

Software Users Guide












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Designed by



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Purpose:

We have designed a standard style for all of our software modules to make the easy for users to quickly navigate any of our modules. Our software modules are designed and developed using Microsoft Access.

1. Introduction

This guide is designed for everyday users of our software modules. You do not need technical or programming experience. By the end, you'll know how to:

1. • Navigate dashboards and menus
2. • Enter and view information using forms
3. • Run and export reports
4. • Use built-in libraries and tools
5. • Move confidently through the software

2. Navigating the Dashboard

The dashboard is your home screen. It's designed to make the database easy to use by giving you buttons that open forms, reports, or tools.

What You'll See on a Dashboard

- Large buttons or tabs
- Categories such as:• Data Entry
- Reports
- Search
- Admin Tools (if you have permission)
- A logo or title at the top
- A clean layout with simple navigation

How to Use the Dashboard

Dashboards are designed to guide you through the process.

- Click a button to open the area you need
- Use the "Back" or "Home" button to return
- Tabs may switch between different screens

3. Using Menus

Menus are simple screens with buttons that help you move through the database.

What Menus Are Used For

- Opening forms
- Running reports
- Viewing lists
- Navigating between sections

How to Use Menus

- Click the button that matches what you want to do
- Follow the prompts on the next screen
- Use “Back” or “Close” to return

Note: Menus keep you from having to search through the database manually.

4. Working With Forms

Forms are the main way you enter, edit, or view information.

Types of Forms You May See

- Form Type: What It Does
- Single Form: Shows one record at a time (e.g., a client profile).
- Continuous Form: Shows a list of records.
- Split Form: Shows a list and a detail view together.
- Search Form: Lets you look up information.

How to Use a Form

- Type information into the fields
- Use drop downs, checkboxes, or date pickers
- Move between records using navigation arrows at the bottom
- Click Save, Add New, or Close depending on the form

Important Notes

- Some fields may be required
- Some forms may be view-only
- If you cannot edit something, your administrator may have locked it for safety

5. Running Reports

Reports summarize information in a clean, printable format.

What You Can Do With Reports

- View summaries (e.g., monthly totals, client progress)
- Print reports
- Export to PDF or Excel
- Filter or sort information (depending on the report design)

How to Run a Report

1. Go to the Reports menu or dashboard section
2. Click the report you want
3. If prompted, enter a date range or filter
4. The report will open in a new window

Exporting a Report

- Click File → Print → Print Preview
- Or use Export options (PDF, Excel, etc.)

Note: Reports are read-only – you cannot change the data from inside a report.

6. User Libraries

Libraries are used to store objects and are available through out different areas of the each software module and are retrievable as needed.

Types of Objects

Stored Objects:

- Images
- Forms
- Reports
- Notes
- Links

7. Best Practices for Database Users

Do

- Use the dashboard instead of navigating manually
- Enter accurate, complete information
- Use search forms instead of scrolling through long lists
- Export reports instead of copying/pasting data
- Close forms when finished to avoid locking records

Don't

- Edit data you don't recognize
- Force-close the database while saving
- Change settings unless instructed
- Delete records unless you are trained to do so

8. Troubleshooting for Users

If a form won't open

You may not have permission — contact your administrator.

If a report looks empty

Check your filters or date range.

If you can't edit a field

It may be locked to protect data integrity.

If the database feels slow

Close unused forms or restart Access.

9. Summary

As a database user, your role is simple:

- Use dashboards and menus to navigate
- Enter and view information through forms
- Run and export reports
- Follow best practices to keep data clean
- Let administrators handle technical issues



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