Introduction to SITS:Vision Client Server

- Foundation / basic skills course -

Course Description.

This course is designed to provide an introduction to the SITS:Vision client server software. A range of navigation methods and examples of useful tools will be outlined to provide the user with a practical introduction to SITS:Vision.

It should be noted that the topics presented during this course are designed to provide a foundation for further SITS:Vision training and should be considered preparatory to all other SITS:Vision courses.

Objectives.

During this course, you will learn many aspects of the SITS:Vision client server including:

- ✓ Introduction to SITS:Vision
- ✓ Differences between SITS:Vision client server and e:Vision
- ✓ Examples of client server and e:Vision screens
- ✓ Logging into and out of SITS:Vision client server
- ✓ Windows tree style menus and the panel buttons
- ✓ Using commands to display tables/screens
- ✓ SITS:Vision client server screen components
- ✓ Further navigation and shortcuts
- ✓ Record operations:
  - o Retrieving, adding, deleting & releasing records
  - o Using first, previous, next or last record navigation icons
  - o Wildcards and Boolean operators
- ✓ Tools:
  - o Special characters
  - o GoTo field contents
  - o Sorting
  - o Dropping records
  - o Quick analysis
  - o Cross referencing analysis
  - o Exporting *quick analysis* or *cross referencing analysis* data.

Pre-requisites.

Any introductory knowledge of using the computer in a Windows environment will be an advantage although no specialised knowledge of SITS:Vision or the client server software is necessary. This course will present a basic introduction to SITS:Vision client server including navigational topics and a range of tools.

Manual Version 1.2

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Section 1 – Introduction to SITS:Vision client server

Section 2 – Navigation

Section 3 – Record operations

Section 4 – Tools & Special Characters

SITS:VISION

Notations

The following notations and terms will be used during the course:

<div style="border:1px solid black; padding:10px; text-align:center;">
Exercise example to work through.
</div>

<div style="border:1px solid black; padding:10px; text-align:center;">
Hints, tips and highlighted information.
</div>

- **Keyboard Shortcuts:**

    - i.e. **CTRL+Q** (hold down the **CTRL** key and press **Q**)

- **Menu Items:**

    - i.e. **File**, **Exit**

        (select the **File** menu and choose the **Quit** command or use **ALT+F** and then **ALT+Q**).

- **Mouse operations**

    Select, **click** or **left click**:   Click the left button on the mouse.

    Double click: Click the left mouse button (*primary button*) in two quick successive clicks.

    Right click: Click the right mouse button (*secondary butto*n) over an area on the screen to display a context/pop-up menu (the menu will show a range of suitable commands).

Please note that if your mouse configuration is set to 'left handed mode' (instead of 'right handed mode') the buttons will be reversed. In 'left handed mode', the right-most button will be set as the *primary button* (for single or double clicking) and the left-most button will be set as the *secondary button* (i.e. for 'right click' operations where a context/pop-up menu will be displayed).

This course has been designed for users of **Windows XP**. The screenshots presented throughout this manual will therefore apply windows, icons, screens and buttons based on the default Windows XP style.

Disclaimer

The training materials provided in this manual have been created by the University of London for staff/users of SITS:Vision and e:Vision. Please note that the training materials are not sourced or supported by Tribal Group plc.

T R I B A L

Section 1 – Introduction to SITS:Vision

In this section of the course, you will learn about:

- Introduction to the SITS:Vision system

- Differences between SITS:Vision client server and e:Vision

- Examples of client server and e:Vision screens.

- Loading SITS:Vision

- Logging into SITS:Vision

- Closing and logging out of SITS:Vision

There is **one** exercise in this section to help illustrate the above topics:

- Exercise 1A: Loading the SITS:Vision client server software, logging in and closing.

1.0   Introduction to SITS:Vision

SITS:Vision (also known as SITS), is a management information system used by many Higher Education institutions across the UK. The SITS:Vision software is supplied by the company Tribal. The name 'SITS' was originally derived from '**S**trategic **I**nformation **T**echnology **S**ervices' who joined Tribal Group plc in October 2004.

SITS:Vision supports the administration of students and courses within universities and colleges. It is designed to increase efficiency in administrative processes by way of highly functional software working in conjunction with innovative technologies such as automation and workflow management.

The software is designed to assist with statutory reporting and the production of flexible reports using key data. SITS:Vision provides a powerful and reliable database as well as flexible and efficient software to manage the unique needs of higher education.

There are two sides of SITS:Vision that you will use:

- SITS:Vision client server
- e:Vision[1]

SITS:Vision client server provides a 'back end' to the system and is useful for infrequent tasks. SITS:Vision client server cannot be modified with regards to the appearance of various screens.
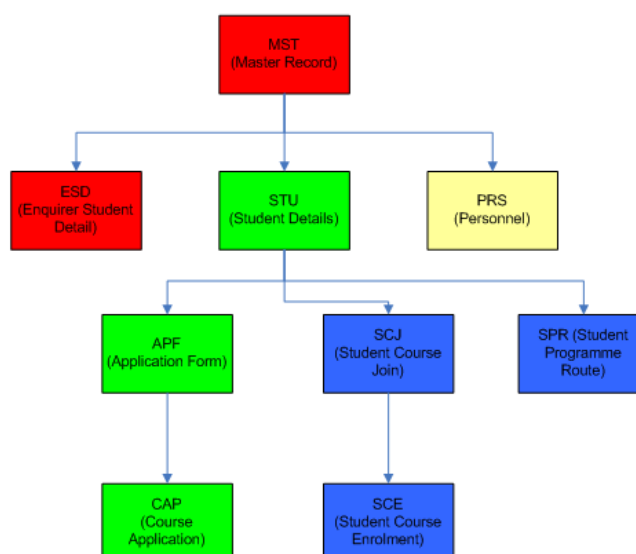
e:Vision provides secure portal access via the web and is used to manage the delivery of data and information from the SITS:Vision client server software. The e:Vision portal is useful for frequent activities as screens are customised to obtain/store the required information.

Further details with regards to the differences between SITS:Vision client server and e:Vision are presented in the next section of the course.

SITS:Vision High-Level Table Hierarchy

The diagram shown right presents a simplified introduction to the hierarchy of records and the main aspects of the student lifecycle in SITS:Vision (*without the processing screens*).

The **MST (Master)** table holds the *person* information and the related tables show examples of the *roles* that a *person* can have.

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[1] e:Vision provides secure portal access via the web and is used to manage the delivery of data and information from the SITS:Vision client server system.

1.1   Differences between SITS:Vision client server and e:Vision

The client server software is provided in an '*as is*' or '*out of the box*' manner in much the same way as most '*off the shelf*' software systems.

For example, when you install and use an application such as *Microsoft Word* – this is provided in an '*as is*' or '*out of the box*' fashion. Most (if not all) of the screens are already created and arranged by the software developer/company.   A range of predetermined icons/menus/tools/dialogs are also provided.

With regards to SITS:Vision client server, a range of useful tables/screens and processes are already provided by the software so that it can indeed be used in an '*out of the box*' manner.

SITS:Vision client server cannot be modified with regards to the appearance of various screens. However, not all of the fields in each table/screen need to be necessarily used as only the desired fields may be utilised as required. Additional fields may also be added to existing screens (in the form of 'user defined fields').
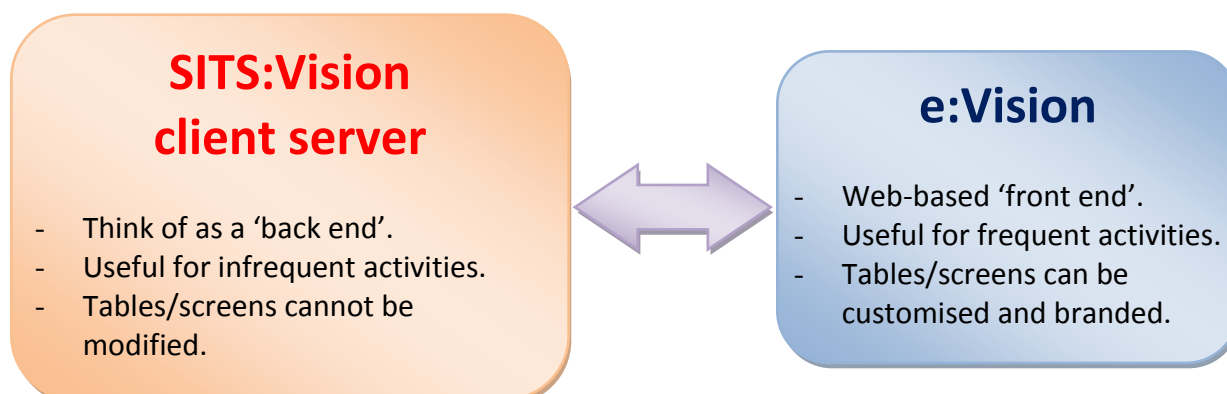
E:Vision provides secure portal access via the web and is used to manage the delivery of data and information from the SITS:Vision client server software.

Tables/screens can be fully customised (*unlike the tables/screens in client server*) so that only the required elements are displayed to a user. Branding can also be applied to e:Vision screens with regards to colours, logos etc.   It should be noted however that not all client server tables/screens or processes can be represented in e:Vision.

E:Vision is useful for frequent activities as the tables/screens are customised to obtain/store the required information in the most efficient manner available. Data entry in an e:Vision screen can also be optimised (for example, when pressing the **TAB** key to move to another field, the order in which the cursor moves to another field can be arranged to enhance the flow of navigation).

Users of SITS:Vision are often advised that the client server can be used for infrequent tasks (i.e. once-a-day processes for example) or that the client server can be thought of as a '*back end*' to SITS:Vision. E:Vision can therefore be thought of as a '*front end*' for users.

SITS:Vision client server

-   Think of as a 'back end'.
-   Useful for infrequent activities.
-   Tables/screens cannot be modified.

e:Vision

-   Web-based 'front end'.
-   Useful for frequent activities.
-   Tables/screens can be customised and branded.

1.2   Examples of client server and e:Vision screens

As an example of the difference between SITS:Vision client server and e:Vision screens, the screenshots in this section illustrate how information with regards to an *Enquirer* would be displayed to a user.

1.2.1 Client server example screens

In this example, the **Enquirer Student Detail (ESD)** table/screen will be presented to illustrate a typical screen in the SITS:Vision client server software.

To load the **ESD** table (*for this example*), enter **ESD** into the **option box** and select the **Run** button, press the **TAB** key or press the **ENTER** key on the **number pad**.
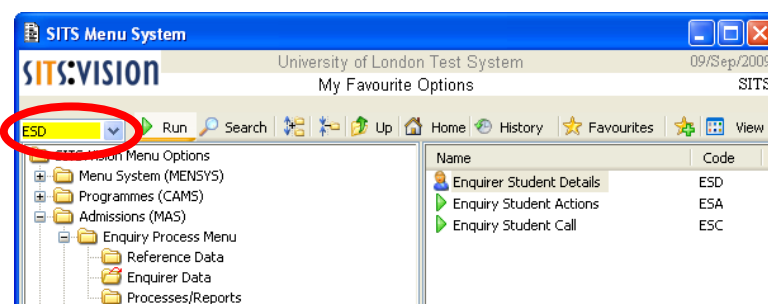
Alternatively, locate the **ESD** screen in the following menus: ***Admissions (MAS), Enquiry Process Menu, Enquirer Data***.

In the example **ESD** screen, a record relating to an enquirer has been retrieved and displayed.

> Note that methods to retrieve records will be outlined during a later section of the course.

The fields displayed on the **ESD** screen are the default '*out of the box*' fields provided by the software.

Note that some fields are left blank (as they may be unused).

To view additional details with regards to the current record (*i.e. an Enquirer in this example*), the use of the **Other** menu can be applied.
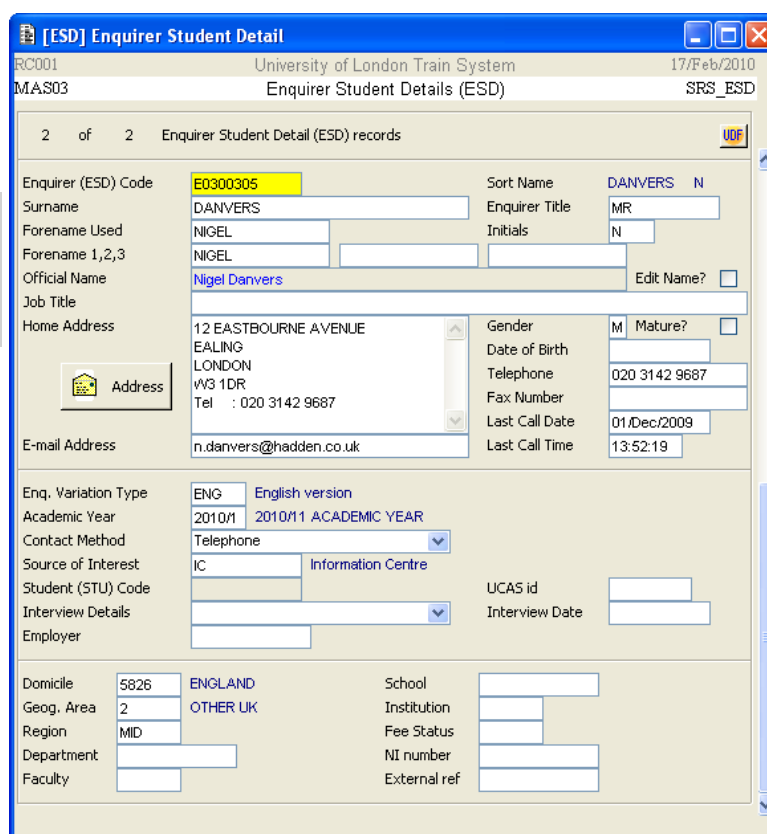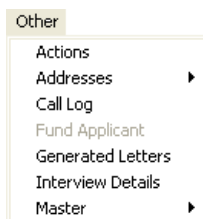
In this example, the **Other** menu lists all the tables that are directly related to the current record.
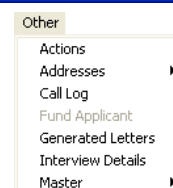
As a further illustration of viewing information that is related to a record in the **ESD** table/screen, shown right is a screen displaying data relating to the calls made by an enquirer.
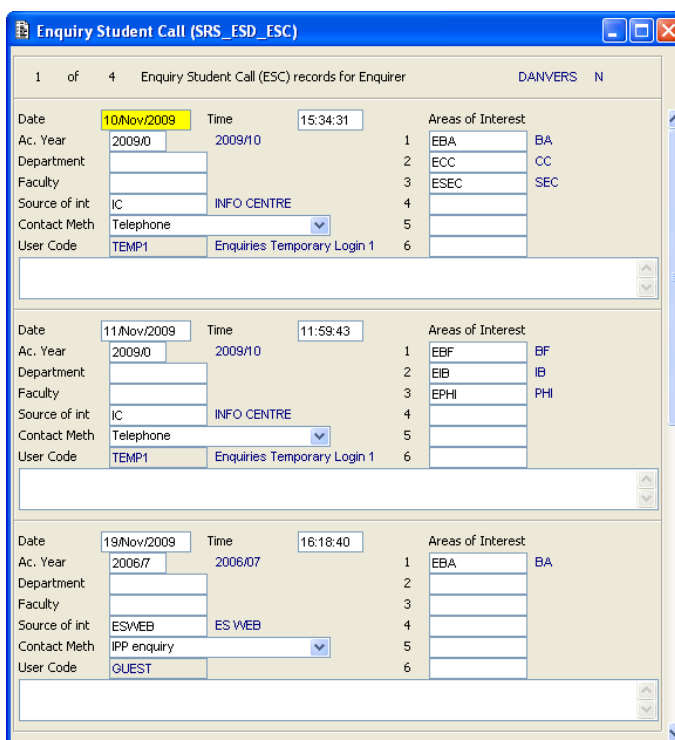
This information is presented by selecting the **Other** menu and choosing **Call Log**.

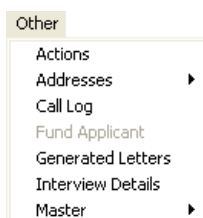In the **Enquiry Student Call (ESC)** window (*shown right*), each call log will be listed.

Note that a scrollbar will appear towards the right-hand side of the window to enable scrolling up/down.

To return to the **ESD** table/screen, the current **ESC** window must been closed.

As another example of viewing further information that is related to a record in the **ESD** table/screen, shown right is a screen displaying data relating to the actions undertaken for an enquirer.

This information is presented by selecting the **Other** menu and choosing **Actions**.

In the **Enquiry Student Actions (ESA)** window (*shown right*), each *Area of Interest* that the enquirer has enquired about will be shown.
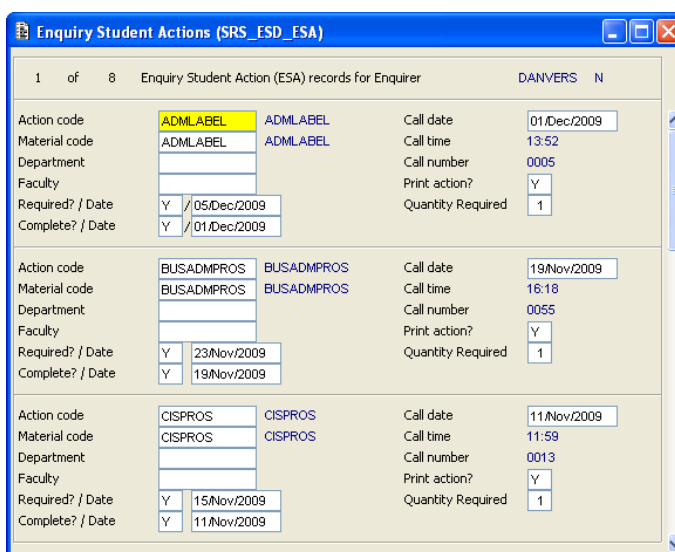
Note that a scrollbar will appear towards the right-hand side of the window to enable scrolling up/down.

It should be noted that you cannot return to the **ESD** window until the current **ESA** window has been closed.

The examples presented above have been provided to illustrate how many tables/screens are already available in the SITS:Vision client server software in an '*out of the box*' manner. Useful fields can be used where appropriate and any fields that are not required may be omitted.

Menus can also be used to provide additional information via related tables (i.e. by the use of the **Other** menu and any available sub-menu commands). The SITS:Vision client server software can also be used if the e:Vision portal is not available (i.e. if the e:Vision web-based service is temporarily offline).

> Note that methods to retrieve records and to navigate around client server screens will be outlined during a subsequent section of the course.

1.2.2 E:Vision example screens

To compare the difference between SITS:Vision client server and e:Vision screens, the previous example of displaying and exploring data for an *Enquirer* will be presented below (*using e:Vision screenshots instead of the client server screens*).
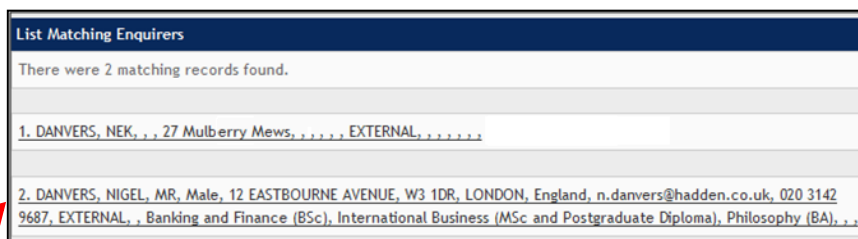
To display data with regards to an *enquirer*, in e:Vision you would firstly need to select the **Search and Edit** screen via the available menu.
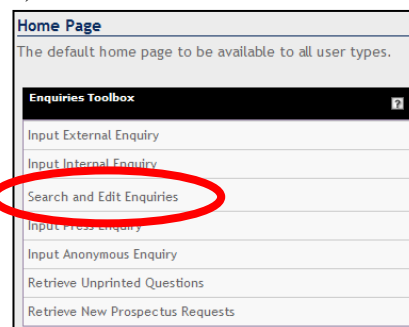
In first part of the **Search and Edit** screen, you could enter any desirable details with regards to the *Enquirer* that you are searching for (*i.e. the family name of the Enquirer can be entered into the appropriate field as shown in the example displayed right*).

After entering suitable search criteria, select the **Find** button (or press the **ENTER** key).

If more than one record exists for the specified person (*i.e. an Enquirer in this example*), a list of available records will be displayed.

List Matching Enquirers

There were 2 matching records found.

1. DANVERS, NEK, , , 27 Mulberry Mews, , , , , , EXTERNAL, , , , , , ,

2. DANVERS, NIGEL, MR, Male, 12 EASTBOURNE AVENUE, W3 1DR, LONDON, England, n.danvers@hadden.co.uk, 020 3142 9687, EXTERNAL, , Banking and Finance (BSc), International Business (MSc and Postgraduate Diploma), Philosophy (BA), , ,

Select the desired record to display further details.

In the **View and Edit Enquirer Details** screen (*shown right*), the record for the desired *enquirer* will be presented.
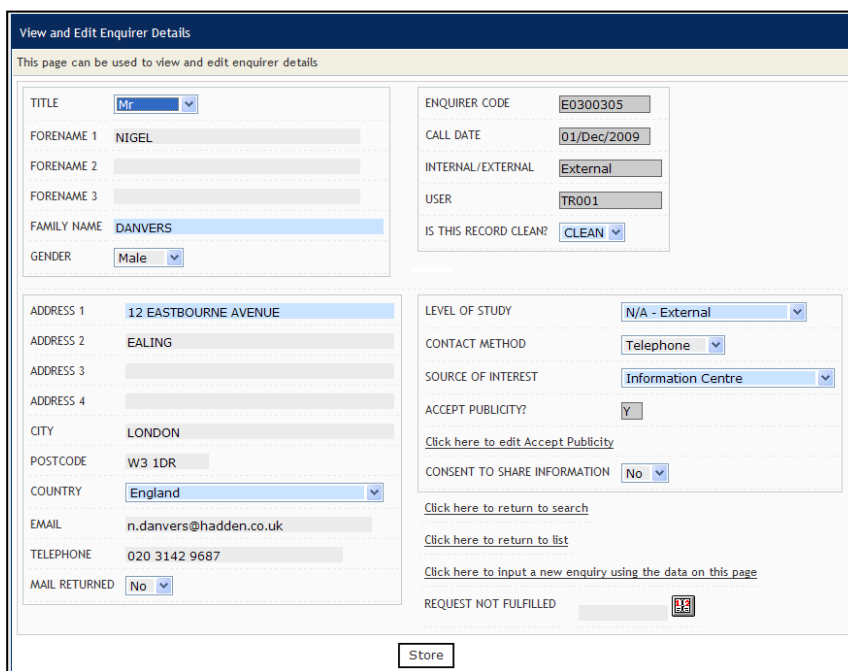
Note that in e:Vision, only the required fields are displayed on the screen (in order to avoid cluttering the screen with non-required fields).

Beneath the record data, further information with regards to the *calls* that the enquirer has made and any *actions* that have been completed will also be displayed.
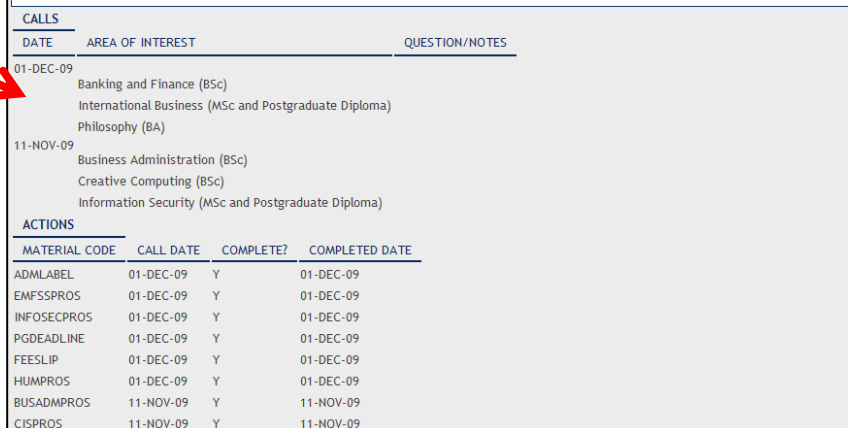
Note that the *calls* and *actions* areas show that this example enquirer has enquired on two occasions and that the most recent date has been recorded against each appropriate action.

View and Edit Enquirer Details
This page can be used to view and edit enquirer details

TITLE	Mr
FORENAME 1	NIGEL
FORENAME 2	
FORENAME 3	
FAMILY NAME	DANVERS
GENDER	Male

ENQUIRER CODE	E0300305
CALL DATE	01/Dec/2009
INTERNAL/EXTERNAL	External
USER	TR001
IS THIS RECORD CLEAN?	CLEAN

ADDRESS 1	12 EASTBOURNE AVENUE
ADDRESS 2	EALING
ADDRESS 3	
ADDRESS 4	
CITY	LONDON
POSTCODE	W3 1DR
COUNTRY	England
EMAIL	n.danvers@hadden.co.uk
TELEPHONE	020 3142 9687
MAIL RETURNED	No

LEVEL OF STUDY	N/A - External
CONTACT METHOD	Telephone
SOURCE OF INTEREST	Information Centre
ACCEPT PUBLICITY?	Y

Click here to edit Accept Publicity

CONSENT TO SHARE INFORMATION No

Click here to return to search
Click here to return to list
Click here to input a new enquiry using the data on this page

REQUEST NOT FULFILLED

Store

CALLS

DATE	AREA OF INTEREST	QUESTION/NOTES
01-DEC-09	Banking and Finance (BSc)	
	International Business (MSc and Postgraduate Diploma)	
	Philosophy (BA)	
11-NOV-09	Business Administration (BSc)	
	Creative Computing (BSc)	
	Information Security (MSc and Postgraduate Diploma)	

ACTIONS

MATERIAL CODE	CALL DATE	COMPLETE?	COMPLETED DATE
ADMLABEL	01-DEC-09	Y	01-DEC-09
EMFSSPROS	01-DEC-09	Y	01-DEC-09
INFOSECPROS	01-DEC-09	Y	01-DEC-09
PGDEADLINE	01-DEC-09	Y	01-DEC-09
FEESLIP	01-DEC-09	Y	01-DEC-09
HUMPROS	01-DEC-09	Y	01-DEC-09
BUSADMPROS	11-NOV-09	Y	11-NOV-09
CISPROS	11-NOV-09	Y	11-NOV-09

It should again be noted that e:Vision screens can be tailored to show only the required information from the SITS:Vision system. The e:Vision screens are hosted via an online portal but not all aspects of the SITS:Vision client server can be replicated in e:Vision.

The above examples have been presented to illustrate typical tables/screens in the SITS:Vision client server software and e:Vision. The examples have also been provided to highlight the differences between the display of SITS:Vision client server and e:Vision screens. Subsequent sections of this course will further address the use and navigation of the client server screens.
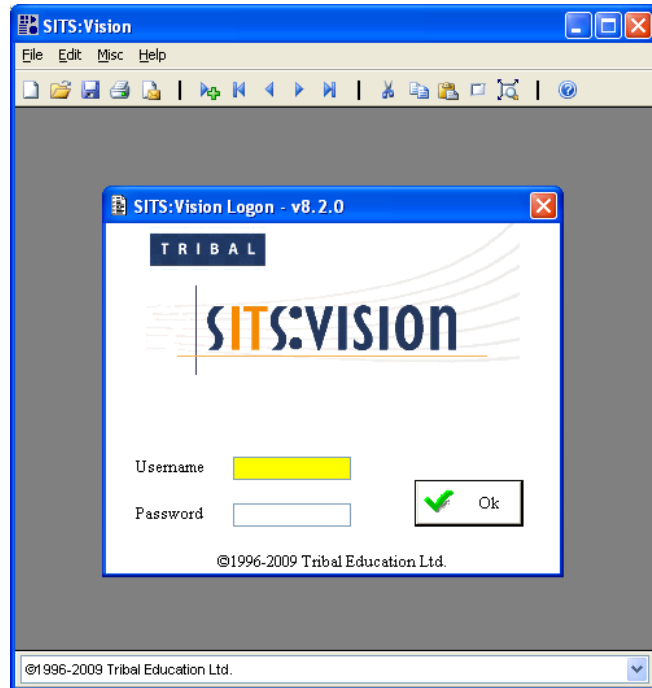
1.3   Logging into SITS:Vision client server

From the desktop (or the location/folder where shortcuts to SITS:Vision have been installed), double-click the **SITS Vision** icon.

At the SITS:Vision log in screen (*as shown right*), enter your **username** and **password**.
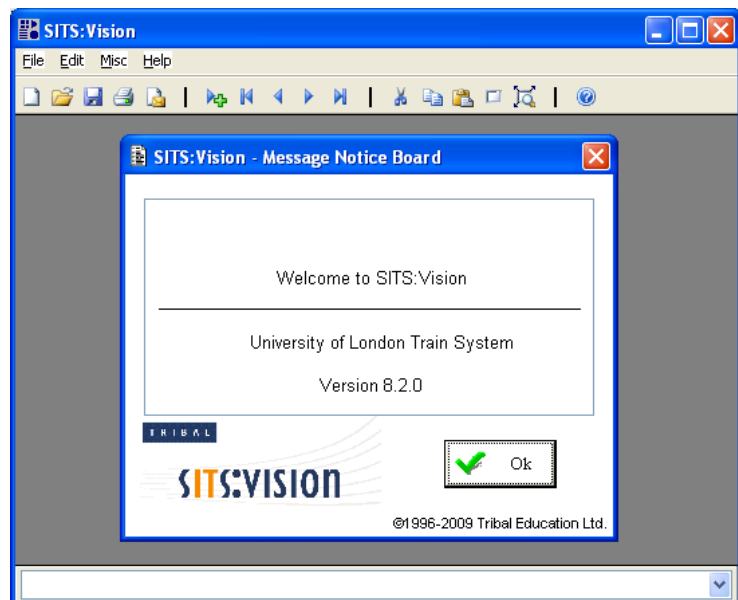
> Note that usernames will be configured in the format of **AB000** (i.e. two characters followed by three digits).
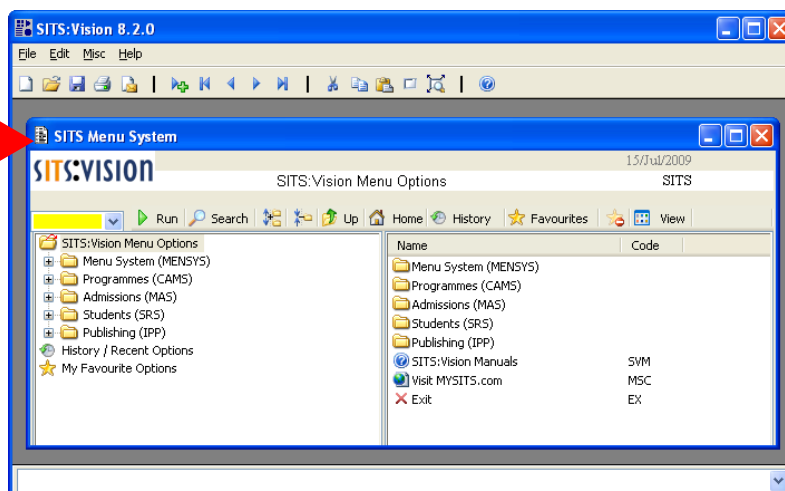
Press the **ENTER** key or select the **Ok** button to continue.

A welcome screen/message board will be displayed (*an example is shown right*).

Press the **ENTER** key or select the **Ok** button to continue.

After logging into SITS:Vision client server, the **SITS Menu System** will be displayed (*an example is shown right*).

Note that the default view for SITS:Vision client server is to display the menu in a 'Windows tree style'.

Further details of the menu system will be outlined in a subsequent section of the course.

1.4   Logging out of SITS:Vision client server

There are several methods that can be used to exit and log out of SITS:Vision client server. These methods are outlined below:

(i)   You can select the close icon to the upper right of the menu screen. A dialog box will be displayed and you will be prompted with the message "**Exit menu system?**".

     Select **Yes** to exit or **No** to remain logged in.
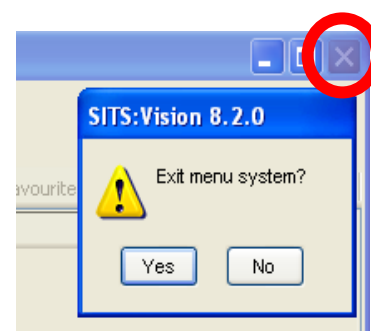
(ii)   You can also select the close icon from the upper right corner of the main background screen.

     A dialog box will be displayed and you will be prompted with the message "**Do you want to leave this application?**".

     Select **Yes** to exit or **No** to remain logged in.
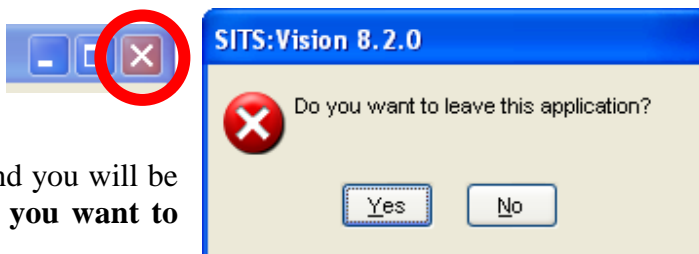
(iii)   Type **EX** in the **option box** (towards the upper left of the SITS Menu System screen). Select **Run** or press the **TAB** or **ENTER** key (on the number pad) to execute the command and exit SITS:Vision client server.

     Note that no warning message will be displayed.
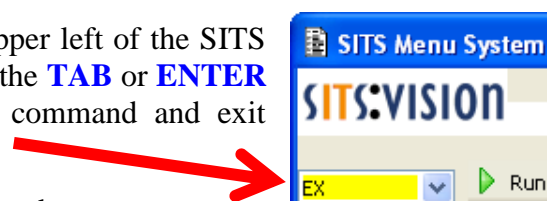
(iv)   Double click the **Exit** command located in **SITS:Vision menu options**.

     Note that no warning message will be displayed.

(v)   From the **File** menu, select **Exit** (or choose **CTRL+Q** as a keyboard shortcut).
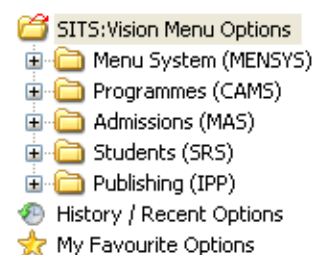
1.5   Exercise 1A

In this exercise you will load the SITS:Vision client server, log into the system and log out.

1.   Ensure that the computer is switched on and logged into a Windows session.

2.   From the desktop, double-click the **SITS Training** folder.

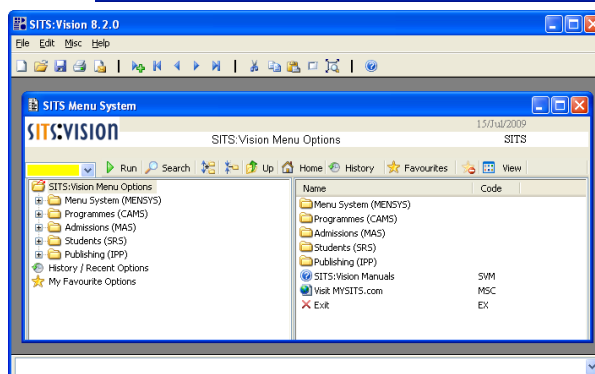   Double click the **SITS Vision Train** icon.

        If a '*security warning*' window is displayed, select the **Run** button.
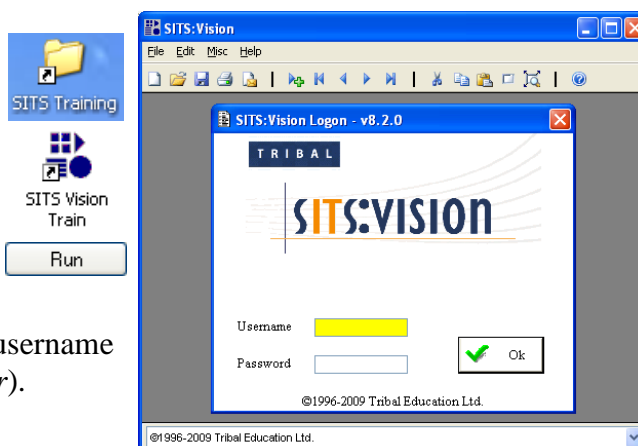
3.   At the log in screen, enter your username and password (*provided by the tutor*).

        Press the **ENTER** key or select **Ok**.

4.   The welcome screen/message board will also be displayed. Select the **Ok** button again to enter the SITS:Vision client server software.

5.   After logging into SITS:Vision client server, the *SITS Menu System* will be displayed (*an example is shown right*).

        Note that the default view for SITS:Vision client server is to display the menu in a 'Windows tree style'.

6.   You will now explore methods used to exit and log out of SITS:Vision client server. Choose **any** of the methods shown below:

        (i)   Select the close icon to the upper right of the menu screen and answer **Yes** when prompted with the "**Exit menu system?**" dialog.

or

        (ii)   Select the close icon from the upper right corner of the main screen.

                Choose **Yes** when prompted with the dialog "**Do you want to leave this application?**".
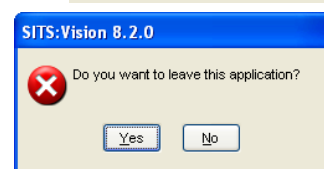
or

        (iii)   Type **EX** in the option box (towards the upper left of the **SITS Menu System** screen). Select **Run** or press the **TAB** key or the **ENTER** key on the number pad to execute the command and exit SITS:Vision client server.
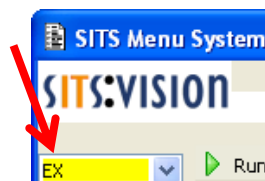
7.   If you finish the exercise quickly, repeat all the steps above and try an alternative method to exit the system (*as outlined in step 6 above or section 1.4 in the manual*).

(End of Exercise)

Section 2 – Navigation

In this section of the course, you will learn about:

- Windows tree style menus.

- Panel buttons.

- Using commands to display tables/screens.

- SITS:Vision client server screen components.

- Further navigation and shortcuts:

  ➢ Pull-down menus.

  ➢ Right-click menus.

  ➢ Keyboard shortcuts.

There are **two** exercises in this section to help illustrate the above topics:

- Exercise 2A: Exploring the use of menus, panel buttons and navigation techniques.

- Exercise 2B: Exploring a range of menu and keyboard shortcut options.

2.0   Windows tree style menus and the panel buttons

Although there are several menu formats available in the SITS:Vision client server, "Windows tree style" is preferred as it offers more functionality than other styles.

To the right is an example of a "Windows tree style" view of the SITS:Vision main menu options.

To the top of the window, **panel buttons** provide a range of useful facilities.

Option box   Run button
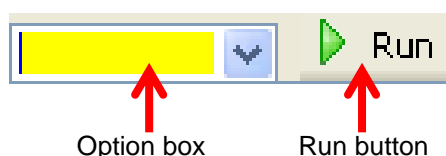
After entering a command in the **option box**, the **Run** button will run/open a menu option (or the last menu option that was previously opened).
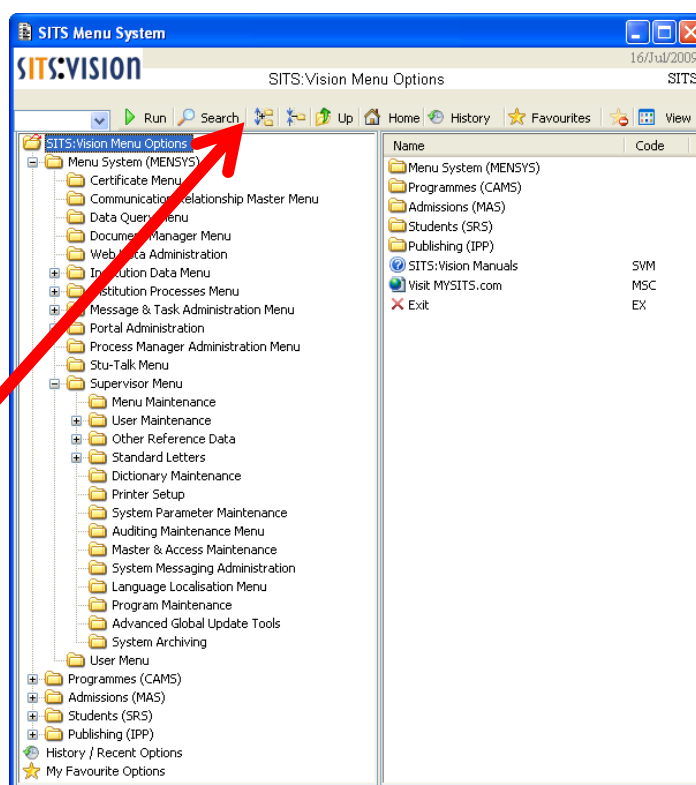
The **Search** button provides access to a **Keyword Search** window where a menu search can be performed.

Enter a word (or words) in the *Search for* box, select **All words** or **Any word** (if desired) and choose the **Find** button.

A list of results will be displayed and the **Run** button can be used to run (open) a highlighted option.

The **Clear** button will clear/empty the **Keyword Search** window.
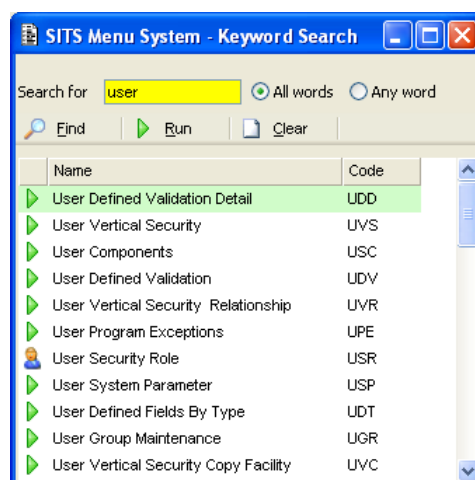
The **expand all** button will expand every branch of the menu tree and the **collapse all** button will collapse all branches.

The **Up** button will move the user from a sub-menu back to the previous menu (i.e. the next menu higher in the tree).
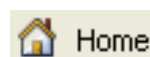
The **Home** button will move a user to the top of the menu tree.

The **History** button will display the 'history' folder which will show the most recently accessed menu options within the current session.

The **Favourites** button will display menu options that the user has added to their 'favourites' folder.

The **star button** presents three options depending on the selected menu option:

➢ A plus icon is displayed if a menu option can be added to "Favourites".

➢ A no-entry sign is displayed if a menu cannot be added to 'Favourites'.

➢ A cross is shown if a menu option can be removed from the 'Favourites' list.

The **View** button can be used to change the format of the menu options. By selecting the **View** button, the display of menu commands can be toggled between **list format** or **icon and text**.

List format   **Icon and text**

The icons displayed in the SITS:Vision client server indicate the type of menu option available:

Menu		Close	
Option		History / recent options	
Process		My favourite options	
Report		Help	
User / Person		Web Page	

2.1   Using commands to display tables/screens

Each table/screen in SITS:Vision client server can be displayed by using commands instead of locating a menu in the "Windows tree view" and running/double-clicking the desired menu option. This provides a very quick and useful method to users who may frequently access a range of menu options during their use of the system.

In the **option box** you can enter a menu command and press the **TAB** key, the **ENTER** key (on the *number pad*) **or** select the **Run** button to quickly display a menu option.

Applying a shortcut/command can help a user from having to find the menu option (i.e. the example screen displayed right shows that the **ESD** screen is located in the *Admissions (MAS)*, *Enquiry Process Menu*, *Enquirer Data* folders).
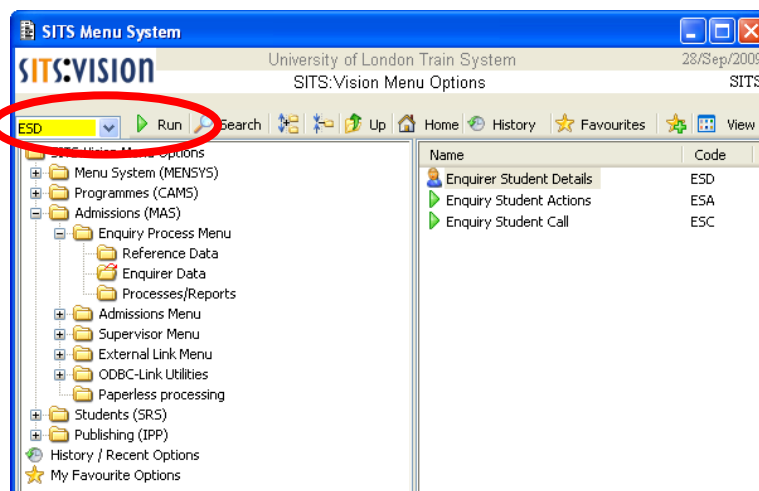
2.2   Exercise 2A

In this exercise you will explore the use of menus, panel buttons and navigation techniques.

1.   Ensure that you are logged into SITS:Vision client server and from the panel button area, select the **Home** button (so that the **SITS:Vision Menu Options** is displayed).

2.   As an <u>example</u> of opening a menu option, select the [+] icon adjacent to **Admissions (MAS)**.

   Select the [+] icon adjacent to **Enquiry Process Menu** and choose the option labelled **Enquirer Data**.
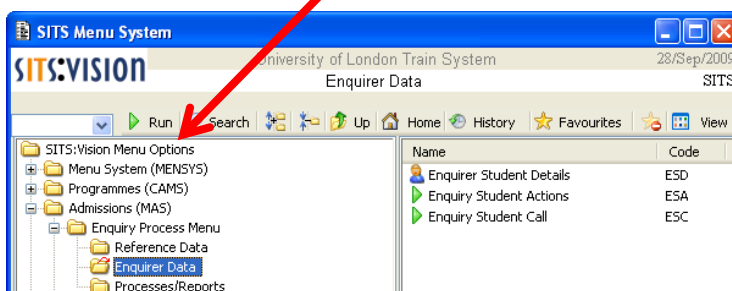
3.   From the list of options available on the right-hand side of the screen, **double-click** the **Enquirer Student Details** icon.

   In this example the **Enquirer Student Details (ESD)** window will be displayed. For the moment we will not need to make use of this window (*as it was just an example of opening a command/window in the SITS:Vision client server software*).
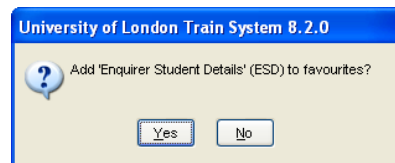
(Continued…)

4.   Close the window (select the ❌ icon towards the upper right corner of the window or press the **F4** key).

       With the **Enquirer Student Details** icon still highlighted (*as shown above*), select the icon. ⭐

5.   When prompted with 'add to favourites?', select the **Yes** button.

6.   You will now open another example menu option using a **command** instead of locating the option in the "Windows tree style" view.

       Although you are about to open a particular screen/table, do not worry about the contents of the screen for the moment as this is just an experiment to open a screen by using a command.

       In the **option box** (upper left corner of the *SITS Menu System* window), enter the command **TRAN** (*for the Transfer Options* screen) and press the **TAB** key, the **ENTER** key (on the number pad) or select the **Run** button.

7.   Close the window (select the ❌ icon towards the upper right corner or press **F4**).

       With the **Transfer Options** icon still highlighted (*as shown right*), select the ⭐ icon.

   When prompted with 'add to favourites?', select the **Yes** button.

8.   View the 'Favourites' folder by selecting the ⭐ Favourites button.

9.   You should be able to see the favourites that you have added so far. **Double click** any of the favourites to display a screen (*and exit the chosen screen afterwards as we will not be using the selected screen during this exercise*).
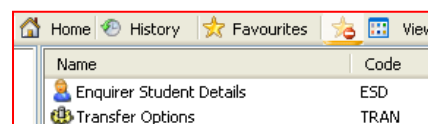
10.   Back in the *Favourites* list, select any of the options that you have added so far and choose the ⭐ button.

       When prompted to confirm the removal of the favourite, select the **Yes** button. The chosen option will be removed from the favourite list.
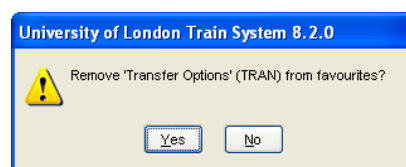
11.   Repeat the step above to remove all favourites added to the *Favourites* list.

12.   (*Optional*) If you finish the exercise quickly, select the **History** button to re-open any screens that you may have previously viewed. Also try the **View** button to change the display of the menu options.

(End of Exercise)

2.3   SITS:Vision client server screen components

There are four basic kinds of screens within the SITS:Vision client server software. These screens are:

- Data maintenance screens
- Process screens
- Report screens
- SITS:Vision management screens

A typical screen is usually composed as follows:

SITS:Vision application name

Menu bar

Panel
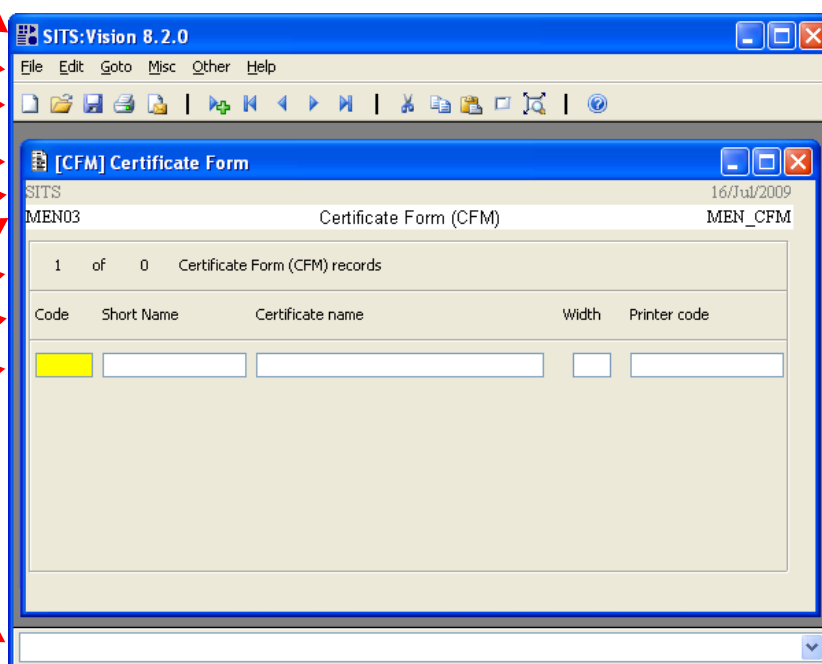
Program name

User, institution & date

Component, menu & program
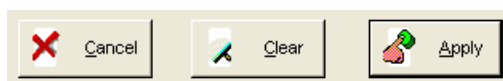
Occurrence

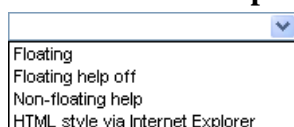Boilerplate Text

Fields

Message line

SITS:Vision will also make use of many windows controls (often referred to as 'widgets'). Some examples of these types of controls are:
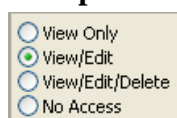
- **Command buttons**

- **Pull-down/drop-down list**

  The pull-down list, displays a list of options that you can choose from. Select the down arrow to view all items in the list and move the mouse over the item to select it (an example is shown left).

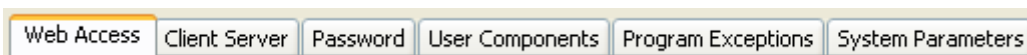- **Option buttons** (often referred to as **Radio Buttons**).

  A group of buttons that present a range of choices to the user. If you select an option, all other options are automatically deselected.

- **Checkboxes**

Checkboxes are a set of square boxes that you can select or deselect to turn options on or off. With regards to checkboxes, you can select more than one box at a time.

- **Tabs**

Some windows contain too many elements to fit in a single area. To partition the window into groups of commands, **tabs** are often used. Tabs display headings along the top and you can select the options under each heading by clicking on the tab itself.

- **Spin Boxes**

Spin boxes are used to select values. The user can click the up or down arrows to increase/decrease the value in the box. Additionally, the user can enter the number in the box directly.

2.4   Further navigation and shortcuts

SITS:Vision provides a number of different methods to perform the same function via keyboard or mouse interaction. Every user may have a personal preference with regards to which method to apply. This section therefore outlines a range of techniques that can be used to navigate around the SITS:Vision client server software.
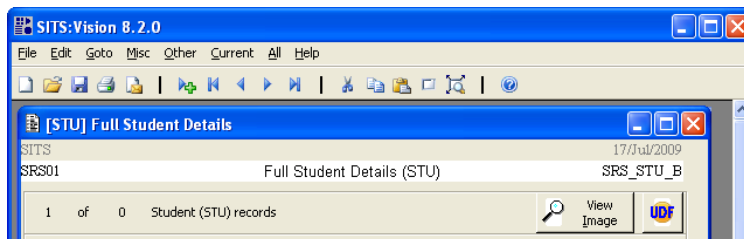
2.4.1 Pull-down menus

Pull-down menus are located at the top of the SITS:Vision client server window.

It should be noted that the menu options may change, depending on the window that may be opened in the main screen.
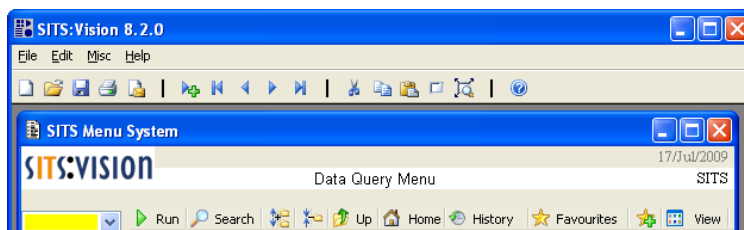
In the main **SITS Menu System** screen (*as shown above*), the pull-down menus will consist of **File**, **Edit**, **Misc** and **Help**.

In many other windows, a different range of menu options will be displayed (for example **File**, **Edit**, **Goto**, **Misc**, **Other**, **Current**, **All** and **Help**).

It should be noted that **File**, **Edit**, **Misc** and **Help** will be available in all screens.

Commands via the pull-down menus can be accessed by:

- Selecting a menu by using a mouse.

- Pressing the menu bar key (**F10**) followed by the underlined letter of the desired menu (you can also use the arrow keys after pressing **F10** to move along/down menus).

- Pressing **ALT** and the underlined letter of the desired menu.

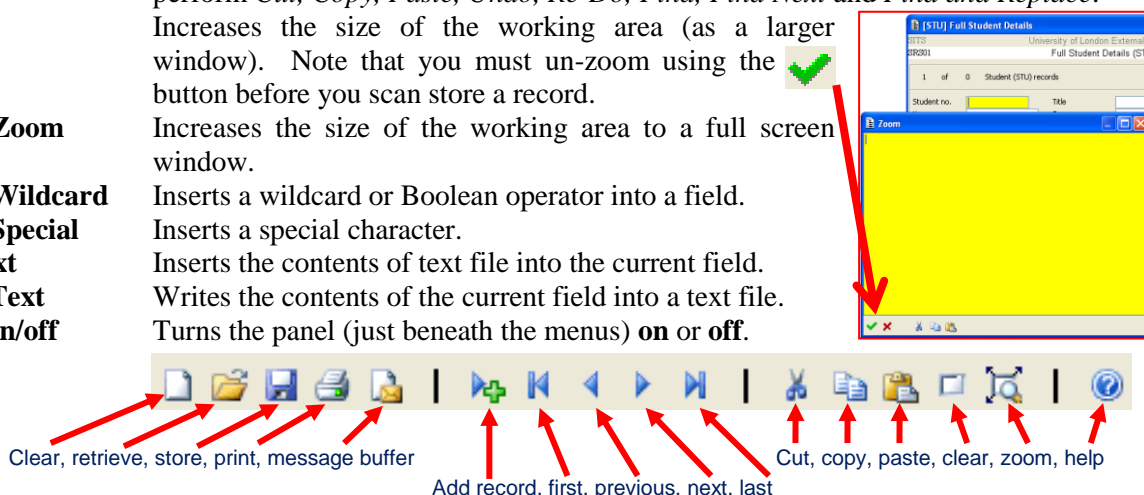The common menus (for all windows in SITS:Vision client server) are shown below:
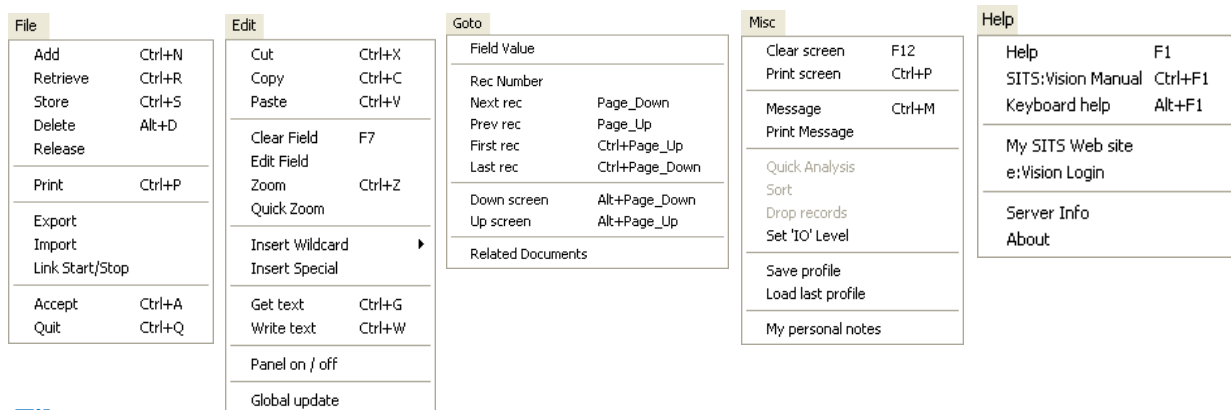
File menu:

Add	Used to add a new record (which once defined, needs to be stored).
Retrieve	Used to retrieve an existing record based on none, one or many selection criteria.
Store	Stores a new record or an existing record that has been modified.
Delete	Removes a record. You will be prompted to confirm the action.
Release	Prepares the retrieved record to be used as a template for a new record.
Print	Used to print a screen. Note that this option is also available on the **Misc** menu.
Export	Allow data to be extracted from the system for manipulation with other software.
Import	Allows data to be imported from external sources.
Link Start/Stop	Provides the ability to start a *Dynamic Data Exchange* (*DDE*) link with another application. The application can be automatically launched when the user starts a DDE link and closed when the user terminates the link.
Accept	Exits from a program/screen or zoom mode. Accept also accepts a code from a selection list.
Quit	Quit from a program/screen or zoom mode. Quit also exits a selection list without selecting a code.

Edit menu:

Cut, Copy, Paste	Standard Windows cut/copy/paste commands.
Clear Field	Delete the entry in the field.
Edit Field	The 'Edit Field' option is available for any field that is greater than 50 characters (where the field is not part of the primary key). The text from the selected field will be taken through to the 'Edit Field' screen where it will be possible to perform *Cut, Copy, Paste, Undo, Re-Do, Find, Find Next* and *Find and Replace*.
Zoom	Increases the size of the working area (as a larger window). Note that you must un-zoom using the button before you scan store a record.
Quick Zoom	Increases the size of the working area to a full screen window.
Insert Wildcard	Inserts a wildcard or Boolean operator into a field.
Insert Special	Inserts a special character.
Get Text	Inserts the contents of text file into the current field.
Write Text	Writes the contents of the current field into a text file.
Panel on/off	Turns the panel (just beneath the menus) **on** or **off**.

Clear, retrieve, store, print, message buffer

Add record, first, previous, next, last

Cut, copy, paste, clear, zoom, help

Global update	Allows a user to make a change to a field which can be applied to many records at once.

Goto menu:

|	
Field Value	Go to a value in a field on the record in the retrieved list.
Rec Number	Go to a specific record in the retrieved list.
Next rec / Prev rec	Go to the next or previous record in the retrieved list.
First rec / Last rec	Go to the first or last record in the retrieved list.
Down / Up screen	Go the record at the bottom or top of the screen. This option is useful for a list of simpler records that have been retrieved.

Misc menu:

Clear screen	Removes all the current details on the screen (but does not delete them).
Print screen	Triggers a process to print the screen.
Message	Accesses the message buffer. The buffer may contain error, warning or information messages.
Print Message	Prints the contents of the message buffer.
Quick Analysis	Allows the user to run an analysis of the values in a specific field and/or perform cross analysis with another field (for example: minimum, maximum, total value, average, count etc).
Sort	Allows the user to perform a sort operation.
Drop records	Enables the user to drop or keep records from a retrieved list using a variety of criteria including ranges or values of records. It should be noted that dropped records are not deleted; they are not available for viewing or processing on the current screen. This facility is useful if you are amending a large list as you are able to drop records that have already been viewed or amended.
Set 'IO' Level	Options can be defined to specify the level to which messages are returned to the message buffer by the system.
Save profiles	Saving a profile enables a user to temporarily store information so that it can be reused when the screen is next accessed or as part of the retrieval of data.
Load last profile	Allows the user to load the last combination of values that they used to retrieve a certain set of records if "Save Profiles" had been enabled.
My personal notes	Allows the user to add information that is available for inclusion in a standard letter. The note is created as a text file in the working directory on the user's PC.

Help menu:

Help	Displays the help window in relation to the currently opened window.
SITS:Vision Manual	Gives access to the SITS:Vision manual.
Keyboard Help	Displays a map of the keyboard with an explanation of the special keys.
My SITS Web Site	Gives access directly to the "My SITS" Website (www.mysits.com)
e:Vision Login	Gives access directly to e:Vision via the Internet.
Server Info	Provides server information.
About	Help with regards to the version of the field, program, its location, privileges and hot fixes.

2.4.2 Right-click menus

You are also able to right-click any of the SITS:Vision client server screens or fields. A context/right-click menu will be displayed (and the contents will vary depending on where you right-clicked the mouse).
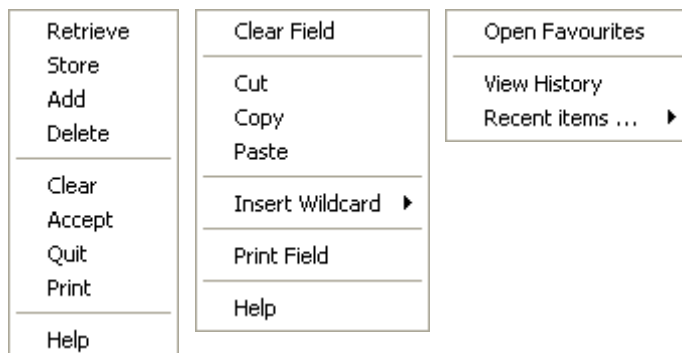
2.4.3 Keyboard shortcuts

- **The GOLD key**

The **gold key** can be used to provide additional functions when applied in conjunction with normal keys. For example **GOLD+Z** would activate the *zoom* function. In Windows, the **GOLD** key is the **+** key on the number pad (as shown in the keyboard help window below)

Note that you can also press the **ESC** key to activate the 'gold key' function (which is useful for keyboards or laptops which may not provide a number pad). For example, to apply the '**GOLD+Z**' keys for the *zoom* function you can either press **+** key on the number pad and **Z** or **ESC** and **Z**.

- **Function keys**

The **F1** through to **F12** keys can also be used as shortcut keys to popular commands:

Key	Action	GOLD+key	CTRL+key	ALT+key
F1	Help	Help	SITS:Vision manuals	Keyboard
F2	Detail	Detail	-	-
F3	Accept	Accept	-	-
F4	Quit	Quit	Quit	Exit application
F5	Retrieve	-	-	-
F6	Store	-	Switch window within session	-
F7	Clear field	Clear field	Clear field	-
F8	Previous field	Previous field	-	-
F9	Message	Message	Message	-
F10	Activate menu	Activate menu	-	-
F11	Print screen	Print screen	-	-
F12	Clear screen	Clear screen	Print screen	-

- **ALT key**

The **ALT** key can also be used to access keyboard shortcuts with regards to menus and commands (in much the same manner as with many other Windows-based applications).

Press the **ALT** key to highlight menu hot keys and then select another keystroke (*note that you do not need to hold down the ALT key*). Keyboard shortcuts are displayed with an underscore (*as demonstrated in the example menu shown right*).

2.5   Exercise 2B

In this exercise, you will explore a range of menu and keyboard shortcut options.

1.   Ensure that you are logged into the SITS:Vision client server software and from the panel button area, select the **Home** button (to make sure that the **SITS:Vision Menu Options** are displayed).

2.   You will now open a screen so that you can explore a number of keyboard shortcuts.

In the **SITS Menu System** screen, open the **Enquirer Student Detail** table/screen by entering **ESD** into the **option box** (and selecting the **Run** button or by pressing **TAB** or **ENTER** from the *number pad*).
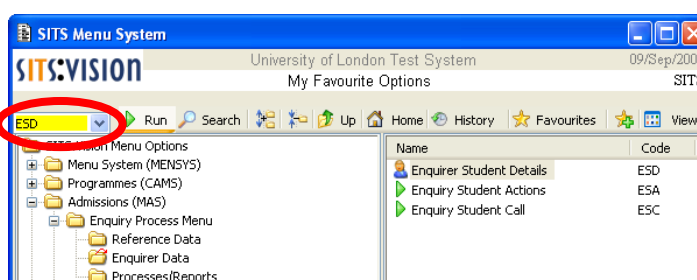
You can also load the table/screen in the following menus: *Admissions (MAS)*, *Enquiry Process Menu*, *Enquirer Data*.

Do not worry too much about the actual contents of the menu options explored during this exercise; example screens are used during the exploration of menus/keys etc.

3.   In the **ESD** table/screen, enter the *Surname* and *Forename Used* fields as shown right.

Note that you can either click into a field to enter the data or press the **TAB** key to move to the next field (or **SHIFT+TAB** to move back to a previous field).

4.   After entering the example data shown above (i.e. *Nigel Danvers*), select the **File** menu and choose **Retrieve**.

This action will open the record based on the values entered into the current table/screen.
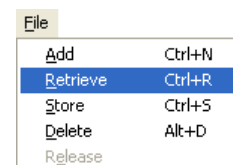
You can also choose **CTRL+R** or **F5** as keyboard shortcuts to retrieve a record.

> Note that further record operations (*Add, Store, Delete* etc) will be explored in a subsequent section of the course. This exercise briefly introduces the concept of 'record retrieval'.

5.   The example record for '*Nigel Danvers*' (*a previous enquirer*) will be loaded.

6.   As an example of using the 'zoom function', position the cursor in the *Home Address* field.
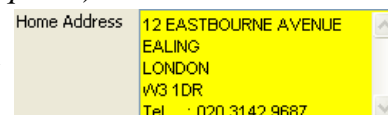
Select the **Edit** menu and choose **Zoom or** select the zoom button from the **panel** to zoom into the *Home Address* field (*the CTRL+Z shortcut can also be used*).

Select the *green tick* icon or press **F3** to accept the current address in the field.

(Continued…)

7. Back in the **ESD** (**Enquirer Student Detail**) table/screen, select the **Other** menu to list all of the tables that are directly related to the current record (*i.e. an Enquirer in this example*).
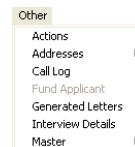
8. As a further illustration of viewing information that is related to a record in the **ESD** table/screen, select **Call Log** from the **Other** menu.
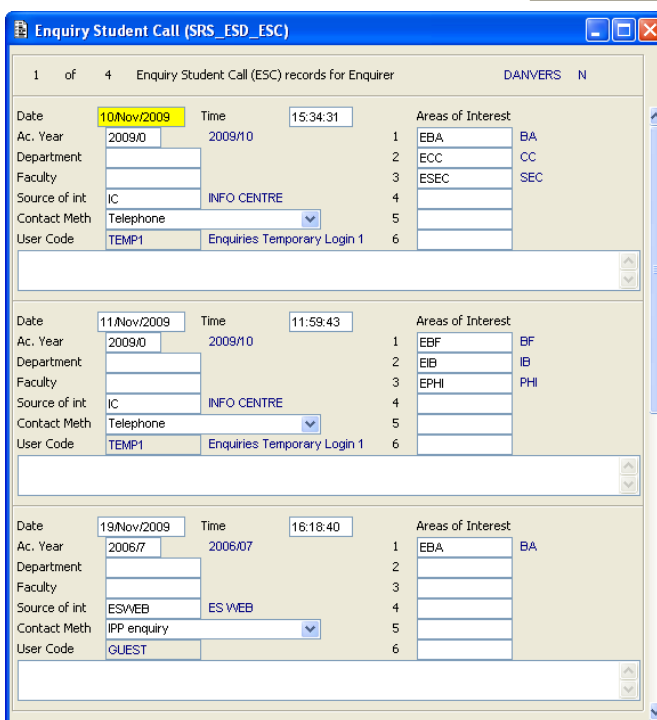
    The **Call Log** option will display data relating to the calls made by an enquirer (*as shown right in the Enquiry Student Call window*).

    Note that a scrollbar will appear towards the right-hand side of the window to enable scrolling up/down (you can also use the **Page Up**/**Page Down** keys).

    To return to the **ESD** screen, close the current screen by selecting the **[x]** icon in the upper right corner or press **F4**.

9. As another example of viewing information that is related to a record in the **ESD** table/screen, select the **Other** menu and choose **Actions**.
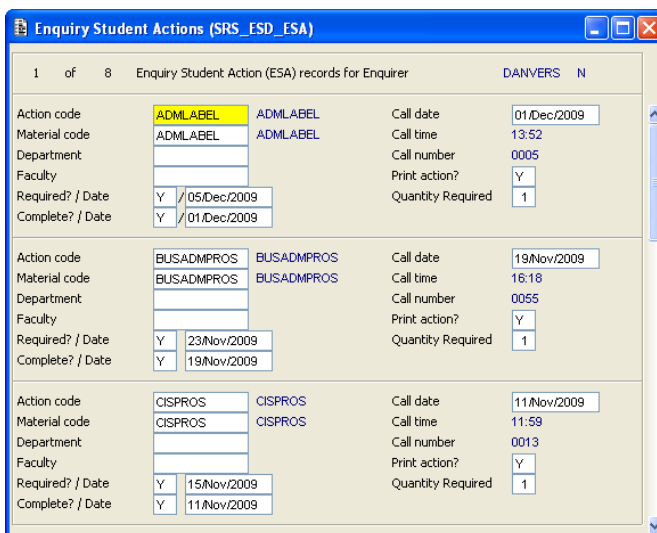
    The **Actions** option will display each *Area of Interest* that the enquirer has enquired about (*as shown right in the Enquiry Student Actions window*).

    Use the scrollbar towards the right-hand side of the window (*or the Page Up*/*Page Down keys*) to scroll up/down.

    To return to the **ESD** screen, close the *Enquiry Student Actions* screen (select the **[x]** icon in the upper right corner or press the **F4** key).

10. Close the **ESD** screen (select the **[x]** icon in the upper right corner of the window or press **F4**). If asked if you wish to '*Quit without saving/storing*', choose **Yes** as you will not be saving any changes in this exercise.
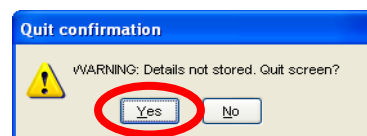
(Enter of Exercise)

Section 3 – Record operations

In this section of the course, you will learn about:

- Retrieving records.

- First, previous, next or last records.

- Wildcards and Boolean operators.

- Adding records.

- Deleting records.

- Releasing records.

There are **two** exercises in this section to help illustrate the above topics:

- Exercise 3A: Applying the use of wildcards and Boolean operators to retrieve data.

- Exercise 3B   Experimenting with the addition, deletion and releasing of records.

3.0   Retrieving records

Towards the upper area of a data table/screen, a line indicating the number of the current record, the total number of records retrieved and the name of the table will be displayed.
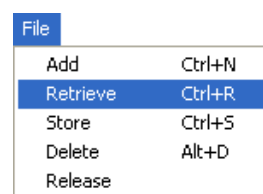
This information is known as the **Current Occurrence of Total Occurrences**.
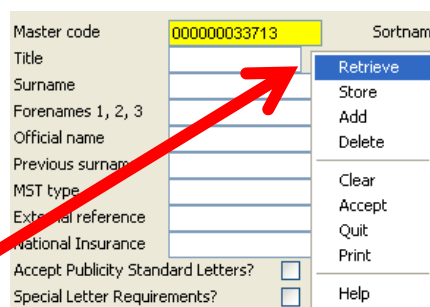
When initially entering a screen (and prior to retrieving records), "**1 of 0 <Table Name>**" will be displayed.

- **To retrieve a single record:**

   - Use the primary key field(s), which will require a unique code.

   - Retrieve records using the **File** menu, choosing **Retrieve.**

      or by pressing **F5**

      or by pressing the **TAB** key.

      or by pressing **GOLD+R**   (**GOLD** = the **+** key on the number pad or the **ESC** key).

      or by right-clicking (just outside of the field box) and choosing **Retrieve**.
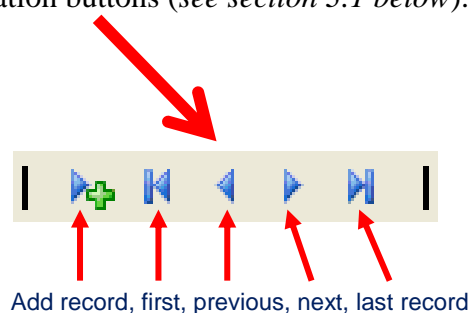
- **To retrieve multiple records:**

   - In the desired field(s), enter suitable codes.

   - Retrieve the corresponding records (using **File-> Retrieve**, **F5**, **GOLD+R** or **right-click->Retrieve** as outlined above).

   - Scroll through the records using the record navigation buttons (*see section 3.1 below*).

3.1   First, previous, next or last records

To navigate to the *first*, *previous*, *next* or *last* record (in the currently opened window) you can use the panel buttons or keyboard shortcuts.

Add record, first, previous, next, last record

First record: Select the ⏮ button or use the keyboard shortcut of **CTRL + PageUp** (*PgUp*).
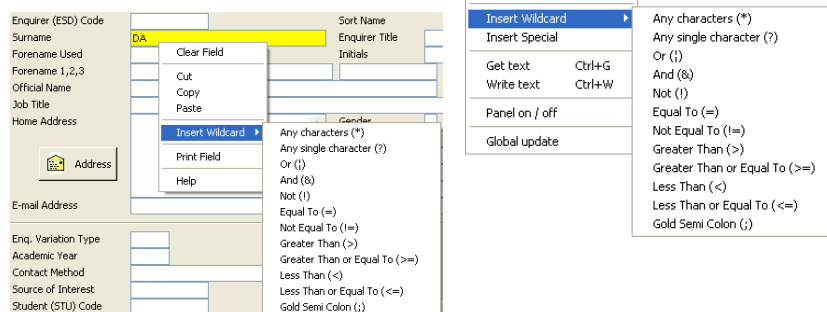
Previous/next record: Select the ◀ ▶ buttons or use the keyboard shortcut of **PageUp** (*PgUp*) or **PageDown** (*PgDn*).

Last record: Select the ⏭ button or use the keyboard shortcut of **CTRL + PageDown** (*PgDn*)

3.2   Wildcards and Boolean operators

Wildcards and Boolean[2] operators can be applied during the retrieval of records. Wildcards can be inserted via the **GOLD** key or by using the **Edit** menu (selecting **Insert Wildcard** and choosing a suitable option).

A wildcard can also be inserted by **right-clicking** a field and selecting **Insert Wildcard** (*as shown right*).

The following table outlines the range of wildcards and Boolean operators that may be used.

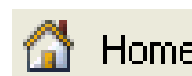| Character	Type	Definition
·*	Wildcard	Search for any characters. For example, if you defined **N·*** in a primary key field, records whose code started with N would be retrieved.
·?	Wildcard	Can be used if the required records have a field of a specific length. For example **N·?·?·?** would retrieve all records whose code started with N followed by three other characters.
·!	Boolean	**NOT** – for example ·**!COMP1** would retrieve all records that do not use the code COMP1.
·| ·;	Boolean	**OR** – allows two different search strings in the same field, where either one may be identified. For example, **N·*** ·| **X·*** would retrieve records whose code started with N or X.
·&	Boolean	**AND** – allows two different search strings in the same field, where both are identified. For example **C·*** ·**&** ·**!COMP1** would retrieve records whose code started with C and excluded any codes of 'COMP1'.
·=	Boolean	**Equal to** – for example ·**=COMP1** would retrieve all records that match the code COMP1. Entering ·**=** on its own would retrieve all records where the field value is blank.
·!=	Boolean	**Not equal to** – for example ·**!=COMP1** would retrieve all records that <u>do not</u> match the code COMP1.
·>	Boolean	**Greater than** – for example ·**>C** would retrieve all records greater than C (i.e. D, E, F … Z)
·>=	Boolean	**Greater than or equal to** – for example ·**>=C** would retrieve all records greater than or equal to C (i.e. C … Z)
·<	Boolean	**Less than** – for example ·**<C** would retrieve all records less than C (i.e. beginning with A or B).
·<=	Boolean	**Less than or equal to** – for example ·**<=C** would retrieve all records less than or equal to C (i.e. beginning with A, B or C).

Note: leaving a blank in a search pattern will result in the retrieval of all records containing <u>any</u> value in the field (including blank entries). Entering a **GOLD** asterisk (i.e. a ·* character) will result with the retrieval of all records containing a value in the selected field (not including records where the chosen field contains a blank entry).

---

[2] Boolean algebra is based on logical counterparts, namely conjunction **x∧y** (**AND**), disjunction **x∨y** (**OR**) and complement or negation **¬x** (**NOT**). Further information with regards to Boolean algebra and operators can be found at http://en.wikipedia.org/wiki/Boolean_algebra_(logic)#Basic_operations.
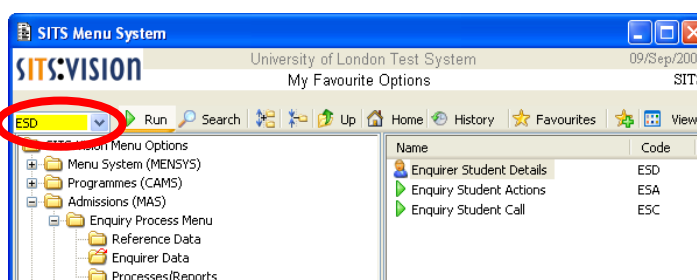
3.3   Exercise 3A

In this exercise, you will apply a range of different wildcards to retrieve records.

1.   Ensure that you are logged into the SITS:Vision client server software and from the panel button area, select the **Home** button (to make sure that the **SITS:Vision Menu Options** are displayed).

2.   You will now experiment with the use of wildcards and Boolean operators.

In the **SITS Menu System** screen, open the **Enquirer Student Detail** table/screen by entering **ESD** into the **option box** (and selecting the **Run** button or by pressing **TAB** or **ENTER** from the *number pad*).

You can also load the table/screen in the following menus: *Admissions (MAS)*, *Enquiry Process Menu*, *Enquirer Data*.

Do not worry too much about the actual contents of the menu options explored during this exercise; example screens are used during the exploration of various tools.

3.   In the **Surname** field, enter the characters **RUBE** (*as shown right*).

Add the wildcard **·*** by:

- Selecting the **Edit** menu, choosing **Insert Wildcard** and **Any characters (*)**
or
- **Right-clicking**, selecting **Insert Wildcard** and choosing **Any characters (*)**
or
- Using the keyboard shortcut of **GOLD** + ***** (**GOLD** = number pad '**+**' or **ESC**)

4.   Press **F5** (or select **File**, **Retrieve**) to retrieve corresponding records. If you are prompted with a '*Retrieve Records?*' message, select **Yes**.

5.   A number of records will be loaded into the table/screen. Note that the *Occurrence* label towards the top of the table/screen will indicate the number of matching records retrieved (an example is shown below).

> 1   of   7   Enquirer Student Detail (ESD) records

6.   Scroll through the retrieved records using the record navigation buttons (towards the top of the screen) or the scrollbar or via keyboard shortcuts (**Page Up**, **Page Down**).

Display the record for **Lucy Rubens** (*as shown right*).

(Continued…)

7. Press **F12** or choose the **Misc** menu and select **Clear Screen** to clear the screen.

8. You will now apply further wildcards to retrieve records.

   In the **Surname** field, enter the characters **DA** (*as shown right*).

   After the DA text, insert the **.?** wildcard by:

   - Selecting the **Edit** menu, choosing **Insert Wildcard** and **Any single character (?)**
   or
   - **Right-clicking**, selecting **Insert Wildcard** and choosing **Any single character (?)**
   or
   - Using the keyboard shortcut of **GOLD** + **?** (**GOLD** = number pad '**+**' or **ESC**)

   This wildcard will retrieve any record with a surname consisting of 3 characters, starting with the characters **DA** and any other character.

9. Press **F5** (or select **File**, **Retrieve**) to retrieve corresponding records. If you are prompted with a '*Retrieve Records?*' message, select **Yes**.

10. Scroll through the records (*using the scrollbar,* **Page Up/Down** *or the record navigation buttons*) to view the retrieved records.

    Can you see how the wildcard has been successfully applied?

11. (*Optional extra example*) Press **F12** or choose the **Misc** menu and select **Clear Screen** to clear the screen.

    In the **Surname** field, firstly enter the surname of **DANVERS**.

    After '*Danvers*', add the **.|** wildcard by:

    - Selecting the **Edit** menu, choosing **Insert Wildcard** and **Or (¦)**
    or
    - **Right-clicking**, selecting **Insert Wildcard** and choosing **Or (¦)**
    or
    - Using the keyboard shortcut of **GOLD** + **|** (**GOLD** = number pad '**+**' or **ESC**)

    After the **.|** wildcard, add the surname **RUBENS** (*as shown in the above example*).

12. Press **F5** (or select **File**, **Retrieve**) to retrieve corresponding records.

13. The resulting records should include all enquirers with a surname of *Danvers* or *Rubens*.

14. After experimenting with the examples presented in this exercise, close the **Enquirer Student Detail** window.

(End of exercise)

3.4   Adding records

New records can be added to a table at any time. Records can be added using the **File** menu (by choosing **Add**) or by selecting the **add record** icon from the panel.

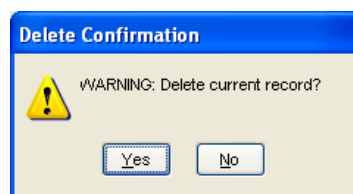When adding records, the following points should be considered:

➢ A new record must have a <u>unique</u> code.

➢ The code for a new record must follow any existing coding convention.

➢ Code fields and short name fields will always default to UPPER CASE.

➢ The format of the full name field (i.e. the description) can be entered in upper or lower case. **It is recommended that upper case is used for consistency and to help avoid mistakes during record retrieval**.

➢ Complete as many fields as possible in the new record.

➢ Some fields may be mandatory and you will be unable to leave such fields blank.

➢ After completing any required fields, store the record by pressing the **F6** key or by choosing the **File** menu and selecting **Store**.
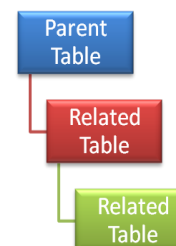
3.5   Deleting records

If you have appropriate user access rights to delete records you can delete by:

- Retrieving the desired record in an appropriate screen (*enter suitable criteria into a desired field and retrieve the record using the **File**->**Retrieve** menu or the **F5** key*).

- With the correct record displayed on the screen, select the **File** menu and choose **Delete**.

- In the **Delete Confirmation** window, select **Yes** to confirm the deletion or **No** to cancel.

- Close/quit the screen (press **F4** or select the close window icon).

Note that you must delete any related table entries prior to deleting the parent table entry. If you do not, you will leave the low level record 'hanging'.
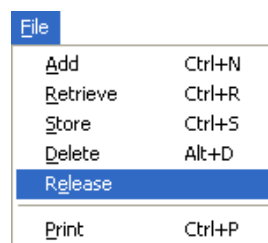
Also note that deleting a record in one table may affect records in another. It should also be noted that not all users will be able to delete records (depending on their user access rights).

3.6   Releasing records

If there are many records that you wish to create (perhaps with very similar contents for each record), you can apply the use of the release facility to use a single record as a template.

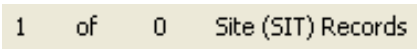The release facility can be found by selecting the **File** menu and choosing **Release**.

Using a single record as a template, you can make modifications and store the modified record.

Note that the new record is created whilst leaving the old record intact.

It should also be noted that the primary key **must** be changed before the new record can be stored.

- **The steps involved in releasing records are:**

    - Retrieving the desired record in an appropriate screen (**F5** or **File**->**Retrieve**).

    - From the **File** menu, select **Release** to release a new record.

    - The *Current & Total Occurrence* line will display '**1 of 0 records**' (*an example is shown right*).

    - Change appropriate values in the record (including the primary key).

    - Press **F6** (or choose the **File** menu and select **Store**) to store the new record. The *Current & Total Occurrence* line will show '**1 of 1 records**'.

    - Close/quit the screen (press **F4** or select the close window icon) or repeat the above steps to enter another record.
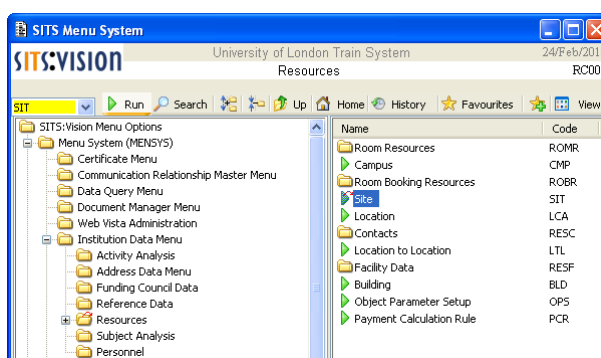
3.7   Exercise 3B

In this exercise, you will add, delete and release records in a table.

1.   Ensure that you are logged into SITS:Vision and from the panel button area, select the **Home** button (to make sure that the **SITS:Vision Menu Options** are displayed).

        Do not worry too much about the actual contents of the menu options explored during this exercise; example screens are used during the exploration of various tools.

2.   In the **SITS Menu System** screen, display the **Site / Building / Room** window by either entering **SIT** into the **option box** (and select **Run**, press the **TAB** key or the **ENTER** key from the number pad)

        Alternatively, locate the table/screen in the following menus: *Menu System (MENSYS), Institution Data Menu, Resources* (*as shown right*).

3.   In the example table/screen used during this exercise, you can create/view/edit records with regards to *Site/Building/Room* data. For this example, enter data in the manner outlined below and press **TAB** to move to the next field.

        In the *Code* field, enter a code of **TEST0n** where **n** is your computer number (i.e. **TEST01**, **TEST02** etc – ask the tutor for assistance if required).

        Press the **TAB** key to move to the *Short Name* field and enter the same data as the *Code* field (i.e. TEST01, TEST02 etc).

        In the *Name* field, enter a full name in the format of **Test Site n** where **n** is your computer number (i.e. **1**, **2** etc – ask the tutor for assistance if required).
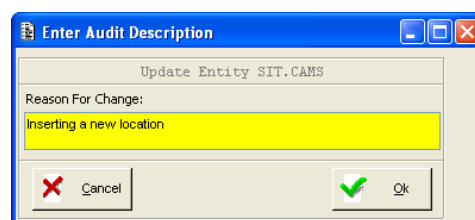
        Note that after entering data into the *Name* field, if you press the **TAB** key once more, a message will be displayed asking "***Add another record***"? If this message is presented, select **No** (as you will not be adding further records at this point).

        To store the new record, press the **F6** key, use the keyboard shortcut of **CTRL+S** or select the **File** menu and choose **Store**.

4.   The **Enter Audit Description** window will be displayed. Enter a suitable *Reason For Change* (*an example is shown right*) and select the **Ok** button.

5.   To exit the screen, press **F4** or select the **[x]** icon in the upper right corner.

                                    (Continued…)

6.   You will now use the **Release** facility to create a new record based on the values already contained in an existing record.

In the **SITS Menu System** screen, display the **Site/Building/Room** window by either entering **SIT** into the **option box** (and selecting **Run**, pressing **TAB** or **ENTER** from the number pad) or by locating the screen in the following menus: *Menu System (MENSYS), Institution Data Menu, Resources*.

Enter the code that you applied during step 3 (i.e. **TEST01, TEST02** etc) and press the **TAB** key or **F5** key to retrieve the record.

Alternatively, you can **double-click** the empty *Code* field to display a selection list where you can choose the value that you entered during step 3 (*remember to press the TAB key or the F5 key to retrieve the record after choosing from a selection list*).

7.   The record that you created earlier will be reloaded into the current table/screen. Select the **File** menu and choose **Release**.

You can now modify the record with the knowledge that the original record will remain unchanged (i.e. you have copied a 'template' of the original data to save as another record).

Modify the fields with additional characters such as your initials or name (*an example is shown right*).

To store the new record, press the **F6** key, use the keyboard shortcut of **CTRL+S** or select the **File** menu and choose **Store**.

8.   The **Enter Audit Description** window will be displayed. Enter a suitable *Reason For Change* (*an example is shown right*) and select **Ok** button.

Close the **Site/Building/Room** window.

9.   You will now delete the record that you have entered (as another example of using menus or keyboard shortcuts).

In the **SITS Menu System** screen, display the **Site/Building/Room** window by either entering **SIT** into the **option box** (and selecting **Run**, pressing **TAB** or **ENTER** from the number pad) or by locating the screen in the following menus: *Menu System (MENSYS), Institution Data Menu, Resources*.

Enter any of the codes that you applied earlier (during step 3 and/or step 7) and press the **TAB** key or **F5** key to retrieve the record(s).

To delete the record(s), select the **File** menu and choose **Delete**.

You will be prompted to confirm the deletion of a record. In the **Delete Confirmation** window, select the **Yes** button.

(End of Exercise)

SITS:VISION

Section 4 – Tools & Special Characters

In this section of the course, you will learn about:

- Special characters.

- GoTo field contents.

- First, previous, next or last records.

- Sorting.

- Dropping records.

- Quick analysis.

- Exporting quick analysis data.

- Cross referencing analysis.

- Exporting Cross referencing analysis data.

There are **two** exercises in this section to help illustrate the above topics:

- Exercise 4A: Applying the use of special characters, using the GoTo field contents tool, sorting records, dropping records and making use of record navigation tools.

- Exercise 4B: Exploring the quick analysis and cross referencing analysis tools.

4.0   Special characters

There may be instances where you wish to quickly insert special characters into various fields in the SITS:Vision client server software. To insert a special character, you can type a keyboard shortcut (if the required characters are available on the keyboard) or you can make use of the **Insert Special** menu command.

- **To enter keyboard characters:**

  - Select the desired field (in a suitable window).

  - Type any desired characters (*for example: if you required the name ANDRÉ, you would start by typing 'ANDR'*).

  - Press the **GOLD** key (**+** on the number pad or the **ESC** key).

  - Press the **J** key and enter suitable special characters (*for example: to complete the name ANDRÉ, you would then type **E** and ´ to insert the character É*)

> Note: the shorthand notation for the above example would be:
> ➢ **ANDR <GOLD> J E ´**

- **To enter special characters via the menu:**

  - Select the desired field (in a suitable window).

  - Type any desired characters (*for example: if you required the name ANDRÉ, you would start by typing 'ANDR'*).

  - From the **Edit** menu, select **Insert Special**.

  - The **Insert Special Characters** window will be displayed.

  - Position the cursor into the text box towards the lower edge of the window.

  - Choose an appropriate character to insert.

  - The character will be added to any existing text in the lower pane of the window.

  - To accept the changes made, select the **green tick** icon (or choose the **red cross** icon to cancel).

4.1   GoTo field contents

The **GoTo Field Contents** window can be used to quickly find a record according to specified search criteria. This facility is very useful if you have retrieved many records (possibly hundreds of records) but then wish to search the retrieved records for particular data items.

Before applying the **GoTo Field Contents** window, place the cursor into a suitable field in a record/window.

From the **GoTo** menu, select **Field Value** and the **GoTo Field Contents** window will be displayed (note that at least one record may need to be retrieved/opened in order to activate the commands under the **GoTo** menu).

The current field name will be displayed in the *Field name* box.

In the *Search for* box, enter suitable text (an example is shown right).

To search for the desired item, select the **Find Forward** or **Find Backward** buttons.

If a corresponding record is found, the record data will be displayed.

If you choose the **Count** button, the system will count the number of matching records (in the current window). The count value will be displayed in the message bar, along the lower left edge of the screen.

Repeat the above steps as required to display further results.

4.2   Sorting

Towards the top of many windows, the number of records will be indicated as records **1 of N** (in a similar manner to the example shown right).

| 1 | of | 125 | Enquirer Student Detail (ESD) records |

Rather than browsing randomly through the records until you find the record that you are searching for, you can sort the records into ascending or descending order.
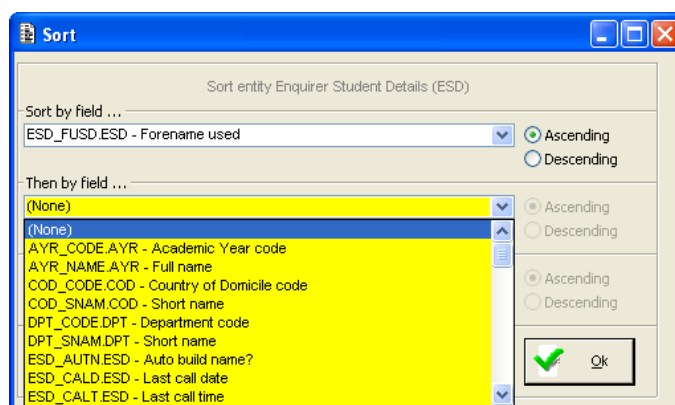
To apply the use of the sort tool, select the desired field and from the **Misc** menu, choose **Sort.**

In the **Sort** window, you can choose up to three fields (as the levels for sorting) and further apply the option of **Ascending** or **Descending** for each field.

To choose a field, select a drop-down arrow and choose a suitable option.

Select the **Ok** button to apply the sort or select **Cancel** to abort.

4.3   Dropping records

Under the **Misc** menu, you can select **Drop records** if you wish to remove records (temporarily) from the currently displayed window. Dropped records are **not** deleted, only temporarily removed from the current screen.

This feature is useful if you wish to omit records from the current activity.

In the **Drop/Keep occurrences** window, select the **Drop records** option and choose:

➢ **Current record** (to drop the currently displayed record only).

➢ **Range of records** (to delete a range of records from *x* to *y*)

➢ **Select by Value** to indicate records that may be 'dropped' according to specified criteria.

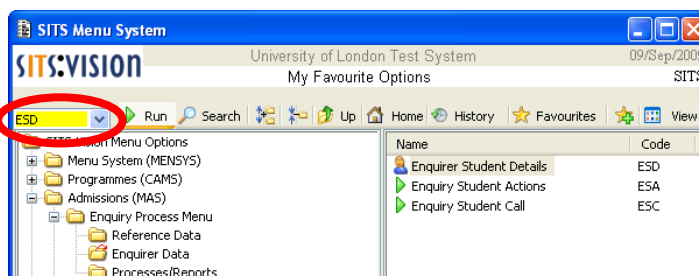Select the **Ok** button when complete.

4.4   Exercise 4A

In this exercise, you will apply the use of special characters, use the GoTo field contents tool, apply sorting, drop records and make use of record navigation tools.

1.   Ensure that you are logged into SITS:Vision and from the panel button area, select the **Home** button (to make sure that the **SITS:Vision Menu Options** are displayed).

2.   You will now experiment with the use of special characters.

In the **SITS Menu System** screen, open the **Enquirer Student Detail** table/screen by entering **ESD** into the **option box** (and selecting the **Run** button or by pressing **TAB** or **ENTER** from the *number pad*).

You can also load the table/screen in the following menus: *Admissions (MAS)*, *Enquiry Process Menu*, *Enquirer Data*.

Do not worry too much about the actual contents of the menu options explored during this exercise; example screens are used during the exploration of various tools.

3.   In the *Forename Used* field, type: **ANDR**

From the **Edit** menu, select **Insert Special**.

In the **Insert Special Characters** window, check that the cursor is positioned after the text '**ANDR**' towards the lower left corner of the screen.

Select the ⊡ É ⊡ button and note the insertion of the special character.

To accept the text, select the green tick icon.

> ℹ As an alternative approach, you can also use the keyboard to enter special characters:
> -   Press the **GOLD** key (+ on the number pad or the **ESC** key) and press the **J** key.
> -   Type: **E** and ´

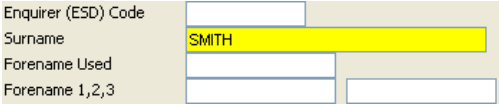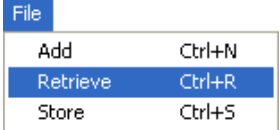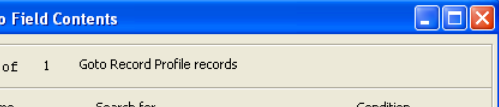This text **ANDRÉ** should now be displayed in the *Forename Used* box.
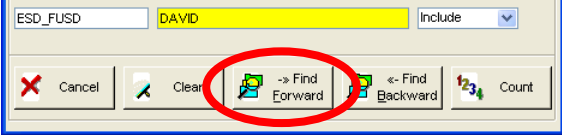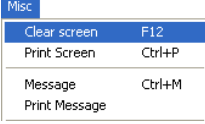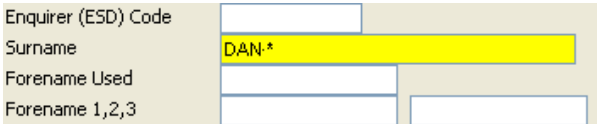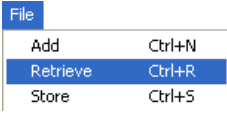
4.   Press **F5** (or select **File**, **Retrieve**) to retrieve corresponding records. If you are prompted with a '*Retrieve Records?*' message, select **Yes**.

5.   Scroll through the records (using the scrollbar, **Page Up**/**Down** or the record navigation buttons) to view the surname for the retrieved records.

6.   After browsing the records retrieved so far, clear the current screen by selecting the **Misc** menu and choosing the **Clear screen** command (note that you can also press the **F12** key to clear a screen).

(Continued…)

7. With the **Enquirer Student Detail** table/screen still open, position the cursor in the *Surname* field and type the text: **SMITH**

8. Press the **F5** key (or from the **File** menu, select **Retrieve**) to retrieve records with a surname of 'SMITH'.

9. If you are prompted with the **Retrieve confirmation** message, select the **Yes** button.

10. Now **position the cursor** in the *Forename Used* box (*as you will search the retrieved records for a particular 'forename'*).

11. From the **GoTo** menu, select **Field Value** and the **GoTo Field Contents** window will be displayed.

12. In the *Search for* box, enter the text **DAVID** and select the **Find Forward** button.

13. The appropriate record will be displayed in the **Enquirer Student Detail** window. This example demonstrates how you can 'go to' a particular instance of a record without manually scrolling through all records.

14. Repeat steps 11 and 12 (*above*) a few more times to view additional records matching the name '*David Smith*'.

15. After browsing the records retrieved so far, clear the current screen by selecting the **Misc** menu and choosing the **Clear screen** command (note that you can also press the **F12** key to clear a screen).

16. In the *Surname* field, enter the characters **DAN** (*as shown right*).

    After the characters **DAN**, add the wildcard **.*** by:

    - Selecting the **Edit** menu, choosing **Insert Wildcard** and **Any characters (*)**
    or
    - **Right-clicking**, selecting **Insert Wildcard** and choosing **Any characters (*)**
    or
    - Using the keyboard shortcut of **GOLD** + ***** (**GOLD** = number pad '**+**' or **ESC**)

17. Press the **F5** key (or from the **File** menu, select **Retrieve**) to retrieve the records.

    If you are prompted with a **Retrieve confirmation** window, select the **Yes** button.

18. Scroll through the records (using the scrollbar, **Page Up**/**Down** or the record navigation buttons) to view the retrieved records.

    Note how the default order of the records is via the *Enquirer (ESD) Code* field.
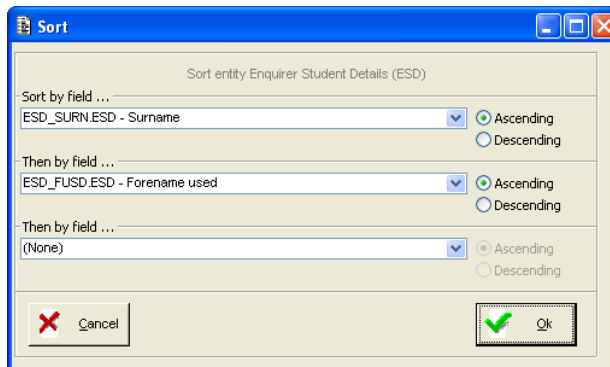
(Continued…)

19. Position the cursor in the *Surname* field and from the **Misc** menu, choose **Sort**.

20. In the **Sort** window, the *Sort by field* will already be populated.

   In the *Then by field*, select the drop-down arrow and choose:

   ESD_FUSD.ESD – Forename used

   Check that the **Ascending** option is selected for both fields.

   Select the **Ok** button and note how the records will be sorted in the order of **Surname code** and **Forename used** (in **Ascending** order).

   If you finish the exercise quickly, try the additional steps below **or** go to **step 23**.

21. (*Optional*) Use the record navigation icons to scroll through the records and display any record of your choice. Take note of the data shown and the record number.
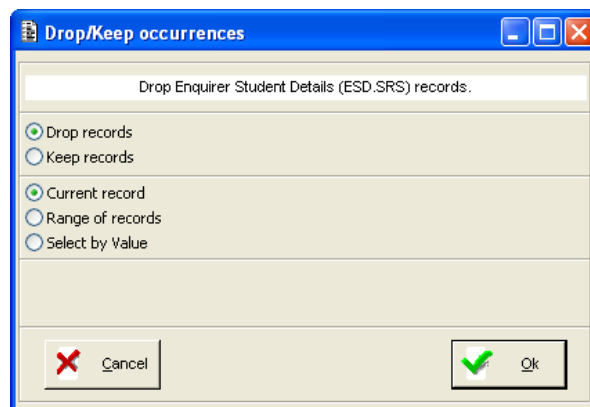
22. (*Optional*) From the **Misc** menu, select **Drop records** to remove desired record(s) from the currently displayed window. Note that dropped records are **not** deleted (they are temporarily removed from the current screen).

   In the **Drop/Keep occurrences** window, select **Drop records** and choose the **Current record** option.

   Select **Ok** when complete.

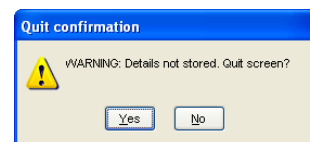   Notice how the chosen record has been removed from the screen.

   Experiment with further 'drop records' features (i.e. using the '*Range of records*' options for example).
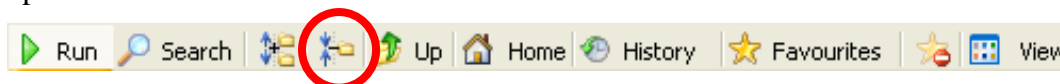
23. Close the currently opened table/screen (by selecting the **[x]** icon from the top right-hand corner of the window).

   If you are prompted with a **Quit confirmation** window (*as shown right*), select the **Yes** button to quit the screen <u>without</u> saving any changes.

   Finally, from the panel buttons, choose the **collapse all** icon to close all current expanded menus/trees.
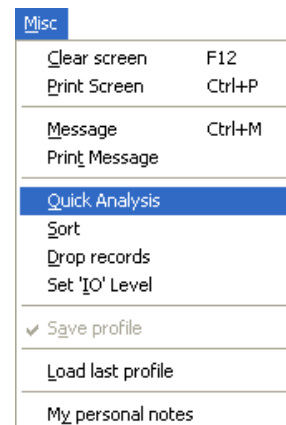
   (End of Exercise)

4.5   Quick analysis

The Quick Analysis tool allows the user to perform basic mathematical analysis of the values in a field.

To activate the Quick Analysis tool, select the **Misc** menu and choose **Quick Analysis**. It should however be noted that the Quick Analysis tool is only available if more than one record is retrieved in the current table.
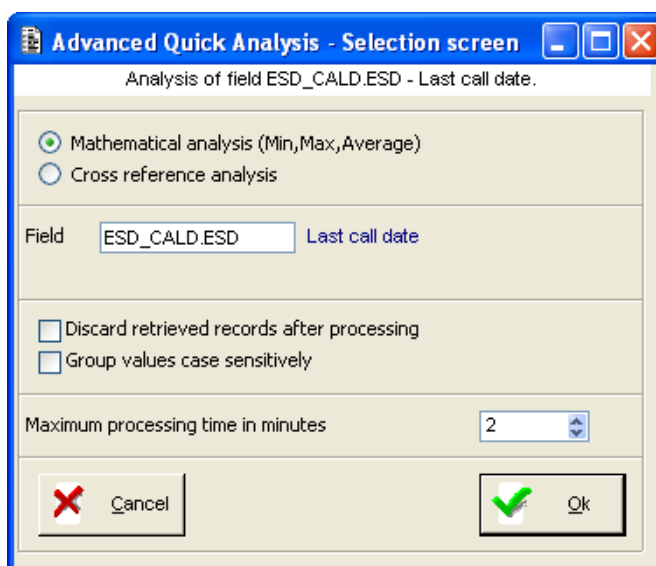
The basic mathematical analyses that can be performed are:

- o   Minimum value in the field.
- o   Maximum value in the field.
- o   Total value of the fields.
- o   Average of the values in the field.
- o   Median (middle) value.
- o   Mode (most common) value.
- o   Standard deviation value.
- o   Mode frequency.
- o   A list of the values and a count of each type of value in both actual and percentage values.

In the **Advanced Quick Analysis** window, the *Field* box will be populated with the code of the field where the cursor is currently situated.

To apply mathematical analysis, ensure that the **Mathematical analysis** option has been selected.
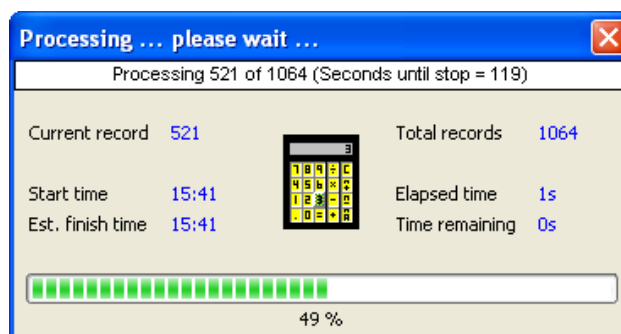
Select the **Discard retrieved records after processing** tick box if you wish to drop retrieved records after the use of the Quick Analysis tool (*i.e. the previous window will be cleared after using Quick Analysis*).

Select the **Group values case sensitively** tick box if you wish to distinguish between lowercase and uppercase values in the analysed records.

Select the **Ok** button to apply the **Quick Analysis** tool or **Cancel** to abort.

It should be noted that the analysis may take a few minutes to process if you are processing a large number of records. During this time period, you may see a processing window displayed (*as shown right*).
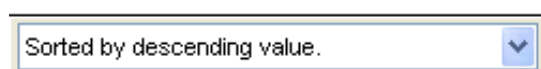
After selecting **Ok**, the **Quick Analysis Results** window will display appropriate results (*an example is shown right*).

In the results area of the window, you can also select the headers (**Value**, **Count**, **Perc** etc) to toggle the data between **ascending** and **descending** order.

The **message bar** (*lower left corner of the screen*) will also display an indication of ascending or descending sorting if a header has been selected.
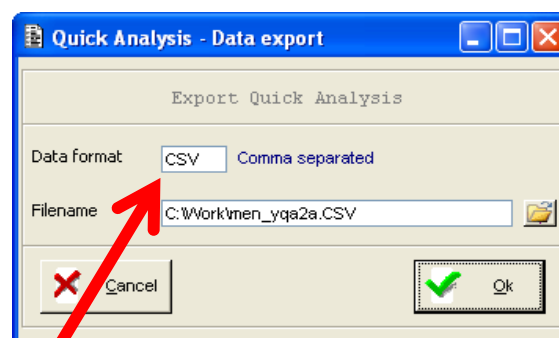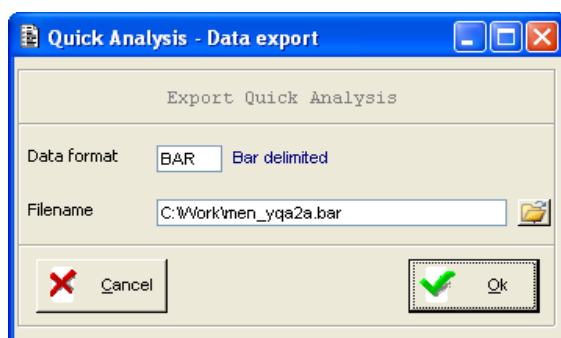

Select the **Ok** button to close the window (or choose the **Export** button to export the data to an external file – as outlined in section 4.5.1 below).

4.5.1 Exporting quick analysis data

Note that in the **Quick Analysis Results** window (*as shown above*) you can also select **Export** if you wish to export the results to an external file.

A **Quick Analysis – Data export** window will be displayed (*as shown below*).

In the *Data format* field, you can change the format of the file by entering a suitable value (for example, **CSV** or **EXCEL** can be applied to create a comma separated value file that can easily be imported into Microsoft Excel).

> If you wish to select a different format, select the *Data format* field and press **F2** to display a list of available options (see **Appendix A**).

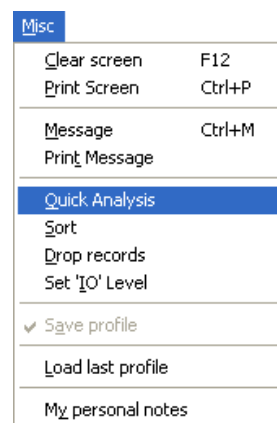Adjacent to the *Filename* field, you can select the folder icon to choose an appropriate drive/folder. Note that you are also able to edit the auto-generated filename if desired.

Select the **Ok** button to export the data or **Cancel** to abort.

4.6   Cross referencing analysis

A cross reference analysis allows the user to produce a cross tabulation, showing all the values held in two fields. The **Cross referencing** tool is available via the **Advanced Quick Analysis** window (*as explored during the previous section of the course*).
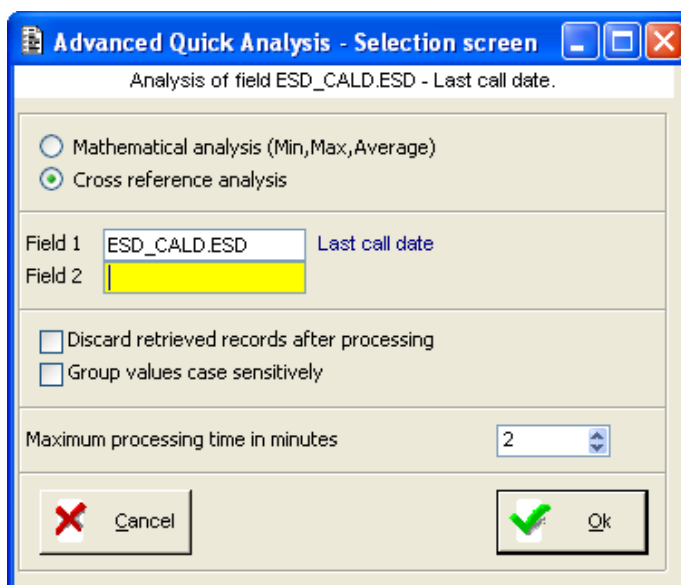
To access the **Cross referencing** tool, select the **Misc** menu and choose **Quick Analysis**. It should however be noted that the **Quick Analysis** command is only available if more than one record is retrieved in the current table.

In the **Advanced Quick Analysis** window, select the option labelled **Cross reference analysis**.

The *Field 1* box will be populated with the code of the field where the cursor is currently situated.

Select the *Field 2* box and either press **F2** or **double-click** to select a suitable field from the **Select…** window.

> The **F2** key is used to view/select further details.

In the **Select…** window, choose an appropriate field code to insert into *Field 2*.

Scroll up/down using the vertical scroll bar (or use the **Page Up** / **Page Down** keys).

When you have identified the desired field, select the field and press **F3** to accept or choose **Accept** from the **File** menu (you can also choose the keyboard shortcut of **CTRL+A** or **double-click** an item from the list).

Select the **Discard retrieved records after processing** tick box if you wish to drop retrieved records after the use of the Quick Analysis tool (*i.e. the previous window will be cleared after using Quick Analysis*).

Select the **Group values case sensitively** tick box if you wish to distinguish between lowercase and uppercase values in the analysed records.

Select the **Ok** button to apply the **Cross reference analysis** tool or **Cancel** to abort.
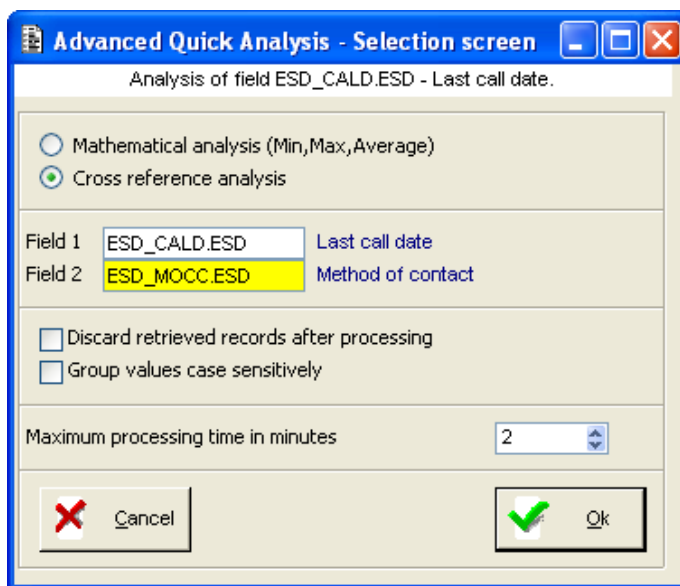
It should be noted that the analysis may take a few minutes to process if you are processing a large number of records. During this time period, a processing window may be displayed (*as shown right*).

The **Quick Analysis – Results** window will display the results of the *Cross reference analysis*.

Note that the default format is set to **Text**.

The example displayed right presents a cross reference analysis of the number of enquiries by date and method of contact.

To change the display format to **HTML**, select the **Html** radio button.

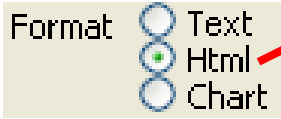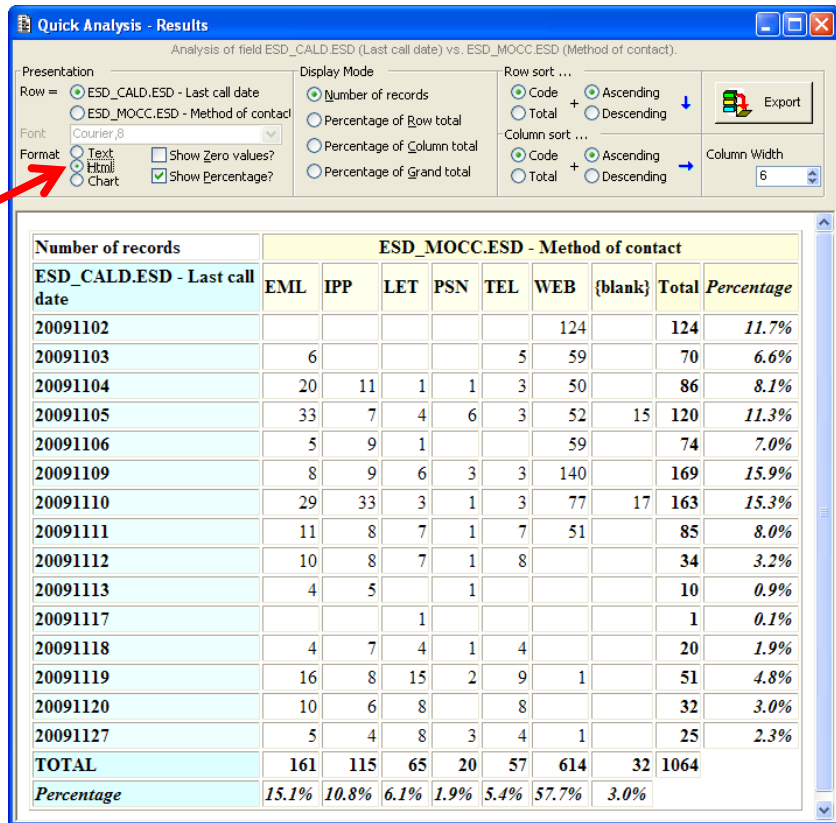*The example displayed right presents a cross reference analysis of the number of enquiries by date and method of contact.*

Number of records	ESD_MOCC.ESD - Method of contact								
ESD_CALD.ESD - Last call date	EML	IPP	LET	PSN	TEL	WEB	{blank}	Total	*Percentage*
20091102						124		124	*11.7%*
20091103	6				5	59		70	*6.6%*
20091104	20	11	1	1	3	50		86	*8.1%*
20091105	33	7	4	6	3	52	15	120	*11.3%*
20091106	5	9	1			59		74	*7.0%*
20091109	8	9	6	3	3	140		169	*15.9%*
20091110	29	33	3	1	3	77	17	163	*15.3%*
20091111	11	8	7	1	7	51		85	*8.0%*
20091112	10	8	7	1	8			34	*3.2%*
20091113	4	5		1				10	*0.9%*
20091117			1					1	*0.1%*
20091118	4	7	4	1	4			20	*1.9%*
20091119	16	8	15	2	9	1		51	*4.8%*
20091120	10	6	8		8			32	*3.0%*
20091127	5	4	8	3	4	1		25	*2.3%*
TOTAL	**161**	**115**	**65**	**20**	**57**	**614**	**32**	**1064**	
Percentage	*15.1%*	*10.8%*	*6.1%*	*1.9%*	*5.4%*	*57.7%*	*3.0%*		

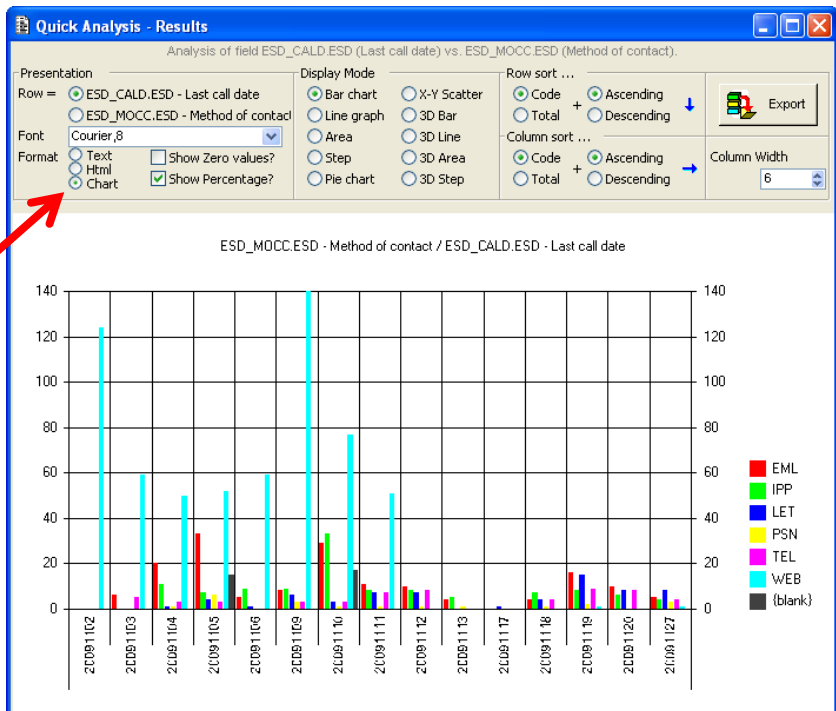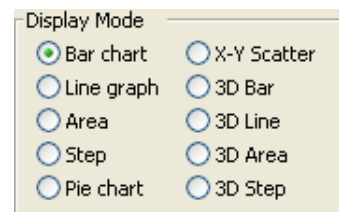To change the display to **Chart** format, select the **Chart** radio button.

The example displayed right presents a cross reference analysis of the number of enquiries by date and method of contact.

In **Chart** format, you can change the type of chart by selecting a suitable option under the ***Display Mode*** group (towards the top-middle area of the **Quick Analysis – Results** window).
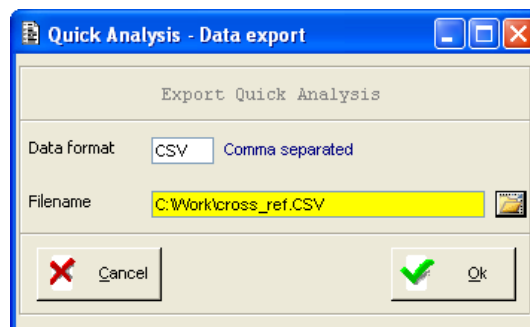
4.6.1 Exporting cross referencing analysis data

As outlined earlier in section 4.5.1, you can also choose the **Export** button in
the **Quick Analysis – Results** window if you wish to export the results to an
external file.

In the **Quick Analysis – Data export** window,
enter a suitable format in the *Data format* field
(for example, **CSV** or **EXCEL** can be applied to
create a comma separated value file that can
easily be imported into Microsoft Excel).

> If you wish to select a different format,
> select the *Data format* field and press **F2**
> to display a list of available options (see
> **Appendix A**).

Adjacent to the *Filename* field, you can select the folder icon to choose an appropriate
drive/folder. Note that you are also able to edit the auto-generated filename if desired.

Select the **Ok** button to export the data or **Cancel** to abort.

4.7   Exercise 4B
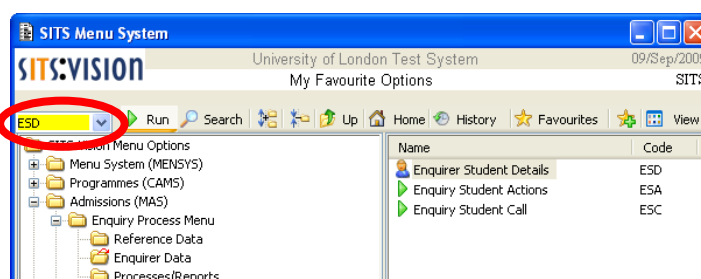
In this exercise, you will explore the quick analysis and cross referencing analysis tools.

1. Ensure that you are logged into SITS:Vision client server and from the panel button area, select the **Home** button (to make sure that the **SITS:Vision Menu Options** are displayed).

2. You will use wildcards (*as explored earlier during section 3.2*) and the *Quick Analysis* tool to view the number of enquiries during a period of time.

    In the **SITS Menu System** screen, open the **Enquirer Student Detail** table/screen by entering **ESD** into the **option box** (and selecting the **Run** button or by pressing **TAB** or **ENTER** from the *number pad*).

    You can also load the table/screen in the following menus: *Admissions (MAS)*, *Enquiry Process Menu*, *Enquirer Data*.

3. Position the cursor in the *Last Call Date* field.

    In the *Last Call Date* field, enter the date range shown below (including wildcards):

    -   Press the **GOLD** key (**ESC** or **+** on the number pad) and type **>**
    -   Press the **GOLD** key (**ESC** or **+** on the number pad) and type **=**
    -   Type: **01/11/2009**
    -   Type: **&**
    -   Press the **GOLD** key (**ESC** or **+** on the number pad) and type **<**
    -   Press the **GOLD** key (**ESC** or **+** on the number pad) and type **=**
    -   Type: **30/11/2009**

    The text will appear as: **·>·=01/11/2009&·<·=30/11/2009**

    > Note that you can also right-click in the field (or use the **Edit** menu) and choose **Insert Wildcard** to choose the **>**, **=** or **<** characters instead of typing them. Ask the tutor for assistance if required.

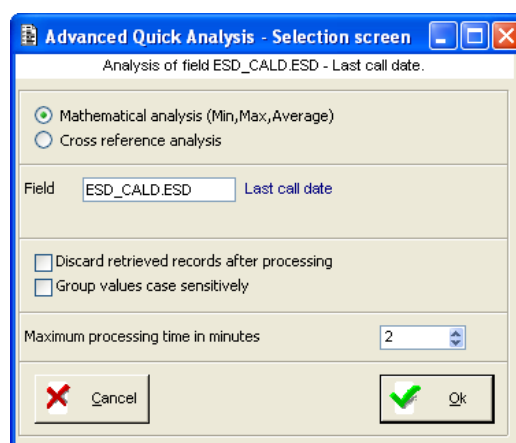4. Press the **F5** key (or from the **File** menu, select **Retrieve**) to retrieve records.

    When prompted to retrieve files, select **Yes**.

5. Position the cursor in the *Last Call Date* field and from the **Misc** menu, choose the **Quick Analysis** option.

    In the **Advanced Quick Analysis** window, check that **Mathematical analysis** is selected and select the **Ok** button.

    (Continued…)

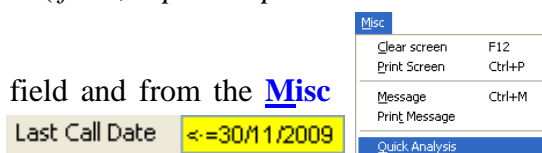6.   In the **Quick Analysis Results** window, a table will be shown (*in a similar manner to the example shown right*).

7.   Select the headings **Value**, **Count** and **Perc** to modify the view of the data in ascending/descending order.
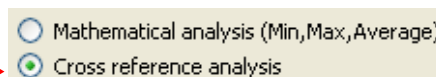
8.   Close the **Quick Analysis Results** window to return to the **Full Student Details** window.

9.   Back in the **Enquirer Student Detail** table/screen you should still have the records opened during the earlier part of this exercise (*if not, repeat steps 2-4 or call the tutor for assistance*).

10.   Position the cursor in the *Last Call Date* field and from the **Misc** menu, choose the **Quick Analysis** option.

11.   In the **Advanced Quick Analysis – Selection screen**, check that the option **Cross reference analysis** has been selected.

12.   *Field 2* will be displayed in the window. Select *Field 2* and press **F2** (or **double click** *Field 2*) to view a list of field names available for analysis.

13.   Use the **Page Down** key or the vertical scroll bar to scroll through the records until you get to the "*ESD_MOCC – Method of Contact*" field.

    With this field code selected, press the **F3** key, **double-click** the field code **or** choose the **File** menu and select **Accept**.

14.   Back in the **Advanced Quick Analysis** window, select the **Ok** button to continue. *Note that there may be a brief delay whilst the results are calculated & displayed.*

15.   In the **Quick Analysis – Results** screen, a table of the results will be displayed.

    Towards the upper left corner of the screen, select **Text**, **Html** and **Chart** from the *Format* box to view different representations of the data.

    Close the **Quick Analysis – Results** and **ESD** windows when complete.

(End of exercise)

Appendix A – Further exported data formats

Further exported data formats are available when applying the **Data export** feature during the use of the **Quick Analysis** or **Cross referencing analysis** tools.

In the **Data export** window, clear the *Data format* field and either double click the field or press the **F2** key to display a selection list.

The contents of the selection lists are shown below.

From the selection list, you can either **double click** a suitable option or highlight a value and press **F3**.

Appendix B – Glossary

The following terms, abbreviations and commands have been used during the topics presented throughout this course/manual. The table below provides a summary of the terms used.

Term	Description
BAR	Bar delimited file. A 'bar' character is used to separate different items of data.
Boolean operators	Boolean operations allow you to combine search terms using the Boolean operators **AND**, **OR** and **NOT**.
Cross referencing analysis	A cross reference analysis allows the user to produce a cross tabulation, showing all the values held in two fields.
CSV	Comma separated value file. A 'comma' character is used to separate different items/fields of data.
e:Vision	Provides secure portal access via the web and is used to manage the delivery of data and information from the SITS:Vision client server system.
ESA	**Enquirer Student Actions** table. Each **ESD** (*Enquirer Student Details*) table may also have one or more **ESA** records associated with it. An **ESA** record is created for each programme (*Area of Interest*) that each enquirer requests information about.
ESC	**Enquirer Student Call** table. Each **ESD** (*Enquirer Student Details*) table may also have one or more **ESC** records associated with it. An ESC record is created for each contact that an enquirer has had with the University.
ESD	**Enquirer Student Details** table. This table holds one record per enquirer (contact information and most recent contact with the University).
EX	The **Exit** command
Favourites	Panel button used to display menu options that the user had added to the 'favourites' folder.
Field	A field is the basic unit of data (i.e. a single piece of information) in a record.
GOLD key	The **GOLD** key is the + key on the number pad or the **ESC** key.
GoTo field contents	The **GoTo Field Contents** window can be used to quickly find a record according to specified search criteria.
History	Panel button used to display the 'history' folder which will show the most recently accessed menu options within the current session.
Home	Panel button used to move the user to the top of the menu tree.
Message buffer	Displays any error messages and the output of some processing operations. The contents of the message buffer can be viewed and printed.
Panel buttons	Towards the top of the SITS:Vision main menu, a range of buttons are displayed. These buttons are referred to as panel buttons.
Primary key	A unique identifier for each records (usually the first fields in a table). A primary key cannot be duplicated (in another record) and cannot be edited.

Term	Description
Quick Analysis	The *Quick Analysis* tool allows the user to perform basic mathematical analysis of the values in a field.
Record	A record stores information with regards to a person/item etc. Each record can be uniquely identified via a primary key.
SIT	The **Site/Building/Room** screen.
SITS Menu System	The menu system is displayed in a 'Windows tree style' format and provides access to options/screens that the user is permitted to run.
SITS:Vision	SITS:Vision is a management information system used by many Higher Education institutions across the UK.
SITS:Vision client server	SITS:Vision client server provides a 'back end' to the system and is useful for infrequent tasks. The screens in SITS:Vision cannot be modified. Not all of the fields in each table/screen need to be necessarily used as only the desired fields may be utilised as required
Table	Also referred to as an 'entity', a table is a group of data consisting of records. For example, information about a student would be stored in a 'student' table.
View	The **View** button can be used to change the format of the menu options. By selecting the **View** button, the display of menu commands can be toggled between **icon and text** or **list format**.
Wildcard	A wildcard character is a character that may be substituted for any of a defined subset of all possible characters. Wildcards are used during searches, for defining criteria and for the retrieval of records

A wildcard character (for example, *****) can therefore be applied to identify data/records according to the specified characters. For example, to search for all records starting with 'R', you would enter 'R*' or to search for an address with 'Russell' in the data you could enter *russell* in an address field. |
| **Windows Tree Style Menus** | The "Windows tree style" is the preferred menu format in SITS:Vision as it offers more functionality than other styles. A 'tree' displays the options/commands available to the user and branches of the tree can be expanded and collapsed by selecting the **[+]** and **[-]** icons respectively. |

Summary

During this course, you have been introduced to the SITS:Vision client server software for the viewing, creation and editing of database records.

Upon completion of this course, you should now have a basic understanding of the following topics:

- Introduction to SITS:Vision.
- Differences between SITS:Vision client server and e:Vision.
- Examples of client server and e:Vision screens.
    - Client server example screens.
    - E:Vision example screens.
- Logging into SITS:Vision client server.
- Logging out of SITS:Vision client server.
- Windows tree style menus and the panel buttons.
- Using commands to display tables/screens.
- SITS:Vision client server screen components.
- Further navigation and shortcuts.
    - Pull-down menus.
    - Right-click menus.
    - Keyboard shortcuts.
- Record operations:
    - Retrieving records.
    - Using first, previous, next or last record navigation icons.
    - Wildcards and Boolean operators.
    - Adding records.
    - Deleting records.
    - Releasing records.
- Tools:
    - Special characters.
    - GoTo field contents.
    - Sorting.
    - Dropping records.
    - Quick analysis.
        - Exporting quick analysis data.
    - Cross referencing analysis.
        - Exporting cross referencing analysis data.