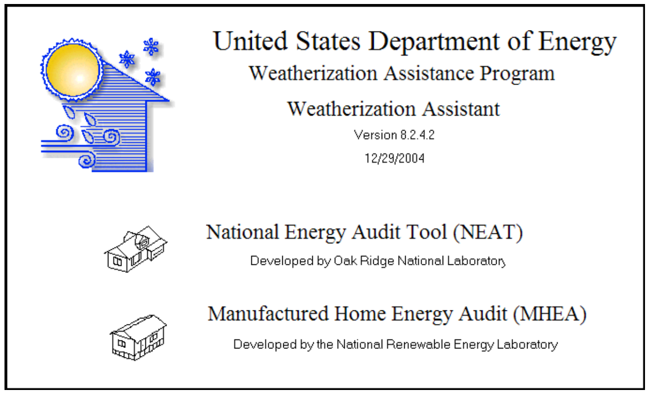
NEAT Features

Check In / Check Out



NEAT Features - Check In / Check Out

Each machine that is going to be taken out into the field appears to need the following things implemented before doing the first check in / check out. These steps will smooth the way for subsequent use.

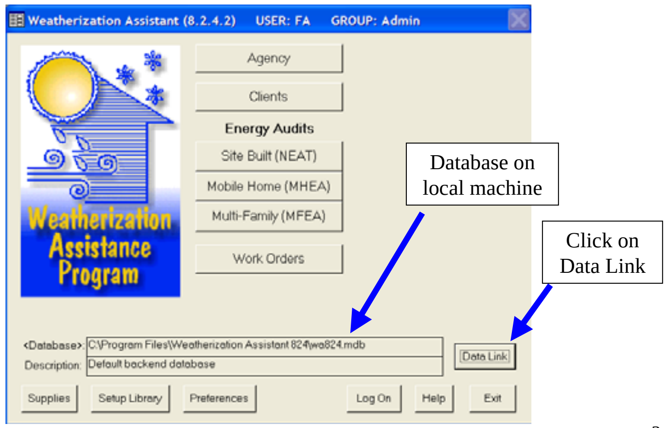
1. Create your agency in the local version of the database (wa824.mdb) that can be found in the path “C:\Program Files\Weatherization Assistant 824” on the laptop or tablet computer (field computer).

2. Set up at least the agency contacts that will be using the field computer in the check in / check out mode. Use the exact same contact info that is set up for those people in the network backend database.

3. Create a copy of the supply library for your agency on the field computer. This is really only required if the user intends to run the audit to generate recommendations while not connected to the network backend database. The supply library doesn’t currently appear to get dragged along to the field computer during the check-out / check-in process.

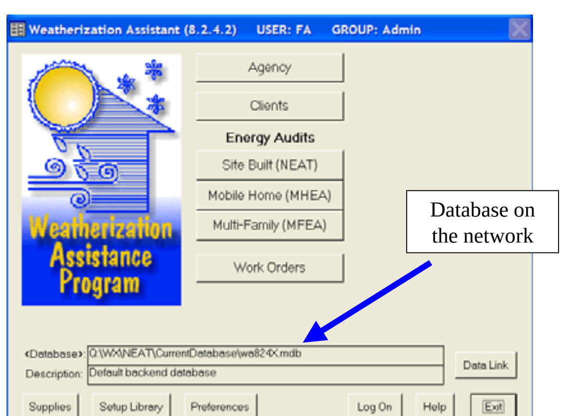
NEAT Features - Check In / Check Out

Local database is set up on the laptop or tablet computer (field computer) with the steps on the previous slide already performed. In this example the current user is an agency contact named Field Auditor. Click on Data Link to go through the process to re-connect to the network backend database. This process is described in the file “NEAT Connection to Network Database.pdf”



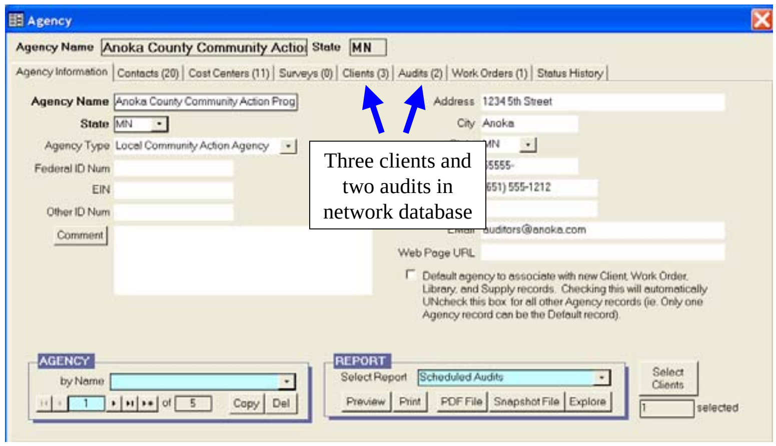
NEAT Features - Check In / Check Out

After going through the Data Link process and connecting to the network database, that new database is shown on the Main screen. This is the database <u>from</u> which Client records will be checked out.



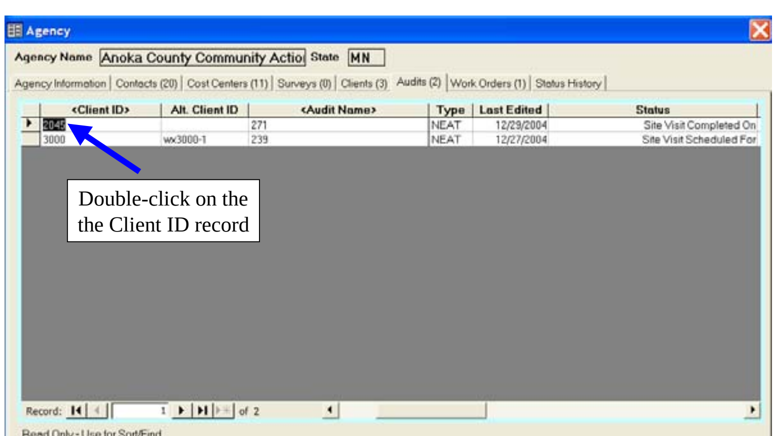
NEAT Features - Check In / Check Out

This example uses Anoka County Community Action Program as the agency. There are three clients currently in the network database, with two of them having audits downloaded from eHEAT.



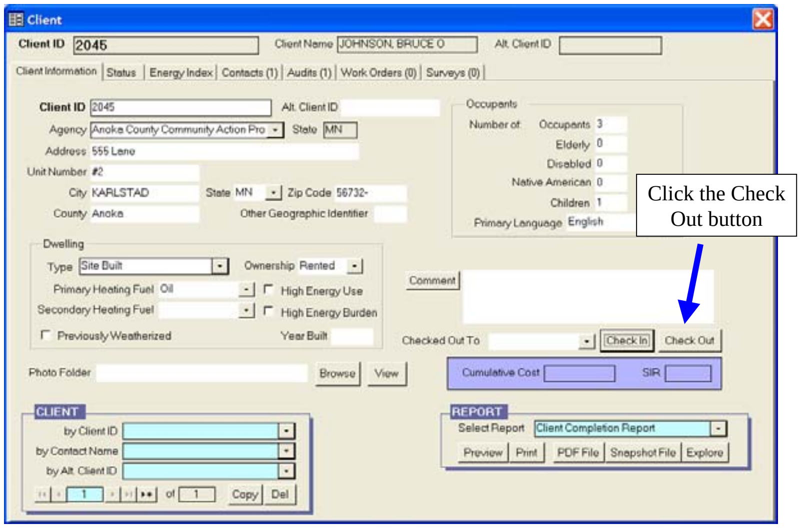
NEAT Features - Check In / Check Out

In this example we will check out the two client records (2045 and 3000) that have audits started. This check out process can be performed two different ways. The first way is by checking out each client record individually from the Client screen. The second way is shown starting on Slide 17. Using the first approach, access the Client screen from the Audits tab by double-clicking on Client ID 2045.



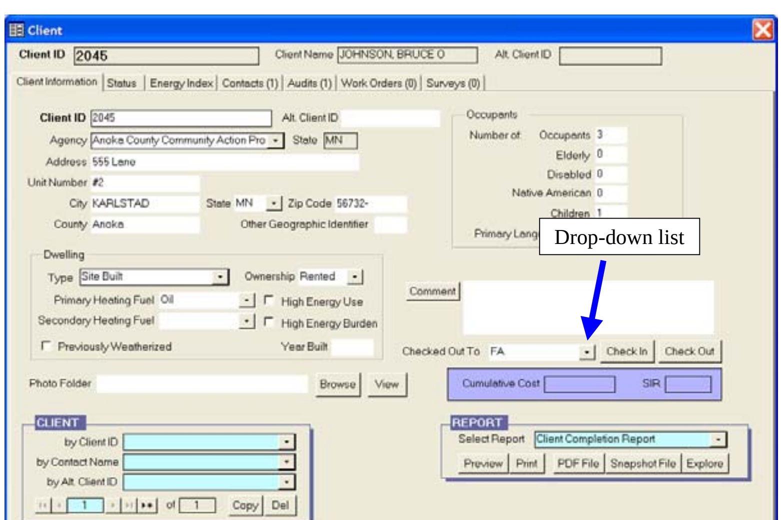
NEAT Features - Check In / Check Out

This opens the Client screen. Click the Check Out button to check out the client record to FA, which is the currently logged in user.



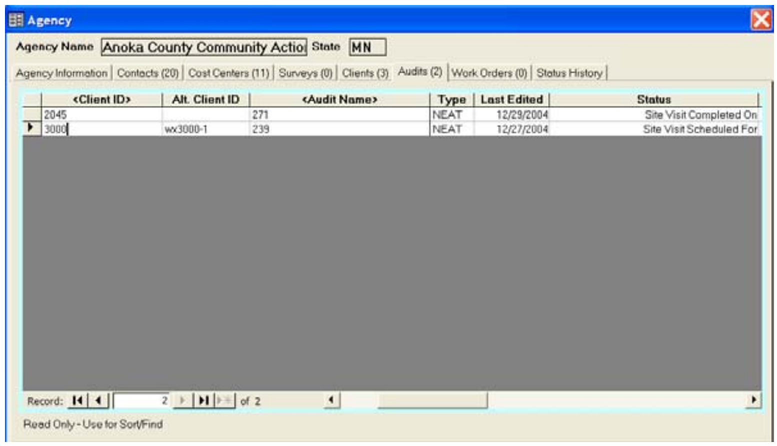
NEAT Features - Check In / Check Out

The client record is now checked out to user FA. You can also pick a different user from the drop-down list of who checked-out to, but logged in user is selected by default.



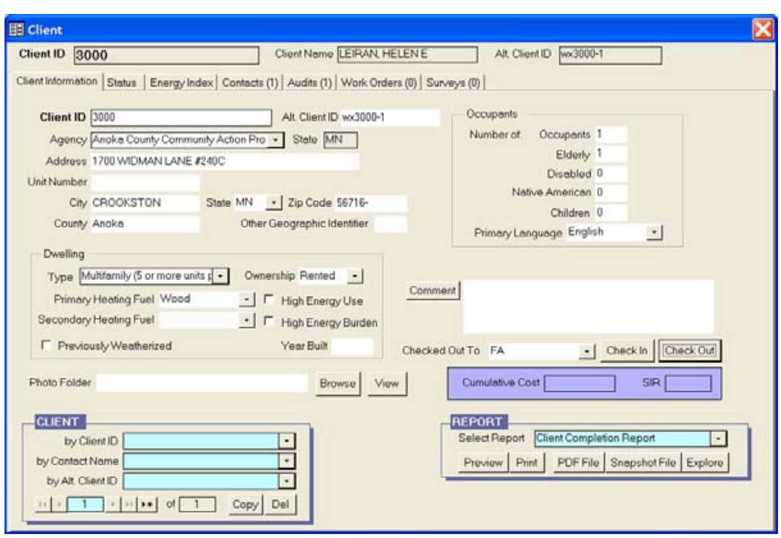
NEAT Features - Check In / Check Out

Follow the same process for Client ID 3000. Either close the previous screen and double-click on Client ID 3000 from the Audits tab (below) to open the Client screen again, or navigate to Client ID 3000 from the Client search in the lower left corner of the Client screen.



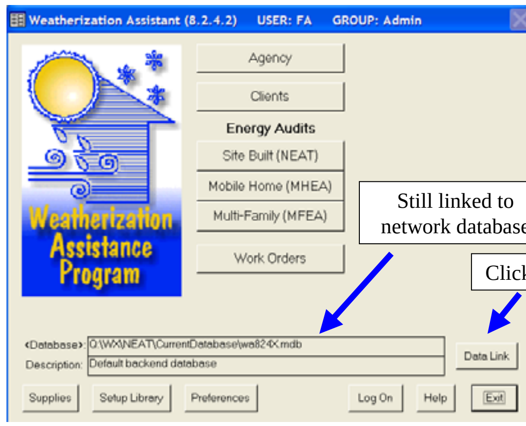
NEAT Features - Check In / Check Out

Client ID 3000 is now checked out to FA also.



NEAT Features - Check In / Check Out

Return to the main screen and click on Data Link. Still currently linked to the network database.

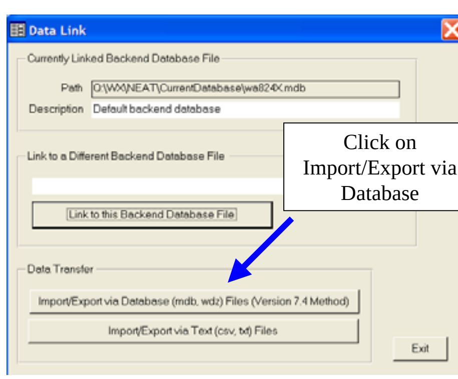


Still linked to network database

Click on Data Link

NEAT Features - Check In / Check Out

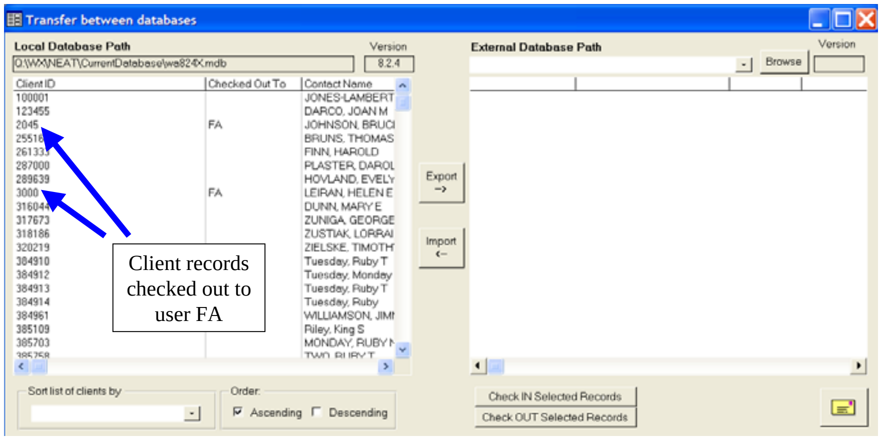
Select Import/Export via Database



Click on Import/Export via Database

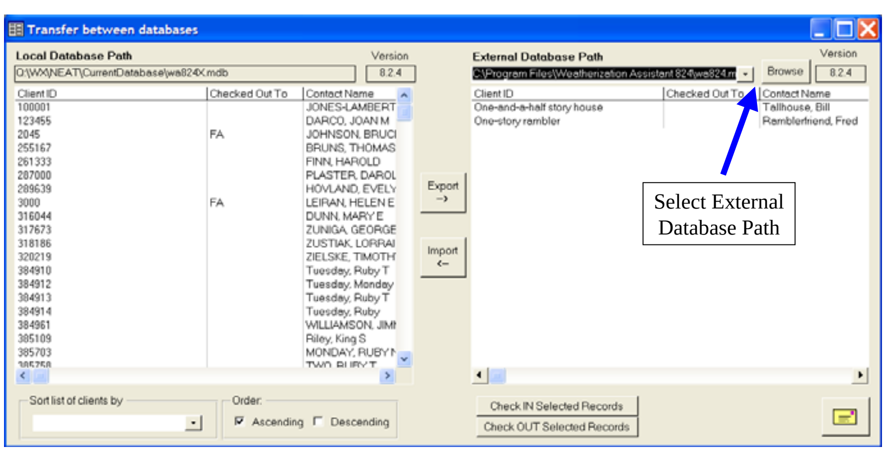
NEAT Features - Check In / Check Out

Shows client records on the left, including noting which clients (Client IDs 2045 and 3000) are checked out.



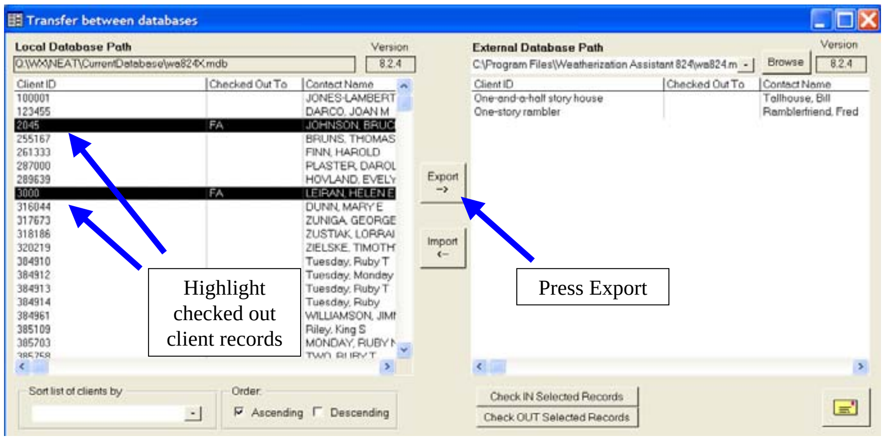
NEAT Features - Check In / Check Out

Select the external database path TO which the clients are to be copied and checked out to (the path to the database on the field computer), either by clicking on Browse and navigating, or by selecting from the drop-down list.



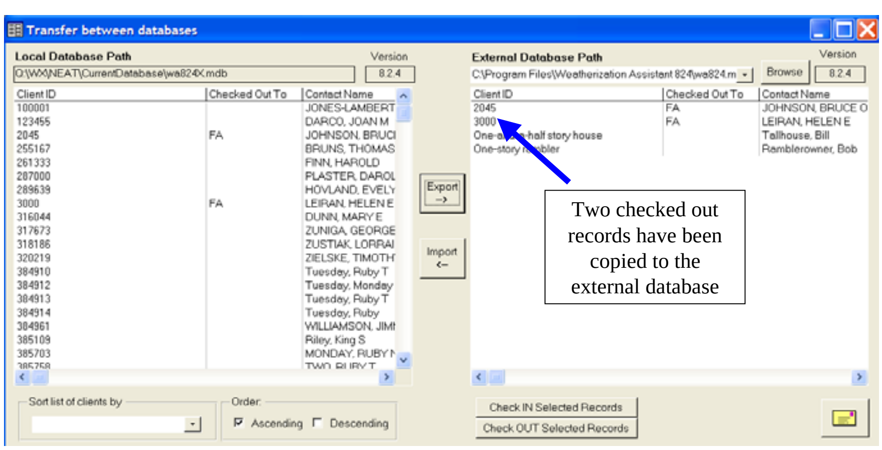
NEAT Features - Check In / Check Out

Highlight the clients that have been checked out and which want to move to the field computer database. Click on Export. Lower left corner of screen will show progress.



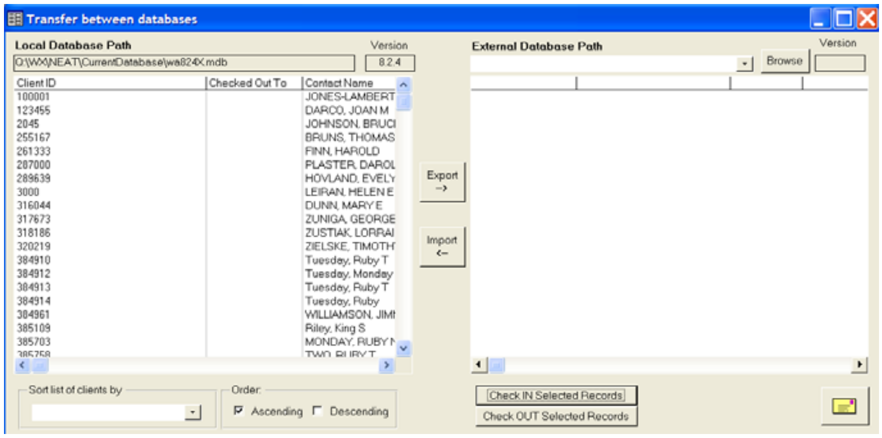
NEAT Features - Check In / Check Out

When completed, the checked out client records are now also in the database file on the field computer.



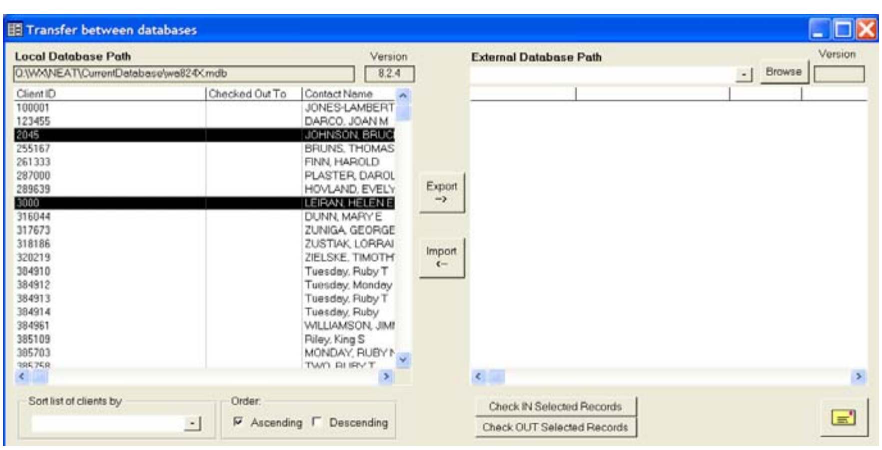
NEAT Features - Check In / Check Out

The following three slides show the second way that client records can be checked out. Multiple records can be checked out directly from this screen, rather than one at a time from the Client screen.



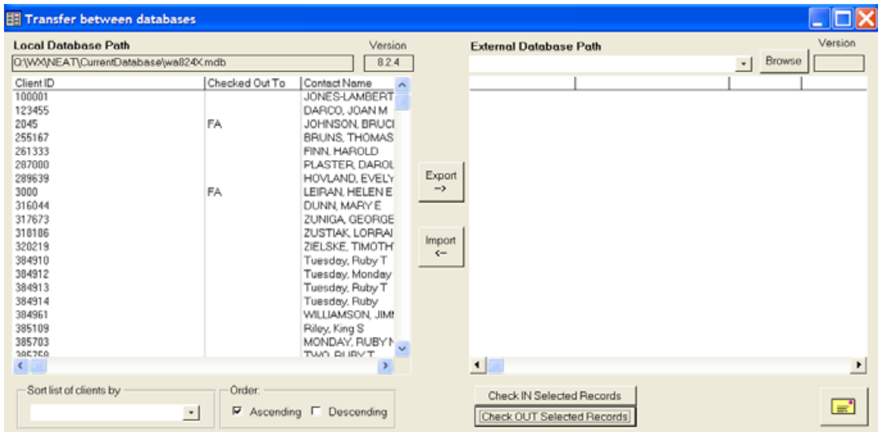
NEAT Features - Check In / Check Out

Highlight the clients that you want to check out and then press the “Check OUT Selected Records” button at the bottom. Highlighting the records is done by using the mouse to click on a record. Standard Windows methods for selecting multiple records can be used - e.g. press the CTRL key and click on additional individual records to highlight them, or click on a record and then press the SHIFT key and click on another record to highlight all records in between.



NEAT Features - Check In / Check Out

This produces the same result as shown previously on Slide 13.

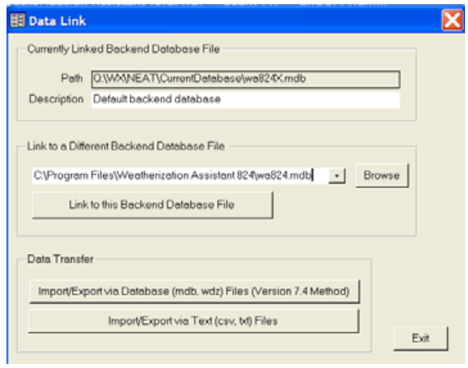


NEAT Features - Check In / Check Out

Still connected to network database. Select Data Link to connect to local database on field computer.

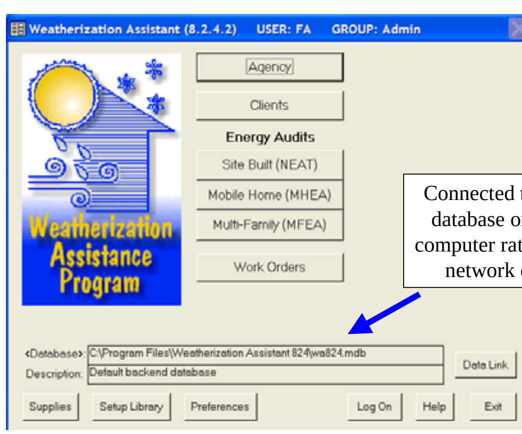
NEAT Features - Check In / Check Out

Selected the local database and Link to this Backend Database File



NEAT Features - Check In / Check Out

After logging back in the user is now connected to the local field computer database.



Connected to the local database on the field computer rather than the network database

NEAT Features - Check In / Check Out

Go to Agency screen to see have 2 client and 2 audit records which were transferred to this database.