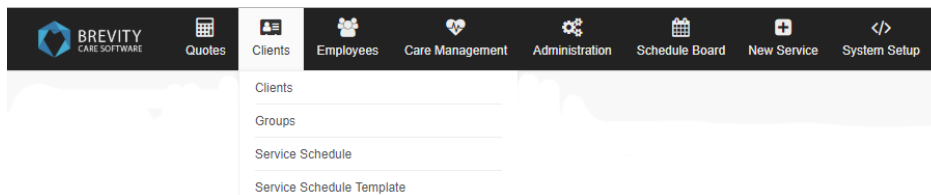


Getting Around

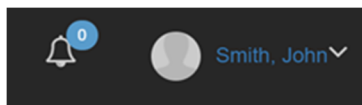
This guide will help you get around the Brevity system as well as teach you how to use the various screens and form elements to manage records within brevity.

System Navigation Bar

The system menu allows you to navigate to the various areas within the system. Most of the main menu items contain sub-menu items, which are shown when you hover over the icon on the menu:

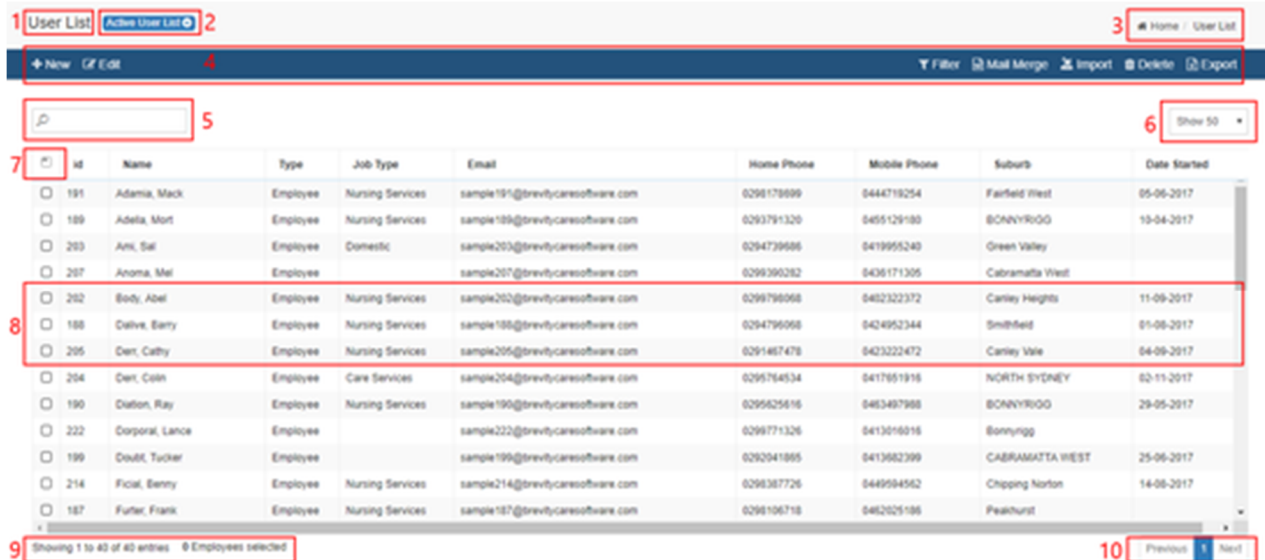


The navigation bar also has a section in the right that show alerts for the logged in user as well as the name of the logged in user, with a sub-menu that a link to logout of the system.



Record List Screens

Displays a list of records for the selected navigation item.



1 User List Active User List 2

3 Home / User List

4 + New Of Edit Filter Mail Merge Import Delete Export

5 Search

6 Show 50

| <input type="checkbox"/> | ID | Name | Type | Job Type | Email | Home Phone | Mobile Phone | Suburb | Date Started |
|--------------------------|-----|-----------------|----------|------------------|-----------------------------------|------------|--------------|-----------------|--------------|
| <input type="checkbox"/> | 191 | Adama, Mack | Employee | Nursing Services | sample191@brevitycaresoftware.com | 0298178899 | 0444718254 | Fairfield West | 05-06-2017 |
| <input type="checkbox"/> | 189 | Adela, Mort | Employee | Nursing Services | sample189@brevitycaresoftware.com | 0293791320 | 0455129180 | BOONRYROO | 10-04-2017 |
| <input type="checkbox"/> | 203 | Ami, Sal | Employee | Domestic | sample203@brevitycaresoftware.com | 0294739686 | 0419955240 | Green Valley | |
| <input type="checkbox"/> | 207 | Anoma, Mel | Employee | | sample207@brevitycaresoftware.com | 0299390282 | 0436171305 | Cabramatta West | |
| <input type="checkbox"/> | 202 | Body, Abel | Employee | Nursing Services | sample202@brevitycaresoftware.com | 0299798068 | 0402322372 | Canley Heights | 11-09-2017 |
| <input type="checkbox"/> | 188 | Calve, Barry | Employee | Nursing Services | sample188@brevitycaresoftware.com | 0294796068 | 0424952344 | Smithfield | 01-08-2017 |
| <input type="checkbox"/> | 205 | Carl, Cathy | Employee | Nursing Services | sample205@brevitycaresoftware.com | 0291467478 | 0423222472 | Canley Vale | 04-09-2017 |
| <input type="checkbox"/> | 204 | Carl, Colin | Employee | Care Services | sample204@brevitycaresoftware.com | 0295764534 | 0417651915 | NORTH SYDNEY | 02-11-2017 |
| <input type="checkbox"/> | 190 | Dalton, Ray | Employee | Nursing Services | sample190@brevitycaresoftware.com | 0295625616 | 0463497988 | BOONRYROO | 29-05-2017 |
| <input type="checkbox"/> | 222 | Corporal, Lance | Employee | | sample222@brevitycaresoftware.com | 0299771326 | 0413016016 | Bonnyrigg | |
| <input type="checkbox"/> | 199 | Doubt, Tucker | Employee | | sample199@brevitycaresoftware.com | 0292041895 | 0413682399 | CABRAMATTA WEST | 25-06-2017 |
| <input type="checkbox"/> | 214 | Fical, Benny | Employee | Nursing Services | sample214@brevitycaresoftware.com | 0298387726 | 0449594562 | Chipping Norton | 14-08-2017 |
| <input type="checkbox"/> | 187 | Furter, Frank | Employee | Nursing Services | sample187@brevitycaresoftware.com | 0298106718 | 0482025186 | Peakhurst | |

9 Showing 1 to 42 of 40 entries 0 Employees selected

10 Previous Next

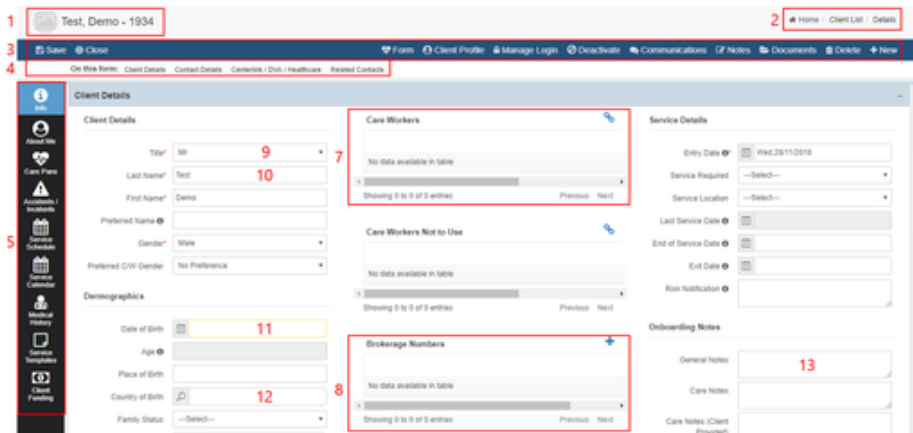
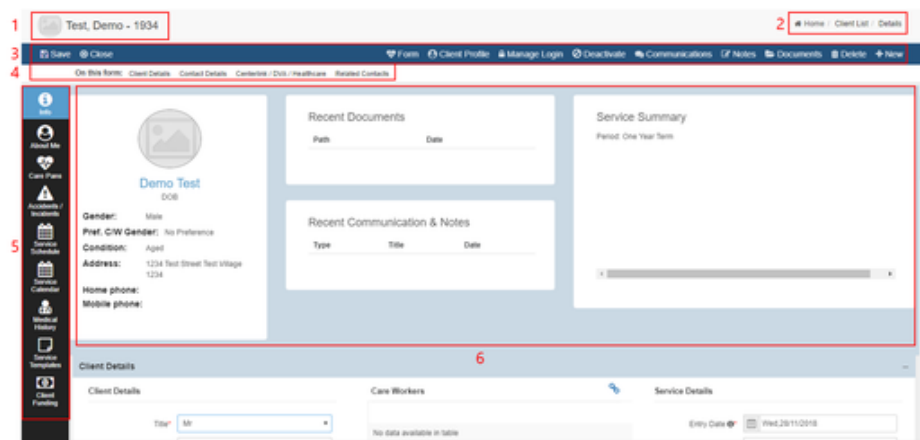
There are several action that can be taken from the list screen:

1. **Page Title:** this is the page/module title.
2. **Page views:** this has different views depending on the status or fields available in the module. You can click this button and a popup appears from where different views can be selected.
3. **Breadcrumbs:** Secondary navigation that indicates your location within application
4. **Page Toolbar:** contains action buttons like add/edit/delete records or other bulk record actions. Some buttons you will see are:
 1. **+ New:** this adds a new record for the screen/module.
 2. **Edit:** select a record in the grid and click the edit button to edit the record. You can also double-click a record in the list to edit it.
 3. **Filter:** this is used to sort the record by clicking on the attribute (eg. Name, Job Type, Email)
 4. **Delete:** deletes selected records.
 5. **Import:** allows import of data from a csv file.
5. **Records filter:** You can search through all the records using this search field, as soon as you start typing, the records are filtered and this filter applies on all the displayed columns.
6. **Paging size:** these are number of records for display that will appear on the grid without paging.
7. **Select all:** ticking this box will select all the records in the grid for use with bulk action like bulk delete, bulk confirm, etc.
8. **Records:** double clicking a record, opens the record in edit mode for changes.
9. **Paging information:** displays total number of records.
10. **Paging:** if there are more number of records that does not fit in the current grid, then page number are displayed and clicking on those, loads up records from that page.

If you want to select multiple records from the table, click on the link for the guide in selecting multiple record ([Selecting Multiple Record from the List](#))

Record Edit Screen (or Record Form)

Allows creation of new records or editing of existing records.

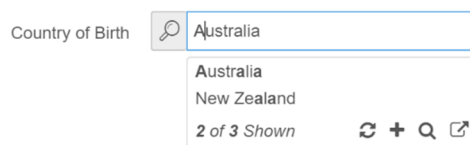


- Record Name:** Display the name of the current record. You can also click the image icon to upload an image for the record. This can be the photo of a client or employee for example.
- Breadcrumbs:** Secondary navigation that indicates your location within application
- Page Toolbar:** contains action buttons like save, close, add/edit/delete records or other bulk record actions. Some buttons you will see are:

1. **Save:** Save the changes made in the account.
2. **Close:** Close the view of the account.
3. **Form:** Allows you to create Care Plans details
4. **Manage Login:** Allow you to manage the login details for the mobile app.
5. **Notes:** Create notes related to the Client.
6. **Documents:** Allows you to upload files related to the customer
4. **Form Quick Links:** allows to just to different section on the form.
5. **Form Tabs:** Allows you to access related information for the record being viewed.
6. **Summary:** Display all the detailed information about the client
7. **Linked Related List:** Allows you to link to multiple records. To link records, click the blue link icon above the list, enter the name of the record you wish to link to, then select the record from the list to link to it
8. **Related List:** Allows you to view and add related records. The difference between this and a linked related list, is that list requires you to complete additional information via a form when adding items to the list
9. **Dropdown List:** Allows selecting of a value from a dropdown list
10. **Textbox:** Single line free text input.
11. **Date field:** Allows selecting date from a calendar.
12. **Lookup field:** Allows linking to a related record. Similar to related lists but only allows linking to a single record.
13. **Textarea:** Allows multi-line free text input.

Using the Lookup control

The lookup control is a special control and allows you to link to other records in Brevity. Clicking into the field will show the value dropdown, to allow you to select a value. You can also easily find records by typing within the field to filter the list - this will match any part of the string within available values. You are also able to click either the main search icon to the left of the input box or the search icon within the dropdown to open the advanced search box.



There are a couple of additional icon options in the bottom right of the dropdown list. There is a plus icon to add a value to the dropdown list and an open record link that will open the selected record in a new window, to allow you to make changes. There is also a refresh icon to refresh the values after you have added or updated records.