will determine what is available in the Process menu below.
-

- Email templates are currently available for the HR and PO modules only.
- Select the **Process** that will generate the emails based on this template. If HR is selected in the System field above:
  - Select Open Enrollment if the template will be used when employees are accessing the deduction and benefit open enrollment process.
  - Select User Registration if the template will be used when a new employee creates an online user profile.
- If PO is selected in the System field above:
  - Select Purchase Orders if the template will be used when generating electronic purchase orders in the Send Electronic POs step of the Purchase Orders process.
- Enter the **Email Subject** that will appear on the subject line for all emails generated by this template. This field can accommodate up to 200 characters.
- The **Email Body** section is used to enter the text that will appear in the body of the email.
  - The **Available Fields** section on the left displays all of the employee specific variable merge fields that can be included in the email. When one of these fields is added to the email, the system will pull the employee specific data from that field on the employee record and insert it into the subject line or email.
    - Highlight an available field, click the Insert Field icon  drop-down menu and select Insert Field into Subject to insert the selected merge field into the current cursor location on the subject line.
      - For example, if you would like to personalize the subject line of each email to include the employee's first and last name, you

could enter "Registration information for [PR\_Employee.First\_Name] [PR\_Employee.Last\_Name]".

- Highlight an available field, click the Insert Field icon  drop-down menu and select Insert Field into Body to insert the selected merge field into the current cursor location in the email body.
    - You can also double click an available field to insert it into the email body.
- 


### 3 Customize the look of the email.

- Because these email templates are designed to be used with a wide variety of email systems, any display customization must be accomplished using HTML (Hyper Text Markup Language) tags.
- These tags are most often used in pairs. Only the words, phrases or paragraphs that fall between the opening tag and the closing tag will be affected. For example, in the following sentence, the words "username" and "password" would appear in bold text on the email.

To complete the registration process, please access the Employee Self Service portal using your **username** and **password**.

- Here are a few of the most commonly used HTML tags:
- 
-

HTML Tag	Effect
<b> </b>	This is the <b>Bold</b> markup tag. Any words or phrases between these tags will be displayed in bold text.
<i> </i>	This is the <b>Italic</b> markup tag. Any words or phrases between these tags will be displayed in italicized text.
 	<p>This is the <b>Line Break</b> markup tag. Place this tag at the end of a line if you wish to return to the beginning of the next line. You can also use this tag between lines to increase the space between one line and the next.</p> <p>This is a self-contained, single tag that does not require an opening tag and a closing tag like the other tags described here.</p>

- For a more comprehensive list of HTML tags, please refer to one of the many free, online HTML tutorials such as [W3Schools.com](http://W3Schools.com). Here you can learn how to insert tags used to change font styles, create web site links and insert pictures.
- Click the Save icon  to save the completed email template.

# SS> Maintenance> Equipment



## Equipment Maintenance



### Summary

The Equipment Maintenance window is used to create and maintain equipment in the application. Equipment can be attached to timesheets in the Payroll module to record the use of the equipment (PR> Timesheets).

### Step by Step

#### 1 View the equipment.


- Open the **Equipment Selection** window (SS> Maintenance> Equipment).
- The Equipment Selection window displays all of the equipment that has been created in the application.
- Enter information into the fields in the Search Criteria section and click the Refresh icon  to locate a specific piece of equipment.
- Highlight a piece of equipment and click the Delete icon  or press DELETE to delete the selected record.

- Highlight a piece of equipment and click the Modify icon  or press ENTER to maintain the selected record.
  - Click the Create icon  or press INSERT to create a new piece of equipment. This will open the Equipment Maintenance window.
- 

## 2 Create or modify a piece of equipment.

- The **Equipment Maintenance** window is used to create a new piece of equipment.
  - The **Code** field is used to identify a unique piece of equipment. This is the field that will be used to identify a specific piece of equipment when it is selected on timesheets, so make sure the Code field is descriptive.
    - The Code field can be up to 20 alphanumeric characters long.
  - The **Description** field is used to enter a description of the equipment. Enter a description of the equipment that is less than 32 characters long.
  - The **Department** drop-down menu is used to associate a piece of equipment with a department. This is used for reference only.
    - This is an optional field. Leave this field blank if you do not want to associate a department with the piece of equipment.
  - The **GL Account** field is used to attach a GL account to the piece of equipment. For example, if you would like to use a specific GL account to record the use of the equipment.
-



- Click the GL Account field label to select a GL account from a list.
  - This is an optional field. Leave this field blank if the equipment should not be associated with a specific GL account.
  - Click the **PM Type** field label to associate the equipment with a Project Management type code.
    - The **LEMS** field will automatically populate with the LEMS code attached to the selected PM Type code. Type codes are created and maintained, and LEMS codes are attached to type codes, on the Type Code Maintenance window (PM> Maintenance> Type).
  - The **Make, Model, Year, Color** and **VIN** fields are optional fields used to enter more information on the equipment.
  - The **Hourly Rate** field is used to enter an hourly rate on the equipment. This is the rate at which the usage of the equipment will be expensed when used.
  - Press ENTER or click the Save icon  when complete to save the equipment.
-

# SS> Maintenance > Export Configuration

## Export Configuration






### Summary

The Export Configuration tool is used to set up an export file format in Springbrook that matches an import file you would like to import into a third-party application. For example, if your organization uses Springbrook UB to generate and process utility bills but uses a third-party application to handle General Ledger duties, the Export Configuration tool can be used to export Springbrook UB journal entries in a format acceptable to your third-party GL application.

### Step by Step

1 View the existing configurations.

- Open the **Export Configuration Selection** window (SS> Maintenance> Export Configuration).
  - The Export Configuration Selection window displays all of the export file configurations that have been created in the application.
-


- Enter information into the fields in the Search Criteria section and click the Refresh icon  to locate a specific export file configuration.
  - Highlight a configuration and click the Delete icon  or press DELETE to delete the selected record.
  - Highlight a configuration and click the Modify icon  or press ENTER to maintain the selected record.
  - Highlight a configuration and click the Copy icon  to create a renamed copy of the export file configuration.
  - Click the Create icon  or press INSERT to create a new export file configuration. This will open the Export Configuration Maintenance window.
- 

## 2 Create or modify an export file configuration.


- The **Export File Configuration Maintenance** window is used to create a new export file configuration.
  - Enter a **Name** for the new export configuration.
    - This is a required field and is limited to 40 alphanumeric characters.
  - Select a **Definition** from the drop-down list. This will determine where the export file will be used.
    - Export configuration definitions are created by Springbrook and are designed to export data out of specific processes. As more Springbrook processes are
-

exposed to the Export Configuration tool, they will be made available in the Definition drop-down list.

- Once a Definition is selected, the **Description** and **Properties** fields will automatically populate with the associated details.
  - Select a **Type** for the export file from the drop-down list.
    - Select Comma, Pipe, Tab or User Defined to create a delimited export file that displays the included data fields in rows separated by a specified delimiter character.
      - If Comma, Pipe, or Tab is selected, the **Delimiter** field below will be disabled and will display the selected delimiter.
      - If User Defined is selected, use the **Delimiter** field to enter the delimiter characters that will be used to separate fields on each line. This will be determined by the delimiter used in the file you are attempting to export. Commas are the most commonly used delimiters.
    - Select Fixed Width to create an export file that displays the included data fields in rows with specified width and padding values for each field.
      - The Delimiter field will be disabled if Fixed Width is selected.
  - The **Generate header labels** toggle is used to include a header row in the export file that displays the Name value for each property included on the Properties tab.
    - This toggle will only be enabled if Delimited is selected in the Type field above.
  - Check the **Default** toggle to save the new configuration as the default export file configuration.
    - Only one export file configuration can be marked as Default.
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- Once the export file configuration is complete, click the Export icon  to export the file configuration so it can be shared with other Springbrook users.
- 

### 3 Complete the Properties tab.

- The Properties tab is used to set up which of the available properties will be included in the export file configuration and how those properties will be organized.
  - Select a property in the Available Properties section and click the Add icon  drop-down and select Property to add the property to the export file.
  - Once a property has been added to the Selected Properties section, it can be edited in the Options section. Delimited and Fixed Width file types will display unique options.
  - When creating a Delimited export file configuration:
    - Specify a **Position** for the selected property.
      - Properties will automatically be placed in the last position as they are added. When the value is edited in the Position field, the Selected Properties will update to display the new property position.
      - Each property must occupy a different position. If two properties share the same position value, an error will occur when the export file configuration is saved.
    - The **Multiplier** field is used to set a recalculation multiplier for the selected property.
-

- For example, if a third-party application does not import decimal values, any dollar values exported out of Springbrook must be multiplied by 100. So \$57.25 would be multiplied by 100 in order to display 5725 in the export file. This value would then be imported and recalculated by the third-party application.
- This field will only be enabled for decimal and integer properties.
- The **Format** field is used to specify how data exported from Springbrook will be converted to a string representation and how that string will appear to the user.
  - When exporting data from Springbrook to a third-party application, the format requirements of that third-party application will determine how Springbrook data should be formatted. Please refer to your third-party application requirements before formatting exported Springbrook data.
  - Here are a few common format examples:
    - Date Examples - Please note that you **MUST** use an uppercase "M" when including months in a date format. A lowercase "m" will result in the format including the minutes value:

<b>Springbrook Data</b>	<b>Format</b>	<b>Resulting String</b>
6/6/2018	MM/dd/yyyy	06/06/2018
6/6/2018	M/d/yy	6/6/18
6/6/2018	MMddy	060618
6/6/2018	MMyyyy	062018

- Time Examples:

<b>Springbrook Data</b>	<b>Format</b>	<b>Resulting String</b>
6/6/2018	MM/dd/yyyy	06/06/2018
6/6/2018	M/d/yy	6/6/18
6/6/2018	MMddy	060618
6/6/2018	MMyyyy	062018

- Number Examples:

<b>Springbrook Data</b>	<b>Format</b>	<b>Resulting String</b>
1234.567	C	\$1234.56
1234.567	C3	\$1234.567
1234.567	F	1234.57
1234.567	F3	1234.567
1234.567	N	1,234.57
1234.567	N1	1,234.6
1234.56	#	123456
0.98765	P	98.77%
0.98765	P4	98.7650%

- Integer Examples:

<b>Springbrook Data</b>	<b>Format</b>	<b>Resulting String</b>
1234	D	1234
1234	D6	001234

- ServicePointID:

Springbrook Data	Format
Compound Indicator - last character of the Full Serial Number	C or c
Lot Number - formatted as xxxxxx	L or l
Service Point	N or n
Partial Serial Number - all but the last character of the Full Serial Number	P or p
Sequence Number	Q or q
Route Number	R or r
Full Serial Number	S or s

Note: Other formatting characters are allowed. For example, LN would display the Lot Number and Service Point as LLLLLLN while L-N would display as LLLLLL-N.


- For more information on using .NET format strings, please refer to the Microsoft Developer Network section on Formatting Types - [http://msdn.microsoft.com/en-us/library/26etazsy\(v=vs.110\).aspx](http://msdn.microsoft.com/en-us/library/26etazsy(v=vs.110).aspx)
- The **Null Substitute** field is used to specify a substitute term or character for any NULL values that are included in the export file.
- Check the **Exclude text qualifiers** toggle to exclude the standard text qualifiers that the system includes in the export file. When creating a delimited



export type file, the system automatically wraps string values in quotes in order to avoid invalid character issues. When checked, those qualifiers will be excluded.

- This toggle will be unchecked by default.
  - When creating a Fixed Width export file configuration:
    - Specify a **Position** for the selected property.
      - Properties will automatically be placed in the last position as they are added. When the value is edited in the Position field, the Selected Properties will update to display the new property position.
      - Each property must occupy a different position. If two properties share the same position value, an error will occur when the export file configuration is saved.
      - Fixed width export files use a combination of property position and maximum length to determine how properties are displayed. For example, if Property A is in position 1 and has a maximum length of 5, Property B must have a position value of at least 6 in order to prevent overlap. If Property B is in position 6 and has a maximum length of 4, Property C must have a position value of at least 10.
      - Because of this relationship, setting the length values for each property before adding the next property is suggested.
    - The **Maximum** and **Minimum Length** fields are used to determine the length of the fields included in the export file.
      - If a property value included in the export file exceeds the specified Maximum Length, the value will be trimmed based on the Pad Direction specified below.
- 
-

- If a property value included in the export file does not meet the specified Minimum Length, the value will be padded based on the Padding and Pad Direction specified below.
  - The **Padding** field and the **Pad Direction** drop-down field are used to specify the character that will be used when including padding in the property value and where that padding will be added.
    - For example, a user could enter "x" in the Padding field and select "Left" in the Pad Direction field. If the value exported from Springbrook for that property was "75" and the Minimum Length for that property was set at "6", the value displayed in the export file would be "xxxx75".
    - The Pad Direction field will also determine how the value is trimmed if it exceeds the Maximum Length for the property. If the value exported from Springbrook is "john.smith" but the Maximum Length for the property is set at "8", the value will need to be trimmed. If "Right" is selected in the Pad Direction field, the value in the export file will be "john.smi". If "Left" is selected, the value will be "hn.smith".
  - The **Multiplier** field is used to set a recalculation multiplier for the selected property.
    - This Fixed Width multiplier field behaves the same as the Delimited multiplier field described above.
  - The **Format** field is used to specify how data exported from Springbrook will be converted to a string representation and how that string will appear to the user.
    - This Fixed Width format field behaves the same as the Delimited format field described above.
-

- The **Null Substitute** field is used to specify a substitute term or character for any NULL values that are included in the export file.
  - Click the Add icon  drop-down and select Constant to add a constant value to the export file. This will add a constant line item to the Selected Properties section below.
    - Constants can be added to export configurations to include things like bank-mandated codes in positive pay files or city codes in meter reading files.
    - Once a constant has been added to the Selected Properties section, the Options section to the right will be enabled.
      - The **Position** field is used to set the position for the constant. This field works as described above.
      - The **Constant** field is used to enter the constant that will display in the export file. This field is limited to 256 alphanumeric characters.
- 

#### 4 Setting up the Positive Pay Payee Name format on the Properties tab.

- NOTE: This section deals with the specific process for specifying a **Format** for the **Payee Name** property on a **Positive Pay** export configuration. Please ignore this section if you are working with any other properties or configurations.
  - The **Payee Name** property allows users to control exactly how payee name data is displayed on the Positive Pay export configuration. This is achieved by using the characters included in the table below:
-


Character	Exported Value
F	First name
f	First letter of first name
L	Last name
l	First letter of last name
M	Middle name
m	First letter of middle name
%	Conditional space only shown when the next character is valid
,	Conditional comma only shown when the next character is valid
.	Conditional period only shown when the next character is valid
\	Escape character (will be removed and always print the character following)
G	General format "L,%F%M" (last name, first name middle name)

- Any combination of these characters can be used in the **Format** field to determine how the payee name data is displayed.
  - Many organizations will choose the general format (last name, first name middle name), and will only need to enter "G" in the Format field.
  - If your organization would like to use a different format, use the characters in the table above to configure the field. For example, entering "F%m.%L" will display (first name) (first letter of middle name). (last name) for the payee name field. If a payee named John William Doe was included in the export, his name would display as "John W. Doe".
  - If your organization would like to include a label, such as "Employee:", at the beginning of the Payee Name field, you will need to use the escape character "\". When using the John William Doe example above, if you entered "Employee:%F%m.%L" in the Format field, the export file would actually display "EWpDoyee: John J. Doe", because the "m" and "l" in "Employee" are conditional characters and will be replaced with the first letter of the middle name


and the first letter of the last name. In order to display those letters properly, you would enter "E\mp\loyee:%F%m.%L" in the Format field. The escape character "\" will tell the system to print the character that immediately follows it, rather than treat that character like a conditional character that needs to be replaced with payee data.

---


## 5 Complete the Mapping tab.


- The Mapping tab is used to map specific property values that are exported from Springbrook to match specific values that need to be imported into a third-party application.
  - Click the Create icon  to create a new value mapping. This will create a new property line item in the data grid below.
  - Expand the new value mapping and select the child line item to enable the Maintenance section to the right.
  - The **Property** drop-down field is used to determine which property value will be mapped.
    - This drop-down list will populate with all of the Available Properties displayed on the Properties tab.
  - The **From** field is used to enter the value exported from Springbrook.
  - The **To** field is used to enter the value that will be included in the export file.
    - For example, if a property value for a logical field is exported from Springbrook as "TRUE", but the third-party application needs to read this value as
-

"YES", entering "TRUE" in the From field and "YES" in the To field will create the required mapping. When the system generates the export file, "TRUE" will be converted to "YES" for the selected property.


- Each property can include a number of mappings. One property could include "TRUE" → "YES" and "FALSE" → "NO". But each From and To value must be unique, so including "TRUE" → "YES" and "TRUE" → "YOU BET" will cause an error.
  - Highlight a property mapping and click the Delete icon  to delete the selected mapping.
- 


## 6 Complete the Sorts tab.

- The Sorts tab is used to set up sort properties, orders, and directions on export configurations. These sort properties can then be used to sort related export configurations, improving the user's ability to quickly find and select the desired configuration.
  - Click the Create icon  to create a new sort property. This will create a new line item in the data grid below and enable the Maintenance section to the right.
  - The **Property** field is used to specify which property the sort will be based on.
    - The available properties displayed in the Property field is determined by the export configuration definition.
    - Once a property is selected for a sort, it cannot be selected for another sort on the same export configuration.
-

- The **Sort Order** and **Sort Direction** fields are used to specify how the properties will be sorted.
    - The Sort Order field will determine the order in which the system sorts the properties on the export configuration. A property with a sorter order of "1" will be sorted before a property of a sort order of "2". If, for example, the Bank Account property has a sort order of 1 and the Amount property has a sort order of 2, the export configuration will be generally sorted by Bank Account the Amount values will be sorted within each Bank Account section.
    - The Sort Direction field will determine if the sort property begins with a low number or letter and ascends to a higher number or letter or if it descends from higher to lower.
  - Highlight a sort property and click the Delete icon  to delete the selected property.
- 

## 7 Complete the Groups tab.

- The Groups tab is used to configure optional headers and footers on the export file.
  - The Available Groups section will display all the groups that can be added to the export file. Which groups are available is determined by the export file Definition selected on the Settings tab. Select a group in the Available Groups section and click the Add icon  to add the group to the export file.
- 
-

- Once a group is selected, it will appear in the Selected Groups section below. Highlight the group in the Selected Groups section and click the Create icon  drop-down menu to specify group properties and constants.
- Click the
  - The **Property** field is used to specify a property for the group. This selection will determine which fields are enabled below.
  - The **Location** field is used to specify if the data will be displayed in the header or the footer of the file. You can add multiple groups to the same header or footer.
  - The **Operation** field is used to select an operation for the group. See the table below for an explanation of how the different operations will calculate the value included in the export file. This field will be enabled or disabled based on the value selected in the Property field above.

Operation	Export Function
Average	Average of values in the file
Count	Count of rows in the file
First	First value in the file
Key	Key associated with selected property
Last	Last value in the file
Max	Maximum value in the file
Min	Minimum value in the file
Sum	Sum of values in the file



- When creating a Delimited export file configuration:
    - Specify a **Position** for the selected property.
      - Properties will automatically be placed in the last position as they are added. When the value is edited in the Position field, the Selected Properties will update to display the new property position.
      - Each property must occupy a different position. If two properties share the same position value, an error will occur when the export file configuration is saved.
    - The **Multiplier** field is used to set a recalculation multiplier for the selected property.
      - For example, if a third-party application does not import decimal values, any dollar values exported out of Springbrook must be multiplied by 100. So \$57.25 would be multiplied by 100 in order to display 5725 in the export file. This value would then be imported and recalculated by the third-party application.
      - This field will only be enabled for decimal and integer properties.
    - The **Format** field is used to specify how data exported from Springbrook will be converted to a string representation and how that string will appear to the user.
      - When exporting data from Springbrook to a third-party application, the format requirements of that third-party application will determine how Springbrook data should be formatted. Please refer to your third-party application requirements before formatting exported Springbrook data.
-

- Here are a few common format examples:
  - Date Examples - Please note that you MUST use an uppercase "M" when including months in a date format. A lowercase "m" will result in the format including the minutes value:

<b>Springbrook Data</b>	<b>Format</b>	<b>Resulting String</b>
6/6/2018	MM/dd/yyyy	06/06/2018
6/6/2018	M/d/yy	6/6/18
6/6/2018	MMddyy	060618
6/6/2018	MMyyyy	062018

- Number Examples:


<b>Springbrook Data</b>	<b>Format</b>	<b>Resulting String</b>
1234.567	C	\$1234.56
1234.567	C3	\$1234.567
1234.567	F	1234.57
1234.567	F3	1234.567
1234.567	N	1,234.57
1234.567	N1	1,234.6
1234.56	#	123456
0.98765	P	98.77%
0.98765	P4	98.7650%

- Integer Examples:


Springbrook Data	Format	Resulting String
1234	D	1234
1234	D6	001234

- For more information on using .NET format strings, please refer to the Microsoft Developer Network section on Formatting Types - [http://msdn.microsoft.com/en-us/library/26etazsy\(v=vs.110\).aspx](http://msdn.microsoft.com/en-us/library/26etazsy(v=vs.110).aspx)
- The **Null Substitute** field is used to specify a substitute term or character for any NULL values that are included in the export file.
- When creating a Fixed Width export file configuration:
  - Specify a **Position** for the selected property.
    - Properties will automatically be placed in the last position as they are added. When the value is edited in the Position field, the Selected Properties will update to display the new property position.
    - Each property must occupy a different position. If two properties share the same position value, an error will occur when the export file configuration is saved.
    - Fixed width export files use a combination of property position and maximum length to determine how properties are displayed. For example, if Property A is in position 1 and has a maximum length of 5, Property B must have a position value of at least 6 in order to prevent overlap. If Property B is in position 6 and has a maximum length of 4, Property C must have a position value of at least 10.


- Because of this relationship, setting the length values for each property before adding the next property is suggested.
  - The **Maximum** and **Minimum Length** fields are used to determine the length of the fields included in the export file.
    - If a property value included in the export file exceeds the specified Maximum Length, the value will be trimmed based on the Pad Direction specified below.
    - If a property value included in the export file does not meet the specified Minimum Length, the value will be padded based on the Padding and Pad Direction specified below.
  - The **Padding** field and the **Pad Direction** drop-down field are used to specify the character that will be used when including padding in the property value and where that padding will be added.
    - For example, a user could enter "x" in the Padding field and select "Left" in the Pad Direction field. If the value exported from Springbrook for that property was "75" and the Minimum Length for that property was set at "6", the value displayed in the export file would be "xxxx75".
    - The Pad Direction field will also determine how the value is trimmed if it exceeds the Maximum Length for the property. If the value exported from Springbrook is "john.smith" but the Maximum Length for the property is set at "8", the value will need to be trimmed. If "Right" is selected in the Pad Direction field, the value in the export file will be "john.smi". If "Left" is selected, the value will be "hn.smith".
  - The **Multiplier** field is used to set a recalculation multiplier for the selected property.
-

- This Fixed Width multiplier field behaves the same as the Delimited multiplier field described above.
  - The **Format** field is used to specify how data exported from Springbrook will be converted to a string representation and how that string will appear to the user.
    - This Fixed Width format field behaves the same as the Delimited format field described above.
  - The **Null Substitute** field is used to specify a substitute term or character for any NULL values that are included in the export file.
  - Click the Create icon  drop-down and select Constant to add a constant value to the export file. This will add a constant line item to the Selected Properties section below.
    - Constants can be added to export configurations to include things like bank-mandated codes in positive pay files or city codes in meter reading files.
    - Once a constant has been added to the Selected Properties section, the Options section to the right will be enabled.
      - The **Property** field should be left blank.
      - The **Location** and **Position** fields are used to set the position within the header or footer for the constant. These fields work as described above.
      - When creating a fixed width file, the **Maximum Length, Minimum Length, Padding** and **Pad Direction** fields should be completed as described above.
      - The **Constant** field is used to enter the constant that will display in the export file. The Maximum Length and Minimum Length values entered
-


above will dictate the size of the Constant value that displays on the export file.

- This field is limited to 256 alphanumeric characters.
  - Press ENTER or click the Save icon  when complete to save the export file configuration.
- 

## 8 Preview the export file configuration.

- The Preview tab is used to preview the export file configuration.
  - Enter the test values in the Values section and click the Generate icon  to populate the Text section below. This is how the values will display in the export file.
  - Check the positioning, padding, formatting and mapping of the export file. If the Text section does not display the data as intended, return to the Properties and Mapping tabs to make the required changes.
- 

## 9 Track any changes made to the export file configuration.

- Click the Audit Trail icon  to open the Audit Trail window.
  - Use the Search Criteria section to sort the displayed audit history.
- 
-

- The Audit Trail section will provide details about any changes made to an export file configuration record including the date of the change, type of change made, user that made the change, and data table that was edited.
-

# SS> Maintenance> Forms

## Forms Maintenance

### Summary

Forms refer to Microsoft Word documents that, through the use of merge fields, allow users to pull data from the application and customize how that data is displayed on the forms. Forms will be saved in the Springbrook folder on your server at the path specified when the application was installed (SS> Utilities> System Setup> System tab> **Archive Directory** field).






The forms will be saved as .sbw files in this folder and should not be edited to avoid corruption. Forms can be attached to various application elements through the module process and maintenance palettes.

### Step by Step

- 1 Open the Word Merge Forms Selection window.



- The **Word Merge Forms Selection** window (SS> Maintenance> Forms) displays all of the forms created in the application.
-



- Filter the displayed forms by entering the desired form information and clicking the Refresh icon .
  - Enter a **Form Name** to select a specific form.
  - Select a module from the **System** drop-down menu to display only forms associated with that module.
    - Once you have selected a module from the System drop-down menu, you can further filter the displayed forms by selecting a related process from the **Process** drop-down menu. The processes available in this field are determined by the selected System.
  - Highlight a form and click the Preview icon  to view the selected form. This will open the MS Word document in a new window.
  - Highlight a form and click the Copy icon  to copy the selected form. This will create a copy of the original form.
  - Highlight a form and click the Delete icon  to delete the selected form.
  - Click the Create icon  to create a new form. This will open the Word Merge Form Maintenance window.
- 

## 2 Create a new form.

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- Enter the new form information on the Word Merge Form Maintenance window.
    - Enter a unique **Form Name** for the new form. This name can be up to 32 alphanumeric characters long. This is a required field.
    - Enter a **Description** for the new form. This description can be up to 100 alphanumeric characters long.
    - Associate the new form with a module by selecting one from the **System** drop-down menu.
    - Once you have selected a System, select a module-specific process from the **Process** drop-down menu.
  - Click the Create icon  to open a new Word document. This new document will be edited to include the desired data through the use of merge fields.
  - The module in which you are creating the form will determine which merge fields are available. Click here for a complete list of merge fields and an explanation of the data those fields correspond to.
    - Please refer to Microsoft documentation for instructions on how to create mail merge documents in Word.
    - Once you have created the Word mail merge form, save the document to return to the Word Merge Form Maintenance window.
  - Click the Save icon  to save the new form.
  - The new form will now be available when creating form letters in the specified module and process.
-

# SS> Maintenance > Import Configuration


## Import Configuration





### Summary

The Import Configuration tool is used to set up an import file format in Springbrook that matches an export file you would like to import. For example, an organization that outsources garbage collection could set up an import file that matches the file the garbage contractor generates for billing. This would allow a UB Billing Clerk to import the contractor's billing data directly into the UB Adjustments and Fees process.

### Step by Step


1 View the existing configurations.

- Open the **Import Configuration Selection** window (SS> Maintenance> Import Configuration).
- The Import Configuration Selection window displays all of the import file configurations that have been created in the application.
- Enter information into the fields in the Search Criteria section and click the Refresh icon  to locate a specific import file configuration.

- Highlight a configuration and click the Delete icon  or press DELETE to delete the selected record.
  - Highlight a configuration and click the Modify icon  or press ENTER to maintain the selected record.
  - Highlight a configuration and click the Copy icon  to create a renamed copy of the import file configuration.
  - Click the Create icon  or press INSERT to create a new import file configuration. This will open the Import Configuration Maintenance window.
- 


## 2 Create or modify an import file configuration.


- The **Import File Configuration Maintenance** window is used to create a new import file configuration.
  - Enter a unique **Name** for the new import configuration.
    - This is a required field and is limited to 40 alphanumeric characters.
  - Select a **Definition** from the drop-down list. This will determine where the import file will be used.
    - Import configuration definitions are created by Springbrook and are designed to import data into specific processes. As more Springbrook processes are exposed to the Import Configuration tool, they will be made available in the Definition drop-down list.
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- Once a Definition is selected, the **Description** and **Properties** fields will automatically populate with the associated details.
  - Select a **Type** for the import file from the drop-down list.
    - Select Delimited to create a delimited import file that displays the included data fields in rows separated by a specified delimiter character.
      - Use the **Delimiter** field below to enter the delimiter character that will be used to separate fields on each line. This will be determined by the delimiter used in the file you are attempting to import. Commas are the most commonly used delimiters.
    - Select Fixed Width to create an import file that displays the included data fields in rows with specified width and padding values for each field.
      - The Delimiter field will be disabled if Fixed Width is selected.
  - The **Skip Lines** field is used to force the application to ignore one or more lines at the top of the import file. This is useful if the file you are attempting to import a file includes a header row.
    - This must be a non-negative value between 0 and 100.
  - Check the **Default** toggle to save the new configuration as the default import file configuration.
    - Only one import file configuration can be marked as Default.
  - Once the import file configuration is complete, click the Export icon  to export the file configuration so it can be shared with other Springbrook users.
- 

### 3 Complete the Properties tab.


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- The Properties tab is used to set up which of the available properties will be included in the import file configuration and how those properties will be organized.
  - Select a property in the Available Properties section and click the Add icon  drop-down menu and select Add Property to add it to the import file.
  - Once a property has been added to the Selected Properties section, it can be edited in the Options section.
  - Specify a **Position** for the selected property.
    - Properties will automatically be placed in the last position as they are added. When the value is edited in the Position field, the Selected Properties will update to display the new property position.
    - Each property must occupy a different position. If two properties share the same position value, an error will occur when the import file configuration is saved.
    - When creating a fixed width import file, the **Width** field will display below the Position field. This field is used to specify the width of a property.
      - Fixed width import files use a combination of property position and property width to determine how properties are displayed. For example, if Property A is in position 1 and has a width of 5, Property B must have a position value of at least 6 in order to prevent overlap. If Property B is in position 6 and has a width of 4, Property C must have a position value of at least 10.
      - Because of this relationship, setting the width values for each property before adding the next property is suggested.
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- The **Multiplier** field is used to set a recalculation multiplier for the selected property.
    - For example, if a third-party file is exported without using decimals, that export file will display a dollar value of \$57.25 as 5725. In order to import that value into Springbrook properly, the multiplier would need to be set to 0.01, thereby recalculating 5725 as 57.25 in Springbrook.
    - This field will only be enabled for decimal and integer properties.
  - The **Rounding Place** field is used to specify which decimal place will be rounded.
    - For example, if 2 is entered in this field, a decimal value of 25.926 will be rounded to 25.93.
    - This field will only be enabled for decimal values.
  - The **Trim Mode** field is used specify how white space should be removed from the text field. Start and End will remove this space from the beginning and the end of the field respectively. Both will remove the white space from both the beginning and the end. Any white space that does not fall at the beginning or end of the text field value will not be removed.
    - This field will only be enabled for text field properties, such as account number or fee code.
  - Set up optional property constants for the import file. These properties, and the constant specified for the property, will be included in every record in the import.
    - Select a property in the Available Properties section and click the Add icon  drop-down menu and select Add Constant to add it to the Selected Constants section.
    - Once a property is added to the Selected Constants section, the **Constant** value must be specified before the configuration is saved.
-



- For example, when creating an AR-specific import file for the CR Cash Receipts process, you could select the SubSystem property and set the constant value to "AR" in order for that column to display on every included record.
- 

#### 4 Complete the Mapping tab.



- The Mapping tab is used to map specific property values that are exported from a third-party application to match specific values that need to be imported into Springbrook.
  - Click the Create icon  to create a new value mapping. This will create a new property line item in the data grid below.
  - Expand the new value mapping and select the child line item to enable the Maintenance section to the right.
  - The **Property** drop-down field is used to determine which property value will be mapped.
    - This drop-down list will populate with all of the Available Properties displayed on the Properties tab.
  - The **From** field is used to enter the value exported from the third-party application.
  - The **To** field is used to enter the value that will be included in the import file for Springbrook.
    - For example, if a property value for a logical field is exported from a third-party application as "TRUE", but Springbrook needs to read this value as
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"YES", entering "TRUE" in the From field and "YES" in the To field will create the required mapping. When the system imports the file, "TRUE" will be converted to "YES" for the selected property.

- Each property can include a number of mappings. One property could include "TRUE" → "YES" and "FALSE" → "NO". But each From and To value must be unique, so including "TRUE" → "YES" and "TRUE" → "YOU BET" will cause an error.
  - Highlight a property mapping and click the Delete icon  to delete the selected mapping.
  - Press ENTER or click the Save icon  when complete to save the import file configuration.
- 



## 5 Complete the Expressions tab.

- The Expressions tab is used to create a set of expressions that the system will execute when processing the import file. This is an optional tab.
  - Click the Create icon  to add a new expression to the data grid below.
    - This will enable the Maintenance section to the right.
    - Highlight an existing expression and click the Delete icon  to delete the selected expression.
  - The **Expression** field is used to enter the expression that will be executed when the import file is processed by the application.
-


- The **Action** field is used to specify the action taken by the expression. This is currently limited to the Skip Line option.
  - EXAMPLE:
    - If your organization needs to import a file that includes non-data lines, you can create an expression to direct the application to skip those lines. For example, if your import configuration includes non-data lines that begin with terms like "START" and "PAY", you can create two expressions to skip those lines.
      - Enter "^S" in the Expression field to create an expression that skips any line in the import file that begins with the letter "S".
      - Enter "^P" in the Expression field to create an expression that skips any line in the import file that begins with the letter "P".
      - Additional expression operators can be used to create more complex skip line expressions, but these expressions can become difficult to troubleshoot in the event of a parsing error. Please refer to Microsoft documentation on Regex Class expressions for more information.
    - Once you have saved your expressions, be sure to use the Preview tab to confirm the expressions do not result in a parsing error.
- 

## 6 Preview the import file configuration.

- The Preview tab is used to preview the import file configuration.
  - Click the **File Name** field label and browse to your test import file.
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- Click the Generate icon  to import the test file.
    - The Text section will display the actual contents of the import file. The Preview section below will display the updated values based on the import configuration settings selected on the Settings, Properties and Mapping tabs above.
    - If the import file settings are not set up properly, you will receive a parsing error and you will need to make the appropriate changes to the import configuration.
  - Press ENTER or click the Save icon  when complete to save the import file configuration.
- 

## 7 Track any changes made to the import file configuration.

- Click the Audit Trail icon  to open the Audit Trail window.
  - Use the Search Criteria section to sort the displayed audit history.
  - The Audit Trail section will provide details about any changes made to an import file configuration record including the date of the change, type of change made, user that made the change, and data table that was edited.
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# SS> Maintenance> Locations

## Location Maintenance



### Summary

The Location Maintenance window is used to create and maintain the physical and mailing addresses of your organization. Location records are the physical or mailing address of departments, offices or warehouses belonging to your organization and can be used throughout the application to reduce data entry. For example, locations created in the Location Maintenance window can be attached to purchase orders and used as the ship to address (PO> Purchase Orders> Purchase Orders> Create icon> **Shipping Address** field).

The primary organization name and address are set up in the System Setup window (SS> Utilities> System Setup).


### Step by Step

- 1 View the locations set up in the application.

- Open the **Locations Maintenance** window (SS> Maintenance> Locations).
  - The Locations Maintenance window will display all of the locations that have been set up in the application.
  - Highlight a location in the left section of the window and the fields in the Maintenance section will populate with the information attached to the selected record.
  - Click the Delete icon  or press DELETE to delete the selected location.
  - Click the Create icon  or press INSERT to create a new location. This will create a new line item in the left section of the window.
- 

## 2 Create a new location.


- Enter the name of the location in the **Name** field.
    - The Name field cannot be modified once the location has been created and saved.
    - The Name field can be up to 15 characters long.
  - Enter an optional **Contact** for the location. This contact can be up to 25 characters long.
  - Enter the location address in the **Address 1**, **Address 2**, **City**, **State** and **Zip** fields.
    - The **Address 1** and **Address 2** fields can be up to 30 alphanumeric characters long.
  - Use the **Comments** section to add any additional notes or special instructions to the location. The comments can be up to 512 characters long.
-

- Check the **Default** toggle to specify the location as the default location. Only one location can be specified as the default location.
  - Click the Save icon  or press ENTER to save the location.
- 

## Lot Icon






## Lot Maintenance

### Summary





The Lot Maintenance window is used to maintain lot records. Lot records can either be created from the Lot window (Lot icon  on the main desktop) or they can be created when a new customer account is created from the UB New Account Wizard.

### Step by Step


- 1 View the lots in the application.
-

- Open the **Lot** window by clicking the Lot icon  on the main desktop or through the SS module (SS> Maintenance> Lot).
  - The Lot window displays all of the lots that have been created in the application. The Accounts section at the bottom of the window will display the account number and module information attached to the lot.
- Enter information into the fields in the Search Criteria section and then press ENTER to filter the lots that display in the window.
- To enhance the performance of the application, all records may not load in the window. The Complete icon  will display in the bottom right corner of the window if all records matching the criteria entered in the Search Criteria fields have been loaded into the window. The Incomplete icon  will display if only a portion of the records have been loaded. Click the Incomplete icon if you would like to load all of the records into the window.
  - NOTE - Springbrook Cloud users will not be able to click the Incomplete icon  to display all of the available records. Data grid filters will need to be refined in order to display all records that meet the filter criteria. However, Springbrook Cloud users can generate a .csv file that includes all the records in the database that meet the specified filter criteria via a data grid export.
- The **Accounts** section will display each of the accounts attached to the selected lot.
  - To edit an attached account, highlight the account and select Modify Account from the Modify icon  drop-down menu. This will open the module-specific Account Maintenance window for the selected

account.

- The **Contact Management** section will display each of the CM Issues attached to the selected lot.
    - To modify an attached issue, highlight the issue and click the Modify icon  drop-down menu. You can also attach a new issue to the lot by selecting New Issue from the Create icon  drop-down menu. This will open the Issue Maintenance window.
  - Highlight a lot and click the Delete icon  to delete the selected lot.
    - You cannot delete lots that are attached to customer accounts.
  - Highlight a lot and select to open the selected lot. This will open the Lot Maintenance window.
  - Click the Create icon  drop-down menu and select New Lot to create a new lot.
- 

## 2 Create or modify a lot.

- Enter the general lot and owner information in the General section.
  - The **Lot Number** field will always be disabled. When you are creating a new lot, the Lot Number field will populate once the lot is created (when the Save icon  is clicked). An information window will open that displays the new lot number.
    - Lot numbers are assigned sequentially.
-




- The **Status** field is used to assign the status of a lot. This is the only field required when creating a new lot.
  - The **Owners Customer Number** field is used to set the owner of a lot. Click the Owner's Customer Number field label to select the owner from a list of customer records.
    - The **Owners First** and **Last Name** fields will automatically populate with the information attached to the selected customer number.
  - The **Tax Lot** field is generally used to track the tax lot identification number.
  - The **Parcel** field is used by some organizations to record the lot parcel number.
  - The **Street Number**, **Street Directional** and **Street Name** fields are used to enter the address on the lot. For example, if the address is 11 N Main Street, enter 11 in the Street Number field, enter N in the Street Directional field, and enter Main Street in the Street Name field.
  - The remaining address fields in the General section are used to record specific lot address details and may not be used by every organization.
  - The **Master Account** field is used to specify a master customer account on the lot. When the active customer account on the lot is finalized in the Utility Billing module, and the Final Billing batch is committed, the status of the master account will change to active and the master account becomes the active account on the lot. The connection date on the master account will be the date the Final Billing batch is committed.
-

- A master account must be in suspended status. If the master account changes to Delete status, the account is no longer the master account.
    - A customer account will only display in the Master Account drop down menu if it has already been attached to the lot and is in suspended status.
    - If the account selected in the Master Account drop down menu is processed in the UB Final Billing process, the Master Account will be set to suspended status rather than delete status when the Final Billing batch is committed. In this case, the master account will maintain its position as the master account on the lot.
    - If the status of the Master Account is manually changed to Delete from the account maintenance window (UB> Maintenance> Account> Account tab> **Account Status** field), the master account will no longer be attached to the lot and the Master Account field will be blank.
- 

### 3 Complete the Details section of the Lot tab.

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- The **Balance** field displays any outstanding balances associated with the lot.
  - The remaining fields in the Details section are used to record specific details about the lot. Complete as many of these fields as desired.
    - Subdivisions are created and maintained on the Subdivision Maintenance window (SS> Maintenance> Subdivision).
    - Class codes are created and maintained on the Class Maintenance window (UB> Maintenance> Class).
    - Zone codes are created and maintained on the Zone Maintenance window (SS> Maintenance> Zone).
  - Click the Launch URL icon  drop-down menu and select a URL type code to transmit data from the customer or lot to the web site attached to the URL type code.
    - This icon is accessible from any tab on the Lot Maintenance window.
  - If your organization uses third-party web sites for tasks such as lot mapping or license applicant background checks, URL type codes can help improve efficiency by reducing data entry.
  - URL type codes are created and maintained on the URL Setup window (SS> Maintenance> URL Setup).
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#### 4 Complete the Miscellaneous tab.



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- The **Miscellaneous** tab is used to enter user-defined information that is outside the scope of the Springbrook application. You can set the value of the miscellaneous field labels using the Miscellaneous Field Labels window (SS> Utilities> Miscellaneous Field Labels).
- 

## 5 Open the Work Orders tab.


- The **Work Orders** tab will display any work orders that are attached to the lot. Click on a work order number to open the Work Order Maintenance window.
  - Click the Save icon  when complete.
- 

## 6 Complete the Alert tab.

- The Alert tab will display all of the existing alerts attached to the lot.
  - Highlight an alert code and click the Delete icon  or press DELETE to remove the selected alert code from the lot.
  - Highlight an alert code and click the Modify icon  or press ENTER to edit the selected alert code.
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- Click the Create icon  or press INSERT to attach a new alert code to the lot. This will open the Alert Code Selection window.
    - Select an alert code and click the Confirm icon  to add the selected alert code to the lot.
    - Alert codes are created and maintained on the Alert Code Maintenance window (SS> Maintenance> Alert Code).
  - The **Description** field will automatically populate with the description attached to the selected alert code.
  - Enter an **Alert Date** for the new alert code. This represents the date that the alert code becomes active.
    - This field will automatically populate with today's date.
  - The **Expiration Date** is calculated by adding the alert duration specified on the selected alert code to the date specified in the Alert Date field. If the Alert Date is updated, the Expiration Date will automatically update according to this calculation.
    - The Expiration Date cannot be prior to the Alert Date.
  - The **Comment** field will populate with the comment attached to the selected alert code.
  - Check the **Selection Alert** toggle to activate the alert message when the lot is selected and attached to another entity in the application.
  - Check the **Maintenance Alert** toggle to activate the alert message when the lot is opened from any window where the lot details can be maintained or edited.
  - The **CR Receipt Alert** toggle is not enabled for alerts associated with lots or other System Setup entities.
  - Click the Save icon  to save any updates made to the attached alerts.
-

## 7 Track any changes made to the Lot Maintenance window.

- Click the Audit Trail icon  to open the Audit Trail window.
  - Use the **Search Criteria** section to sort the displayed audit trail.
  - The **Audit Trail History** section will provide details about any changes made to the lot maintenance window including the date of the change, type of change made, user that made the change, and data table that was edited.
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# SS> Maintenance> Purchasing Unit Maintenance

## Purchasing Unit Type Maintenance



### Summary

Purchasing unit types are attached to purchase order line items and AP module invoice line items and are used to describe the type of units that are being purchased. For example, if a product is purchased by the dozen, create a unit type labeled DOZEN. When purchase orders are received (PO> Receiving), the receiving department will know how to receive the items. This applies even if you do not receive purchase orders in the PO module because the unit type displays on the printed version of the PO in a column labeled U/M.

### Step by Step

1 View the unit types.


- Open the **Purchasing Units Maintenance** window (SS> Maintenance> Purchasing Units).
- The Purchasing Units Maintenance window is used to maintain units that will be used in the AP, IC and PO modules.

- Select a unit type in the left section of the window and the fields in the Maintenance section will update with the information attached to the selected unit type.
  - Right click on the unit types in the left section of the window and select Export grid contents to Excel if you would like to create an MS Excel spreadsheet of the unit types in the window.
  - Highlight a unit type and click the Delete icon  or press DELETE to delete the selected unit type. This will open a confirmation information box.
    - There is no validation on this procedure, so you can delete a unit type that is attached to a PO or invoice line item.
  - Press INSERT or click the Create icon  if you would like to create a new record. This will create a new line item in the left section of the window.
- 

## 2 Create or modify a unit type.

- The **Unit Type** field is used to enter the unit type code. This is the value that will display in the Unit Type drop-down menu when you are attaching the unit type to a record. For example, enter EA if you would like to create a unit type for individual units.
    - The value in the Unit Type field can be up to 10 characters long.
    - If you will add this unit type to purchase orders, you may want to create a unit type that is less than or equal to four characters. Only four characters will display correctly on the printed version of the purchase order.
-



- The Unit Type field must be unique within the AP, IC and PO modules. For example, you can create a unit type of EA in both the SS Units Maintenance window and the SS Purchasing Units window, but you cannot have two EA unit types in the same window. You will get a validation error if the Unit Type is not unique.
  - The **Multiplier** field allows you to specify a multiplier value for an individual unit. For example, an inventory item that is counted individually but is stored 12 units to a box could have a unit type of BOX12 and a multiplier of 12.
    - This field has no function in the Accounts Payable and Purchase Order modules. Multipliers will not affect the quantity to be received or the total amount on the PO.
  - The **Description** field is used to enter a description of the unit type. This field can be up to 128 characters long.
  - Press ENTER or click the Save icon  to save the unit type.
-

# SS> Maintenance> Report Layout



## Report Layout Maintenance




### Summary

The Report Layout Maintenance window is used to create and maintain customized report layouts. This allows users to create customized reports and checks that meet their unique needs.

### Step by Step

1 Open the Report Layout Selection window (SS> Maintenance> Report Layout).



- The **Report Layout Selection** window will display all of the existing report and check layouts created in the application.
- Use the **Report** drop-down menu and the **Name** field to filter the reports or checks that are displayed in the data grid below.
- Highlight a report layout and click the Delete icon  or press DELETE to delete the selected layout.
- Highlight a report layout and click the Modify icon  or press ENTER to edit the selected layout.


- This will open the selected layout in the Report Layout Maintenance window.
  - Highlight a report layout and click the Copy icon  to create a copy of the selected layout.
    - This will create an exact copy of the selected layout. You will be required to specify a new, unique report layout name in order to save the copied layout.
  - Click the Import icon  to import a report layout from outside of the system.
  - Click the Create icon  or press INSERT to create a new report layout. This will open the Report Layout Maintenance window.
- 

## 2 Create a new Report Layout.


- The Report Layout Maintenance window consists of the Designer tab, the Advanced tab, the Labels tab and the Settings window.
  - The **Report** drop-down menu is used to specify what type of layout will be created.
    - Once a selection is made in this field, the Designer tab above will populate with a graphical representation of the selected report or check.
  - Enter a unique **Name** for the new report layout. This field can be up to 20 characters in length.
  - The three steps below outline how to customize the layout of the report or check. Please note that the changes made in the Settings section will not update the appearance of the report or check displayed in the Designer tab. You will need to print a test report in order to confirm the changes appear as desired.
-


### 3 Edit the Report Layout with the Designer tab.

- Click the Whitespace icon  and select a report section in the Designer tab. This will enable the Section layout fields in the left column of the Settings window below.
  - The Section layout fields - Section, Height, Suppress and Suppress if Blank - are used to set the amount of white space that will be included on the printed report or check.
  - Not all sections of every report or check can be adjusted to increase or decrease white space. When a section can be adjusted, it will be outlined in blue when selected.
  - The **Section** field will display the name of the selected section. This field cannot be edited.
  - The **Height** field is used to adjust the height of the selected section.
    - This value is displayed in inches and can be positive or negative. For example, entering "-0.25" will reduce the selected white space section height by a quarter of an inch.
    - Changes entered here will not appear in the Designer tab above. You will need to print a test report to see how the changes affect the layout. Click the Print Preview icon  to print a test report.
  - The **Suppress** field is used to prevent the selected section from being printed on the report or check. By default, all sections are included when printed.
    - Select True from the drop-down menu to prevent the selected section from printing.

- Select False to include the selected section on the printed report or check.
- The **Suppress if Blank** field is used to prevent the selected section from being printed on the report or check if the selected section does not contain any data.
- Click the Object icon  and select a report object in the Designer tab. This will enable the Object layout fields in the right column of the Settings window below.
  - The Object layout fields - Object, Left, Top, Height, Width and Suppress - are used to customize the size and location of the elements on the report or check.
  - Not all objects on every report or check can be adjusted for size and location. When an object can be adjusted, it will be outlined in red when selected.
  - The **Object** field will display the name of the selected object. This field cannot be edited.
  - The **Left** field is used to adjust the position of the selected object relative to the object's current left edge.
    - This value is displayed in inches and can be positive or negative. A positive value will move the object to the right, while a negative value will move the object to the left. For example, entering "-0.25" will move the selected object to the left by a quarter of an inch.
  - The **Top** field is used to adjust the position of the selected object relative to the object's current top edge.
    - This value is displayed in inches and can be positive or negative. A positive value will move the object down, while a negative value will move

the object up. For example, entering "-0.25" will move the selected object up the report by a quarter of an inch.

- The **Height** field is used to adjust the height of the selected object.
    - This value is displayed in inches and can be positive or negative. For example, entering "-0.25" will reduce the selected object height by a quarter of an inch.
    - Graphical elements, such as logos or other images, will not appear properly if the Height is adjusted independently of the Width.
  - The **Width** field is used to adjust the width of the selected object.
    - This value is displayed in inches and can be positive or negative. For example, entering "-0.25" will reduce the selected object width by a quarter of an inch.
  - The **Suppress** field is used to prevent the selected object from being printed on the report or check. By default, all objects are included when printed.
    - Select True from the drop-down menu to prevent the selected object from printing.
    - Select False to include the selected object on the printed report or check.
      - For example, if your partner bank requires a dollar sign (\$) be displayed before the Amount on the configurable check, select the Currency Symbol (\$) object and select False in the Suppress field to ensure it is displayed.
  - Click the Save icon  to save the Report Layout.
-



- Once a report layout is complete, you can use the Export icon  to export the report layout. That report layout can then be imported into the Report Layout Selection window, allowing organizations to share custom report layouts.
- 

#### 4 Edit the Report Layout with the Advanced tab.

- The Advanced tab displays every section type on the report or check.
  - Expand a section type to display the individual sections or object within that section type.
  - Highlight a section or object and the associated layout fields will be enabled below.
  - Make any desired changes to the layout fields in the same manner as described in step 3.
- 

#### 5 Edit the Report Layout with the Labels tab.

- The Labels tab is used to edit the six labels that appear at the top of the configurable check stub.
  - The current labels, as described in the bullets below, are also the default labels. If your organization has been using these labels on configurable checks and would like to continue to use these labels, no change is necessary. The AP and PR configurable checks will default the these existing labels:
-

- Accounts Payable:
    - Vendor Name
    - Vendor Number
    - Check Amount
    - Check Date
    - Vendor Account Number
    - N/A
  - Payroll:
    - Employee Name - Employee Number
    - Department
    - Check Amount
    - Check Date
    - Period Range
    - Location
  - If you would like to edit these labels, you can specify the label for each field by selecting the desired label in the **Type** column drop-down field next to the desired check stub location.
    - These changes will not be displayed on the Designer tab, so you will need to save your changes and click the Print Preview icon  to print a test report.
  - For more information on the specific labels available, please see the related Check Labels Community article at <https://success.springbrooksoftware.com/s/article/Configurable-Check-Labels>.
  - Click the Save icon  to save the Report Layout.
- 
-



# SS> Maintenance> Report Publishing



## Report Publishing Maintenance

### Summary

The Report Publishing Maintenance window is used to organize and maintain published reports in the application. When a report is originally published the publisher can specify a name for the published report and where the report will be accessed within the application. Once a report is published, any changes to the report or where the report is accessed must be made through the Report Publishing Maintenance window.










### Step by Step



- 1 Open the Report Publishing window (SS> Maintenance> Report Publishing).
  - 2 Create or edit a menu group.
    - The Report Publishing window is divided into two sections.
    - The **Menu Groups** section will display all of the available menu groups in the application.
-

- Click the Expand button next to a module to display the available menu group palettes within that module.
    - Each module will include a menu group palette with the default title "Published Reports". Click on the menu group palette to edit the title.
  - Highlight a module and click the Create icon  to add a new menu group palette to that module.
    - This will create a new menu group line item below the module. Enter a name for this palette as it will display when a user accesses the module.
    - While this name can be up to 32 alphanumeric characters long, if the palette width is not changed only the first 19 characters will display on the palette itself.
  - Highlight a menu group and click the Delete icon  to delete the menu group.
    - You cannot delete a menu group that contains a published report. You must delete the published report first.
  - Highlight a menu group and the published reports that are in that palette will populate the Published Items section.
- 

### 3 Edit a published report.

- The **Published Items** section will display all of the published reports in the highlighted palette.
-

- Highlight a published report and click the copy icon  to create a renamed copy of the report in the same menu group.
  - Highlight a published report and click the Modify icon  to edit the report.  
This will open the report window as it appeared when the report was originally published.
    - Edit the report filtering options. This includes entering information into any of the filter fields or checking toggles to include or remove information from the report.
    - Edit which fields users should have access to by changing the icons next to the fields.
      - The Read Only icon  should display next to each field that the user should not be able to edit.
      - Click the Read Only icon and it will change to an Edit icon .  
Now the user will be able to change the value in this field when they generate the published report.
      - Click the Save icon  to keep these changes or click the Cancel icon  if you would like to cancel the changes.
  - Highlight a published report and click the Delete icon  to delete the report.
  - Use the Up  and Down  arrow icons to rearrange the published reports.  
The order that the reports are displayed in the Published Items section is the same order that the published reports will display in the palette.
-

- Click the Sort Alphabetically icon  to sort the published reports alphabetically.
  - Click the Save icon  to save the changes.
-



# SS> Maintenance> Subdivision

## Subdivision Maintenance


### Summary

Subdivisions are user-defined codes that can be used to group lots in the UB module. These codes can then be reported on in the Query by Example report. Follow this process to create a Subdivision.

### Step by Step

- 1 Open the Subdivision Maintenance window (SS> Maintenance> Subdivision).
  - The **Subdivision Maintenance** window will display all of the Subdivision codes created in the application.
  - Highlight a subdivision code and click the Delete icon  to delete the selected code.
    - Subdivision codes that are attached to existing lots cannot be deleted.
  - Click the Create icon  to create a new subdivision code.
    - This will create a new line item and activate the Maintenance fields to the right.

## 2 Create a new Subdivision code.

- Enter a unique code in the **Subdivision** field. This is a required field.
    - This code can be up to 20 alphanumeric characters long.
    - Once the subdivision code is saved, this value cannot be edited.
  - Enter an optional Description for the subdivision code.
    - This field can be up to 60 characters long.
  - Click the Save icon  when complete.
-

# SS> Security> Tag



## Tag Maintenance


### Summary

The Tag Maintenance window is used to create user-defined categories for Springbrook entities. For example, AP Vendors could be tagged as Office Supplies, Fire and Rescue, or Heavy Equipment vendors in order to control which employees have access to specific types of vendors and to improve efficiency when working with large numbers of vendors.

### Step by Step

#### 1 View the existing tags.

- Open the **Tag Selection** window (SS> Security> Tag).
- The Tag Selection window will display all the tags that exist in the system. Use the Name and System fields in the Search Criteria section to filter the tags displayed in the data grid below.
- Select a tag and click the Delete icon  or press DELETE to delete the selected tag.
- Select a tag and click the Modify icon  or press ENTER to edit an existing tag.





- Click the Create icon  or press INSERT to create a new tag. This will open the **Tag Maintenance** window.
- 

## 2 Create a tag.

- Complete the **General** tab.
  - The **Name** field is used to specify a name for the tag.
    - This field is limited to 32 alphanumeric characters and must be unique.
  - The **Description** field is used to add a description to the tag.
  - Check the **Restrictive** toggle to set this tag to restrict access.
    - Tags that have this toggle checked are restrictive tags. Tags that do not have this toggle checked are permissive tags. How restrictive and permissive tags are attached to Springbrook entities will determine how Springbrook users will access those entities.
      - If an entity is associated with more than one restrictive tag, only users that have access to ALL of those restrictive tags will be able to access the entity.
      - If an entity is associated with more than one permissive tag, any user that has access to ANY of those permissive tags will be able to access the entity.
      - If an entity is associated with more than one restrictive tag and more than one permissive tag, only users that have access to ALL




of the restrictive tags and AT LEAST ONE of the permissive tags will be able to access the entity.

- Select the **System** the tag will be used in.
    - Current tag functionality is limited to AP Vendors and GL Charts.
    - At least one system must be selected.
  - Complete the **Permissions** tab.
    - The Permissions tab is used to add users and user groups to the tag.
    - Click the Create icon  drop-down menu and select either New User or New User Group to add a user or a user group to the tag. This will open the User or User Group Selection window.
      - The same user or user group cannot be added to a tag multiple times.
    - Highlight a user or user group and click the Delete icon  to delete it from the tag.
  - Complete the **Securables** tab.
    - The Securables tab is used to add Springbrook entities to the tag. Individual entities can be associated with tags on the entity maintenance window.
    - Click the Create icon  drop-down menu and select an entity to add to the tag. This will open the related entity selection window.
      - The same entity cannot be added to a tag multiple times.
    - Highlight an entity and click the Delete icon  to delete it from the tag.
- 

### 3 Track any changes made to the tag record.

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- Click the Audit Trail icon  to open the Audit Trail window.
  - Use the Search Criteria section to sort the displayed audit history.
  - The Audit Trail section will provide details about any changes made to a tag record including the date of the change, type of change made, user that made the change, and data table that was edited.
-

# SS> Maintenance> Units


## Unit Type Maintenance


### Summary

The Units Maintenance window is used to create and maintain unit types.


### Step by Step

#### 1 View the unit types.

- Open the **Units Maintenance** window (SS> Maintenance> Units).
- Select a unit type in the left section of the window and the fields in the Maintenance section will update with the information attached to the selected unit type.
- Right click on the unit types in the left section of the window and select Export grid contents to Excel if you would like to create an MS Excel spreadsheet of the unit types in the window.
- Highlight a unit type and click the Delete icon  or press DELETE to delete the selected unit type. This will open a confirmation information box.
  - There is no validation on this procedure, so you can delete a unit type that is attached to an AP invoice line item.

- Press INSERT or click the Create icon  if you would like to create a new record.  
This will create a new line item in the left section of the window.
- 

## 2 Create or modify a unit type.

- The **Unit Type** field is used to enter the unit type code. This is the value that will display in the **Unit Type** drop-down menu when you are attaching the unit type to a record. For example, enter EA if you would like to create a unit type for individual units.
    - The value in the Unit Type field can be up to 10 characters long.
  - The **Unit Type** must be unique. For example, you can have a unit type of EA in the SS and WO modules, but you cannot have two EA unit types in the SS module. You will get a validation error if the **Unit Type** is not unique.
  - The **Multiplier** field has no function in the Accounts Payable. Multipliers will not affect the quantity to be received or the total amount.
  - The **Description** field is used to enter a description of the unit type. This field can be up to 128 characters long.
  - Press ENTER or click the Save icon  to save the unit type.
-

# SS> Maintenance> URL Setup

## URL Setup

### Summary




The URL Setup window is used to create Uniform Resource Locator type codes. These URL type codes are used to specify the web address of the web site you would like to access and the Customer or Lot information that will be transmitted to that web site. If your organization uses third-party web sites for tasks such as lot mapping or new applicant background checks, URL type codes can help improve efficiency by reducing data entry.

Follow this process to create a URL type code. This document includes the steps required to create an example URL type code that automatically locates a lot in Google Maps by using the existing lot details.


URL requirements are not universal, and the web site you are attempting to connect to may require a different format. Because Springbrook does not support format questions regarding URL access to third party web sites, please contact the web site owner for specific URL requirements.

### Step by Step


## 1 Open the URL Setup selection window (SS> Maintenance> URL Setup).

- The URL Setup selection window will display all of the URL Types that have been created in the application.
  - Highlight a URL type and click the Delete icon  to delete the selected URL type.
  - Highlight a URL type and click the Modify icon  to edit the selected URL type.
  - Click the Create icon  to open the URL Type Maintenance window.
- 

## 2 Create a new URL type code.


- Enter a unique **Type** for the new URL type code. This should be as descriptive as possible, as this is the name that will appear on the Launch URL icon  drop-down menu.
    - This field can accommodate up to 32 characters.
      - *Example* - For our Google Maps example, we will enter Lot Locator in this field.
  - Enter an optional **Description** for the new URL type code.
    - The Description can be up to 60 characters long.
  - Use the **Entity** field to specify whether the URL type code will be associated with Customer information or Lot information.
    - The **Available Fields** section to the right will automatically populate with the fields associated with the selected entity.
-

- Customer details are maintained on the Customer Maintenance window (SS> Maintenance> Customer).
  - Lot details are maintained on the Lot Maintenance window (SS> Maintenance> Lot).
  - The selected Entity will also determine where the URL Type is accessible. For example, only Lot URL types are accessible from the Lot Maintenance window. In the Customer Maintenance window, only Customer URL types are accessible. For maintenance items that can be associated with both customer and lot records, such as BP Permits and LP Licenses, both URL types will be accessible.
    - *Example* - Select Lot in order to have access to the lot details.
  - The **Behavior** drop-down menu is used to specify what the system will do when a URL type code is launched.
    - Select Open Browser to launch an Internet browser, browse to the web page URL attached to the type code, and then populate with the web page with data from the available fields specified. This is the standard functionality.
    - Select Process Online Exchange if your organization utilizes Online Utility Exchange's (OUE) bad debt management tool. This will allow this URL type code to interface directly with OUE and reduce data entry.
      - The Online Utility Exchange interface is a premium feature. Please contact Springbrook Support for more information.
  - Enter the **URL** for the web site you would like to access with the new URL type code.
-

- The Insert Field icon  is used to insert a field displayed in the Available Fields section into a specified location on the URL. Highlight a field and click the Insert Field icon to add that field to the URL. You can also insert a field by double clicking the desired field.
- The contents of the selected field will automatically populate the specified section of the URL.






- *Example* - For our example, the required URL for Google Maps is:

[http://maps.google.com/maps?f=q&source=s\\_q&hl=en&geocode=&q=](http://maps.google.com/maps?f=q&source=s_q&hl=en&geocode=&q=)

- After entering this URL into the URL field, we can add the necessary lot details. In the case of Google Maps, each lot detail must be separated by a plus sign "+".
  - URL requirements are not universal, and the web site you are attempting to connect to may require a different format. Because Springbrook does not support format questions regarding URL access to third party web sites, please contact the web site owner for specific URL requirements.
- Highlight the first required lot field and click the Insert Field icon . In this example, the first required lot field is Street Number.
- Enter a plus sign "+" and then highlight and insert the next required lot field. In this example, the next required lot field is Street Directional. Repeat this process for the Street Name, City and State fields. When you are done, the complete URL should look like this:



http://maps.google.com/maps?f=q&source=s\_q&hl=en&geocode=&q=[Lot.Street\_Number]+[Lot.Street\_Directional]+[Lot.Street\_Name]+[Lot.City]+[Lot.State]

- When the Launch URL icon  is clicked from within an applicable maintenance window, the lot details associated with the open account will automatically populate the address fields in the URL. A Google Maps map of the lot location will then be launched in your default web browser.
- The **Sub Systems** section determines which Springbrook modules will interface with the URL type code.
  - If more than one URL type code is associated with a sub system, the Launch URL icon  for that sub system will include a drop-down menu that allows you to select the desired URL type code.
  - Use the Select All  or Deselect All  icons to select all or deselect all of the displayed sub systems.
    - *Example* - Check the System Wide Access toggle in order to make our example URL type code accessible from the Lot Maintenance window.
- Click the Save icon  when complete.
  - *Example* - Open the Lot Maintenance window (SS> Maintenance> Lot) and select a lot. When you click the Launch URL icon drop-down menu, our example Lot Locator URL type code should be displayed. Select the type

code and a Google Maps map of the lot location should launch in your default web browser.

---

# SS> Maintenance> User Schedule



## User Schedule Setup Maintenance

### Summary

The User Schedule Setup Maintenance window is used to set up Springbrook users in the appointment scheduling system. Once a user is set up in the scheduling system, that user can be assigned to an appointment, such as conducting a building inspection. When that appointment is scheduled or updated, the user will receive an email notification that includes a link that allows the user to add the appointment to their MS Outlook calendar.



### Step by Step

- 1 Open the **User Schedule Setup Maintenance** window (SS> Maintenance> User Schedule).
  - The User Schedule Setup Maintenance window will display all of the Springbrook users that have been set up in the appointment scheduling system.
    - Users can be added to the appointment scheduling system through the User Schedule Setup Maintenance window or the User Maintenance window.

- Highlight a user and click the Delete icon  or press DELETE to delete the selected user schedule setup. This will remove the user from the scheduling availability, but will not delete the user from the Springbrook system.
  - Highlight a user in the left section of the window and the schedule details for that user will be displayed in the Maintenance section on the right for editing.
  - Click the Create icon  or press INSERT to create a new user schedule.
- 

## 2 Create a new user schedule.

- Enter a **User Name** or click the field label to select one from a list. This is the only information required to save the user schedule.
    - Users are created and maintained on the User Maintenance window (SS> Security> User).
  - Specify a **Status** for the user schedule.
    - Only user schedules with a status of Active will be available in the appointment scheduling system.
  - Enter a **Contact Phone** number for the user schedule.
  - The **Contact Other** fields can be used to specify alternate contact information, such as additional phone numbers or email addresses.
    - This field can be up to 30 characters long.
-

- Select a **Schedule Color** from the drop-down menu.
    - It can be very helpful to assign unique colors to each user that will be sharing a queue. For example, if your organization employs five building inspectors, and all of those building inspectors are part of a building inspections queue, you will be able to open the appointment calendar, select the building inspections queue, and quickly determine which inspectors are available.
    - Queues are module-specific and are created and maintained within each module.
  - Click the Add icon  to specify when a user will be available for scheduling. This will add a line item to the Availability section on the bottom right.
    - Select the Day, System, From and To values for the new user schedule availability. A single user can be scheduled to be available in multiple systems for the same day and time. A user can be scheduled outside of their specified availability, but the individual scheduling the appointment will need to confirm that they are aware that the appointment falls outside of the user's availability.
  - Click the Save icon  when complete.
-

# SS> Maintenance> Zone

## Zone Maintenance

### Summary


Zones are user-defined groupings that allow you to group lots (for example, residential, commercial, etc.). Zones are attached to lot records using the Lot Maintenance window (Lot icon> Open a lot> Lot tab> Details section), and can be used when creating Query by Example reports. (Zones are located in the Lot Master table.)

### Step by Step



1 View the existing zones.

- Open the **Zone Maintenance** window (SS> Maintenance> Zone).
- The Zone Maintenance window will display all of the zones that have been created in the application.
- Highlight a zone in the left section of the window and the fields in the Maintenance section will populate with the information attached to the selected zone.
  - If the Maintenance section does not display in the window, it has been reduced. Move the cursor to the right border of the window. When the border

changes color, right click the mouse. This will expand the Maintenance section.

- Highlight a zone and click the Delete icon  to delete the highlighted zone. If the zone is attached to a lot, you will not be able to delete the zone.
- 

## 2 Create a new zone.

- Click the Create icon  to create a new zone. This will add a new line item to the left section of the window and the fields in the Maintenance section will be available to enter the zone record information.
  - The **Code** field is used to identify a unique zone. The value in the Code field can be up to 20 characters long and it must be unique.
  - The **Description** field is used to enter a description of the zone. The value in the **Description** field can be up to 50 characters long.
  - Click the Save icon  or press ENTER to save the new zone.
-

# SS> Reports> External Reports

## External Reports

### Summary

The External Reports tool allows you to run external reports created in Crystal Reports through the Springbrook application. In order for these external reports to work with the External Reports tool, they must be saved in the `.local` folder of the Springbrook installation. They also need to be renamed to include "ext-" as a prefix.


### Step by Step

- 1 Open the External Reports window (SS> Reports> External Reports).
- 2 Select and configure the external report.
  - Click the **Report Name** drop-down menu to select the external report you would like to generate.
    - This drop-down menu will populate with any reports that are located in the `.local` folder of the Springbrook installation and have been renamed to include "ext-" as a prefix.



- The **Parameters** section below will automatically populate with any editable parameters attached to the external report.
- 

### 3 Print the external report.

- Once you have entered the desired details in the Parameters section, you can print the external report.
  - Click the Print icon  to process the report immediately or enter a date and time in the field next to the Print icon to schedule the report to generate at a later time. You can view the progress of the report on the Job Viewer window (SS> Utilities> Show Scheduled Jobs).
    - Click the Print icon drop-down menu and select Print Preview to preview the report before printing.
    - Click the Print icon drop-down menu and select Excel to export the report data to an Excel spreadsheet as unformatted data.
    - Click the Print icon drop-down menu and select Excel (Formatted) to export the report data to an Excel spreadsheet that includes much of the Springbrook formatting found on the printed version of the report.
    - Once the report is generated, you can also display the report using the View Reports window (SS> Utilities> View Report).
- 

### 4 Publish the external report. This is an optional step.

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- By publishing an external report, you can give the report a descriptive, understandable name and specify a logical location within the application where the report can be accessed by other users.
-

# SS> Security> Menu Security Display




## Menu Security Display

### Summary

The Menu Security Display window is used to compare security settings between departments, user groups and individual users. Filter options allow you to compare security settings across all Springbrook modules and processes or to limit the comparison to specify modules or processes within those modules.

### Step by Step

- 1 Open the **Menu Security Display** window (SS> Security> Menu Security Display).
  - 2 Select the menu security settings that will be compared.
    - Select a **Compare From Type** from the drop-down menu.
      - This is the Department, User Group or User that the comparison will be based on.
-

- Enter a **Compare From** value or click the field label to select one from a list.
    - Depending on the selected Compare From Type, clicking the field label will open the Department, User Group or User selection window. Highlight the type you would like to compare from and click the Confirm icon .
  - Select a **Compare To Type** from the drop-down menu.
    - This is the User Group or User that will be compared to the selection in the Compare From field.
  - Enter a **Compare To** value or click the field label to select one from a list.
    - Depending on the selected Compare To Type, clicking the field label will open the User Group or User selection window. Highlight the type you would like to compare to and click the Confirm icon .
  - Select a **System** from the drop-down menu to limit the comparison to a specific module. Select All to compare security across all modules and processes.
  - Select a **Process Name** from the drop-down menu.
    - The options available in this field will be determined by the selection in the System field above. Select a process or select All to compare security settings across all processes within the system selected above.
    - This field will not be enabled if All is selected from the System drop-down menu.
  - Click the Refresh icon  to populate the data grid below with the filtered results.
- 

### 3 Compare the results.

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- The data grid will only display the systems or processes where the Compare From and Compare To security settings differ.
  - If the Difference column displays "Added", the Compare From security is set to Full Access or No Access and the Compare To security is not set.
  - If the Difference column displays "Missing", the Compare From security is not set and the Compare To security is set to Full Access or No Access.
  - If the Difference column displays "Non-matching", the security is set for both the Compare From and Compare To fields, but the settings are different. The Access Level field will display the setting for Compare To and the Security Difference field will display the setting for Compare From.
-

# SS> Security> DB Security

## DB Security Maintenance

### Summary

DB Security allows you to set the security on a database field or table for a user or user group. This feature is helpful when creating security on personal customer information such as social security or bank account numbers because the security will apply to all windows that display the information.

DB Security can be set up by user or user group. If there is security set up on a field at both the user and user group level, the security set up at the user level will override the security set up on the user group. This allows you to customize the user group settings for each user that is attached to a user group. If a user is attached to multiple user groups and there is no DB security set up at the user level, the least restrictive user group security will be applied.

If you would like to view the DB security that will be applied to a user, open the user in the Maintain DB Security window and select the field in the Security Settings section. The security that will be applied to the user will display next to the field name. All of the groups and security settings that are attached to the user will display next to the database field.


DB Security can be set up at the field level or the table level, and individual field level security will override all of the security set up on the table level. As with field security, table security set up on the user will override table security set up on groups that a user is attached to.

Use the Table/Field Help feature in Help> Table/Field to determine what field and table the information on a window is stored in. When the Table/Field Help feature is turned on a message bubble will display the table and field name of the fields in a window as you move the cursor.

There are five levels of database security that can be placed on a field or table: Full, Read/Write, Read, No access and Security Not Set. Full access grants the user full access to the field or table. Read/Write access allows the modification of the data but not the deletion of it. Read access will display the data, but the data cannot be modified. When a window is opened that contains a Read access field or table, the field will be disabled. No access security will remove the field from any window that displays the database field or table. If a window is opened that contains a No access field, there will be a blank space where the field is usually displayed. If no security is set up on a table or field, the security will default to No Security Set. This is similar to Full Access because it will not limit access, but security with the No Security Set status on a user account will be overridden by security set up on a user group.

Use Menu Security (SS> Security> Menu Security) to control access to a menu option if you would like a user or user group to have access to a field in one window but not another.

Here are a few fields you may want to set security on in the overview document of each module.



- SS module, Users table, User Name field – This will affect the security on the User Name drop-down menu on the Jobs Viewer (Jobs Viewer icon  on the main desktop). Users with access to this drop-down menu can view the reports generated by other users. If other users are creating reports with sensitive data, users with access to this drop-down menu will have access to that data.
- SS module, Customer table, SSN field – This will affect the security on the social security number displayed in maintenance and search windows throughout the application. This will not only affect the social security number that displays on the Customer Maintenance window (Central Search> Open a customer), it will also affect how the SSN will display on the maintenance windows that display information pulled from the customer record such as the People tab on the Account Master Maintenance window in the UB module (UB> Maintenance> Account).

## Step by Step

1 Open the **Maintain DB Security** window (SS> Security> DB Security).


- The Maintain DB Security window allows you to set up security on database fields by users or user groups.
  - Select if you would like to modify the security of a user or user group. By default the user group security is selected.
-






- Click the User icon  to modify the database security settings on user accounts. This will change the User Group Selection section to the User Selection section in the Maintain DB Security window.
  - Click the Group icon  to modify the menu security settings of user groups. This will change the User Selection section back to the User Group Selection section in the Maintain DB Security window.
  - If you have selected to modify user group security settings, the drop-down menu in the User Group Selection section will display all of the user groups that have been created in SS> Security> User Groups.
    - Users can be added to user groups from either the User Group Maintenance window or the User Maintenance window.
    - You can view all of the users attached to a user group in the User Group Maintenance window in SS> Security> User Groups.
  - If you are modifying user settings, the drop-down menu will display all users accounts that have been created in SS> Security> Users.
  - Select a user or user group to modify.
- 





## 2 Set the security on a table or field.





- After you have used the Table/Field Help feature to determine the name of the field and/or table you would like to set security on, locate the table and/or field in the Security Settings section.
  - Click the Expand button for a module that you would like to set security on.
-

- The Expand button will only be enabled after a user or user group has been selected in the drop-down menu.
- Security on the tables in the System Wide Access group will generally affect multiple windows throughout the Springbrook application.
  - Example: The Customer table is used to store the customer record (SS> Utilities> Customer Master Search) and is used by all of the modules that display customer information.
- You can set up security on a table or on the fields within a table.
  - To set the security of an entire table, highlight a table in the Security Settings section. This will enable the security icons at the top of the window.
  - Field level security will override all table level security inherited by fields within the table.
    - For example: If a table is set up as Full Access and a field within the table is set up as No Access, the field security of No Access will override the table security and the user will not have access to the field. If the security on the field is not set, the inherited table security will not be overridden.
  - Click the Confirm icon  to allow full access to the table.
    - Full Access is different than the Security Not Set status because it is an active way of granting complete access to the table. Full Access security on an individual field will override all security access set up on the table containing the field. Full Access security set on a user account will override any security set up on user groups the user is attached to.

- Click the Read/Write icon  to allow read and write access to the table.
    - If a table is set up as Read/Write status, the Delete icon  on the maintenance window that maintains the table will be disabled.
  - Click the Read Only icon  to allow only read access to the table.

When a window containing the fields in the table is opened the value in the fields will display, but the fields will not be enabled for modifications.

    - Click the No Access icon  if you do not want the fields in the table to display on any windows.
  - Click the Delete icon  to remove all security setting on the selected table. This will change the security setting on all of the fields in the table to Security Not Set.
  - To set the security of a single field, click the Expand button on the table. This will display all of the fields in the selected table.
    - Click the Confirm icon  to allow full access to the table.
      - Full Access is different than the Security Not Set status because it is an active way of granting complete access to the field. Full Access security set on a user account will override any security set up on user groups the user is attached to.
    - Click the Read/Write icon  to allow read and write access to the field.
      - Users or user groups will not be able to delete data in a field set up as Read/White.
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- Click the Read Only icon  to allow only read access to a field. When a window containing the field is opened the value in the field will display, but the field will not be enabled.
  - Click the No Access icon  if you do not want the field to display on any windows. If a window is opened that contains the field, a blank space will be where the field usually displays.
    - Click the Delete icon  to remove the security settings on the field.  
This will change the security setting to Security Not Set.
  - Click the Save icon  when complete. The Save icon will only be enabled if there has been modifications to the user or user group security settings.
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# SS> Security> Menu Security

## Menu Security Maintenance

### Summary



The Maintain Menu Security window is used to set up which palette menu options can be accessed by a user and user group. If there is security set up on a user and the user is attached to a user group, the security set up on the user account will always override the security set up on a user group. This allows you to attach a user to a user group and then customize the security for a single user.

If a user is attached to multiple user groups, the least restrictive group security will apply. This allows you to attach a user to multiple user groups (including user groups with less security access in some areas of the application) without creating conflicts in security. If there is security set up on the user account, the security on the user will override the security on all of the user groups.

There are three security settings on menu options: full access, no access and security not set. If security is set to full access the menu option will display on the palette and can be opened. If no access is selected the menu option will not be displayed. If all of the menu options on a palette are set as no access, the entire palette will not be displayed. If no security is set up on a menu option, the security will default to No Security Set. This is similar to Full Access because it will not limit access, but menu options set up as No Security Set on a user account will be overridden by the security set up on a user group.







## Step by Step


### 1 Open the **Maintain Menu Security** window (SS> Security> Menu Security).

- The Maintain Menu Security window allows you to set up menu security on users and user groups.
  - Select if you would like to modify a user or user group security settings.
    - Click the User icon  to modify the menu security settings on user accounts rather than user groups. This will change the User Group Selection section to the User Selection section.
    - Click the Group icon  to modify the menu security settings of user groups. This will change the User Selection section back to the User Group Selection section.
  - If you have selected to modify user group security settings, the drop-down menu in the User Group Selection section will display all of the user groups that have been created in SS> Security> User Groups.
    - If you are modifying user settings, the drop-down menu will display all users accounts that have been created in SS> Security> Users.
  - Select a user or user group to modify in the drop-down menu.
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### 2 Set security on a menu option.

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- Click the Expand button of a module that you would like to set security on. The Expand button will only be enabled after a user or user group has been selected from the drop-down menu above.
- You can set the security on an entire palette or you can set security on a palette option.
  - To set the security on an entire palette, simply highlight the palette. This will enable the security icons at the top of the window. The security set on a palette will be applied to all of the options on the palette. If you disable all of the menu options on a palette, the palette will not be displayed when the user logs in to the application.
    - Click the Yes icon  to allow full access to the palette.
    - Click the No icon  to disallow access to the palette.
    - Click the Delete icon  to remove all security settings on the selected palette and change the palette to Security Not Set status.
  - To set the security on a palette option, click the Expand button on the palette. This will display all of the palette options in the selected palette.
    - Click the Yes icon  to allow full access to the palette option.
    - Click the No icon  to disallow access to the palette option.
    - Click the Delete icon  to remove all security settings on the selected palette. This will change the security setting on all of the palette options to Security Not Set.

- Click the Save icon  when complete. The Save icon will only be enabled if there have been modifications to the security of the selected user or user group.
-



# SS> Security> PM Security

## PM Security

### Summary

The Task Security window is used to set up security on Project Management module tasks. This keeps users or user groups from attaching a PM task to transactions in specific modules or the entire application. Users will only be able to attach a PM module task to their timesheets or to invoices if that PM task is manually enabled using the PM Security window.

Security can be set up by user or user group. Security set up on a user will override the security that is set up on a user group. For example, if an employee is attached to both a user and a user group, and there is PM security on both, the PM security on the user will apply. This allows you to assign users to user groups and then customize the security on each user by assigning specific security at the user level.

When a user or user group is restricted from using a task code in a module (for example, a user is forbidden from attaching a certain task code to AP invoices), that task code will not display in the selection window that is opened from the **Task Code** field labels. If the user manually enters the forbidden task code into a Task Code field, they will receive an error message when they try to save the new record.

You should limit access to the PM Security window using the Menu Security feature.

When a user creates a task code using the Task Maintenance window (PM> Maintenance> Task), the user will automatically have system wide access to that task code. For example, if a user creates a task code in the Task Maintenance window, they will be able to attach that task code to their timesheet in the Payroll module or to an AP module invoice line item.

You can also limit access to PM module task codes that are attached to transactions by locking the task (PM> Maintenance> Task> General tab> **Locked** toggle). Locked tasks cannot be attached to transactions (for example, AP invoices, PR timesheets, etc.).

## Step by Step



1 View the PM security set up on a user or user group.

- Open the **Task Security** window (SS> Security> PM Security).
  - PM security can be set up by both user and user group. Use the User or User Group icon at the top of the page to select the type of security you would like to create. Security set up on the user level will override security set up on the user group level.
  - Select a user or user group from the drop-down menu.
  - All of the PM module task codes will display in the grid, along with the security defined on each.
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## 2 Define security on the task codes.

- The **SS**, **AP**, **DS**, **PR**, **PO**, **GL** and **IC** columns represent the modules in the application where Project Management module task codes can be attached to transactions. Check the toggle to enable the task code in that module for the user group or user selected in the drop-down menu at the top of the window.
  - GL - PM module task codes can be attached to journal entry line items in the Journal Entries batch process (GL> Journal Entries).
  - AP - PM module task codes can be attached to invoice line items in the AP Invoices batch process (AP> Invoices), and manual check line items (AP> Manual Checks).
  - DS - The Departmental Services module has not been implemented, so this toggle currently has no function.
  - PR - PM module task codes can be attached to timesheets (PR> Timesheets) and timecard line items in the Computer Checks and Manual Checks batch processes.
  - PO - PM module Task and Type codes can be attached to Purchase Order or Requisition line items. When the purchase order or requisition is invoiced, the PM Task will display the PO transaction.
  - IC - PM module task and type codes can be attached to an IC Inventory Transaction in order to track materials costs on special projects.
  - SS - The SS toggle is used to enable the task in the entire application. This will put a check in all of the module columns. The SS module toggle also determines if the task will display in the Task Selection window in the Project Management module (PM> Maintenance> Task), and if it can be used in the

Purchase Order module.

- If a user creates a task (PM> Maintenance> Task), this toggle will automatically be checked.
  - The PM module overview page has a diagram that displays the processes in the application that create PM module transactions.
  - You can also use the drop-down menu next to the Enable and Disable icons at the top of the window to make your security selections. Highlight a PM module task code in the grid and then select the security you would like to set using the drop-down menus next to each icon.
  - Press ENTER or click the Save icon  to save the security.
  - Press ESCAPE or click the Exit icon  to close the window.
-

# SS> Security> Print User Permissions


## Print the User Permissions Report

### Summary


The User Permissions report displays a filtered list of users and their Springbrook security settings.

### Step by Step

- 1 Open the User Permissions report (SS> Security> Print User Permissions).
  - 2 Configure the report.
    - The **Security For** drop-down menu is used to filter the displayed user permissions to those set up at the user, user group or department level.
      - The field label below is determined by the selection in the Security For field above. Click the field label to select the User, User Group or Department that you would like to use to filter the report.
        - Users are created and maintained on the User Maintenance window (SS> Security> User).
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- User Groups are created and maintained on the User Group Maintenance window (SS> Security> User Group).
  - Departments are created and maintained on the Department Maintenance window (SS> Maintenance> Department).
  - Check the **Include inaccessible menu items** toggle to include menu items that the user does not have access to in the report.
    - This will create a line item in the report for every system, process or step that is set to "No Access" on a user security record.
  - The **System**, **Process Name** and **Step Name** drop-down menus are used to further filter the permissions displayed in the report.
  - After specifying the desired filter details, click the Refresh icon  to display the resulting permissions.
  - The printed report displays the same information that is displayed in the data grid.
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### 3 Print the report.

- Click the Print icon  to process the report immediately or enter a date and time in the field next to the Print icon to schedule the report to generate at a later time. You can view the progress of the report on the Job Viewer window (SS> Utilities> Show Scheduled Jobs).
    - Click the Print icon drop-down menu and select Print Preview to preview the report before printing.
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- Click the Print icon drop-down menu and select Excel to export the report data to an Excel spreadsheet as unformatted data.
  - Click the Print icon drop-down menu and select Excel (Formatted) to export the report data to an Excel spreadsheet that includes much of the Springbrook formatting found on the printed version of the report.
  - Once the report is generated, you can also display the report using the View Reports window (SS> Utilities> View Report).
-

# SS> Security> Roles

## Role Maintenance

### Summary




The Role Maintenance window is used to create and maintain the roles that are associated with user accounts or Human Resources module positions. Roles are used in the Payroll module Timesheets Approval process and define which employees can approve timesheets.

You can create multiple roles for a single user account using this window (for example, you can create two unique roles and attach a single user account to each). If each user account should only be attached to one role, check to make sure the user account is not already attached to a role before creating a new role for that user account.

### Step by Step



- 1 View the roles in the application.
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- Open the **Role Selection** window (SS> Security> Role).
  - The Role Selection window displays all of the roles that have been created in the application.
  - Highlight a role and click the Delete icon  or press DELETE to delete the selected role.
    - Roles associated with existing work flows or work flow templates cannot be deleted.
  - Highlight a role and click the Modify icon  or press ENTER to edit the selected role.
  - Click the Create icon  or press INSERT to create a new role. This will add a line item to the left section of the window and the fields in the Maintenance section will be blank to enter the role information.
- 

## 2 Create or modify a role.

- The **Role** field is used to enter the unique title of the role.
    - If the role is associated with a specific position (for example, Police Department PR Clerk), you may want to include the name of the position in the Role field.
    - If the role is associated with a specific employee, you may want to include the name of the employee in the Role field.
  - The **Status** field is used define the status of the role.
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- Only Active status roles will affect the functioning of the application.
  - The **Type** drop-down menu is used to select how the role will relate to user accounts.
    - Select Position if you would like to associate the role with a Human Resources module position (HR> Maintenance> Position).
      - If you are using this role to approve timesheets in the Payroll module, associating the role with a position means that as employees change positions, they will automatically acquire the roles they will need to approve timesheets.
      - Positions are attached to employee records using the Employee Maintenance window (PR> Maintenance> Employee> General tab> Position field).
    - Select User if you would like to associate the role with a user.
      - User records are created and maintained using the User Account Maintenance window (SS> Security> User).
  - The selection in the **Type** field determines the functionality and field label of the **User/Position** field. This field is used to select the user or HR module position you would like to associate with this position.
  - The **Function** section is used to assign functions to the role.
    - Click the Create icon  to open the Function Selection window. Highlight the function you would like to associate with the role and click the Confirm icon .
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- You can attach multiple functions to a single role.
  - Select Department Clerk if the role is allowed to approve and modify the timesheets of all of the employees in the department selected in the Department column.
  - Select Department Head if the role is allowed access to Extended Budgeting Entries from the Budget Selection window in the EB module.
  - Select HR Contact if the role should receive HR contact messages generated from the Employee Self Service online application.
  - Select HR Employee Access if the role is allowed to access HR employee records and the Require functions to view employee records toggle is checked on the HR Setup window.
  - Select PR Employee Access if the role is allowed to access PR employee records and the Require functions to view employee records toggle is checked on the PR Setup window.
  - Select Requisitions Clerk if the role is allowed to approve and modify the requisitions submitted by the department selected in the Department column.
  - Select Receiving Clerk if the role is allowed to receive purchase orders for the department selected in the Department column.
  - Highlight a function and click the Delete icon  to remove the function from the current role.
  - The **Department** section is used to associate the functions attached to the role with departments.
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- Highlight a function and check the toggles next to the desired departments to associate the role's function with those departments.
    - For example, if the new role should be able to approve timesheets for all employees in departments 150 and 160, highlight the Department Clerk function and check the toggles next to departments 150 and 160.
  - Departments are created and maintained on the Department Maintenance window (SS> Maintenance> Department).
  - Click the Save icon  when complete to save the role.
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# SS> Security> Users

## User Account Maintenance

### Summary

The User Maintenance window is used to create users, add users to a user group (users can also be added to user groups in the User Group Maintenance window in SS> Security> User Groups), and update user information such as employee number and email address.

Once an account has been created, the system will generate a welcome email that includes the new user's User Name and a temporary password so the user can access the application.

**NOTE:** *The workflow for adding users at organizations that run on-premise Springbrook from a local server is slightly different. New users at those organizations will access the Springbrook application with the same password and user name they use to access the organization network. The password of a user account is not maintained in the on-premise Springbrook application. If there are users on your network that should not have access to the Springbrook application, do not create Springbrook user accounts for those users. Only network users with a user account set up in the application will be able to log in.*

Once user accounts have been created, menu and database security options can be set up on the user account (SS> Security> Menu Security and SS> Security> DB Security).



## Step by Step




1 Open the **User Maintenance** window (SS> Security> Users).

- When a User is selected in the left section of the window, the fields in the User Maintenance section will populate with the selected user information.
- Click on an Expand button next to the user record to view the User Groups that a user is attached to.


- Click the Add to User Group icon  to add a user group to the selected user.

This will open a list of user groups to select from.

- Database security (SS> Security> DB Security) and menu security (SS> Security> Menu Security) set up on the user account will override menu security that is set up on the user group. The security set up on a user group will apply if security has not been explicitly set up on the user account. This allows you to attach a user to a user group and then customize the security for a single user.
- Highlight a user group and click the Remove from User Group icon  to remove the selected User Group from the user.
  - The Remove from User Group icon  will only be enabled when a User Group is highlighted.

- User Groups are created in the User Group Maintenance window (SS> Security> User Groups). The User Group Maintenance window also allows you to attach users to a user group.
  - Click the Delete User icon  to delete a user.
  - Click the Add to User Group icon  to add a user group to the selected user. This will add a new line item to the left section of the window.
  - Click the Reset Password icon  to reset the currently selected user's password. This icon will not display for agencies using enhanced multi-factor authentication security.
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## 2 Create a new user account.

- Press INSERT or click the Create User icon  to create a new user. This will create a new line item in the User Maintenance section of the window.
  - Enter a **User Name**. This is what the user will enter to log into the Springbrook application. Make sure it is the same as the user account used to log into the MS Windows network.
    - The user name can be up to 32 alphanumeric characters long.
    - The User Name field is not case sensitive. A user account set up as *TOM* is the same as a user account set up as *tom*.
    - Once a user name has been entered and the user saved, the User Name cannot be modified.
-

- Enter a **Description** of the user account.
    - If the **User Name** field does not include the entire name of the user, you may want to enter the name of the user in the **Description** field. For example, Tom Smith.
    - The **Description** field can be up to 30 characters long.
  - Enter an **Email address** for the user account. This is required field. Once the new user account is saved, the system will generate a welcome email that includes the new user's User Name and a temporary password so the user can access the application.
  - Enter an **Employee Number** to associate the user account with a Payroll module employee record. This is currently only required if you use the Timesheets feature.
  - Check the **Use Scheduling** toggle to include the user in the Springbrook appointment scheduling system.
    - When this toggle is checked, the new user will appear on the User Schedule Setup Maintenance window (SS> Maintenance> User Schedule). Here the user's availability can be set up so that the user can be included in the appointment scheduling process.
    - This toggle is only active when the user is being initially created. In order to add a user to the appointment scheduling system after a user is created and saved, you must use the User Schedule Setup Maintenance window.
  - The **Active** toggle will automatically be checked on all user accounts, as this is the default user status. Uncheck the toggle in deactivate the user.
    - Deactivated users will be unable to log in to the application. When a deactivated user provides valid login credentials, a message will display explaining
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that the user has been deactivated and they should direct questions to the system administrator.

- Check the **Work Flow Admin** toggle if the user should be set up as a work flow administrator.
    - Work flow administrators are able to approve or reject ALL work flows assigned to other Springbrook users.
  - The **Tableau Settings** section displays for users in agencies that are using the Tableau-powered Springbrook Analytics reporting tool.
    - The Tableau User and User Can Publish settings are initially set up on the Tableau User Maintenance window (SS> Web Maintenance> Tableau Users).
  - The **Multi-factor Authentication** section displays for agencies using multi-factor authentication (MFA). This section is used by an agency administrator to check and update a user's MFA status.
    - The Load Status button will check the MFA status of the selected user. Once that status is displayed, that status can be updated with the Opt In or Opt Out button.
      - Users that are members of multiple agencies cannot opt out of MFA.
    - Because MFA provides an additional level of security for our partner agencies, Springbrook strongly recommends keeping MFA enabled for all users.
  - Click the Save icon  or press ENTER when complete to save the user account.
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# SS> Security> User Groups



## User Group Maintenance

### Summary

The User Group Maintenance window is used to create user groups, add users to a user group and update user group information. User groups allow you to create menu and database security at a group level and then assign that security to users. For example, if all UB clerks should have similar security settings (access to the same fields, windows and processes), you can create a UB Clerks user group and then assign all UB clerk user accounts to that group. The user accounts attached to the UB Clerk user group will inherit the security settings of the UB Clerk user group. If there are security settings on the user account that conflict with the user group security, the security settings on the user account will override the user group level settings. This allows you to assign specific security settings to user accounts. If a user account belongs to multiple user groups and the security on those user groups conflict (one user group grants access to a field and the other restricts it), the user group with the least restrictive access will apply.



### Step by Step

- 1 Open the **User Group Maintenance** window (SS> Security> User Groups).
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- When a User Group is selected in the left section of the window, the fields in the User Group Maintenance section will populate with the selected user information.
  - Click on an Expand button next to the user group record to view the users attached to user group.
    - Click the Add User icon  to add a user to the selected user group. This will open a list of users to select from.
      - Database security (SS> Security> DB Security) and menu security (SS> Security> Menu Security) set up on the user account will override menu security that is set up on the user group. The security set up on a user group will apply if security has not been explicitly set up on the user account. This allows you to attach a user to a user group and then customize the security for a single user.
    - Highlight a user and click the Remove User icon  to remove the selected user from the group.
      - The Remove User icon will only be enabled when a User is highlighted.
    - Users are created in the Users Maintenance window (SS> Security> Users). The Users Maintenance window also allows you to attach users to a user group.
  - Highlight a user group and press DELETE to delete a user group.
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## 2 Create a new user group account.

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- Click the Create User Group icon  or press INSERT to create a new user group.  
This will create a new line item in the Group Maintenance section of the window.
  - Enter a **Group Code**.
    - The user group code can be up to 32 alphanumeric characters long.
    - Once a user group code has been created and saved, the Group Code field cannot be modified.
  - Enter a **Description** of the user group.
    - The Description field can be up to 30 characters long.
  - Check the **Notify About Related DB Errors** toggle if the members of the group should be notified in the event of an error during the import process of a related data transfer. This toggle is only enabled for organizations set up to use Multi-Muni relational databases.
  - Click the Save icon  or press ENTER when complete to save the user group.
    - Changes to user group security are handled as standard processing jobs.  
This means changes will not be reflected in the application until the changes are saved and the job has processed.
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# SS> Security> User Status

## Print the User Status Report

### Summary


The User Status report displays a list of Springbrook users filtered by their user status. This is a Cloud-only report.

### Step by Step

- 1 Open the User Status report (SS> Security> User Status).
- 2 Configure the report.
  - The **User Status** drop-down menu is used to filter the displayed users by user status.
    - Select (All), Active or Deactivated and click the Refresh icon  to filter the users displayed in the data grid below.
  - The printed report displays the same information that is displayed in the data grid. These fields include the User Name, User Description, Status, Deactivated date (if one exists), Password Expiration date, Password Expired status, Password Changed date, First Login date and Last Login date.

- The dates displayed on this report represents only Cloud data. If your organization migrated from an On-Premise version to the Cloud version, existing password and login dates will not be imported from On-Premise databases.
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### 3 Print the report.

- Click the Print icon  to process the report immediately. You can view the progress of the report on the Job Viewer window (SS> Utilities> Show Scheduled Jobs).
  - Once the report is generated, you can also display the report using the View Reports window (SS> Utilities> View Report).
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# General Information

## Audit Trail Window


### Summary

The application wide Audit Trail window is used to track any changes made to audit trail enabled windows across the application. The Search Criteria section can be used to limit the displayed changes to specified modules and windows.

Application window specific Audit Trail windows are used to track any changes made to the specific windows they are launched from. For example, if an employee made a configuration change to the Payroll Module through the PR Setup window, the Audit Trail window launched from the PR Setup window will display the details surrounding that change.

### Step by Step

- 1 Open the Audit Trail window (SS> Utilities> Audit Trail).

- The Audit Trail window can also be launched from a number of other windows in the application. Click the Audit Trail icon  to launch the Audit Trail window from these maintenance and setup windows.

- The Audit Trail icon will only be enabled on maintenance windows after the maintenance entity is initially created and saved. The icon will only be enabled on setup windows after the module is initially set up and saved.
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## 2 Filter the Audit Trail data.


- Use the **Search Criteria** section to sort the data displayed in the audit trail.
    - The **Sub System** field is used to filter the changes displayed in the data grid below by application module.
      - When accessing the Audit Trail window from a maintenance or setup window, the Sub System, Master Table and Master Reference fields will be disabled. The changes displayed will only apply the sub system, master table and master reference associated with the maintenance or setup window the Audit Trail window was launched from.
    - The **Master Table** field is used to filter the displayed changes by the table that was edited.
      - The Master Table refers to the specific window that was edited. For example, if you would like to display only changes made in the AP Vendor window, you would select AP in the Sub System field and Vendor in the Master Table field. Changes to module setup windows can be displayed by selecting Header in the Master Table field.
      - When All is selected in the Sub System field, all the Master Tables in the system will be enabled in this field. When a specific module is
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selected in the Sub System field, only the Master Tables associated with that module will be enabled in this field.

- The **Master Reference** field is used to filter the displayed changes by the record that was edited.
    - The Master Reference refers to the specific record that was edited. For example, if you would like to display only changes made to a specific AP vendor, you would select AP in the Sub System field, Vendor in the Master Table field and enter the vendor number in the Master Reference field.
  - The **User Name** field is used to filter the displayed changes by the Springbrook user that was logged in to the system when the changes were made.
  - The **From Date** and **To Date** fields are used to filter the displayed changes by a specified date range.
    - The default date range will display the last three months of activity.
  - The **Action** field is used to filter the displayed changes by the action taken.
    - For example, by selecting Delete in the Action window, only those changes that resulted in an entity being deleted will be displayed in the data grid.
  - The **Audited Table** field is used to filter the displayed changes by the specific part of the Master Table that was edited.
    - This field will default to All, and can only be changed if a selection is made in the Master Table field above.
    - The Audited Table often refers to individual elements of the selected Master Table, such as the individual tabs on a maintenance window.
-

This is not always the case, so initially selecting All in this field is generally recommended.

- Once the filter criteria are specified, click the Refresh icon  to populate the data grid with the filtered audit trail records.
  - The data grid below will provide details about any changes made to the window including the date of the change, type of change made, user that made the change, and data table that was edited.
-


# SS> Utilities> Check Audit Display

## Check Audit Display

### Summary

The Check Audit Display window is used to display committed checks generated through the AP Computer Checks, PR Computer Checks and PR Retro Pay batch processes. The window provides sortable check details such as batch process and number, payee name and number, and check number, date and amount. The Check Audit Display window also provides information on deleted checks in order to help track and prevent fraud.

### Step by Step

- Open the **Check Audit Display** window (SS> Utilities> Check Audit Display).
- Enter the batch, payee, check or bank details in the Search Criteria section and click the Refresh icon  to display the filtered checks.

# SS> Utilities> Open Batches

## Display Open Batches

### Summary

The Open Batches window displays a sortable list of all open batches in the application. The system, process, batch number and last user details are displayed.

### Step by Step

- Open the **Open Batches** window (SS> Utilities> Open Batches).
- To group the displayed batches by system, click the System column header and drag the header up to the field that displays "Drag a column header here to group by that column." You can then click the expand button next to each system to display the open batches in that system only.

# SS> Utilities> Show Scheduled Jobs

## Jobs Viewer

### Summary

Most processes (reports, generating bills and statements, etc.) are processed on the application server rather than the workstation you are logged into. This allows you to continue working while reports or batch processes are being run.

When a job is created (for example, the generation of a report), you can either set the job to process immediately, or you can schedule the job to be processed at a specific time. As jobs are created, they are queued up on the server and then completed when the resources become available or the scheduled time elapses. The Jobs Viewer window displays all of the jobs that have been queued on the server and the status of each job.

Springbrook uses two jobs queues: the Standard Jobs queue and the Big Jobs queue. The Standard Jobs queue is reserved for the vast majority of the processes in the application. Because these processes are relatively quick to complete, running a job through the Standard Job queue rarely results in a delay.

The Big Jobs queue is reserved for the few application processes that can take longer to complete. Because these processes can take longer, Springbrook recommends taking advantage of the job scheduling feature and scheduling these jobs to begin at off-peak





hours when few if any users will be processing jobs. However, in the event that a longer job must be processed during regular working hours, the job will be processed through the Big Jobs queue, thereby preventing unnecessary delays for users processing standard jobs.

The following processes are considered Big Jobs:

- Application Wide> Query by Example report
- CR> Reports> Pay Method Listing
- FA> Reports> Query Manager
- GL> Reporting Tools> Query Manager
- PR> Computer Checks> ACH Checks (regular and long stub)
- PR> Computer Checks> Calculate Payroll
- PR> Computer Checks> Checks (regular and long stub)
- PR> Computer Checks> GL Distribution
- PR> Reports> Detail Distribution
- SS> Utilities> Install Service Pack
- UB> Collections> Generate
- UB> New Billing> Generate
- UB> New Billing> Statement Settings
- UB> New Billing> Commit
- UB> Reports> Aging Report
- UB> Reports> Balance by AR Account
- UB> Reports> Consumption Revenue
- UB> Reports> Trend Monitoring

- UB> Reports> Trial Balance by Date
- UB> Reports Consumption> Consumption by Service Rate

The following example describes the steps required to generate a UB module Account Master Report. If you do not have the UB module, this example applies to any report generated from a Reports palette in any module.

- Open the **Account Master** window (UB> Reports> Account Master).
- Select the report criteria.
- Once the criteria has been entered, either:
  - Enter a date and time in the field next to the Print icon  to schedule the report to generate at a specific time. The date and time should be in the following format: MM/DD/YYYY - H:MM AM/PM.
  - Leave the field next to the Print icon  blank. The report will print as soon as the resources become available on the application server.
- Click the Print icon  to schedule the job to generate the report. This will only generate the report in a PDF file. If you would like to print the report, you can print the PDF file once the report has been generated.
- Open the Jobs Viewer window (Jobs Viewer icon  on the application) to view the progress of the report.
- Once the report is complete, you can open the report from either the Jobs Viewer window or from the View Reports window (SS> Utilities> View Reports). If the report was generated from a batch process, you will not be able to open the report from the View Reports window.


- Reports generated from the Reports palette will automatically be archived on the server and can be retrieved at any time using the View Reports window.
- Reports that are generated from a batch process are not automatically archived on the server and are replaced if a new version of the report is generated. For example, if you reprint the Statements generated in a UB module New Billing batch, the previous statements will be overwritten by the new version. If you try to open the previous version of the statements using the Jobs Viewer window, the new version of the report will display.
- Generating the report only creates a PDF file of the report, it does not actually print the report. If you would like to print a copy of the generated report, print the PDF file.

## Security


The Jobs Viewer window allows you to view reports generated in the application. Security settings for the Jobs Viewer are inherited from the security set up on the user logged in to the application.

## Step by Step

1 View the jobs in the Jobs Viewer window.

- The Jobs Viewer window can be opened by clicking the Jobs Viewer icon  on the desktop or in SS> Utilities> Show Scheduled Jobs.




- Select the search criteria of the jobs you would like to display in the window and click the Refresh icon  to update the jobs that display in the window.
    - The **User Name** field allows you to filter the jobs by the user that scheduled it. The field will default to the user name you are logged in as.
      - You can set up DB field security on this field if you do not want users to have access to the reports generated by other users. If you set the access of this field to read only, users will only be able to view the reports that they have generated.
    - The **Job Type** drop-down menu allows you to filter the jobs by job type. For instance, you could select Process Jobs in order to display a batch process you are running without displaying the reports that might be processing at the same time.
    - The **Batch Type** drop-down menu allows you to filter the jobs by the process that created the job.
    - The **Scheduled From** and **Scheduled To** fields will default to the current date. If you would like to view jobs scheduled in the future you must change the date in the Scheduled To field.
      - If you would like to view a report that has been generated in the past, change the Scheduled From field to a previous date. For example, if you scheduled a report to print the previous night, change the value in the Scheduled From date to a previous date to open the report.
    - The toggles in the Search Criteria section are used to select which jobs will display in the window. Check or uncheck the toggles in the window to select which jobs will display. Once set, these toggles will retain their settings until the user changes them.
-

- Check the **Show jobs that are scheduled** toggle to include jobs that have been scheduled but have not been processed. Once the server begins processing the job it is no longer scheduled but current being processed.
  - Check the **Show jobs that are currently processing** toggle to include jobs that are currently being processed. Jobs will only have this status when they are being processed.
  - Check the **Show jobs that completed successfully** toggle to include jobs that have been completed without errors.
  - Check the **Show jobs that didn't complete due to an error** toggle to display jobs that generated an error as they were being processed. This applies to processes and reports. If a process or report results in an error the error will display in the Results column.
  - Check the **Show jobs that were deleted** toggle to display jobs that were canceled by a user.
- 



## 2 View the job details.

- The data grid displays a range of job details.
  - Click the **Journal Entry** column to open the Journal Entry Display window for the selected journal entry.
  - The **JE Count** column displays the number journal entries created by the process.
    - Some processes, such as PM Adjustments or PR Computer Checks, can create multiple journal entries for a single job. Click the Display Journal Entries
-


icon  next to the JE number to see the journal entry details.

---

### 3 View a report.



- Select a report job in the Jobs Viewer window and click the Print icon  to view the report. The job must be complete before you can view the report.
  - The report will open in a print preview window.
  - Click the View Report icon  to view the report.
    - From the report window, the report can be printed or saved locally as a PDF.
- 

### 4 View the exceptions on a batch.

- Select a UB New Billing Generate step job and click the View Errors icon  to view the exceptions associated with the batch. This will display the same exceptions that display in UB> New Billing> Exceptions.
  - The job must be complete before you can view the exceptions.
- 

### 5 Delete a job.

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- The Delete icon  is used to delete jobs that have been scheduled in the future and have not been processed yet.
    - Select a scheduled job in the window and click the Delete icon. This will change the status of the job to Deleted.
  - Click the Save icon  to save the Deleted status of the job. If you do not save the status of the job will not be updated.
-

# SS> Utilities> Login History

## Login History


### Summary

The Login History window is used to help Springbrook Cloud users track authentication attempts. Each time a user attempts to access Springbrook Cloud, the system will record the date and time, the user's user name, whether or not the login attempt was successful, and the IP address that the login attempt originated from.

While the recorded source IP addresses cannot be certified, they offer a way to easily determine how many users access the application from outside of the organization's network.

### Step by Step

- Open the **Login History** window (SS> Utilities> Login History).
- The Search Criteria section is used to filter displayed login attempts.
  - Enter a **From Date** and a **To Date** to filter the login attempts by date range.
  - Enter the user name in the **User Name Begins** field to filter the login attempts by user.
    - You do not need to enter the user's entire name to filter the results. For example, if "MIL" is entered, the results will include names such as Miller, Mills and Milton.

- This field is limited to 25 alphanumeric characters.
- Select All, True or False from the **Authenticated** drop-down menu to filter the login attempts by the result of the attempted login.
- Click the Refresh icon  to display the filtered login attempts.

# SS> Utilities> Lot Import

## Import or Update Lot Data

### Summary



The Lot Import window is used to add new lots or to update lot details for multiple lots in the database through a user-configurable import file. The most common use of this tool is to integrate GIS systems that require additional details be associated with each lot in the database. If a lot included in the import file does not exist in the database, it will be created. If a lot included in the import file does exist, the lot details in the database will be updated to match the lot details in the import file.

### Step by Step

- 1 Open the Lot Import window (SS> Utilities> Lot Import).

- 2 Import the lot file.

- The **Configuration** drop-down menu is used to select the import configuration you would like to use.
-

- A Lot-specific import configuration can be created before importing lots. Import configurations are created and maintained on the Import Configuration Maintenance window (SS> Maintenance> Import Configuration).
  - The Standard Springbrook configuration will be selected by default.
  - The **File Name** field is used to select the path of the lot file you would like to import into Springbrook. Enter a path or click the File Name field label to locate the file by browsing through the file structure on your network.
    - Click the Display Report Layout icon  to view the expected format of the import file.
  - The **Primary Key** field is used to specify how the import file will identify individual lots. Each imported lot will need to have the primary key specified, whether it is Parcel, Tax Lot, or Lot Number.
    - Parcel and Tax Lot are often used as the primary key when updating lot details via importing data from a third-party system, such as a GIS system.
    - Lot Number is often used as the primary key when users export lot data via QBE, edit that data in a spreadsheet, and then import the edited data to create new lots or update existing lots.
      - If using Lot Number as the primary key, you will first need to create a custom Import Configuration as the standard configuration will not work.
  - Press ENTER or click the Confirm icon  to import the file immediately or enter a date and time in the field next to the Confirm icon to schedule the import to process at a later time. You can view the progress of the import on the Job Viewer window (SS> Utilities> Show Scheduled Jobs).
-



# SS> Utilities> Merge Customers

## Merge Customers Update

### Summary


Springbrook modules share a common Customer table. By using the same customer number and giving the customer various accounts, Cash Receipts can operate most efficiently. If you find that you have a customer with two different customer numbers, you may be inclined to combine these customers so that they use only one customer number but multiple account numbers.

The Merge Customers process includes two steps:

1. Run the Merge Customer Report
2. Run the Merge Customer Update tool

Run a Merge Customer Report (SS> Utilities> Merge Customer Report) before this step to review the changes before updating the database. All customers included in the Merge Customer Report will have their accounts merged.

### Step by Step

- Open the **Merge Customers** window (SS> Utilities> Merge Customers).
- Click the Confirm icon . Customers that share identical name and address information will be combined under one customer number.

# SS> Utilities> Merge Customer Report

## Merge Customer Report

### Summary

Springbrook modules share a common Customer table. By using the same customer number and giving the customer various accounts, Cash Receipts can operate most efficiently. If you find that you have a customer with two different customer numbers, you may be inclined to combine these customers so that they use only one customer number but multiple account numbers.

The Merge Customers process includes two steps:

1. Run the Merge Customer Report
2. Run the Merge Customer Update tool

The Merge Customer Report displays the changes that will be made when the Merge Customer tool is run. The Summary report will display the original customer number and the newly assigned customer number. The Detail report will display all the affected accounts across all systems other than Utility Billing. Customers with UB accounts cannot be merged or moved.

In order for a customer to be pulled into the Merge Customer Report and, ultimately, to have their accounts merged into one customer account on the Merge Customer Update step, the customer data on the individual accounts must match exactly. That data includes:

- First Name
- Last Name

- Mailing Address
  - Address 1
  - Address 2
- City
- State
- ZIP code

If any of these fields do not match across accounts, those accounts cannot be merged under a single customer number.

## Step by Step


**1** Open the **Merge Customer Report** window (SS> Utilities> Merge Customer Report).

**2** Configure the report.

- Select a **Report Type** from the drop-down menu.
  - The Summary report will display the Original Customer Number, the New Customer Number, and the Customer Name.
  - The Detail report will display everything included in the Summary report as well as the Account Type and Account ID.
- 

**3** Print the report.

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- Click the Print icon  to process the report immediately or enter a date and time in the field next to the Print icon to schedule the report to generate at a later time. You can view the progress of the report on the Job Viewer window (SS> Utilities> Show Scheduled Jobs).
    - Once the report is generated, you can also display the report using the View Reports window (SS> Utilities> View Report).
-

# SS> Utilities> Miscellaneous Field Labels

## Miscellaneous Field Label Maintenance

### Summary


The Miscellaneous Field Labels window is used to maintain the field labels of the miscellaneous fields in the application. The titles of miscellaneous fields can be modified so that the field label will reflect the customized information stored in the miscellaneous field. For example, the title of the **Character 1** field on the Lot Miscellaneous tab of the Lot Maintenance window can be changed to **Zone** if you would like to store the zone of a lot in that field.

The Miscellaneous Field Maintenance window is also used to set up the titles of the sections in the GL chart of accounts. For example, if your GL chart of accounts has three sections: fund, department and account, you set up the titles of those sections using this feature. Change the field labels in the GL Chart table to change the titles of the GL chart of accounts sections.

### Step by Step

- 1 Open the **Miscellaneous Fields Labels** window (SS> Utilities> Miscellaneous Field Labels).

## 2 Complete the Field Labels section.

- All of the miscellaneous fields in the application will display in the window. You can use the Table/Field Help feature to determine the table and field name of a miscellaneous field you would like to modify.
    - Open a window that displays the miscellaneous fields and make sure it is docked on the application window. Turn the Table/Field Help feature on and then hover the cursor over the field you would like to modify. The table and field name of the miscellaneous field will display in an information bubble.
  - Modify the value in the Label column to change the title of the selected miscellaneous field.
  - Click the Save icon  or press ENTER when complete.
-


# SS> Utilities> Out of Office Utility

## Out of Office Utility

### Summary

The Out of Office Utility is used to update the out of office status for selected Springbrook users. This tool is designed to enable a system or process administrator to change a user's status to out of office in order to allow a process to bypass that user's approval. For example, if a work flow approver is out of office but forgot to set their status to out of office, that work flow would not be able to proceed. With this tool, the process administrator can update the approver's status to out of office so that the work flow can be completed.

### Step by Step

- Open the **Out of Office Utility** window (SS> Utilities> Out of Office Utility).
  - The Out of Office Utility window will display all users in the system.
  - Type the first letter of employee's name to jump to that letter.
- Check the **Out of Office** toggle for the employees that needs to be updated to out of office status.
  - Users can also be removed from out of office status from this window.
- Click the Save icon  to update the out of office status for the selected users.

# SS> Utilities> Re-export Related Data

## Re-export Related Data

### Summary

The Re-export Related Data tool is used to re-export data from committed batches to the related database. This export tool is only enabled for organizations set up to use Multi-Muni relational databases.

This tool can help Multi-Muni organizations re-export any data that failed to import into the related database. For example, if an AP Invoices batch was committed in the child database, that batch data import could fail in the parent database because of a reference GL account not being active for the current fiscal year. In this situation, the issue with the GL account could be resolved and then the AP Invoices batch data could be re-exported through this process. This process does not create any new data in the database running the tool.


### Step by Step

- 1 Open the **Re-export Related Data** window (SS> Utilities> Re-export Related Data).
  - 2 Configure the export.
-



- The **Batch Type** drop-down menu is used to select the type of batch you would like to export.
    - In the parent database, this tool can export data from the AP Computer Checks, AP Void Checks, and AP Void Invoices batch processes.
    - In the child database, this tool can export data from the AP Invoices batch process. Ongoing development work will expand these export options in the future.
  - The **Batch Number** field is used to select the batch number you would like to include in the export.
    - Enter a batch number or click the Batch Number field label to select one from a list. Only the batch of the type selected in the Batch Type field above will display in the window.
- 

### 3 Export the data.

- Click the Confirm icon  when complete to generate the export data.
    - You can view the progress of the export on the Job Viewer window (SS> Utilities> Show Scheduled Jobs).
-

# SS> Utilities> Request/Install Service Pack

## Request and Install Service Packs


### Summary

**NOTE:** *This topic applies only to organizations that install Springbrook on a local server. Springbrook Cloud users can ignore this topic.*

Service packs are usually released every two weeks and contain a bundle of defect corrections to the application. This document explains how to request and install a service pack once it is available. Service packs will need to be installed separately for each application slot you have. However, you only need to request the service pack once to get the latest files.


### Step by Step

- 1 Request the service pack.
-

- Log in to the Springbrook Application installed in the slot you would like to update.
  - Open the **Request Service Pack** window (SS> Utilities> Request Service Pack).
    - Enter the **Email Address** that will receive the service pack download email.
    - Click the Confirm icon .
  - Once the service pack is requested, you should receive an email that includes a link to download the service pack .zip file.
  - Open the email and click the download link. This will launch a web browser that displays the release notes for the service pack.
  - Review the release notes and click the **I Accept These Changes** link at the bottom.
  - Save the service pack .zip file to your computer.
- 

## 2 Install the service pack.

- Log in to the Springbrook Application installed in the slot you would like to update.
  - Open the **Install Service Pack** window (SS> Utilities> Install Service Pack).
    - Enter the date and time that you would like the service pack installed. Springbrook recommends service packs be installed when no users are logged into the application.
    - Click the **Service Pack** field label and browse to the .zip file you saved in step 1.
    - Enter the **Email Address** that will receive the notification that the service pack installation is complete.
-

- Check the **Delete Service Pack after install** toggle if this is the only slot being upgraded. If you plan on installing the service pack on another slot, confirm that this toggle is NOT checked.
  - Click the Confirm icon .
- The service pack is now scheduled to install at the specified time.
-


# SS> Utilities> Reset User Preferences



## Reset User Preferences

### Summary

The Reset User Preferences tool is used to reset a specified group of employees' system preferences. These module-specific preferences include things such as grid and column sorting and saved window settings.

### Step by Step

- 1 Open the **Reset User Preferences** window (SS> Utilities> Reset User Preferences).
- 2 Specify which user preferences will be reset.
  - Select the **Systems** where the user preferences will be reset.
    - Select the systems individually or press CTRL+A to select all systems.
  - Select the **Users** that will have their preferences reset.
    - Click the Add icon  to open the User Selection window.
    - Highlight the users that should have their preferences reset.
      - Use the CTRL or SHIFT keys to select multiple users.

- Click the Confirm icon  when all desired users are selected.
  - The selected users will now appear in the Users section.
  - Click the Confirm icon  to reset the user preferences.
-

# SS> Utilities> System Setup

## SS System Setup

### Summary

The System Setup window is used to define system wide settings that apply to all modules. Most of the settings on this window will be set up when the application is first installed and will not have to be modified.

### Step by Step

- 1 Open the **System Setup** window (SS> Utilities> System Setup).
- 2 The Organization tab is used to enter general information about your organization.
  - Enter the name of your organization in the **Name** field. The organization name can be up to 64 alphanumeric characters long.
    - The organization name will display on Utility Billing module billing statements.
  - The address entered in the **Address Line 1**, **Address Line 2**, **City**, **State**, **Zip** and **County** fields will be used as the Bill To address on purchase orders created in the

PO module. This is not necessarily the address that the items on the purchase order will be sent to, but it will display on the PO.

- The **Address 1** and **Address 2** fields can be up to 30 characters long.
  - The **City** field can be up to 25 characters long.
  - Select a **State** from the drop-down menu.
    - The state selected in this drop-down menu will affect the functionality of the Payroll module. The state selected in this field is the primary state of the organization and will determine the retirement and state specific reports that display in the Payroll module. The state will also affect the palette options that display in the Payroll module.
  - Enter a **Zip** code. The zip code field will change the format of the value entered into the field to the XXXXX-XXXX format.
  - The **County** field can be up to 25 characters long.
  - Enter a **Phone** number.
  - Click the **Logo** field label to locate the organization logo.
    - The organization logo needs to be formatted to the size 4.00" by 1.25" and should be in either JPG or BMP format. If your logo is in PNG or GIF format, you can convert the image to JPG or BMP format using the Save As feature on your image editing software (for example, Adobe or Paint.NET).
    - You will need to copy the logo to the Custom folder of the application (\\S-pringbrook\7.xx\Custom).
  - Enter the **Federal Tax Identification** number. The format of the value entered in the field will change to XX-XXXXXXX.
-



- Enter the **State Tax Identification** number. The format of the value entered in the field will change to XXX-XXX-XXX.
  - Enter the current **Fiscal Year**.
    - The fiscal year is changed using the Fiscal Year End Reset process in the GL module (GL> Utilities> Fiscal Year End Reset), but you can manually change the fiscal year using this field.
  - The **Fiscal Period Starts** field is used to select the calendar month that begins the fiscal year.
- 


### 3 Complete the System tab.

- The **Title Prefix** field allows you to edit the name that displays at the top of your Springbrook Software toolbar.
  - The **Tax Lot Format** field is used to configure the tax lot numbers. Enter an X to add digits to the format and add special characters ( , . - / \_ ) to separate the characters as needed. The special characters entered into the format will be applied after the tax lot identification number has been entered.
  - The **Default Menu Security** drop-down menu is used to set the default menu security of user accounts that are created using the User Maintenance window (SS> Security> User). For example, select No Access if you would like all new user accounts to have no menu access when they are created.
    - This field will also be used to set the default security of reports generated using the Report Publisher feature.
-

- The **New User Template** and **Reset User Template** fields are used to specify email templates that will be sent to newly registered Springbrook users and existing Springbrook users that are resetting their passwords. These fields will only be enabled for cloud-based Springbrook Cloud users.
    - Only User Maintenance email templates can be selected for these fields. Email templates are created and maintained on the Email Template Maintenance window (SS> Maintenance> Email Template).
  - The Click Once Connection, Archive Directory, Attachment Interface, and Web Parts Serviced URI fields are all used by on-premise organizations only. Cloud organizations can skip this section.
    - The **Click Once Connection** field is used to specify the path used to generate Work Flow and email notification links. This path must also be specified in order to create desktop shortcuts to frequently used menus or records. This field is disabled and will be established by Springbrook when the application is installed.
    - The **Archive Directory** field is used to specify the local save location for attachments, reports and templates. This is field is disabled and will be established by Springbrook when the application is installed.
    - The **Attachment Interface** drop-down menu is used to select the attachment method for the system.
      - The default attachment interface is the standard Springbrook system.
      - Only organizations that utilize Laserfiche document management systems should change this setting. If Laserfiche is selected, the Laserfiche tab can be activated. This is a premium feature. Please contact Springbrook Support for more information.
-

- The **Web Parts Service URI** field is used to specify the endpoint address to the Web Parts Service for the SharePoint dashboard components.
  - The Password Expire Template, Password Duration, and Password History to Keep fields are all used by security administrators for Cloud organizations. On-premise organizations can ignore this section.
    - The **Password Expire Template** is used to specify which Email Template will be used to notify users about password expiration. A series of password expiration emails will be automatically generated and sent to a user when that user's password is 15 days from expiring, 10 days from expiring, five days from expiring, and each day thereafter until the password finally expires or has been updated.
      - This email notification has been pre-populated with the relevant data, but can be edited to meet the needs of individual organizations. Email Templates are created and maintained on the Email Template Maintenance window (SS> Maintenance> Email Template).
      - These automated emails will be generated at 2:00 AM local time.
      - If a user allows their password to expire, they will be redirected to a reset password window when attempting to log in.
    - The **Password Duration** field is used to specify how often users will be required to reset an expiring password.
      - This field will only be enabled if the **Passwords Expire** toggle to the right is checked.
      - The minimum duration for a password is 30 days. The maximum is 365 days.
-

- The **Password History to Keep** is used to specify how many passwords the system remembers, requiring users to create the specified number of unique passwords before a previously-used password can be used again.
    - The minimum number of password history to keep is four and the maximum value is 24.
  - Check the **Use Project Management** toggle to enable the PM module interface.
  - Check the **Allow application of unapplied credits across accounts** toggle to allow the use of credits across the AR, BP, LP and SA modules in the Credits and Deposits process in each module.
  - Check the **Ask permission before sending exception information** toggle to require user approval before sending error messages to Springbrook.
    - If this toggle is not checked, error messages will be reported to Springbrook automatically.
    - Error messages are archived and can be accessed by Springbrook Support personnel in order to better resolve the issue that generated the error.
  - Check the **Block reporting of usage statistics to Springbrook** toggle to block automatic reporting of window access statistics to Springbrook.
    - If this toggle is not checked, the system reports on the number of times a window was accessed during a user session. No Springbrook database data is included in the reporting statistics.
  - Check the **Use enhanced batch security** toggle to enable the Name and Group Security fields on the New Batch window, allowing users to specify an easily recognizable name for the batch and specify which user group should have access to the batch. If a user is not included in the specified group, the batch will not display when that user opens the batch drop-down menu.
-

- Checking this toggle will also enable the My Batches icon  on the main application menu.
- 

#### 4 Complete the Email tab. This is only used by On-premise Organizations.

- The Email tab is used to set up how email is sent to vendors, customers and other users. The fields in this window should be left blank unless you plan on using one of the emailing features.
    - You can generate work flows that notify other users when a batch is ready to be processed or approved.
    - Email notification can be sent to the primary contact on vendors when processing Electronic AP batches in the Clearing House/Central Cash module.
  - Enter the email address that should receive responses from customers and vendors who reply to emails in the **Return Email Address** field.
  - The **Server Name** field is used to enter the network address is used to communicate with the SMTP port on that server. It can be an IP address, a sub-domain (mail.domain.com) or a single computer, depending on how your network is set up.
  - The **User Name** and **Password** fields are used to enable authenticated email functionality. Specify the email address and server password of the Springbrook user that authenticated system-generated emails will originate from.
    - This email address will overwrite a Return Email Address entered above and will appear on all system generated emails.
  - The **Port** field is the port of the outgoing SMTP port used by that server.
-

- The **BCC Addresses** field is used to specify any blind carbon copy email addresses that should be included in notification emails.
    - Any email addresses entered in this field will be blind carbon copied on every system generated email. If you are entering more than one BCC address, separate the addresses with a semicolon.
  - Check the **Enable SSL** toggle to enable Secure Sockets Layer protocols for system generated emails.
    - If your system is set up to use authenticated email, and you have specified Springbrook user details in the User Name and Password fields, this toggle **MUST** be checked.
- 

## 5 Complete the ArcView tab if you would like to set up an ArcView interface.

- The ArcView tab is used to set up a GIS interface.
  - Select an Arcview interface from the **Interface Type** drop-down menu.
  - Click the **File Location** label to open a browse window to locate the path of the GIS interface.
  - Check the **Enclose Tax Lot ID in Quotes** toggle to send the Tax Lot ID field as a string to a web based GIS software instead of as an integer. This allows the Tax Lot ID to contain letters as well as numbers.
- 




## 6 Complete the Laserfiche tab. This tab is only active for Laserfiche users.

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- The Laserfiche tab will only be displayed if the Attachment Interface field on the System tab is set to Laserfiche and your organization has gone through the Laserfiche implementation process. Please contact Springbrook Support for more information.
  - The **Server Name** field is used to enter the name of the server that will host the documents managed with the Laserfiche system.
  - The **Repository** field is used to enter the name of the Laserfiche repository that will contain the documents managed with the Laserfiche system.
  - The **User Name** and **Password** fields are used to enter the login information required to access the documents within the repository.
- 

## 7 Complete the Transfer Accounts tab.



- The **Due To Acct** and **Due From Acct** fields are used to set up the due to and due from accounts the system uses to balance GL accounts between funds.
    - Click the Due To Acct field label to select a GL account from a list. When the GL account is selected, the fund portion of the GL account format will be removed, so it does not matter which fund you select the due to account from.
      - The Due To GL account can be used to balance journal entries by fund in the Journal Entries process in the General Ledger module.
    - Click the Due From Acct field label to select a GL account from a list. When the GL account is selected, the fund portion of the GL account format will be removed, so it does not matter which fund you select the due to account from.
-

- The Due From GL account can be used to balance journal entries by fund in the Journal Entries process in the General Ledger module.
- While you are not required to specify Due To and Due From accounts, if one is specified you will not be able to save the system settings unless the other is specified as well.
- The **Transfer Acct** field is used if all budgeted transfers between funds use the same account number. Click the field label to select a transfer account from a list.
- The data grid below is used to set up due to and due from accounts for specific Springbrook systems.
  - Click the Create icon  to create a new account line item in the data grid.
  - Click the Ellipsis icon  in the **From Account** section to select the due from account for the specified system.
  - Click the Ellipsis icon  in the **To Account** section to select the due to account for the specified system.
    - As with the Due To and Due From accounts above, if one is specified the other must be specified as well in order to save.
  - Select a **System** from the drop-down menu. You must specify a system in order to save the due to and due from accounts.
    - Select AP if the due to and due from accounts are to be used in the Accounts Payable module processes.
      - The From Account for AP must reside in the Clearing Fund specified on the AP Setup window (AP> Utilities> Setup> General tab> Clearing Fund field).



- Multiple due to and due from accounts can be specified for AP, but, while the From Account must reside in the AP Clearing Fund, the To Account cannot reside in the AP Clearing Fund. Each account specified as a To Account must be from a different fund as well.
  - Select CR if the due to and due from accounts are to be used in the Cash Receipts module processes.
    - Cash Receipts processes refer to all module processes that can be paid down in the Cash Receipts module. This includes all CIS (Customer Information Systems - Accounts Receivable, Building Permits, Business Tax, Cash Receipts, Licenses and Permits and Special Assessments) modules as well as the Utility Billing module.
    - Multiple due to and due from accounts can be specified for CR, but the From Account and To Account on each line item cannot be from the same fund. Each account specified as a To Account must be from a different fund as well.
  - Select GL if the due to and due from accounts are to be used in the General Ledger module processes.
    - The due to and due from accounts specified for GL will be used to balance manual journal entries for cash-related line items processed through the Journal Entries process.
    - Multiple due to and due from accounts can be specified for GL, but the From Account and To Account on each line item cannot be
-

from the same fund. Each account specified as a To Account must be from a different fund as well.

- Select PR if the due to and due from accounts are to be used in the Payroll module processes.
    - Multiple due to and due from accounts can be specified for PR, but each account specified as a To Account must be from a different fund.
  - Highlight a due to/due from account line in the data grid and click the Delete icon  to delete the selected line item.
  - Click the Save icon  when the setup is complete.
- 

**8** The Audit Trail tab is used to track any changes to the SS Setup window.

- Use the **Search Criteria** section to sort the displayed audit trail.
  - The **Audit Trail History** section will provide details about any changes made to the setup window including the date of the change, type of change made, user that made the change, and data table that was edited.
-

# SS> Utilities> User Setup

## User Import Wizard

### Summary

The User Import Wizard is used to import groups of Springbrook users into the User Maintenance window via .csv (comma separated value) file or LDAP (Lightweight Directory Access Protocol).

### Step by Step

- 1 Open the User Setup window (SS> Utilities> User Setup).
    - The User Setup window is an import wizard that is used to import a list of Springbrook users into the User Maintenance window.
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- 2 Select the import file type and browse to the file.
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- Select the desired import file **Type** from the drop-down menu.
  - Select File to import the users in a standard .csv (comma separated value) file format.
    - Click the Next button to continue to the file selection step.
    - Enter the **File Name** in the field or click the field label to browse to the file.
    - Click the View File Format button to display the expected .csv file layout.
      - The expected import will include the User Name, Description, Employee Number, Email Address and Use Scheduling status.
  - Select LDAP to import the users via Lightweight Directory Access Protocol.
    - Click the Next button to continue to the LDAP server selection step.
    - Enter the name of your organization's **LDAP Server**.
  - Click the Next button to continue to the edit step.
- 

### 3 Select, edit and import the new users.

- The User Setup window will now display all of the users included in the import file that met the format requirements for importing.
  - Check the **Selected** toggle next to each user you would like to include in the import.
    - When importing via .csv file, all users are selected by default. When importing via LDAP, no users are selected by default.
      - Press CTRL and use the mouse to highlight multiple users. Press SHIFT and use the mouse to highlight a range of users. Once all of the
-

desired users are highlighted, press SPACE to select the users.

- The **User Name** field will display the user name specified on the import file. This field cannot be edited.
  - Edit the **Description** and **Email Address** fields if desired.
  - The **Employee Number** field is used to associate the user with an existing employee number.
    - Enter the employee number or click the Ellipsis icon  to choose one from a list.
  - Check the **Use Scheduling** toggle next to each user that should be included in the Springbrook scheduling system.
    - Only imported users with "True" in the Use Scheduling column of the import file will be checked.
    - User schedules are created and maintained on the User Schedule Maintenance window (SS> Maintenance> User Schedule).
  - Click the Finish button to complete the user import process.
  - The imported users will now be displayed on the User Maintenance window (SS> Security> User).
-


# SS> Utilities> View Release Notes

## View Release Notes

### Summary

The View Release Notes window is used to display service pack release notes. These notes should be reviewed by application users before installing a service pack.

### Step by Step

- Open the **View Release Notes** window (SS> Utilities> View Release Notes).
- The **From Date** and a **To Date** fields are used to filter the release notes by the date that Springbrook releases the service pack update.
  - Springbrook releases service packs on a weekly schedule. If your organization has not installed a service pack for multiple weeks, all the release notes associated with those uninstalled service packs will be displayed in the window, provided those service pack release dates fall within the date range specified above.
  - This window will also display the release notes associated with the last weekly service pack your organization installed.
- Click the Refresh icon  to display the filtered release notes.

# SS> Utilities> View Report


## View Reports

### Summary

**NOTE:** This topic applies only to organizations that install Springbrook on a local server. Springbrook Cloud users can ignore this topic.

The View Reports window is used to view any reports that have been generated in the application. When a report is generated, it is saved in PDF format in an archive file on the application server. For example, the UB Top Users report generated from the database in slot zero on 08/15/2019 would have the following path: ..\Springbrook0\Archive\Reports\2019\UB\Reports\2019-08-15-00001-UB-Top Users.pdf. You can use the View Reports window to locate, view and reprint reports that have been generated in the past, including billing statements.


You may want to set up Menu Security (SS> Security> Menu Security) on the View Reports window because it allows users to view any reports that have been generated in the past. For example, if you do not want a user to have access to Payroll reports, you may want to use Menu Security to restrict that user from being able to open the View Reports window.

You can also open up reports from the Jobs Viewer window (Jobs Viewer icon ) as they are generated.



### Step by Step

1 Open the **View Reports** window (SS> Utilities> View Report).

2 Select the report to view.











- Click the View Report icon  to browse to the Springbrook reports folder and open a report.
    - All reports are saved by year, module, palette option and generate date. Click through the folders to find the report you would like to view.
      - The report is saved in the year it was generated. For example, if you run a Trial Balance Report (GL> Reports> Trial Balance) for a previous fiscal year the report will be saved in the calendar year it was generated, not the fiscal year on the report.
- 

3 Generate the report.

- Click the Print icon  to print the full report.
    - You can also click the drop-down menu next to the icon to print just the current page of the report. The current page number is displayed at the bottom of the print window.
  - Click the Save icon  to save the report to another location. This will save the report in PDF format at a selected path. For example, if you would like to save the
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report locally. Click the Save icon and then select the Desktop of your workstation as the path of the file.

- Click the Back  and Forward  icons to move through the pages in the report. A page number will display at the bottom of each page. The First  and Last  icons can be used to jump to the first or last page of the report.
- Click the Zoom In  or Zoom Out  icon and click on the report to change the magnification of the document.
  - The magnification drop-down menu can also be used to select a magnification level or to fit the report contents to the window. The value selected here will be set as the default magnification level until another level is selected.
- The Search icon  drop-down menu is used to search the open report for things such as account numbers or customer names.
  - Click the Search icon, enter the desired value in the search box, and use the Next and Previous buttons to search through the report.
- The Revert to Pointer icon  is used to return to the standard pointer after using the zoom controls.
- The Send Form icon  is used to send the open report to another Springbrook user.
  - Clicking this icon will open the Send Form window where the recipient, subject line and body text can be specified.
- The Send PDF via Outlook icon  is used to attach the selected PDF to an MS Outlook email. The report title will automatically populate the Subject line on the email.

- Click the Exit icon  when complete.
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# SS> Web Application Setup> Applicant Tracking

## Applicant Tracking Setup




### Summary

The SS Applicant Tracking Setup window is used to configure the default position description and web explanations used on the Applicant Tracking online application.

The HR Applicant Tracking Setup window will also need to be completed to set up Applicant Tracking. This window is used to configure the profile and career info pages of the online application.


### Step by Step

- 1 Configure the Applicant Tracking online application.
    - Open the **Applicant Tracking Setup** window (SS> Web Application Setup> Applicant Tracking).
    - The Position Description tab is used to enable position description headings so they can be attached to open positions.
-

- Position description headings are attached to positions in order to provide applicants with customized details about the positions through the Applicant Tracking online application. Some examples might include Job Description, Job Duties and Required Qualifications.
  - Position description headings are created and maintained on the Position Description Heading Maintenance window (HR> Maintenance> Position Description Heading).
  - Click the Create icon  to add a position description heading to the tab. This will launch the Position Description Heading Selection window.
    - Highlight a position description heading and click the Confirm icon  to add it to the tab.
    - Once a position description heading has been added to the tab, it can be attached to an HR position (HR> Maintenance> Position> Description tab).
  - Highlight a position description heading and click the Delete icon  to remove the position description from the tab.
    - When a position description heading is removed from this tab, it will still be displayed on any HR positions it was attached to. It will not, however, still appear on the Applicant Tracking online application page for that position.
- 

## 2 Complete the Explanations tab.

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- The Explanations tab is used to set up the explanations that will populate the right side of many of the Applicant Tracking pages. You can use these explanations to provide additional instructions, web site links and downloadable files for your users.
- Highlight an explanation and click the Modify icon  to edit the selected explanation. This will open the Web Explanation window.
  - The **Page Name** and **Data Description** fields cannot be edited.
  - The **Explanation Title** field is used to enter the title of the explanation. This will display above the main explanation text in a larger font size.
    - Due to size restrictions, this field is limited to 32 characters.
  - The **Explanation Text** field is used to enter the primary explanation text that will display on the right side of the page.
    - This field is formatted using HTML (Hyper Text Markup Language) tags. While this field can accommodate up to 1024 characters, this includes the HTML tags themselves.
    - HTML tags are most often used in pairs. Only the words, phrases or paragraphs that fall between the opening tag and the closing tag will be affected. For example, in the following sentence, the words "username" and "password" would appear in bold text on the web page.





To complete the registration process, please access the Applicant Tracking site using your **username** and **password**.

- Here are a few of the most commonly used HTML tags:

HTML Tag	Effect
<b> </b>	This is the <b>Bold</b> markup tag. Any words or phrases between these tags will be displayed in bold text.
<i> </i>	This is the <b>Italic</b> markup tag. Any words or phrases between these tags will be displayed in italicized text.
 	<p>This is the <b>Line Break</b> markup tag. Place this tag at the end of a line if you wish to return to the beginning of the next line. You can also use this tag between lines to increase the space between one line and the next.</p> <p>This is a self-contained, single tag that does not require an opening tag and a closing tag like the other tags described here.</p>

- For a more comprehensive list of HTML tags, please refer to one of the many free, online HTML tutorials such as [W3Schools.com](http://W3Schools.com). Here you can learn how to insert tags used to change font styles, create web site links and insert pictures.
- The **Link Text** field is used to enter the text that will display on the optional link below the explanation text.
  - This field is limited to 128 characters.
- The **Link URL** field is used to enter the web site address for the optional link below the explanation text. This URL must include the "http://" or "https://"

address element.

- The contents of the Link Text field will not be displayed if a Link URL is not specified.
  - The **File Description** field is used to add a descriptive label to the downloadable file described below.
    - This field is limited to 128 alphanumeric characters.
  - The **File** field is used to attach a downloadable file to the page. Users will be able to download this file by clicking the "Download" link that appears below the web explanation and link text.
    - Click the Clear File Attachment icon  to remove a previously attached file from the web explanation.
    - Click the Download File Attachment icon  to download a previously attached file. You will be prompted to select a save location for the file.
  - Click the Save icon  to save the Web Explanation and return to the Applicant Tracking Setup window.
  - You must click the Save icon  on the main Applicant Tracking Setup window in order to save any changes.
-

# SS> Web Application Setup> Business Licensing

## Business Licensing Setup

### Summary

The Business Licensing Setup window is used to configure the Business Licensing Online Application. The Business Licensing online application is a web-based business licensing portal that allows business owners and license holders to renew licenses and pay fees online.

### Step by Step

1 Configure the Business Licensing online application.

- Open the Business Licensing Setup window (SS> Web Application Setup> Business Licensing).
- The **General** tab is used to specify the general settings for the Business Licensing online application.
- The **Batch Prefix** field determines the first three digits of the five digit batch prefix for the daily Business Licensing cash receipts batch. This number should be



sufficiently high enough to avoid conflicting with standard cash receipts batches created throughout the normal course of the month.



- For example, if the three digits entered here are 789, the first batch generated by the Business Licensing online application in July of 2019 would be 78901.07.2019.
  - The **Batch Cutoff Time** field determines the cutoff time for submitted payments to be included in that day's Business Licensing cash receipts batch. Returns submitted after this time will be included in the next day's batch.
  - The **Pay Method** field is used to specify the default pay method that business owners and license holders will use to pay fees online. Most users will set up a generic pay method, such as "Web Payments", for all payments received through the Business Licensing online application.
    - Pay methods are created and maintained on the Pay Method Maintenance window (CR> Maintenance> Pay Method).
  - The **Merchant Processor** and **Merchant Account Number** fields will be determined when the application is installed.
  - Check the **Merchant test mode** toggle while testing the Business Licensing online application.
    - When this toggle is checked, any transactions generated in the Business Licensing online application will use simulated account information.
- 



## 2 Complete the Requirement tab.

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- The **Requirement** tab is used to specify what license holder information is required in order to create a Business Licensing online application account. This tab is pre-populated with the customer number and web registration key requirements. Because both of these items are considered mandatory when creating a new account, this tab cannot be edited.
- 


### 3 Complete the License Type tab.

- The **License Type** tab is used to specify which licenses can be renewed through the Business Licensing online application.
  - Click the Create icon  to add a License Type to the data grid. This will open the License Type Selection window.
    - Only those license types marked as Renewable will be displayed (LP> Maintenance> License Type> General tab> Renewable toggle).
    - Highlight a license type and click the Confirm icon  to add the selected license type to the tab.
    - License Types are created and maintained on the License Type Maintenance window (LP> Maintenance> License Type).
  - Click the **Explanation** field label to create an explanation for the license type. This will open the Web Explanation window.
-

- Please see the following step for information on the Web Explanation window.
  - Click the Remove Explanation icon  to remove an existing explanation from the selected license type.
  - The **Acknowledgement** field is used to create an acknowledgement message that will display on the License Renewal Review page.
    - As with the Page Explanations described below, this field can use HTML (Hyper Text Markup Language) tags to determine how the message is displayed.
  - Check the **Default fee units** toggle to if you would like the units associated with the selected license type to be displayed when a Business Licensing Online Application user renews a license.
    - If this toggle is checked, a renewable license will be displayed with the units previously associated with that license. The user can update the number of units if necessary.
    - If this toggle is not checked, a renewable license will be displayed without the number of units previously associated with that license. The user will be required to specify the number of units before the renewal can be submitted.
  - Click the Save icon  to save the changes to the License Type tab.
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#### 4 Complete the Page Explanation tab.

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- The **Page Explanations** tab is used to set up the explanations that will populate the right side of many of the Business Licensing pages. You can use these explanations to provide additional instructions, web site links and downloadable files for your users.
- Highlight an explanation and click the Modify icon  to edit the selected explanation. This will open the Web Explanation window.
  - The **Page Name** and **Data Description** fields cannot be edited.
  - The **Explanation Title** field is used to enter the title of the explanation. This will display above the main explanation text in a larger font size.
    - Due to size restrictions, this field is limited to 32 characters.
  - The **Explanation Text** field is used to enter the primary explanation text that will display on the right side of the page.
    - This field is formatted using HTML (Hyper Text Markup Language) tags. While this field can accommodate up to 1024 characters, this includes the HTML tags themselves.
    - HTML tags are most often used in pairs. Only the words, phrases or paragraphs that fall between the opening tag and the closing tag will be affected. For example, in the following sentence, the words "username" and "password" would appear in bold text on the web page.





To complete the registration process, please access the Business Licensing portal using your `<b>username</b>` and `<b>password</b>`.

- Here are a few of the most commonly used HTML tags:

HTML Tag	Effect
<b> </b>	This is the <b>Bold</b> markup tag. Any words or phrases between these tags will be displayed in bold text.
<i> </i>	This is the <b>Italic</b> markup tag. Any words or phrases between these tags will be displayed in italicized text.
 	<p>This is the <b>Line Break</b> markup tag. Place this tag at the end of a line if you wish to return to the beginning of the next line. You can also use this tag between lines to increase the space between one line and the next.</p> <p>This is a self-contained, single tag that does not require an opening tag and a closing tag like the other tags described here.</p>

- For a more comprehensive list of HTML tags, please refer to one of the many free, online HTML tutorials such as [W3Schools.com](http://W3Schools.com). Here you can learn how to insert tags used to change font styles, create web site links and insert pictures.
- The **Link Text** field is used to enter the text that will display on the optional link below the explanation text.
  - This field is limited to 128 characters.
- The **Link URL** field is used to enter the web site address for the optional link below the explanation text. This URL must include the "http://" or "https://"

address element.

- The contents of the Link Text field will not be displayed if a Link URL is not specified.
  - The **File Description** field is used to add a descriptive label to the downloadable file described below.
    - This field is limited to 128 alphanumeric characters.
  - The **File** field is used to attach a downloadable file to the page. Users will be able to download this file by clicking the "Download" link that appears below the web explanation and link text.
    - Click the Clear File Attachment icon  to remove a previously attached file from the web explanation.
    - Click the Download File Attachment icon  to download a previously attached file. You will be prompted to select a save location for the file.
  - Click the Save icon  to save the Web Explanation and return to the Business Licensing Setup window.
  - You must click the Save icon  on the main Business Licensing Setup window in order to save any changes.
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# SS> Web Application Setup> Contact Management

## Online Contact Management Setup

### Summary

The Contact Management Setup window is used to configure the Online Code and Contact Management application. The Online Code and Contact Management application is a web-based code enforcement portal that allows citizens submit, track and resolve code infractions online.

### Step by Step

- 1 Open the Contact Management Setup window.

- The **Contact Management Setup** window (SS> Web Application Setup> Contact Management) includes the General, Issue Type and Page Explanation tabs.
- The General tab is used to set up how the issue location map will be displayed when a user opens the application.
- The **Initial Map Latitude** and **Longitude** fields are used to specify where the location map is initially centered.

- These fields use the Decimal Degree format for latitude and longitude positioning. If you do not know the Decimal Degree values for the desired map location, you can convert the commonly used Degrees Minutes Seconds coordinate values using the FCC's free converter at <http://www.fcc.gov/mb/audio/bickel/DDMMSS-decimal.html>

- For example, the standard coordinates for Portland, OR are:

45°31'12"N by 122°40'55"W

- When converted to Decimal Degree format, they are:




Latitude: 45.52 Longitude: -122.681944

- The **Initial Map Zoom** field is used to set the initial zoom level for the issue location map.
    - This value must be between 1 (minimum zoom) and 21 (maximum zoom). A value of 10-12 will usually provide enough detail for users to easily center the map on the desired area before zooming in to mark a specific location.
- 

## 2 Complete the Issue Type tab.


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- The Issue Type tab is used to specify which issue types will be available for online submission.
  - Click the Create icon  to add an issue type to the data grid below. This will open the Issue Type Selection window.
    - Highlight the desired issue type and click the Confirm icon  to return to the Contact Management Setup window.
    - Issue types are created and maintained on the Issue Type Maintenance window (CM> Maintenance> Issue Type).
  - Once an issue type is selected, you can specify the issue submission details in the Maintenance section to the right.
  - The **Explanation** field is used to attach a default web explanation to the issue type. This will launch the Web Explanation window.
    - Please refer to Step 3 for more information on setting up web explanations.
    - Once an explanation has been specified, you can use the Clear icon  to remove it from the issue type.
  - The **Notification Recipient** drop-down menu is used to specify who will receive a notification when the issue type is submitted through the online application.
    - The selection in this field will determine which of the **Queue**, **Role** and **User** fields below are used to determine the employee that will receive the notification. Only the field selected in the Notification Recipient field will be notified. The other fields can be completed, but those entities will not be notified.
      - Click the Queue, Role or User field label to select the notification recipient from a list.
-

- Queues are created and maintained on the Queue Maintenance window (CM> Maintenance> Queue).
  - Roles are created and maintained on the Role Maintenance window (SS> Security> Role).
  - Users are created and maintained on the User Maintenance window (SS> Security> User).
  - The **Status on New Issue** field is used to specify the status of any new issue with this issue type selected when it is submitted through the online application.
    - Issue statuses are created and maintained on the Issue Status Maintenance window (CM> Maintenance> Issue Status).
  - Check the **Hidden after submission** toggle to prevent submitted issues based on this issue type from displaying when a citizen uses the Online Code and Contact Management application to search for existing issues.
  - Check the **Require approval** toggle to require that all issues submitted through the online application be processed through a Web Approvals batch.
    - When this toggle is checked, only those submitted issues that are approved will be converted to CM module issues.
  - Check the **Display resolution notes** toggle to display the resolutions notes attached to the issue when a citizen views the issue through the online application.
    - Resolution notes are entered on the Issue Maintenance window (CM> Issues> Issue Search> General tab> Resolution Notes field).
  - Check the **Require Location** toggle to require users to specify a location when submitting issues through the online application.
-

### 3 Complete the Page Explanations tab.





- The Page Explanations tab is used to set up the explanations that will populate the User Help section on the right side of many of the Online Contact Management pages. You can use these explanations to provide additional instructions, web site links and downloadable files for your users.
  - Highlight an explanation and click the Modify icon  to edit the selected explanation. This will open the Web Explanation window.
    - The **Page Name** and **Data Description** fields cannot be edited.
    - The **Explanation Title** field is used to enter the title of the explanation. This will display above the main explanation text in a larger font size.
      - Due to size restrictions, this field is limited to 32 characters.
    - The **Explanation Text** field is used to enter the primary explanation text that will display on the right side of the page.
      - This field is formatted using HTML (Hyper Text Markup Language) tags. While this field can accommodate up to 1024 characters, this includes the HTML tags themselves.
      - HTML tags are most often used in pairs. Only the words, phrases or paragraphs that fall between the opening tag and the closing tag will be affected. For example, in the following sentence, the words "username" and "password" would appear in bold text on the web page.
-

To complete the registration process, please access the Employee Self Service portal using your **username** and **password**.

- Here are a few of the most commonly used HTML tags:

HTML Tag	Effect
<code>&lt;b&gt; &lt;/b&gt;</code>	This is the <b>Bold</b> markup tag. Any words or phrases between these tags will be displayed in bold text.
<code>&lt;i&gt; &lt;/i&gt;</code>	This is the <b>Italic</b> markup tag. Any words or phrases between these tags will be displayed in italicized text.
<code>&lt;br /&gt;</code>	This is the <b>Line Break</b> markup tag. Place this tag at the end of a line if you wish to return to the beginning of the next line. You can also use this tag between lines to increase the space between one line and the next.  This is a self-contained, single tag that does not require an opening tag and a closing tag like the other tags described here.

- For a more comprehensive list of HTML tags, please refer to one of the many free, online HTML tutorials such as [W3Schools.com](http://W3Schools.com). Here you can learn how to insert tags used to change font styles, create web site links and insert pictures.

- The **Link Text** field is used to enter the text that will display on the optional link below the explanation text.
    - This field is limited to 128 characters.
  - The **Link URL** field is used to enter the web site address for the optional link below the explanation text. This URL must include the "http://" or "https://" address element.
    - The contents of the Link Text field will not be displayed if a Link URL is not specified.
  - The **File** field is used to attach a downloadable file to the page. Users will be able to download this file by clicking the "Download" link that appears below the web explanation and link text.
    - Click the Clear File Attachment icon  to remove a previously attached file from the web explanation.
    - Click the Download File Attachment icon  to download a previously attached file. You will be prompted to select a save location for the file.
    - Click the Save icon  to save the Web Explanation and return to the Contact Management Setup window.
  - You must click the Save icon  on the main Contact Management Setup window in order to save any changes.
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# SS> Web Application Setup> Employee Self Service

## Employee Self Service Setup

### Summary

The Employee Self Service Setup window is used to configure the Employee Self Service Online Application.

### Step by Step

- 1 Configure the Employee Self Service online application.
  - Open the **Employee Self Service Setup** window (SS> Web Application Setup> Employee Self Service).
  - The General tab is used to set up how employee requests submitted through the Employee Self Service online application will be processed.
  - The **Report Threshold** field is used to enter the historical date limit for the pay stubs and W-2s that will be included on the site. Any pay stubs or W-2s generated before this date will not be available to ESS users.

- **ATTENTION:** This date MUST fall on or after the date that your organization's Springbrook database was upgraded to Version 7.10 or above. If an earlier date is specified, the ESS online application will attempt to display pay stubs and W-2s generated in a prior, not-web-enabled Springbrook version. This could result in inaccurate or sensitive information being displayed when a web user attempts to access their pay stub or W-2 history.
  - The **HR Contact** field is used to specify a Springbrook Role as the default HR contact role.
    - The user associated with the selected role will receive a contact notification if the employee that submitted the contact did so anonymously or does not have an HR Contact associated with their department.
    - Roles are created, maintained and associated with departments on the Role Maintenance window (SS> Security> Role).
  - The **Time Off Approver** field is used to specify a Springbrook Role as the default time off approver role.
    - The user associated with the selected role will receive a time off approval notification if the employee that submitted the time off request does not have a supervisor associated with their employee record.
      - Supervisors are attached to the employee record on the Employee Maintenance window (PR> Maintenance> Employee> General tab> Supervisor field).
    - The time off approval notification will appear in the approver's My Tasks window. When the notification is clicked, the Time Off Approval window will open and the approver will be able to approve or deny the time off request.
-



- The Time Off Approval window is also accessible from within the Payroll module (PR> Maintenance> Time Off Approval).
  - Roles are created and maintained on the Role Maintenance window (SS> Security> Role).
  - The **Flat Direct Deposit** and **Percentage Direct Deposit** fields are used to attach direct deposit deductions to the employee record.
    - When an employee sets up their direct deposit account information in ESS, they can specify either a flat or percentage direct deposit type for each account. The deduction codes listed here will be displayed next to the specified flat or percentage direct deposit amount on the employee pay stub.
    - Deductions and benefits are created and maintained on the Deduction/Benefit Maintenance window (PR> Maintenance> Deduction/Benefit).
  - The **W4 Forecasting Check** drop-down menu is used to specify which check will be used to generate W4 forecasts.
  - The **ACH Layout** and **Print Layout** drop-down menus are used to select the ACH and Printed check layouts that will be displayed when a user accesses historical check data through the Employee Self Service online application.
    - These fields will default to N/A and will not display any other options unless your organization is set up to use configurable checks.
      - You can set up the system to use configurable checks on the PR Setup window (PR> Utilities> Setup> Checks tab> Check Type field> Configurable or Configurable Long Stub option).
      - Once the system is set up for configurable checks, check layouts need to be created on the Report Layout Maintenance window (SS> Maintenance> Report Layout).
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- Once a configurable check layout has been created, it can be selected in the ACH Layout and Print Layout fields.
  - Check the **Generate timesheet lines on time off approval** toggle to automatically generate time off line items on the employee's timesheet after approval.
    - The system will use the work period and scheduled days associated with the employee record to create the timesheet lines.
  - Check the **Notify department clerk on time off approval** toggle to automatically send a notification to the employee's department clerk when a submitted time off request has been approved.
  - Check the **Require web approvals** toggle to require approval for any changes an employee makes to their record through the Employee Self Service online application.
    - When this toggle is checked, any changes an employee makes through their ESS account will be added to the next available batch in the HR Web Approvals process (HR> Web Approvals).
  - Check the **Notify users on web approval** toggle to automatically send a notification email to the employee when a submitted change is approved. This toggle is only active if the Require web approvals toggle is checked.
  - Check the **Allow anonymous contact** toggle if you would like to provide your ESS users with the option to submit an anonymous message to the specified HR Contact.
- 



## 2 Complete the Accrual Types tab.

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- The Accrual Types tab is used to specify which accrual types will be available when an employee submits a time off request.
  - Click the Create icon  to add a new Accrual Type to the tab.
    - Accrual Types are created and maintained on the Accrual Type Maintenance window (PR> Maintenance> Accrual Type).
  - The **Web Pay Code** column is used to associate a pay code with the accrual type.
    - When a time off request is approved, the pay code associated with the accrual type on the request will be attached to the time off timecard line item.
    - Click the Ellipsis icon  to select a Pay Code. Every accrual type must have an associated pay code.
    - Pay codes are created and maintained on the Pay Code Maintenance window (PR> Maintenance> Pay Code).
- 

### 3 Complete the Deductions tab.


- The Deductions tab is used in conjunction with the ESS W4 Forecasting process.
    - The W4 Forecasting process allows employees to forecast changes to their W4 details based on previous paychecks. Part of that forecasting process includes changes to deductions. Employees will only be able to forecast changes to deductions that appear on the paycheck the forecast is based on AND that appear on this tab.
-

- Click the Create icon  to add a new deduction to the tab.
    - Deductions are created and maintained on the Deduction/Benefit Maintenance window (PR> Maintenance> Deduction/Benefit).
  - Highlight a deduction and click the Delete icon  to remove the deduction from the tab.
    - If the deduction does not appear on this tab AND on the employee's check, the employee will not be able to forecast changes to the deduction.
- 

#### 4 Complete the Templates tab.

- The Templates tab is used to specify which Personnel Action Form (PAF) steps will be displayed when the associated employee opens the Career Tracker page of the Employee Self Service (ESS) website.
  - Click the Create icon  to add a PAF template to the grid.
  - Once a template has been added, the **Steps** section will automatically populate with the steps included in the selected PAF template.
  - Check each step that should be displayed through ESS.
    - The first step in many PAFs will often contain information about who initiated the PAF. In order to keep this information confidential, this step should not be included in those that are displayed in ESS.
    - Review the PAF template in order to be sure the steps that will be displayed do not include sensitive or confidential information. PAF templates are
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created and maintained on the PAF Template Maintenance window (HR> Personnel Action Forms> PAF Template).

- Highlight a PAF template and click the Delete icon  to remove it from the list of templates that will be displayed in ESS.
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## 5 Complete the Requirements tab.


- The Requirements tab is used to specify which employee information will be requested when a new user registers for an ESS account.
  - The **Mandatory** toggle is used to specify which employee information fields must be completed before the employee is allowed to continue registration.
    - By system default, only Employee Number is marked as Mandatory.
  - Check the **Use** toggle next to each field that should appear on the registration page.
  - The **Display Name**, **Display Tip** and **Edit Type** columns cannot be edited.
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## 6 Complete the Page Access tab.

- The Page Access tab will populate with the ESS pages that can be disabled. This list is determined by how the ESS system was initially installed.
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- Check the **Enabled** toggle to enable a page. If the Enabled toggle is not checked, the selected page, and any ESS functionality associated with that page, will not be available to your users.
- 

## 7 Complete the Explanations tab.



- The Explanations tab is used to set up the explanations that will populate the right side of many of the Employee Self Service pages. You can use these explanations to provide additional instructions, web site links and downloadable files for your users.
  - Highlight an explanation and click the Modify icon  to edit the selected explanation. This will open the Web Explanation window.
    - The **Page Name** and **Data Description** fields cannot be edited.
    - The **Explanation Title** field is used to enter the title of the explanation. This will display above the main explanation text in a larger font size.
      - Due to size restrictions, this field is limited to 32 characters.
    - The **Explanation Text** field is used to enter the primary explanation text that will display on the right side of the page.
      - This field is formatted using HTML (Hyper Text Markup Language) tags. While this field can accommodate up to 1024 characters, this includes the HTML tags themselves.
      - HTML tags are most often used in pairs. Only the words, phrases or paragraphs that fall between the opening tag and the closing tag will be
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affected. For example, in the following sentence, the words "username" and "password" would appear in bold text on the web page.

To complete the registration process, please access the Employee Self Service portal using your **username** and **password**.

- Here are a few of the most commonly used HTML tags:

HTML Tag	Effect
<b> </b>	This is the <b>Bold</b> markup tag. Any words or phrases between these tags will be displayed in bold text.
<i> </i>	This is the <b>Italic</b> markup tag. Any words or phrases between these tags will be displayed in italicized text.
 	This is the <b>Line Break</b> markup tag. Place this tag at the end of a line if you wish to return to the beginning of the next line. You can also use this tag between lines to increase the space between one line and the next.  This is a self-contained, single tag that does not require an opening tag and a closing tag like the other tags described here.

- For a more comprehensive list of HTML tags, please refer to one of the many free, online HTML tutorials such as [W3Schools.com](http://W3Schools.com). Here you can learn how to insert tags used to change font styles, create web site links and insert pictures.
  - The **Link Text** field is used to enter the text that will display on the optional link below the explanation text.
    - This field is limited to 128 characters.
  - The **Link URL** field is used to enter the web site address for the optional link below the explanation text. This URL must include the "http://" or "https://" address element.
    - The contents of the Link Text field will not be displayed if a Link URL is not specified.
  - The **File Description** field is used to add a descriptive label to the downloadable file described below.
    - This field is limited to 128 alphanumeric characters.
  - The **File** field is used to attach a downloadable file to the page. Users will be able to download this file by clicking the "Download" link that appears below the web explanation and link text.
    - Click the Clear File Attachment icon  to remove a previously attached file from the web explanation.
    - Click the Download File Attachment icon  to download a previously attached file. You will be prompted to select a save location for the file.
-

- Click the Save icon  to save the Web Explanation and return to the Employee Self Service Setup window.
  - You must click the Save icon  on the main Employee Self Service Setup window in order to save any changes.
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# SS> Web Application Setup> Licensing and Tax

## Licensing and Tax Setup

### Summary

The Licensing and Tax Setup window is used to configure the Licensing and Tax Online Application. The Business Licensing and Tax online application is a web-based business licensing and tax portal that allows business owners and license holders to renew licenses, file business tax returns and pay fees or taxes online.

### Step by Step

1 Configure the Licensing and Tax online application.

- Open the Licensing and Tax Setup window (SS> Web Application Setup> Licensing and Tax).
- The **General** tab is used to specify the general settings for the Business Licensing and Tax online application.
- The **Batch Prefix** field determines the first three digits of the five digit batch prefix for the daily Licensing and Tax cash receipts batch. This number should be

sufficiently high enough to avoid conflicting with standard cash receipts batches created throughout the normal course of the month.


- For example, if the three digits entered here are 789, the first batch generated by the Licensing and Tax online application in July of 2019 would be 78901.07.2019.
  - The **Batch Cutoff Time** field determines the cutoff time for submitted payments to be included in that day's Licensing and Tax cash receipts batch. Returns submitted after this time will be included in the next day's batch.
  - The **Pay Method** field is used to specify the default pay method that business owners and license holders will use to pay taxes and fees online. Most users will set up a generic pay method, such as "Web Payments", for all payments received through the Licensing and Tax online application.
    - Pay methods are created and maintained on the Pay Method Maintenance window (CR> Maintenance> Pay Method).
  - The **Merchant Processor** and **Merchant Account Number** fields will be determined when the application is installed.
  - Check the **Merchant test mode** toggle while testing the Licensing and Tax online application.
    - When this toggle is checked, any transactions generated in the Licensing and Tax online application will use simulated account information.
- 



## 2 Complete the Requirement tab.

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- The **Requirement** tab is used to specify what license holder information is required in order to create a Licensing and Tax online application account. This tab is pre-populated with the business number and web registration key requirements. Because both of these items are considered mandatory when creating a new account, this tab cannot be edited.
- 

### 3 Complete the Tax Type tab.

- The **Tax Type** tab is used to specify which tax types business owners will be able to pay through the Licensing and Tax online application.
  - Click the Create icon  to add a Tax Type to the data grid.
    - Tax types that are set up to omit units cannot be selected and will not be displayed on the Tax Type Selection window.
    - Tax types are set up to omit units on the Tax Type Maintenance window (BT> Maintenance> Tax Type> Omit Units drop-down).
  - Enter a **Missing Fee Infraction** or click the field label to select one from a list.
    - If a business owner files a tax return without selecting the associated BT tax fee, the infraction specified here will be displayed on the business record (BT> Maintenance> Business> History tab> Infractions field).
    - Infraction types are created and maintained on the Infraction Type Maintenance window (BT> Maintenance> Infraction Type).
  - Click the **Explanation** field label to create an explanation for the tax type. This will open the Web Explanation window.
-

- Please see the following step for information on the Web Explanation window.
  - Click the Remove Explanation icon  to remove an existing explanation from the selected tax type.
  - The **Acknowledgement** field is used to enter an acknowledgement message that will display on the Return Filing Review page.
    - As with the Page Explanations described below, this field can use HTML (Hyper Text Markup Language) tags to determine how the message is displayed.
  - Check the **Show excluded units** toggle to display the Excluded Units column when a business owner to filing tax returns online. This will allow the business owner to specify the number of units on a unit-based tax fee that should be excluded from the total.
  - Click the Save icon  when complete.
- 

#### 4 Complete the Page Explanation tab.

- The **Page Explanations** tab is used to set up the explanations that will populate the right side of many of the Business Licensing and Tax pages. You can use these explanations to provide additional instructions, web site links and downloadable files for your business owners and license holders.
  - Highlight an explanation and click the Modify icon  to edit the selected explanation. This will open the Web Explanation window.
-

- The **Page Name** and **Data Description** fields cannot be edited.
- The **Explanation Title** field is used to enter the title of the explanation. This will display above the main explanation text in a larger font size.
  - Due to size restrictions, this field is limited to 32 characters.
- The **Explanation Text** field is used to enter the primary explanation text that will display on the right side of the page.
  - This field is formatted using HTML (Hyper Text Markup Language) tags. While this field can accommodate up to 1024 characters, this includes the HTML tags themselves.
  - HTML tags are most often used in pairs. Only the words, phrases or paragraphs that fall between the opening tag and the closing tag will be affected. For example, in the following sentence, the words "username" and "password" would appear in bold text on the web page.




To complete the registration process, please access the Licensing and Tax portal using your `<b>username</b>` and `<b>password</b>`.

- Here are a few of the most commonly used HTML tags:



HTML Tag	Effect
<code>&lt;b&gt; &lt;/b&gt;</code>	This is the <b>Bold</b> markup tag. Any words or phrases between these tags will be displayed in bold text.
<code>&lt;i&gt; &lt;/i&gt;</code>	This is the <b>Italic</b> markup tag. Any words or phrases between



	these tags will be displayed in italicized text.
<code>&lt;br /&gt;</code>	<p>This is the <b>Line Break</b> markup tag. Place this tag at the end of a line if you wish to return to the beginning of the next line. You can also use this tag between lines to increase the space between one line and the next.</p> <p>This is a self-contained, single tag that does not require an opening tag and a closing tag like the other tags described here.</p>

- For a more comprehensive list of HTML tags, please refer to one of the many free, online HTML tutorials such as [W3Schools.com](http://W3Schools.com). Here you can learn how to insert tags used to change font styles, create web site links and insert pictures.
- The **Link Text** field is used to enter the text that will display on the optional link below the explanation text.
  - This field is limited to 128 characters.
- The **Link URL** field is used to enter the web site address for the optional link below the explanation text. This URL must include the "http://" or "https://" address element.
  - The contents of the Link Text field will not be displayed if a Link URL is not specified.
- The **File Description** field is used to add a descriptive label to the downloadable file described below.
  - This field is limited to 128 alphanumeric characters.

- The **File** field is used to attach a downloadable file to the page. Users will be able to download this file by clicking the "Download" link that appears below the web explanation and link text.
    - Click the Clear File Attachment icon  to remove a previously attached file from the web explanation.
    - Click the Download File Attachment icon  to download a previously attached file. You will be prompted to select a save location for the file.
  - Click the Save icon  to save the Web Explanation and return to the Licensing and Tax Setup window.
- 

## 5 Complete the License Type tab.

- The **License Type** tab is used to specify which licenses can be renewed through the Licensing and Tax online application.
  - Click the Create icon  to add a License Type to the data grid. This will open the License Type Selection window.
    - Only those license types marked as Renewable will be displayed (LP> Maintenance> License Type> General tab> Renewable toggle).
    - Highlight a license type and click the Confirm icon  to add the selected license type to the tab.
    - License Types are created and maintained on the License Type Maintenance window (LP> Maintenance> License Type).
-

- Click the **Explanation** field label to create an explanation for the license type. This will open the Web Explanation window.
    - Please see the previous step for information on the Web Explanation window.
    - Click the Remove Explanation icon  to remove an existing explanation from the selected license type.
  - The **Acknowledgement** field is used to enter an acknowledgement message that will display on the License Renewal Review page.
    - As with the Page Explanations described above, this field can use HTML tags to determine how the message is displayed.
  - Click the Save icon  to save the changes to the License Type tab.
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# SS> Web Application Setup> Open Enrollment



## Open Enrollment Setup

### Summary

The Open Enrollment Setup window is used to configure the Open Enrollment Online Application.

### Step by Step


- 1 Open the Open Enrollment Setup window (SS> Web Application Setup> Open Enrollment).
  - The Open Enrollment Setup window is split into the Documentation tab and the Explanations tab.
  - The Documentation tab is used to attach additional documentation to the deductions, benefits and deduction/benefit groups that are available in the open enrollment process. These documents can be downloaded by your employees before they complete the enrollment process.
  - Click the Create icon  drop-down menu and select Add Deduction/Benefit to add a deduction or benefit to the Documentation tab.

- Deductions and benefits are created and maintained on the Deduction/Benefit Maintenance window (PR> Maintenance> Deduction/Benefit).
  - Only deductions and benefits that are set up with at least one revision step can be used with the Open Enrollment online application (PR> Maintenance> Deduction/Benefit> Calculation tab> Revision Step section).
  - In order to be displayed in the open enrollment process, deductions and benefits must be associated with a deduction/benefit group that is associated with the open enrollment plan. Enrollment plans are created and maintained on the Enrollment Plan Maintenance window (HR> Maintenance> Enrollment Plan).
- Click the Create icon  drop-down menu and select Add Deduction/Benefit Group to add a deduction/benefit group to the Documentation tab.
  - Deduction/Benefit Groups are created and maintained on the Deduction/Benefit Group Maintenance window (HR> Maintenance> Deduction/Benefit Group).
- Click the Ellipsis icon  in the Documentation column to add a document to the deduction, benefit or deduction/benefit group.
  - Once a document is attached to a deduction, benefit or deduction/benefit group, a Documentation link will be displayed next to the item. Open enrollment users will then be able to click the link to download the attached document.
  - Only documents in .DOC, .DOCX and .PDF file formats can be attached.

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## 2 Complete the Explanations tab.

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- The Explanations tab is used to set up the explanations that will populate the right side of many of the Open Enrollment pages. You can use these explanations to provide additional instructions, web site links and downloadable files for your users.
- Highlight an explanation and click the Modify icon  to edit the selected explanation. This will open the Web Explanation window.
  - The **Page Name** and **Data Description** fields cannot be edited.
  - The **Explanation Title** field is used to enter the title of the explanation. This will display above the main explanation text in a larger font size.
    - Due to size restrictions, this field is limited to 32 characters.
  - The **Explanation Text** field is used to enter the primary explanation text that will display on the right side of the page.
    - This field is formatted using HTML (Hyper Text Markup Language) tags. While this field can accommodate up to 1024 characters, this includes the HTML tags themselves.
    - HTML tags are most often used in pairs. Only the words, phrases or paragraphs that fall between the opening tag and the closing tag will be affected. For example, in the following sentence, the words "username" and "password" would appear in bold text on the web page.





To complete the registration process, please access the Employee Self Service portal using your `<b>username</b>` and `<b>password</b>`.

- Here are a few of the most commonly used HTML tags:

HTML Tag	Effect
<code>&lt;b&gt; &lt;/b&gt;</code>	This is the <b>Bold</b> markup tag. Any words or phrases between these tags will be displayed in bold text.
<code>&lt;i&gt; &lt;/i&gt;</code>	This is the <b>Italic</b> markup tag. Any words or phrases between these tags will be displayed in italicized text.
<code>&lt;br /&gt;</code>	<p>This is the <b>Line Break</b> markup tag. Place this tag at the end of a line if you wish to return to the beginning of the next line. You can also use this tag between lines to increase the space between one line and the next.</p> <p>This is a self-contained, single tag that does not require an opening tag and a closing tag like the other tags described here.</p>

- For a more comprehensive list of HTML tags, please refer to one of the many free, online HTML tutorials such as [W3Schools.com](http://W3Schools.com). Here you can learn how to insert tags used to change font styles, create web site links and insert pictures.
- The **Link Text** field is used to enter the text that will display on the optional link below the explanation text.
  - This field is limited to 128 characters.
- The **Link URL** field is used to enter the web site address for the optional link below the explanation text. This URL must include the "http://" or "https://"

address element.

- The contents of the Link Text field will not be displayed if a Link URL is not specified.
  - The **File Description** field is used to add a descriptive label to the downloadable file described below.
    - This field is limited to 128 alphanumeric characters.
  - The **File** field is used to attach a downloadable file to the page. Users will be able to download this file by clicking the "Download" link that appears below the web explanation and link text.
    - Click the Clear File Attachment icon  to remove a previously attached file from the web explanation.
    - Click the Download File Attachment icon  to download a previously attached file. You will be prompted to select a save location for the file.
  - Click the Save icon  to save the Web Explanation and return to the Open Enrollment Setup window.
  - You must click the Save icon  on the main Open Enrollment Setup window in order to save any changes.
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# SS> Web Application Setup> CivicPay Batch Setup


## CivicPay Batch Setup


### Summary

The CivicPay Batch Setup window is used to set up how Springbrook handles Utility Billing payments and adjustments submitted through the CivicPay Online (CPO) application.

### Step by Step

1 View the existing CPO batch setups.

- The left section of the window will display all of the CPO batch setups that have been created in the application. Select a batch setup in the left section of the window and the information attached to that batch setup will populate in the Maintenance section to the right.
- Highlight batch setup and press DELETE or click the Delete icon  if you would like to delete that batch setup.

- Press INSERT or click the Create icon  if you would like to create a new batch setup. This will create a new line item in the left section of the window and the fields in the Maintenance section will be enabled to enter the batch setup information.
- 

## 2 Create a new CPO batch setup.

- The **Payment Type** field is used to select the payment type you'd like to associate with the batch setup configuration.
    - By assigning a unique pay method to a payment type on a batch setup configuration, organizations can increase the control they have over the reconciliation process. CPO payments of different payment types will now have a unique payment method assigned to the receipt. Those receipts can then be processed by payment method in the BR Receipt Deposits process.
    - The **Default** payment type will be assigned to all existing batch setup configurations. If your organization would like to continue using one batch and one payment method for all CPO payments, continue using the Default payment type. This will ensure all undefined payment types are included in the default batch.
  - The **Merchant Account Type** field is used to specify whether the batch setup will include standard CPO Utility payments or the Municipal payments.
  - The **Batch Number Prefix** field is used to specify a batch number prefix for all batches the system creates for CivicPay Online (CPO) transactions.
-

- For example, an organization could add a "999" prefix to all CPO transaction batches in order to keep those transactions separate and organized. Those batches would then appear as "999MMDDYYYY" with "MMDDYYYY" corresponding to the month, day and year that the batch was created.
  - The Batch Number Prefix field will only be enabled if your organization does NOT use enhanced batch security. Enhanced batch security is enabled or disabled by checking or unchecking the Use enhanced batch security toggle on the System tab of the SS System Setup window.
  - The **Batch Name Prefix** field is used to specify a batch name prefix for all batches the system creates for CPO transactions.
    - For example, an organization could add an "CPO-" prefix to all CPO transaction batches in order to keep those transactions separate and organized. Those batches would then appear as "CPO-BATCHNAME" with "BATCHNAME" corresponding to the batch name entered when the batch is created.
    - The Batch Name Prefix field will only be enabled if your organization uses enhanced batch security.
  - The **Pay Method** field is used to specify the pay method that will be associated with imported CPO transactions.
    - Many organizations will create a set of pay methods to use exclusively with CPO. By assigning these pay methods to specific payment types, clients can have more control over how different types of payments are received in the BR Receipt Deposits process.
    - Pay methods are created and maintained on the Pay Method Maintenance window (CR> Maintenance> Pay Method).
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- Click the Save icon  when complete.
-


# SS> Web Application Setup> Web Setup

## Web Setup

### Summary

The Web Setup window is used to specify the online applications' subdomain and the number of unsuccessful login attempts that will be allowed before a user is locked out of an online application.

### Step by Step

- The **Login Attempts Allowed** field is used to specify the number of times a user can fail to log in to an online application before the system locks the user's account.
  - Once an online user is locked out of their account, they will not be able to gain access to that account until a Springbrook user unlocks the account on the Web User Maintenance window (SS> Web Maintenance> User> Reset Login icon ).
- The **Subdomain** field will be determined when the Springbrook Online Applications are installed and configured.
  - If your organization has an existing web site that the Springbrook Online Applications will be incorporated into, the subdomain of that web site's URL can be used here. Please check with your IT department or contact Springbrook Support if you are unsure about what subdomain should be used.

# SS> Web Maintenance> User


## Web User Maintenance



### Summary

The Web User Maintenance window is used to create, maintain and track Springbrook Online Application users.

### Step by Step

1 Open the Web User Selection window.



- The **Web User Selection** window (SS> Web Maintenance> User) displays all of the web users created in the application.
- Filter the displayed web users by entering the desired information and clicking the Refresh icon  .
  - Use the Reference Type, Reference Code and/or Reference Name fields to easily filter the web users by name or number.

- Highlight a web user and click the Modify icon  or press ENTER to edit the selected web user.
  - Click the Create icon  or press INSERT to create a new web user. This will open the Web User Maintenance window.
- 




## 2 Create a new Web User.

- The General tab displays the general web user account details.
  - Enter the new user's **Email Address**.
    - This email address will also be the login name the user will enter to access the online applications. You must enter the complete email address in the valid format (jane.doe@organization.gov) in order to save the new web user.
    - This field can accommodate up to 64 characters.
  - Check the **Closed** toggle to close the web user's account.
    - Once a web user's account has been flagged as closed, they will not be able to access any of the online applications.
  - The **Last Successful Login** field displays the date of the web user's last login.
    - This field cannot be edited and will not display a date until the web user's first successful login.
  - The **User Status** field displays the web user's current status.
    - If a web user has not exceeded the maximum daily unsuccessful login attempts limit, this field will display "Normal". If a web user has exceeded this
-

limit, this field will display "Locked".


- In order to unlock a web user's account, click the Reset icon  drop-down menu and select Reset Login. This will reset the web user's account at zero unsuccessful login attempts.
  - If a web user is unable to access an online application because they have forgotten their password, click the Reset icon  drop-down menu and select Reset Password. This will email a randomly-generated password to the email address associated with the web user's account. Once the web user has successfully accessed the online application with the new randomly-generated password, they will be able to change their password to something more memorable.
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### 3 Complete the Application tab.


- The Application tab is used to attach online applications to the web user account.
  - Highlight an application and click the Delete icon  to remove that application from the web user's account.
  - Click the Create icon  to add an online application to the user's account. This will open the Web Application Selection window.
    - The Web Application Selection window will display all of the Springbrook web applications that are installed. Highlight an application and click the Confirm icon  to add the selected application to the web user account.
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- Highlight the newly added application and the fields in the Maintenance section to the right will be enabled.
  - Enter a **Reference Code** or click the field label to select one from a list. You must select a reference code before you will be allowed to save the new web user.
    - The entity in the Reference Code field is determined by the application selected and the Reference Type field above.
    - Each reference code can only be associated with an application once.
  - Select Active from the **Status** drop-down menu to activate the new web user for the selected application.
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#### 4 View the Login History tab.

- The Login History tab will display the web user's full login history.
    - The date, time, IP address and application name of each login attempt will be recorded.
    - When a user successfully logs in to an online application, the Success toggle will be checked.
    - When a user unsuccessfully attempts to log in to an online application, the Error Message column will display the reason for the failed attempt.
      - The Cleared toggle will be checked if the web user's login history has been reset from the General tab.
  - Click the Save icon  when complete.
-

## 5 Track any changes made to the web user record.

- Click the Audit Trail icon  to open the Audit Trail window.
  - Use the Search Criteria section to sort the displayed audit history.
  - The Audit Trail section will provide details about any changes made to a web user record including the date of the change, type of change made, user that made the change, and data table that was edited.
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# SS> Web Maintenance> Tableau Users



## Tableau User Maintenance

### Summary


Before a user can access the Springbrook Analytics Tableau site, the Tableau admin will need to create a Tableau User record for that user in Springbrook.

NOTE: If you don't see the Tableau User Maintenance option in SS> Web Maintenance, please confirm your menu security settings permit you to view the new menu item.

### Step by Step

- Open the **Tableau User Maintenance** window (SS> Web Maintenance> Tableau Users) to create and maintain Tableau users.
- When a Tableau User is selected in the left section of the window, the **Email** field in the Maintenance section will populate with the selected user email address.
- Highlight a Tableau user and click the Delete icon  or press DELETE to delete a user.
- Click the Create icon  or press INSERT to add a new Tableau user. This will add a new line item to the left section of the window and enable the Email field to the right.
- Enter an **Email** address for the new Tableau user. This is what the user will enter to sign into the Springbrook Analytics Tableau website.



- New Tableau users will use this email when signing in to Springbrook Analytics. The first time a new user access the Tableau site, they will need to click the Forgot Password link in order to generate and send an email to their specified email address. This email will contain a confirmation link the user can follow to reset their password and access Tableau.
- While this email is not required to be the same email address used to sign in to Springbrook, it is strongly recommended.
- Check the **User can publish** toggle if the new Tableau user should have the permission to publish reports in Tableau.
- Click the Save icon  or press ENTER when complete to save the Tableau user account.
- Once a Tableau user has been created, they can be added to a Tableau group.
  - All users will be automatically added the All User Tableau group.

# SS> Web Maintenance> Tableau Groups

## Tableau Group Maintenance

### Summary

Individual Tableau users can be organized into Tableau Groups. These groups are set up to differentiate between which sets of users have access to specific data in Tableau. There are three default Tableau Groups - Admin, Power Users, and All Users.



NOTE: If you don't see the Tableau Group Maintenance option in SS> Web Maintenance, please confirm your menu security settings permit you to view the new menu item.

### Step by Step

- Open the **Tableau Groups Maintenance** window (SS> Web Maintenance> Tableau Groups).
- The standard Tableau Groups are Admin, Power User, and All Users. Each group is set up with a default set of permissions that will affect how users in that group can access and interact with the data in Tableau.
  - Tableau uses a "least restrictive" user group permission system. This means a user in both the Power User and the All Users group will be granted the permissions commensurate with the Power User group, which is less restrictive than the All Users group.

- Users in the **Admin** group have the highest level of access to Tableau. Springbrook recommends only one or two users at an organization be added to the Admin group. Users in this group will have the following permissions:
  - Springbrook Standard Reporting folder workbooks:
    - View
    - **Download**
  - Agency folder workbooks:
    - View
    - Edit
    - Delete
    - Upload
    - Overwrite
    - Create
    - **Set permissions on workbooks and views**
  - Datasources folder:
    - View
- Users in the **Power User** group have a level of access that is similar to the Admin level when accessing data and building or editing workbooks. However, Power Users cannot set user permissions on workbooks and views within Tableau. This user group should be reserved for those users who are very familiar with Springbrook data and who are expected to create reports for other users to consume. Users in the Power User group have the following permissions:
  - Springbrook Standard Reporting folder workbooks:
    - View

- Agency folder workbooks:
  - View
  - Edit
  - Delete
  - Upload
  - Overwrite
  - Create
- Datasources folder:
  - View
- The **All Users** group is the default user group and includes every Tableau user in Springbrook. As this is the default folder for all users, a user cannot be removed from this group. Users who are only in this user group have much more limited access to the data in Tableau. This group should be reserved for those users who consume reports but are not expected to create them. Users in the All Users group have the following permissions:
  - Springbrook Standard Reporting folder workbooks:
    - No access
  - Agency folder workbooks:
    - View
  - Datasources folder:
    - No access
- Only Admin users can edit user and group permissions in Tableau. Because Tableau does not inherit database and field security settings from Springbrook, it may make sense for an organization admin to review the specific data access permissions for their Tableau users.

- Click on an Expand button next to the Tableau group to view the users attached to group.
- Click the Add User icon  to add a user to the selected Tableau group. This will open a list of Tableau users to select from.
  - Users will be automatically added to the All Users group when they are created in the Tableau User window.
- Highlight a user and click the Remove User icon  to remove the selected user from the Tableau group.
  - Users cannot be removed from the All Users group. In order to remove a user from all groups, that user must be deleted on the Tableau Users window (SS> Web Maintenance> Tableau Users).
- While the standard set of Tableau groups are set to the permissions outlined above, the Tableau admin at your organization can edit user and group permissions within Tableau to help differentiate data permissions on individual Tableau reports.
  - For more information on setting and maintaining permissions in Tableau, please see the Tableau help article *Permissions* <https://help.tableau.com/current/online/en-us/permissions.htm>

# SS> Work Flow> Work Flow Templates

## Work Flow Templates

### Summary




Work Flow Templates are used to create process work flows in the application. There are two kinds of work flow notification alerts: Information and Approval.

- Information - When a user completes a step, an email notification will be sent to any Springbrook user specified in the notification window.
- Approval - When a user completes a step, an email notification must be sent to a specific user who must approve the step. This user can decline the step, which means a notification is sent back to the user that originally completed the step. The user will still be able to select the next step on the palette.

**NOTE:** Work Flow Templates are used to create process work flows in the application. An improperly set up work flow template can cause problems that could prevent users from completing core processes in the application. Because this process is quite complicated, Springbrook recommends contacting our toll-free Customer Support Team at 1-866-777-0069 if you have any questions.

### Step by Step

## 1 View the work flow templates that have been created.

- Open the **Work Flow Template Selection** window (SS> Maintenance> Work Flow Templates).
  - The Work Flow Template Selection window will display all work flow templates that have been created in the application.
  - Highlight a template and click the Delete icon  to delete the selected template.
  - Highlight a template and click the Modify icon  to open the selected template.
  - Click the Create icon  to create a new work flow template. This will open the Work Flow Template window.
- 

## 2 Modify or create a work flow template on the General tab.





- The **Type** drop-down menu is used to select the type of work flow generated by the template.
    - Select Process if you would like the work flow to be process driven.
      - For example, select Process if you would like a user or position to receive an email when a palette has reached the Commit step.
    - Select Individual if you would like the work flow approver to be able to accept or reject individual items within a process.
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- For example, an approver can look at an entire Purchase Order batch and reject an individual PO without holding up the entire batch. The rejected PO can be removed by the author and added to a new PO batch. This way the original batch can still be processed without completely deleting the rejected PO.
  - The **Sub System** drop-down menu is used to select the module of the work flow. For example, select Purchase Orders if you would like to generate a work flow in the Purchase Orders module.
    - The selection in this field and the Process field will also affect the information that displays on the Steps tab.
  - The **Process** drop-down menu is used to select the batch process you would like to generate the work flow in. The processes that populate in this drop-down menu depend on the module selected in the Sub System field.
  - The **Department** drop-down menu is used to select a department that will be responsible for completing the work flow. Departments are user-created groups of employees.
  - Enter an optional description of the work flow in the **Description** field.
    - The work flow description will display on the Work Flow Selection window, so you may want to use this field to differentiate between two or more work flows that involve the same system and process.
  - Check the **Active** toggle if you would like the work flow to be available in the designated process immediately.
    - The Active toggle will be checked by default.
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- If you experience issues with a newly-implemented work flow template, uncheck this box to deactivate the work flow and contact Springbrook Support.
- 


### 3 Add or modify the steps of the work flow on the Steps tab.




- The **Steps** tab is used to create and modify the steps on the work flow.
  - The steps attached to the work flow will display in the **Steps** field.
    - Highlight a step in the Steps field and the fields in the Details section will populate with the information on the selected step.
    - Highlight a step, click the Delete icon  drop-down menu and select Remove Step to delete the selected step.
    - Click the Create icon  drop-down menu and select Add Step from the menu to create a new work flow step.
      - New work flow steps will not affect open batches. The new work flow step will only be applied to batches created after the work flow step has been created.
    - Use the Up  and Down  icons to arrange the steps in the desired order.
  - The **Summary** field is used to enter a description of the step.
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- The **Wait** field is used to specify a wait period between action notification alerts.
    - If more than one action notification recipient is set up in the Notification field, the value in the Wait field will determine how soon the second recipient will be notified if no response is received from the first recipient. For example, if 1.00 is entered the second recipient will be notified one hour after the first recipient if the first recipient does not respond.
    - Information notification alerts are only subject to the wait period if they are set up to occur after an action notification alert. For example, you could set up both primary and secondary action notification alerts with an information notification alert in between. In this case, the primary action alert would be sent when the work flow is generated. If that action alert times out, both the information alert and the secondary action alert would be generated at the same time.
    - If the work flow progresses through all of the designated action notification recipients without receiving an approval, the work flow will be rejected.
    - If the wait is set to zero, the action notification will wait for approval indefinitely.
  - The **Action** drop-down menu is used to select the action that will be performed by the step. The actions that display in this menu will be determined by the sub system and process selected on the General tab.
  - Check the **This step requires an electronic signature** toggle to require that the user that approves the step provide an electronic signature for the approval. This feature has not been implemented.
  - The **Primary Entity** and **Child Entity** fields are used to create an argument that will determine if a notification should be generated for the work flow step.
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- In order for a notification to be generated, the process that is running must meet the specifications set up in the Primary Entity Criteria section.
- Double click on a field label in the Fields section to add that field to the Criteria section. Enter an operator and specify a value for the argument in quotation marks. For example, if you created a work flow for the purchase orders process and you want to require an approval for any purchase order associated with a particular vendor, you would select Vendor Number from the fields list, add an equals sign to the argument and enter the desired vendor number in quotation marks. For vendor number 00125, the argument would look like this:

PO\_Purchase\_Order\_Change.Vendor\_No = "00125"

- Use the Child Entity field to add additional filtering arguments. The Child Entity arguments will only be used if the Primary Entity requirements are satisfied.
- Leave the Primary Entity field blank to configure the work flow step to generate a notification every time it is run.
- The **Notification** field is used to add users or positions that will be notified by the work flow step.
  - Click the Create icon  drop-down menu and select Add Notification Recipient. This will open the Role Selection window.
  - Select a role in the left section of the window and the Maintenance section will populate with the information attached to the selected role.

- Click the Confirm icon  to select the highlighted role and return to the Work Flow Template window.
    - Add additional notification recipients in the order that you would like the recipients to receive the notification.
  - Once a role has been added to the Notification section, a drop-down menu to the right of the role allows you to select either Action or Information.
    - Select Action if the notification recipient is required to approve the work flow step.
    - Select Information if the notification recipient is only required to receive a notification that the step has been completed.
  - Notification recipients can be deleted by clicking the Delete icon  drop-down menu and selecting Remove Notification Recipient.
  - When a step is completed and a work flow is generated, the system will produce emails for notification recipients as well as an email for the user that is processing the batch.
  - The user will also receive an email as soon as an action notification is approved or rejected.
    - In order to receive notification email generated by a work flow, each user account must be set up properly on the **User Preferences** window (User Preferences icon  on the main application window> General tab> select Email from the Alert Method drop-down menu).
  - The **Summary Fields** section is used to specify a field value trigger for the work flow step.
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- This can be useful if an approval should be requested or a notification sent only in the event that a specific value is exceeded. For example, if the department head approval is needed for an Invoices batch that exceeds \$5,000.00, the Summary field could be set up to display *Amount > 5000*.
  - When creating a PR Timesheets Approval work flow, the Field column will automatically populate with *Supervisor*. This allows you to route individual timesheets specified in the Entity fields to the supervisors specified in the Summary Fields Value column.
  - Click the Save icon  when complete to save the work flow.
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# SS> Work Flow> My Work Flows

## Approve or Reject Work Flows

### Summary

The My Work Flows window displays all of the work flows that have been generated for or by your user account. For example, if you are set up to approve timesheets in the Payroll module Timesheets Approval process, all Timesheets Approval batches that are awaiting your approval will display in the window. The timesheets can either be approved from this window, or you can navigate to the Payroll module and approve the timesheets from the Timesheets Approval batch.





### Step by Step


Once you have received an action notification alert, there are four ways you can approve or reject the work flow.

- 1 Click the Work Flows link on the notification email.


- Clicking the Work Flows link on the notification email will open only the process window that requires your approval or notification. You will still be prompted to log on to

the application, but you will only have access to the window in question.

- In order to receive notification emails generated by a work flow, your user account must be set up properly on the **User Preferences** window (User Preferences icon  on the main application window > General tab > select Email from the Alert Method drop-down menu).
- The report or process window that needs to be accepted or rejected will display a series of work flow specific icons.
  - Click the Approve icon  to approve the open work flow.
    - This will open a small window below the icon with a text box and an Approve button. Enter any approval notes in the text box and click the Approve button to approve the work flow.
    - The approval notes will display under the User Notes column for that work flow step.
  - Click the Reject icon  to reject the open work flow.
    - This will open a small window below the icon with a text box and a Reject button. Enter any rejection notes in the text box and click the Reject button to reject the work flow.
    - The rejection notes will display under the User Notes column for that work flow step.
  - Click the Display History icon  to examine the work flow history.
    - The displayed work flow history will include approvals and rejections along with any notes that were included. Any conversation entries will also be displayed.

- Click the Display Conversation icon  to initiate an instant message conversation with the work flow author.
    - Type your question or comment and the work flow author will be able to respond on the same window. Each new comment will be displayed above the editable comment box. The format for these comments is determined on the User Preferences window.
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**2** Click the My Tasks icon  on the main application toolbar.

- The number of tasks that require your attention will display in parentheses next to the My Tasks icon. These tasks include work flow and personnel action form notifications. The Type column will display the notification type.
  - The My Tasks window displays each task as an independent line item. Double-click a work flow step or click the Display icon  to open and review the work flow step.
    - Approve, Reject, or comment on the work flow as described above.
  - Once all of the work flow steps have been approved or rejected, the work flow will no longer display in the window.
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**3** Open the My Work Flows window through the SS module.

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- This **My Work Flows** window (SS> Work Flow> My Work Flows) will display all of the outstanding work flows awaiting your attention. The work flows displayed in this window are the same work flows that are displayed in the **Review** section outlined above.
    - Highlight the desired work flow and click the Modify icon  to open a window displaying the process step that you need to approve.
    - Approve, Reject, or comment on the work flow as described above.
- 

#### 4 Navigate to the batch process that is awaiting approval.

- Finally, you can navigate directly into the process in question, click **Review Work Flows** from within the palette menu and follow the same steps as above.
    - Both action and information notification alerts will display the module, process and batch information for the work flow that requires your attention.
    - If you attempt to approve or reject a work flow that has timed out or already been committed or deleted, you will receive an error message.
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#### 5 Approve or reject ALL work flows as a Work Flow Admin user.

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- A work flow administrator is a Springbrook user that can approve or reject ALL work flows assigned to other Springbrook users. This work flow admin user must be set up on the User Maintenance window (SS> Security> User> Work Flow Admin toggle).
  - Once the work flow admin user has been set up, that user can log in to the system and approve or reject any active work flow in the system using any of the methods above.
-