



SAM[®] RF

Operations Manual

Section 4: Management

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Section 4: Management Functions

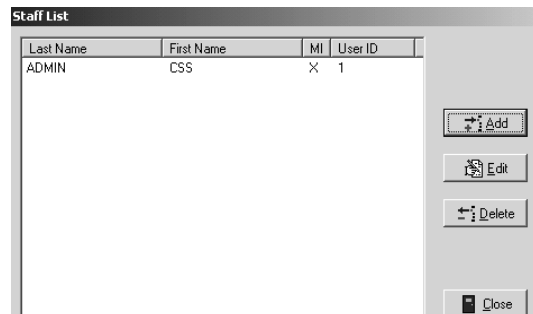
4.1 Assigning the System Administrator

If you are the system administrator, you must register yourself in the SAM RF System and assign yourself the authority of the system administrator.

1. To register yourself as the system administrator in the SAM RF System, click on the **Management** menu at the top of the window or the **Management** icon.
2. Point to **Maintenance**, then select **Staff...**



3. At the Staff List PC dialog box, the default user will appear on the screen. Click **Add** on the right-hand side of the screen to create your system administrator identity and authorization.



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Assigning the System Administrator (continued)

- Using the example to the right as a guide, type your information into the Staff Form – ADD Mode PC dialog box. At the top, type in your last name, first name, and middle name or initial (optional) in the appropriate fields. In the **Position** field, type Administrator, Manager, or another appropriate descriptor.

Note: A user name can range from one to 15 characters and a password can range from three to ten characters. This information will become the user ID and password that you will use each time you log on to the SAM RF System.

- Click on the small box next to **Administrator**. This will give you full authority to access all aspects of the SAM RF System.

- Click **Save**. You will return to the Staff List PC dialog box. Click **Close** to return the SAM RF System main menu.

Note: If someone else will ultimately be the system administrator, you can register him/her using these instructions. You may still want to register yourself with full system administrator authority if you will be performing a number of administrative functions.

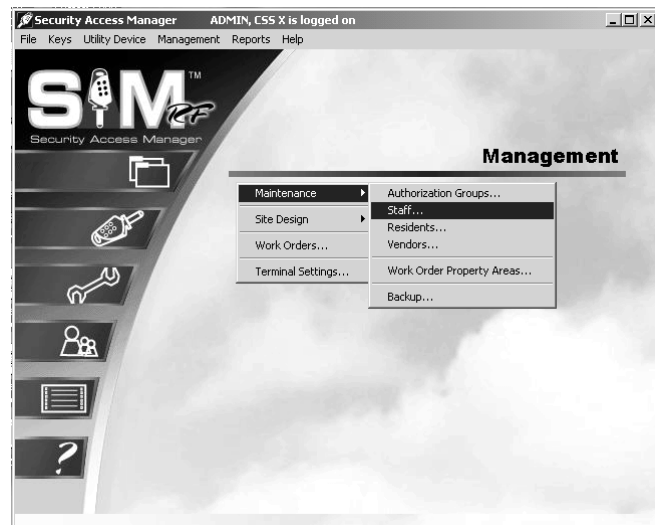
The screenshot shows a dialog box titled "Staff Form - ADD Mode". It has several input fields and a checkbox. The fields are: Last Name (SMITH), First Name (JOHN), Middle Name (Q), Position (MANAGER), User Name (JSMITH), Password (*****), and a checked checkbox for Administrator. There is also a User ID field with "<New User>" and Save/Cancel buttons.

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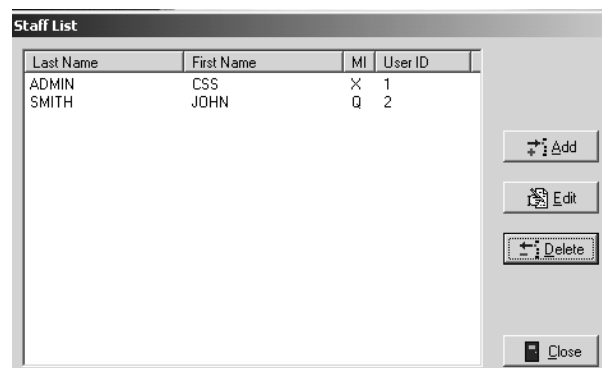
4.2 Removing the Default System Administrator

Once you have registered yourself (and/or someone else) as the system administrator, it is highly recommended that you remove the default system administrator (ADMIN, CSS) from the SAM RF System.

1. Log off the system (File, Log Off) and then log on again using your new user name and password.
2. Click on the **Management** menu at the top of the window or the **Management** icon.
3. Point to **Maintenance**, then select **Staff...**



4. Within the Staff List PC dialog box, click on **ADMIN, CSS** to highlight it, and then click **Delete**.
5. A Delete Confirmation PC dialog box will appear, asking, "Do you wish to delete ADMIN, CSS?" Click **Yes** to confirm the deletion.
6. Back at the Staff List PC dialog box, you can click **Close** to return to the SAM RF System main menu screen, or stay in the Staff List PC dialog box to register SAM RF System users.



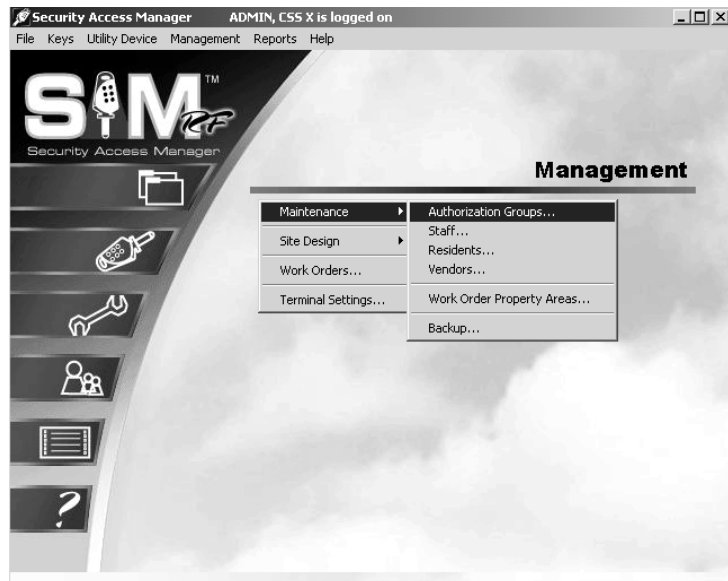
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4.3 Creating Authorization Groups

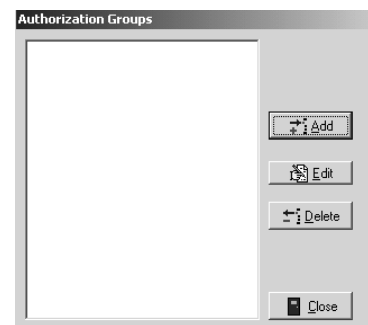
Assigning a staff member to a specific authorization group allows that person access to a specific (and limited) list of SAM RF System functions, such as assigning work orders or creating new keys, rather than allowing access to the entire system.

Be very careful as you determine how much access to give to other users of the system.

1. Click on the **Management** menu at the top of the window or the **Management** icon.
2. Point to **Maintenance**, then select **Authorization Groups...**



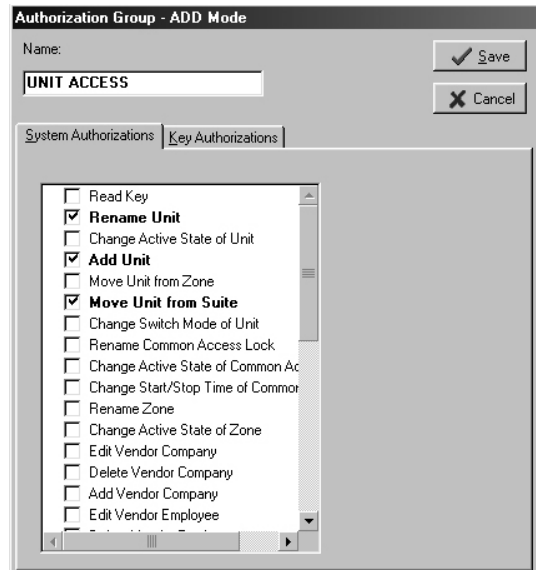
3. At the Authorization Groups PC dialog box, there will be no authorization groups listed in the box. To create new authorization groups, click **Add** on the right hand side of the PC dialog box to display the Authorization Group – ADD Mode PC dialog box.



Section 4: Management Functions

Creating Authorization Groups (continued)

4. Create and type a name for it in the **Name** field at the top of the PC dialog box. It is recommended that the name be something that is easily identifiable, such as Maintenance or Work Order Access. We've added a Unit Access authorization group as an example.
5. Below the **Name** field are two tabs – **System Authorizations** and **Key Authorizations** – each with a list of options from which to choose. A list of **System Authorization** options with short definitions follows. To select options, simply click in the small box next to the option so a check mark appears in it.



System Authorizations

Read Key – Allows the user to use the electronic key encoder to read a key

Rename Unit – Allows the user to go into the site design section and change the names of units

Change Active State of Unit – Allows the user to go into the site design section and edit the active state of a unit

Add Unit – Allows the user to go into the site design section and add additional units to the system.

Move Unit From Zone – Allows the user to go into the site design section and change a unit's zone assignment

Move Unit From Suite – Allows the user to go into the site design section and change a unit's suite assignment

Change Switch Mode of Unit – Allows the user to go into the site design section and change a unit's switch mode. Not applicable at this time

Rename Common Access Lock – Allows the user to go into the site design section and change the names of common access locks

Change Active State of Common Access – Allows the user to go into the site design section and edit the active state of a common access lock

Change Start/Stop Time of Common Access – Allows the user to edit the start and stop times of a common access lock

Change Auto Open of Common Access – Allows the user to change the time a common access lock will automatically open

Section 4: Management Functions

Creating Authorization Groups (continued)

Rename Zone – Allows the user to go into the site design section and rename a zone

Change Active State of Zone – Allows the user to go into the site design section and edit the active state of a zone

Edit Vendor Company – Allows the user to go into the maintenance section and edit information about a vendor company

Delete Vendor Company – Allows the user to go into the maintenance section and delete a vendor company from the SAM RF System

Add Vendor Company – Allows the user to go into the maintenance section and add a vendor company to the SAM RF System

Edit Vendor Employee – Allows the user to go into the maintenance section and edit information about a vendor employee

Delete Vendor Employee – Allows the user to go into the maintenance section and delete a vendor employee from the SAM RF System

Add Vendor Employee – Allows the user to go into the maintenance section and add a vendor employee to the SAM RF System

Edit Resident – Allows the user to go into the maintenance section and edit information about a resident

Delete Resident – Allows the user to go into the maintenance section and delete a resident from the SAM RF System

Add Resident – Allows the user to go into the maintenance section and add a resident to the SAM RF System

Edit Staff – Allows the user to go into the maintenance section and edit information about a staff member

Delete Staff – Allows the user to go into the maintenance section and delete a staff member from the SAM RF System

Add Staff – Allows the user to go into the maintenance section and add a staff member to the SAM RF System

Utility Device Update Clock – Allows the user to reset the date and time in a lock(s)

Utility Device Update Common Access – Allows the user to edit information in common access lock(s)

Utility Device Download Audit – Allows the user to prepare the utility device to go to the lock to retrieve its audit trail information

Utility Device Get Lock Info – Allows the user to prepare the utility device to retrieve information from a lock(s) about its identity, current date and time and current battery voltage information

Utility Device Read Lock Info – Allows the user to display or print information that has been retrieved after getting lock info (see above)

Section 4: Management Functions

Creating Authorization Groups (continued)

Utility Device Upload Audit – Allows the user to upload lock audit trail information from the utility device into the PC for display or printing

Utility Device Battery Backup – Allows the user to access a lock with a dead battery

Edit Property Settings – Allows the user to go into the site design section and edit information regarding default settings and more

Edit Work Order – Allows the user to go into the work order section and edit a work order

Delete Work Order – Allows the user to go into the work order section and delete a work order

Add Work Order – Allows the user to go into the work order section and add a work order

Rename Suite – Allows the user to go into the site design section and change the names of suites

Change Active State of Suite – Allows the user to go into the site design section and edit the active state of a suite lock

Add Suite – Allows the user to go into the site design section and add additional suites to the system

Move Suite From Zone – Allows the user to go into the site design section and change a suite's zone assignment in the SAM RF System

Change Switch Mode of Suite – Allows the user to go into the site design section and change a suite's switch mode. Not applicable at this time

Edit Area – Allows the user to go into the Work Order Property Areas and edit information about locations in the SAM RF System

Delete Area – Allows the user to go into the Work Order Property Areas to delete locations from the SAM RF System

Add Area – Allows the user to go into the Work Order Property Areas and add additional locations to the SAM RF System

View Reports – Allows the user to view reports on the PC

Program Unit Locks – Allows the user to use the utility device to program unit locks

Program Common Access Locks - Allows the user to use the utility device to program common access locks

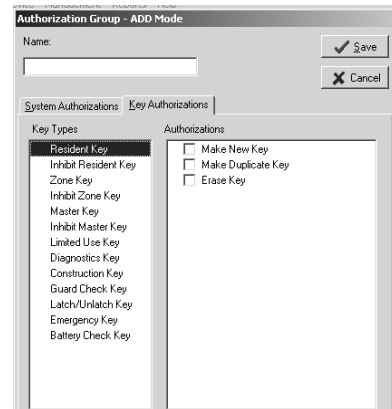
Program Suite Locks - Allows the user to use the utility device to program suite locks

Section 4: Management Functions

Creating Authorization Groups (continued)

6. Under the Key Authorizations tab, every key that can be created is listed under Key Types and the transactions that can be performed are listed under Authorizations.

To select any or all of these options, click on the name of the specific key type in the left-hand column and then click in the small box next to the authorization so a check mark appears in it in the right-hand column. Repeat for each key type.



Key Types

Resident Key – A Resident key will be issued to the resident. This key will allow them to gain access into their individual unit, as well as any associated suite and common access locks.

Inhibit Resident Key – An Inhibit Resident key is used to cancel a resident key out of locks if a key was lost or stolen.

Zone Key – Zone keys will open specific groups of unit locks, including all the units in a building or all the units on a floor, as designated in the site design process. A Zone key will be issued to employees who need access to those units.

Inhibit Zone Key – An Inhibit Zone key is used to cancel a Zone key out of locks if a key was lost or stolen.

Master Key – A Master key will open every lock on the property. These keys should be issued to employees that need access to all units, suites and common access areas.

Inhibit Master Key – An Inhibit Master key is used to cancel a Master key out of locks if a key was lost or stolen.

Limited Use Key – A Limited Use key is issue to vendors who need access to specified unit lock(s). It will work for a limited period of time on a specified date.

Diagnostics Key - The Diagnostics key is designed to help analyze and reveal why a key will not gain entry.

Construction Key – Construction keys allow you and you staff to gain access into locks that have just been installed and have not yet been programmed using the utility device.

Guard Check Key – The Guard Check key allows your staff or security to register their patrol throughout your property at common access locks.

Latch/Unlatch Keys - The Latch/Unlatch key allows a common access lock to be unlatched and latched.

Section 4: Management Functions

Creating Authorization Groups (continued)

Emergency Key – An Emergency key will open every lock on the property including units, suites and common access areas. These keys should be held by the property management and be available for the fire department.

Battery Check Key - The Battery Check key is a non-opening key that is designed to check the battery voltage in the lock

For each Key Type, you can authorize users to perform three tasks:

- Make New Key
- Make Duplicate Key
- Erase Key

Note: If one of these three options appears dark, that option is not available for that particular key.

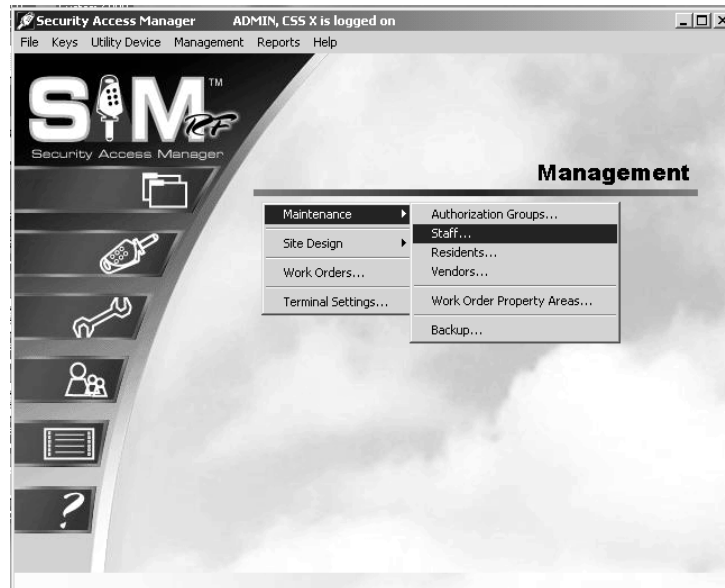
7. When you have finished assigning system authorizations and key authorizations, click **Save** at the Authorization Group-Add Mode PC Dialog Box. Once you have setup your authorization groups, your next task is to add system users.

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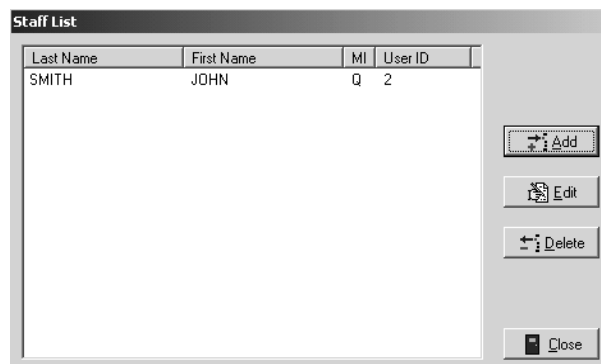
4.4 Adding SAM RF System Users

System users are loosely defined as the people who will be using the SAM RF System. However, it is recommended that you register all staff members, whether they will be directly using the SAM RF System or not. This will make performing such functions as creating staff keys or assigning work orders an easier process. You can register system users now or at any time in the future.

1. Click on the **Management** menu at the top of the window or the **Management** icon.
2. Point to **Maintenance**, then select **Staff...**



3. Within the Staff List PC dialog box, click **Add** to display the Staff Form – ADD Mode PC dialog box.



Section 4: Management Functions

Adding SAM RF System Users (continued)

4. Enter the person's name. At the top of the form are fields for inputting each person's last, first and middle name/initial (optional).
5. Enter information about his/her position. In the Position field, type in a word or two that identifies this person's position or responsibility at your site, such as Manager or Maintenance.
6. Enter the System Authorization Information. Create a user name and password for this person.

Note: A user name cannot be more than 15 characters and a password cannot be more than 10 characters. Keep in mind that this information will become the user ID and password that each user will type in when logging on to the SAM RF System. Be sure it is something they can easily remember. For this reason, it is recommended that you employ an easily identifiable system for assigning user names, such as the person's first initial and last name. For example, Jane Doe's user name would be JDOE.

As the system administrator, you will have access to user name and password information in the future. This will be useful in cases where you need to add or remove users from the system or change passwords.

7. **Assign the authority level.** It is highly recommended that you not give administrator privileges to any other users of the SAM RF System. In other words, *leave the Administrator box unchecked.* Below the Administrator box is a larger box that that should now contain the names of authorization groups that you have set up.
8. To assign the authorization group, click in the box next to the group name so that a check mark appears in the box.

Note: Authorization groups were created in the previous section as a shortcut for assigning authorizations to system users.

9. Click **Save** to return to the Staff List PC dialog box. Click **Add** to add the next user and follow the process once again. When you have registered all staff members in the SAM RF System, click **Close** to return to the SAM RF System main menu screen.

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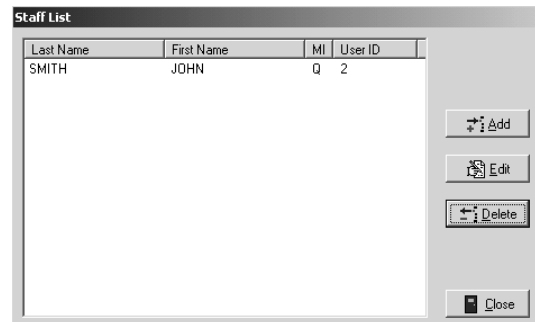
4.5 Adding New Staff to the SAM RF System

You can register additional system users now or any time in the future, such as when a new staff member joins your team.

1. Click on the **Management** menu at the top of the window or the **Management** icon.
2. Point to **Maintenance**, then select **Staff...**



3. At the Staff List PC dialog box, click **Add** to display the Staff Form – ADD Mode PC dialog box.



Section 4: Management Functions

Adding New Staff to the SAM RF System (continued)

4. Complete the Staff Form.

Enter the person's name. At the top of the form are fields for inputting each person's last, first and middle name/initial (optional).

Enter information about his/her position. In the **Position** field, type in a word or two that identifies this person's position or responsibility at your site, such as Manager or Maintenance.

Enter the System Authorization Information. Create a user name and password for this person.

The screenshot shows a dialog box titled "Staff Form - ADD Mode". It contains the following elements:

- Three input fields for "Last Name", "First Name", and "Middle Name".
- A "Position" input field.
- A "System Authorization Information" section containing:
 - "User Name" and "Password" input fields.
 - An unchecked checkbox labeled "Administrator".
 - A larger box containing two unchecked checkboxes: "LEASING AGENT" and "UNIT ACCESS".
- A "User ID" field with a dropdown arrow and the text "<New User>".
- "Save" and "Cancel" buttons at the bottom right.

Note: A user name cannot be more than 15 characters and a password cannot be more than 10 characters. Keep in mind that this information will become the user ID and password that each user will type in when logging on to the SAM RF System. Be sure it is something they can easily remember. For this reason, it is recommended that you employ an easily identifiable system for assigning user names, such as the person's first initial and last name. For example, John Smith's user name would be "jsmith."

As the system administrator, you will have access to user name and password information in the future. This will be useful in cases where you need to add or remove users from the system or change passwords.

Assign the authority level. It is highly recommended that you not give administrator privileges to any other users of the SAM RF System. In other words, *leave the Administrator box unchecked.*

Below the **Administrator** box is a larger box that contains the names of authorization groups that you have set up. An authorization group is essentially a label that represents access to a specific (and limited) list of SAM RF System functions – such as assigning work orders or creating new keys – rather than allowing access to the entire system.

Once you have set up authorization groups in the SAM RF System, you can go back and edit the authority level of certain staff members by selecting one of the authorization groups that will then appear in the **System Authorization Information** box. See Section 4.3 "Creating Authorization Groups."

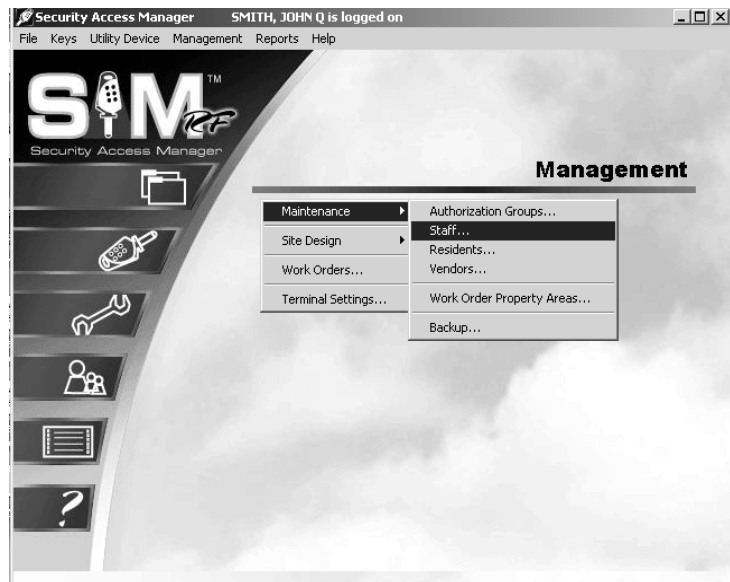
5. Click **Save** to return to the Staff List PC dialog box. Click **Add** to add the next user and follow the process once again. When you have registered all staff members in the SAM RF System, click **Close** to return to the SAM RF System main menu screen.

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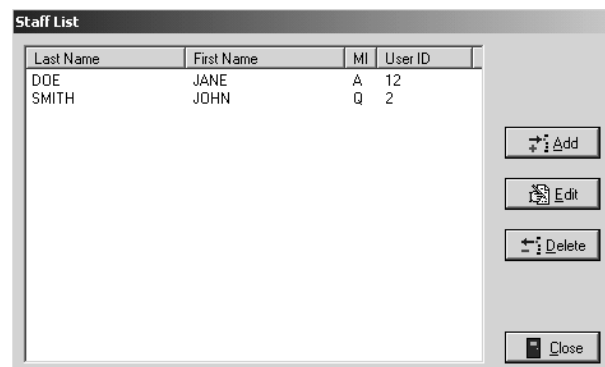
4.6 Preventing Staff Access

When staff members leave your employment, it is highly recommended that you delete them from the SAM RF System and change any existing passwords for current staff. This will prevent previous employees from accessing the information contained in the system or possibly creating new keys.

1. Click on the **Management** menu at the top of the window or the **Management** icon.
2. Point to **Maintenance**, then select **Staff...**



3. Within the Staff List PC dialog box, click on the person's name you wish to delete, and click **Delete**.
4. A Delete Confirmation box will appear, asking if you are sure about deleting that person.
5. Click **Yes** to confirm deletion and then click **Close** at the Staff List PC dialog box to return to the SAM RF System main menu screen.



IMPORTANT: In the event that an employee does not return his or her key, see the Creating Inhibit Keys section to inhibit staff access. If former staff members do not relinquish their keys, they can continue to gain access to common access areas or to your residents' units. Merely deleting staff members from the SAM RF System is not enough to ensure the security of your property. It is also very important that you collect whatever keys they might have in their possession.

To ensure the security of your property whether or not you have collected any keys in former staff members' possession, you should reprogram the locks where these staff members previously had access. To reprogram these locks, you need an Inhibit key.

An Inhibit key is programmed to tell a lock to ignore keys with specific key IDs. If you assign key IDs carefully in the key creation process, the inhibiting process will be simple.

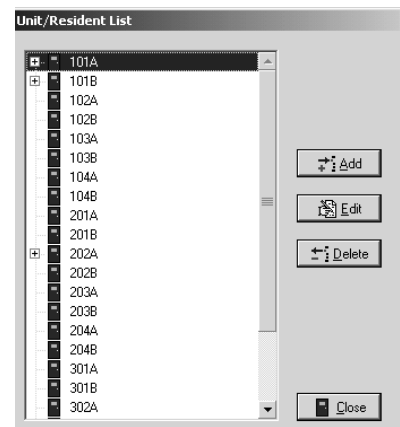
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4.7 Adding Residents to the SAM RF System

1. Click on the **Management** menu at the top of the window or the **Management** icon.
2. Point to **Maintenance**, then select **Residents...**



3. At the Unit/Resident List PC dialog box, all units within your property will appear in the Unit/Resident List. Click on the unit where the resident is moving, then click **Add**.



4. At the Resident Form – ADD Mode PC dialog box, enter as much information as you can about the resident, including his or her name, work phone and home phone numbers. There is also space to record some notes about the resident.

Note: If the Limited Access box is checked here at this Add Mode screen, when making keys for this resident, any defaults for common access areas previously set will be disabled. An example of when to check the limited access box would be for children residing in the unit who may not have access to the pool or health club. You can still manually select common access areas you may want the resident to have access to when making the key.

Section 4: Management Functions

Adding Residents to the SAM RF System (continued)

5. When you have entered as much information as you wish about the resident, click **Save**. This will return you to the Unit/Resident List PC dialog box.
6. If more than one resident will be moving into the same unit, click on that specific unit once again at the Unit/Resident List PC dialog box and enter information about the next person moving in. Continue registering additional residents moving into that same unit – or into a different unit – following the same process. Click **Close** at the Unit/Resident List PC dialog box to return to the SAM RF System main menu screen.

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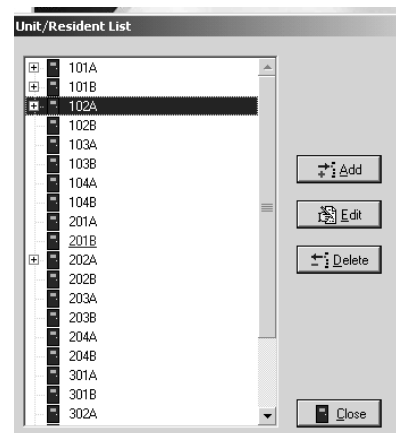
4.8 Deleting Residents

When residents move out of your property, it is highly recommended that you delete them from the SAM RF System.

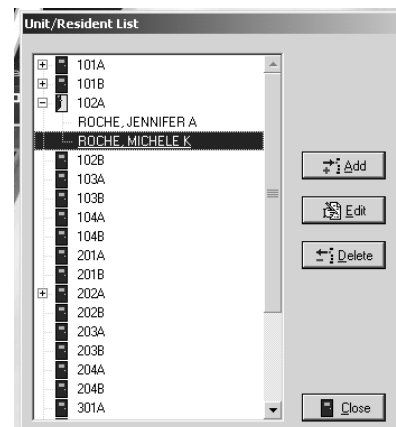
1. Click on the **Management** menu at the top of the window or the **Management** icon.
2. Point to **Maintenance**, then select **Residents...**



3. At the Unit/Resident List PC Dialog Box, click the **Plus Sign (+)** next to the unit number in which the resident resides.



4. Click on the person's name you wish to delete, and then click **Delete**.



Section 4: Management Functions

Deleting Residents (continued)

5. A Delete Confirmation PC dialog box will appear asking if you are sure about deleting that person. Click **Yes** to confirm, and then click **Close** at the Unit/Resident List PC dialog box to return to the SAM RF System main menu screen.
6. Repeat the process until all residents vacating a unit are removed from the SAM RF System.
7. Merely deleting residents from the SAM RF System is not enough to ensure the security of your property. If former residents do not relinquish their keys, they can continue to gain access to common access areas and to their former unit(s). It is also very important that you collect whatever keys former residents might have in their possession.

To ensure the security of your property AND the security of the new residents of that unit, it is important to make sure that any keys in a former resident's possession will no longer provide access.

To prevent access, you must reprogram the locks that the residents previously had access to. To reprogram these locks, you need to create an Inhibit Resident key. If a new resident will be moving in immediately you do not need to create an Inhibit Resident key. When the new resident key is made and used in the lock(s) it will invalidate the previous resident(s) keys.

Note: If you have new residents to register, follow the process "Adding Residents to the SAM RF System" described earlier in this section.

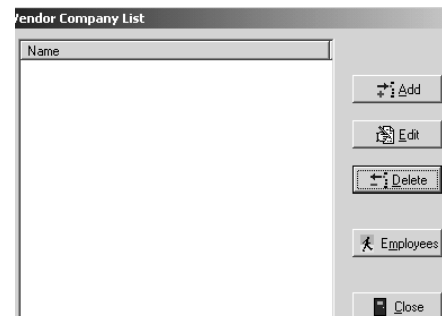
Section 4: Management Functions

4.9 Adding Vendors to the SAM RF System

1. Click on the **Management** menu at the top of the window or the **Management** icon.
2. Point to **Maintenance**, then select **Vendors...**



3. Click **Add** at the Vendor Company List PC dialog box.



4. Input as much information as you wish about the vendor company in the fields provided including:
 - The vendor's company name
 - The vendor type, such as Plumber, Painter, etc.
 - Address and phone number information
5. Click **Save** to return to the Vendor Company List PC dialog box. If you would like to add another vendor to the system right away, click **New** and follow the process once again.

Section 4: Management Functions

Adding Vendors to the SAM RF System (continued)

6. To register employees of a specific vendor company, be sure you are in the Vendor Company List PC dialog box. Click on the vendor for which you will be registering employees and click **Employees**. This will display the Vendor Employee List PC dialog box.
7. To register a new vendor employee, click **Add**. This will display the Vendor Employee Form – ADD Mode PC dialog box.
8. Enter as much information as you can about the employee, including his or her name, position and the phone number that he or she uses most often. When you have entered as much information as you wish, click **Save**. This will return you once again to the Vendor Employee List PC dialog box.
9. Continue registering additional vendor employees by following the same process, or click **Close** at the Vendor Employee List PC dialog box and again at the Vendor Company List PC dialog box.

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4.10 Creating and Viewing Work Orders

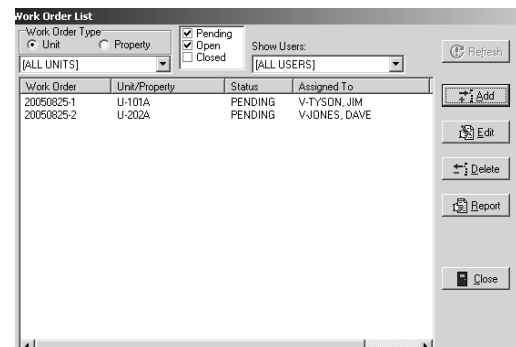
Not only does the SAM RF System provide enhanced security for your property, it also enhances the level of service you can provide to your residents, specifically through the use of computer-generated work orders for property maintenance.

The SAM RF System allows you to create new work orders, assign them to specific staff members or vendors, and track and edit them as they are processed. Pending and open work orders are interrelated with limited use keys. They are easily identified as they appear in bold print when making limited use keys.

1. To view existing work orders, click on the **Management** menu at the top of the window or the **Management** icon.
2. Click on **Work Orders**.



3. The Work Order List PC dialog box provides a number of viewing options for existing work orders. For instance, under **Work Order Type**, you can choose the **Unit** option to view all work orders for all units or just for a single unit. Alternatively, you can choose the **Property** option, which will list any work orders for common access areas around your property.
4. Next, you can choose to review only pending, open or closed work orders – or any combination of the three. You can also choose to review work orders based on the staff member to whom they were assigned by selecting a specific user.



Note: Whenever you make changes to the viewing options, it is important to click the **Refresh** button at the top right corner of the PC dialog box to update the screen.

Section 4: Management Functions

Creating and Viewing Work Orders (continued)

- To create a new work order, click **Add** to display the Work Order – ADD Mode PC dialog box.

The SAM RF System automatically assigns a work order number for later identification. In addition, the **Date/Time Requested** fields will automatically fill in with the current date and time.

- The first step in creating a new work order is to select the **Work Order Type** by clicking the small circle next to either **Unit** or **Property**. If the work order is for a unit, you will then select the unit number using the pull-down box below **Unit**. Property refers to other areas within the property in need of maintenance attention such as the pool or health club. If property is selected, you will then select the area by using the pull down box below **Property**.

- A staff member or a resident can make service requests. By default, the name of the person currently logged on to the SAM RF System will appear in the box “Requested By.” To change this information, click the button to the right of the box. (This button has a hand pointing to the right.) This will display the Select User Type PC dialog box.

If a resident requested the service, click the open circle next to **Resident** and click **OK**. This will take you to the **Resident List** PC dialog box.

- Any residents registered into the system for that particular unit will be listed in this box. Click on the name of the person who reported the problem. Click **Select**.

Note: If the resident who requested the service is not in the resident list, see Section 4.7 “Adding Residents to the SAM RF System”.

Last Name	First Name	MI	User ID	Limited?
KEATING	MARYANN	J	6	
CDX	RAYMOND	T	7	
PICKNER	THERESA	A	8	

- If a staff member requested the service, click the open circle next to **Staff** and click **OK**.

- At the Staff List PC dialog box, click on the name of the staff member who reported the problem and click **Select**. Back at the Work Order List PC dialog box, the name of the person you selected will appear in the box under the words, “Requested By.”

Note: If the staff member who requested the service is not in the staff list, see Section 4.5 “Adding New Staff to the SAM RF System”.

Section 4: Management Functions

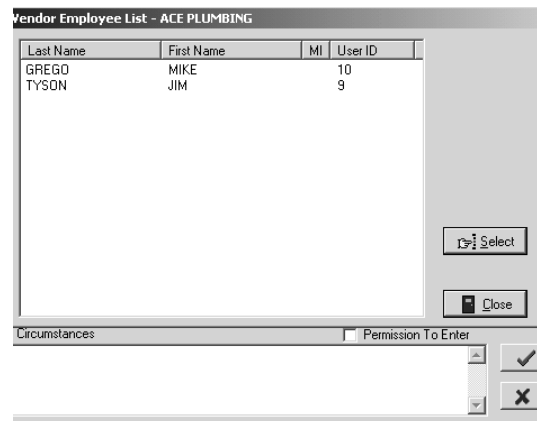
Creating and Viewing Work Orders (continued)

11. Work orders can be assigned to either a staff member or a vendor. By default, the name of the person currently logged on to the SAM RF System will appear in the box under the words, "Assigned To." To assign the work order to someone else, click the button to the right of the box. (This button has a hand pointing to the right.) This will display the Select User Type PC dialog box.



The "Select User Type" dialog box contains three radio button options: STAFF, RESIDENT, and VENDOR. At the bottom, there are two buttons: "OK" (with a checkmark icon) and "Cancel" (with an X icon).

12. Determine whether the work order will be assigned to a staff member or a vendor.
- If the work order is being assigned to a staff member, click the open circle next to **Staff** and click **OK**. This will take you to the Staff List PC dialog box. Click on the name of the staff member who will be assigned the work order and click **Select**.
 - If the work order is being assigned to a vendor, click the open circle next to **Vendor** and click **OK**. This will take you to the Vendor Company List PC dialog box. Any vendors you previously registered into the system will be listed in this box. Click on the name of the vendor to whom you wish to assign this work order and click **Select**.
 - If you would like to assign this work order to a specific vendor employee, click on the name of the vendor and then click **Employees**. This will display the Vendor Employee List PC dialog box.



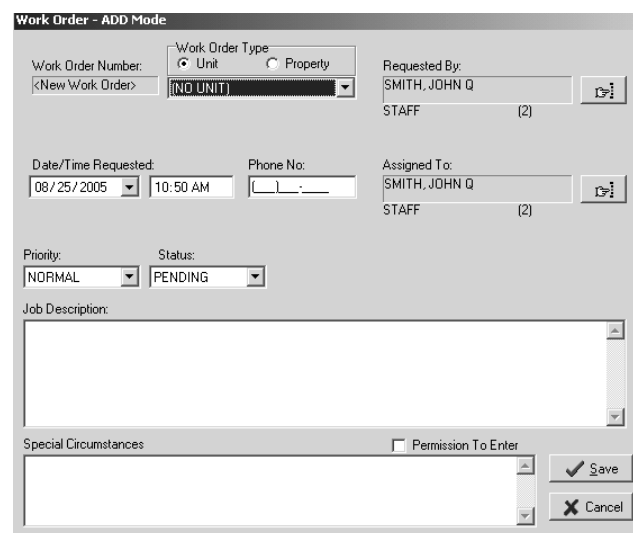
The "Vendor Employee List - ACE PLUMBING" dialog box displays a table with the following data:

Last Name	First Name	MI	User ID
GREGO	MIKE		10
TYSON	JIM		9

At the bottom right of the table area, there are two buttons: "Select" (with a hand icon) and "Close". Below the table area, there are two checkboxes: "Circumstances" and "Permission To Enter". At the very bottom right, there are two buttons: "OK" (with a checkmark icon) and "Cancel" (with an X icon).

Note: If the vendor company or vendor employee you wish to assign the work order to is not in the vendor company list, see Section 4.9 "Adding Vendors to the SAM RF System".

13. Back at the Work Order – ADD Mode PC dialog box, the name of the person or vendor company you selected will appear in the box under the words, "Assigned To." If known, type that person's phone number into the **Phone No.** field.
14. If you wish to assign a date to this work order other than the current date/time, you can do so in this PC dialog box.
15. The next task is to select the **Priority** for this work order – **Low, Normal** or **High** – with **Normal** being the default. And because this is a new work order, you can accept the default **Status** of the work order as **Pending**.



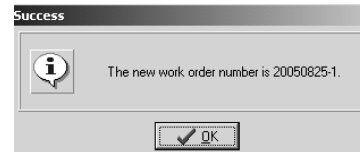
The "Work Order - ADD Mode" dialog box contains the following fields and controls:

- Work Order Number:** A dropdown menu with "<New Work Order>" and "[NO UNIT]".
- Work Order Type:** Radio buttons for "Unit" (selected) and "Property".
- Requested By:** A text field containing "SMITH, JOHN Q" and a hand icon button.
- Assigned To:** A text field containing "SMITH, JOHN Q" and a hand icon button.
- Date/Time Requested:** Two dropdown menus for date and time, showing "08/25/2005" and "10:50 AM".
- Phone No.:** A text field.
- Priority:** A dropdown menu showing "NORMAL".
- Status:** A dropdown menu showing "PENDING".
- Job Description:** A large text area.
- Special Circumstances:** A text area.
- At the bottom right, there are two checkboxes: "Circumstances" and "Permission To Enter".
- At the very bottom right, there are two buttons: "Save" (with a checkmark icon) and "Cancel" (with an X icon).

Section 4: Management Functions

Creating and Viewing Work Orders (continued)

16. The Work Order – ADD Mode PC dialog box has additional fields for recording a full description of the service problem as well as any additional information, such as whether or not permission to enter has been granted, if there is a pet on the premises, etc.
17. When you are satisfied with all the settings for this work order, click **Save**.
18. The Success PC dialog box will appear and show you the newly assigned work order number. Click **OK**.



Section 4: Management Functions

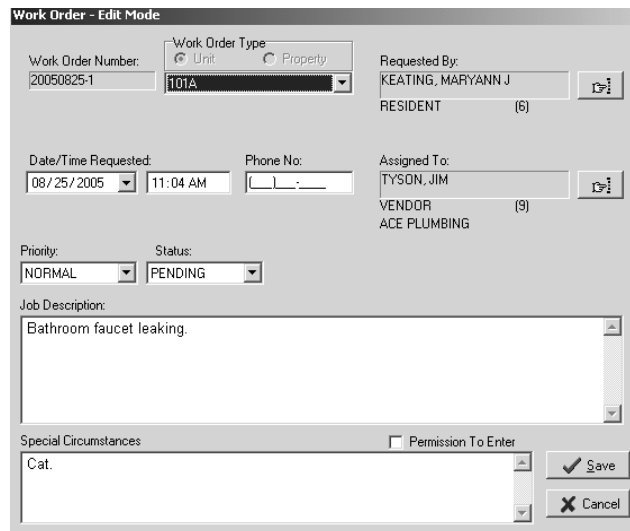
4.11 Editing Existing Work Orders

To keep accurate records, it may be necessary to make changes to existing work orders. For instance, if a work order is being reassigned to a different staff member or to a vendor, or when a work order's status goes from open to closed, that information should be recorded.

1. To edit an existing work order, click on the **Management** menu at the top of the window or the **Management** icon.
2. Click on **Work Orders...**



3. At the Work Order List PC dialog box, click on the work order you wish to update and then click **Edit**. This will display the Work Order – Edit Mode PC dialog box.



Section 4: Management Functions

Editing Existing Work Orders (continued)

4. Either a staff member or a resident can make service requests. To change this information, click the button to the right of the box. (This button has a hand pointing to the right.) This will display the Select User Type PC dialog box.

To change this information to a resident, click the open circle next to **Resident** and click **OK**. This will take you to the Resident List PC dialog box. Any residents you registered into the system for that particular unit will be listed in this box. Click on the name of the person who reported the problem and click **Select**.

Note: If the resident who reported the problem is not in the resident list, see Section 4.7 “Adding Residents to the SAM RF System” for instructions on adding that person to the list.

To change this information to a staff member, click the open circle next to **Staff** and click **OK**. This will take you to the Staff List PC dialog box. Click on the name of the staff member who requested the service and click **Select**.

Note: If the staff member who requested the service is not in the staff list, go to Section 4.5 “Adding New Staff to the SAM RF System” for instructions on adding that person to the list.

Back at the Work Order List PC dialog box, the name of the person you selected will appear in the box under the words, “Requested By.”

5. Work orders can be reassigned to either a staff member or a vendor. To change the work order assignment, click the button to the right of the box under the words, “Assigned To.” (This button has a hand pointing to the right.) This will display the Select User Type PC dialog box.

6.

- If the work order is being reassigned to a staff member, click the open circle next to **Staff** and click **OK**. This will take you to the Staff List PC dialog box. Click on the name of the staff member who reported the problem and click **Select**.
- If the work order is being reassigned to a vendor, click the open circle next to **Vendor** and click **OK**. This will take you to the Vendor Company List PC dialog box. Any vendors you previously registered into the system will be listed in this box. Click on the name of the vendor you wish to assign this work order to and click **Select**.
- If you would like to assign this work order to a specific vendor employee, click on the name of the vendor company and then click **Employees**. This will display the Vendor Employee List PC dialog box.

Note: If the vendor to whom you wish to assign the work order is not in the vendor company list, go to Section 4.9 “Adding Vendors to the SAM RF System” for instructions on adding that vendor to the list.

7. Back at the Work Order – Edit Mode PC dialog box the name of the person or vendor company you selected will appear in the box under the words, “Assigned To.” If known, type that person’s phone number into the **Phone No.** field.

8. If you wish to assign this work order a new date/time, you can do so in this dialog box.

Section 4: Management Functions

Editing Existing Work Orders (continued)

9. Other changes that can be made in the Work Order – Edit Mode PC dialog box are: changing the **Priority (Low, Normal or High)**, its **Status (Pending, Open or Closed)** and adding more information to the **Job Description** and **Special Circumstances** fields.
10. When you are satisfied with all the changes to this work order, click **Save**.

Although you have created and assigned a work order using the SAM RF System, it does not necessarily mean the person to whom the work order is assigned is aware of it. Somehow, that person needs to be informed that the work order exists and action needs to be taken.

There are essentially two ways to do this: (1) Print the work order out and hand it to the staff member it is assigned to (call/fax it to the vendor); (2) Provide access to the SAM RF System work orders functions for responsible staff members to retrieve and edit work orders themselves.

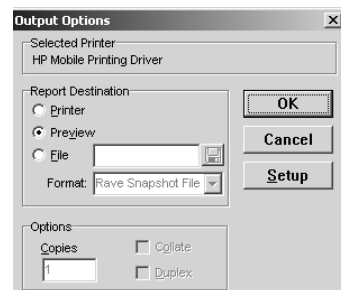
Section 4: Management Functions

4.12 Printing Work Orders

1. To print an existing work order, click on the **Management** menu at the top of the window or the **Management** icon.
2. Click on **Work Orders...**



3. At the Work Orders List PC dialog box, click on the work order you wish to print and then click **Report**. This will display the **Output Options** PC dialog box.
4. At the top of the Output Options PC dialog box, your default printer will be listed. Below that will be a **Report Destination** box along with three options:
 - **Printer:** To print the report out as hard copy
 - **Preview:** To view the report on screen
 - **File:** To save the report to your hard drive or to disk.



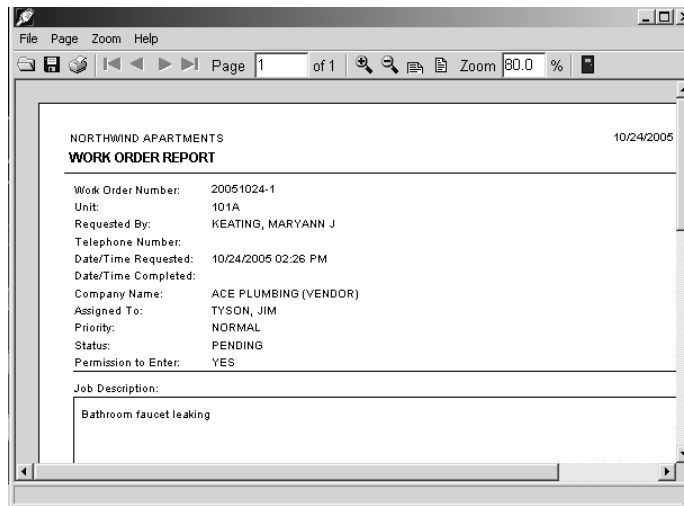
Note: Although you have the option to print or to save the report to file, it is highly recommended that you first preview the report on screen. You will once again have the option to print or save from the preview screen. Also, unless you specifically delete a work order, it will remain in the SAM RF System indefinitely.

Section 4: Management Functions

4.13 Previewing the Work Order Report

To preview the work order report on screen, confirm that the **Preview** option is selected and click **OK**. Within a few moments, the Work Order Report Preview PC dialog box will open up in a new window that you can maximize or minimize like any Windows-based window.

If there are several pages to the work order report, the preview screen provides tools for going from one page to another using either the buttons at the top of the box or the **Page** pull-down menu. There are also options for zooming in or zooming out of the report using either the **Zoom** box or the **Zoom** pull-down menu.



To print the work order report, go to the **File** pull-down menu and select **Print**. This will open up the printing PC dialog box for your default printer. Simply select the various options and click **OK** to commence printing.

To exit the preview PC dialog box, go to the **File** menu and click **Exit**. This will return you to the Work Order List PC dialog box. Click **Close** to return to the SAM RF System main menu screen.

Note: A permanent history of all work orders remains stored for future reference.

Section 4: Management Functions

4.14 Backing Up Data Files

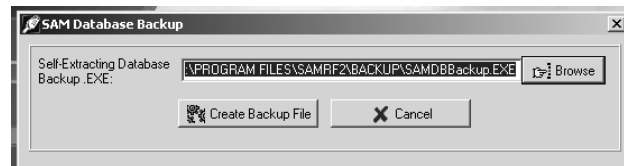
As with most computer software programs, regularly backing up the information in the SAM RF System is highly recommended. Should something unforeseen happen to your computer, a backup file of the data would prevent inputting information all over again.

It is recommended that you backup the data in the SAM RF System at least once each week. Fortunately, the SAM RF System has an easy-to-use backup function built in.

1. To backup your SAM RF System data files, click on the **Management** menu at the top of the window or the **Management** icon.
2. Point to **Maintenance**, then select **Back up...**



3. At the Database Backup PC dialog box, the default backup file name and location (directory) will already be listed in the box next to the words "Self-Extracting Database Backup.EXE".



In other words, the backup file will be named *SAMDBBackup.EXE* and will appear in your C:\ directory (normally your hard drive) in the Program Files subdirectory. Within the SAM RF program folder, a subfolder named "Backup" will be created with the backup file housed within it.

You have the option of changing the directory if you wish. If the backup data will be saved to the hard drive, it is recommended that you **DO NOT** use the default directory. However, it is **highly** recommended that you save the backup data OFF your computer – onto a floppy disk, a CD, tape, zip disk, or even another computer.

Note: SAM RF System database files will often exceed the maximum available disk space on a 3.5-inch floppy disk. It is therefore recommended that you find some other media to save this file to, such as a CD, tape, zip disk, or another computer.

4. To save the backup file onto your computer's hard drive, click **Create Backup File**. Within a few moments, the SAM RF System will display an information screen with the following message:

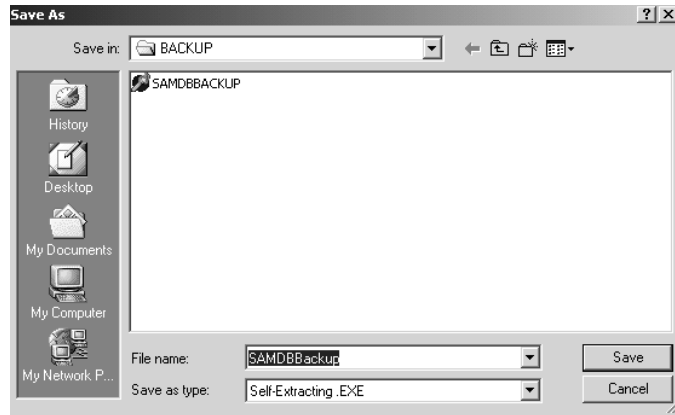
"C:\PROGRAM FILES\SAMRF\BACKUP\SAMDBBackup.EXE has been successfully created."

5. Click **OK** on the information screen and then click **Cancel** at the Database Backup PC dialog box to return to the SAM RF System main menu.

Section 4: Management Functions

4.15 Saving the Backup File Off Your Computer

1. To backup your SAM RF System data files off your computer, click on the **Management** menu at the top of the window or the **Management** icon.
2. Point to **Maintenance**, then select **Back Up**.
3. At the Maintenance Backup PC dialog box, the default backup file name and location will already be listed in the box next to the words **Self-Extracting Database Backup.EXE**.
4. To change this default information, click the **Browse** button next to the box. This will display a typical Windows Save As PC dialog box.
5. Click the down arrow (▼) to access a different directory (for a CD drive, tape drive or zip disk drive). Choose the appropriate location for saving your backup file and click **Save**.



Note: While most computers use the C:\ directory as the hard drive, other directories for the CD drive, tape or zip drive will not necessarily be the same for all computers.

6. When the file has been saved, you will return to the Maintenance Backup PC dialog box. The new location for the backup file (along with the name of the backup file) will now appear in the box next to the words "Self-Extracting Database Backup.EXE." Click **Create Backup File** to proceed.

Within a few moments, the SAM RF System will display an information screen with the following message:

X:\PROGRAM FILES\SAMRF\BACKUP\SAMDBBackup.EXE has been successfully created.

Note: X indicates the letter of the directory you have chosen for the backup file.

7. Click **OK** on the information screen, and then click **Cancel** at the Maintenance Backup PC dialog box to return to the SAM RF System main menu screen.