



## Post-Sales Frequently Asksed Questions

The following pages cover some of the **F**requently **A**sksed **Q**uestions people have when learning how to use the program. We trust that this will be a helpful resource for everyone involved.

**Why can't I see the client records?**

**H.E.A.R.T. Family Software** members have up to 50 Work Groups that are either user or administrator security workgroups. The administrator workgroup is the portion of the program where all of the customizable features are set. By design, while in this workgroup, client records are not accessible. This is to prevent possible errors while setting the customizable fields. Once the fiscal year is set you may log-out of this administrator and re-enter the program in one of the other workgroups. Now you will be able to access client records.

**Why can't I access a particular tab?**

All members of the **H.E.A.R.T. Family Software** have customizable workgroup settings. Check the administrator workgroup to see if the security workgroup under which you logged-in has permission to access that information.

**When using the program, what is a "Segmentation" and how do I use it?**

A "Segmentation" filters the results in a report.

Example: You want to know how many Hispanics slept at your facility in Sept.

For this information you could use the Bed List Report for a list of names or the Bed & Meal Summary if you just need the numbers. (The Month Ending Report would work too!) You design the Segmentation to select "Hispanic" from the Ethnicity field.

To design your own Segmentations, simply select Segmentation from the List menu. This will open the Segmentation Viewer from which you may click on the appropriate buttons to begin filtering your reports.

**I know I assigned people to beds. Why do they not show on the report?**

One possible problem occurs with the "AM" and "PM" bed selection. When assigning a person to a bed, you need to make sure that "AM" or "PM" is selected to your liking. (The administrator can set the default selection.) As you run the report you need to remember to select the "AM" or "PM" button. With this in mind, check the actual bed assignments for those people or run the report two times. Run one report selecting "AM" and one report selecting "PM".

As you set the default selections and become familiar with the program, running multiple reports will not be necessary.

Other possible situations include not having the correct dorm selected, not having the correct date selected, and not having the correct segmentation or data source selected. There could also be an error in the client information. You know that the person is a male and you are asking the report for all males, however this particular client is entered as a female.

These are common errors. Unfortunately the program does not have an "I meant" function.

Continued on the reverse side.

**How many beds may I have in a dorm and how many dorms are available?**

There is an unlimited number of dorms and a maximum of 500 beds available in one dorm. However, for practical usage, this many beds in one dorm may be too cumbersome to manage. For the purpose of statistical gathering within your organization and to better manage your client flow, sleeping counts, and shelter areas, we suggest 150 +/- beds per dorm.

**What if I forget my password?**

Your administrator has a list of all the employee passwords. As embarrassing as it may be, you will have to go and ask the administrator for your password. You may want to change your password to something easier to remember (Better luck next time!)

**How do I find a record?**

The Agency Viewer Screen, Client Viewer Screen, Dorm Viewer Screen, and the Segmentation Viewer Screen all function the same way. When the selected screen is opened, the first record of the list will be highlighted. You may then use your mouse pointer and click on the record you want or use the scroll bar at the right side of the screen to scroll to the desired record. You may also use the search options of the selected screen to find a particular item.

Select the desired "sort by" option then type in your search in the "Search for..." box. As you type the appropriate information in the "Search for..." box, the search mechanism in the program will narrow the choices available in the viewable area of the screen. Select the record you want then use the "Edit" button to view more information. Remember that some security workgroups may not be able to use the "Edit" button. The only information they can see is what shows in the viewer screen.