AES
Adaptive Enterprise Solutions

...unlocking the dawn of better results for your organization

BASIC SYSTEM NAVIGATION GUIDE

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Basic Concepts

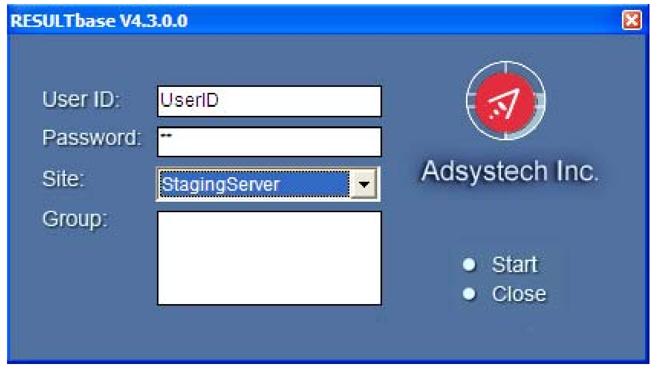
The AES System provides a comprehensive solution for assessing clients and tracking their progression from the initial point of intake through Program exit. This includes entering, tracking and monitoring individuals and their families for referrals from one program to another within the agency and outside of the agency. Better case management and tracking of households means the ability to do more with available resources, avoid duplicate records, improve overall client activity, and ultimately enhance client satisfaction and results.

Logging On

Double-click the AESEnginuity icon on the desktop

In the Login Screen –

- Enter User ID
- Enter Password
- Select Site URL
- Click START



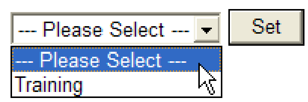
Choices may appear in the Group box, if so -

- Double click the desired Group

Or

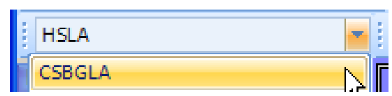
- Click the desired Group and then click START

The Organization may have more than one Location, if so –



- Select the desired Location
- Click SET

A User may have rights to more than one Role, if so –



- Select the desired Role/Application in the dropdown located upper left

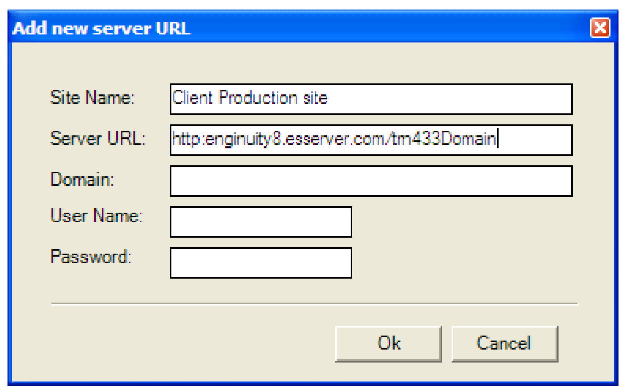
Set up a new URL Site

- Right click at the end of the dropdown in the Site field
- Select ADD DOMAIN SERVER

In the popup window –

- Enter Site Name
- Enter Server URL (leave other fields blank)
- Click OK

Use that Site URL to log on with above instructions.



Logging Back On

While in the system, to log back in with a different Group or Site –

- Click File menu
- Select Open
- Log back on in the Login Screen that appears, User Name will already be displayed

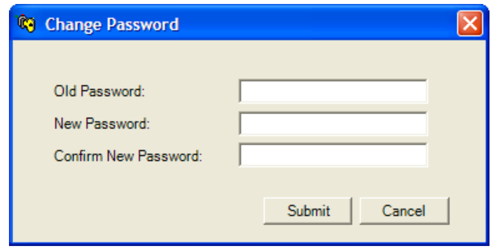
Logging Off

From the File menu, select CLOSE or EXIT.

Timing Out

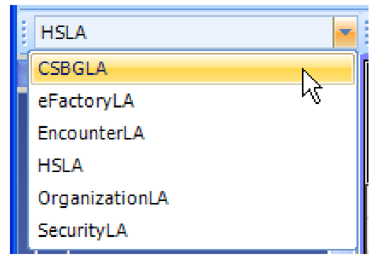
The system will automatically log off if it has not been used for a period of time. A warning will appear when 10 minutes are left before shutting down.

Changing Password



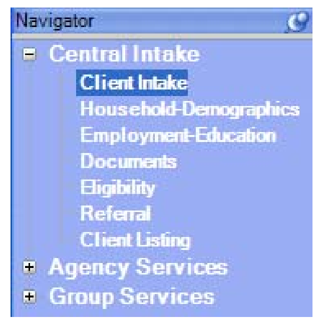
- Click File Menu
- Select Change Password
- Enter Old Password
- Enter New Password and confirm new password
- Click SUBMIT

Applications



Each module (CSBG, HMIS, Head Start, etc.) has its own set of Program pages. Switch between modules with the Application dropdown located just above the Navigation Pane.
Users will see only those Applications and Roles they have permission to use.

Libraries, Pages and Navigation Pane



The system is divided into Libraries, each having several Pages (or screens), which allow client data entry and modification.

- Navigate between Pages using the Navigation Pane located on the left side of the screen. Click on any Page in the Navigation Pane to open it.
- Clicking on the '+' next to each Library title opens it up and shows the related Pages.
- Clicking on the '-' closes the Library and hides the related Pages.
- If the Navigation Pane seems to disappear, click on VIEW in the Menu Bar at the top of the screen and select NAVIGATION VIEW.

Tool Bar Buttons

Some of the buttons in the Windows Tool Bar can be used in the system.

- Do not use the Back or Forward buttons, the page may not be able to be refreshed. Instead use the Navigation Pane or, in some cases, a button will take you to another page.
- If using Resource Manager, this tool bar button will open the application. 
- The PREVIOUS and NEXT arrow buttons will show as blue instead of gray when available. Using them will scroll through the records on the current page.
  
  For example, on the Program Entry page, clicking the blue arrow brings up the next client in the listing. On most Individual Activity pages, after clicking the SHRINK LIST TO CURRENT HOUSEHOLD button, clicking the arrows will scroll through Household Members. Gray means no more records are available.
- Other buttons are described in the User Guides where they are used.

Containers

Pages are often split into sections called *containers.* Each container includes a separate set of data and may have its own set of function button, such as SAVE. Usually making a selection in one container determines what appears in the grid or fields in another container on the same page.

Tabs

Some Libraries have tabbed pages, such as the Resource Manager and the Adhoc Report Query Builder. Different information is stored in each tab section. Click on the Tab heading to switch to that set of information.

Records

Each time the initial Client Intake page is completed and the SAVE button is clicked, the Client is added into the system and assigned a Client ID, Family ID, and a Household ID. Each ID is considered a record. Multiple families can have the same Household ID, and multiple Clients can have the same Family ID. The Client ID is always a unique number. Each record is then tracked within the Central Intake System.

Buttons

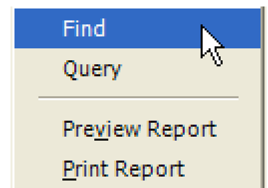
Most Pages have buttons that begin or end the process.

- The NEW button will clear the screen and ready it to add a new client, activity, etc. Not pressing the NEW button may allow overwriting client data currently on the screen.

- The SAVE button allows any changes that were made to the data to be saved. A warning will be displayed if you try to change pages without saving your data or changes.

- Some Pages have Icon Buttons, pause the mouse over the button to see a Tool Tip description of its function.
- An Icon buttons may cause a new page to open, such as the JUMP TO PROGRAM ENTRY button; others may cause a Popup window to appear.

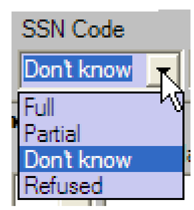
Right-click Menus



In addition to buttons, there are right-click menus available on several Pages with additional functions. Different context menus may appear depending on which Container of the page is used to right-click.

Fields and entering data

Each Page is made up of smaller controls or fields where data is entered and saved in the database. Each field has a label that describes its use; required fields will be noted on each Page. Some of these fields are modifiable; others are system generated and are for display only.



- Some fields have a *dropdown* arrow at the right edge; this indicates that a choice needs to be made out of the items that drop down after the arrow is clicked. Use the mouse to make a selection or type the first few letters into the field.
- Some dropdowns also allow typing an entry if the desired choice isn't listed.
- Other fields have space to write in the item. In some cases only the first few letters need to be typed and the rest of the item fills in automatically.
- When entering data use only alpha and numeric characters; no other symbols are allowed because they have other uses in the database (i.e. # % $). Searches are not case sensitive, however, reports will look better, and Clients will be easier to find in a list if they are entered with a First Capital letter and the rest of the name in lower case, i.e. Fred Flintstone.
- Press the TAB key on the keyboard to move through each modifiable field until the data entry has been completed.
- Many Pages include an area to enter data and a *grid* (see next page) that shows entered information for the selected topic.

Scroll Bars

When the text of a comments box or grid exceeds the available space, scroll bars will appear to allow easier viewing. Both vertical and horizontal scroll bars are used when needed.

Search

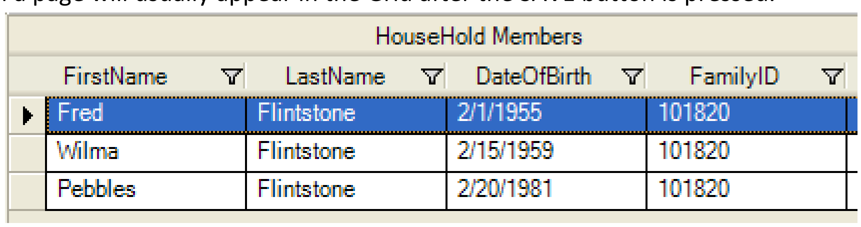
Searching is available on some pages, including all the Client Listing pages. More detailed information is included in the Central Intake and Program Entry guides.

- When searching for a Client, the entire name does not need to be entered, so typing FLIN will bring up Flintstone.
- Clicking the search button without any entry often brings up all available records.
- The wildcard '%' is available to help broaden searches; for example, typing **m%on** in the last name field will produce all names beginning with M and including 'on': Moon, Marton, Mitone, etc.
- A right-click menu allows Find (using one parameter) and Query (using more than one parameter) on the Client Listing pages.
- If a funnel symbol appears at the right side of the Column Heading, clicking the symbol will show selections available for filtering.
- Some Listing pages will have a Search Set dropdown; if the search produces large amounts of matches then smaller sets of data will be available in the dropdown.

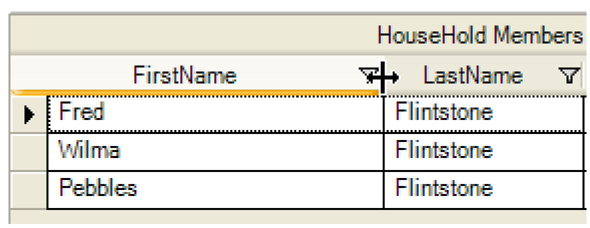
Grids

Grids show multiple records at one time, to view a bigger picture. The grids are not spreadsheets; information in them cannot be changed in the grid, only in the fields themselves.

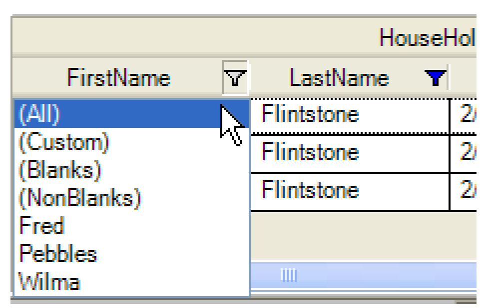
- Information entered in the fields on a page will usually appear in the Grid after the SAVE button is pressed.
- Click on the arrow in the box at the left side of the row to select that record; the row will usually turn blue when it is selected.
- Sort the information in a grid by clicking on a Column Heading. Clicking a second time sorts in the reverse order.



- When the content of a cell is not completely visible, pause the cursor over the field and a tool tip will show the entire contents.
- Columns can be widened or narrowed by putting the cursor on the right edge of a column heading, when the cursor changes to a cross, drag it to the left so more columns are visible or to the right so more of the column can be seen.
- Right clicking on this edge will force the column to the width of the longest entry.



- Some grids can also have the column order rearranged by clicking on the column heading and dragging it to the desired location in the grid.
- Limit the number or records showing in a grid by using the Filter function. If the Column Heading includes the filter funnel icon, the records may be filtered. Click on the icon to access the search function. After performing a filter, the funnel icon will turn blue.



Question Sets

Many pages have sets of questions for the Client to answer.

- Read the question in the Question Box, and use the dropdown in the Answer field to select the best answer. Because logic is available to jump from one question to another based on the Client response, selecting questions in the grid won't always produce the next appropriate question.
- Some questions require the User to enter an answer, type it in the space provided. Comments may be entered for all questions in the Comments area.
- If the question allows multiple answers, checkboxes will appear.
- To move to the next question use the NEXT button or press ENTER key on keyboard; PREVIOUS moves to the last question.
- When finished with the questions, click the SAVE button

Security Levels

Certain pages in the system have the ability to restrict access based on consent to that page or even a record on that page. On these pages, a Consent dropdown is available. The level of security cannot be reduced for a client (i.e. System -> Private), because this would eliminate access to that record for others who are already using it.

Hardware/Software Requirements

For Desktop Hardware/Software:	
Minimum Hardware Configuration • Intel Pentium III Processor • 256 MB RAM • 500 MB Free disk space or greater • 500 MB on Boot Drive • 1 CD-ROM drive • 17" SVGA Monitor 1024x768 • 1 Network Interface Card (NIC)	**Preferred Hardware Configuration** • Intel Pentium IV 1.0 GHz • 512 MB RAM • 1 GB Free disk space or greater • 1 GB on Boot Drive • 1 DVD drive • 17" XVGA monitor • 1 Network Interface Card (NIC)
Minimum Software Configuration • MS Windows 98 SE • MS IE Browser 5.01 • MS Data Access Components 2.8 • MS DotNet Framework 2.0 • Windows Installer 2.0 • Virus Protection	**Preferred Software Configuration** • MS Windows XP • MS IE Browser 5.01 • MS Data Access Components 2.8 • MS DotNet Framework 2.0 • Windows Installer 3.1 • Virus Protection