

## 1.0 USING THE TASKMASTER SYSTEM

### 1.1 Introduction

TASKMASTER uses a variety of standard features in its operations and it is recommended that you familiarise yourself with these features prior to using the system for your live data.

This section will take you through logging on to the system, choosing menu options, input, edit and filing procedures and also gives a full description of the Function Keys and their operation.

It is likely that your organisation will have appointed a System Manager to supervise the workings of the computer system. If you are unsure of any operation, it is advisable to consult him/ her first.

### 1.2 The Cursor

Depending upon the terminal or monitor you are using, the cursor may be displayed either as a flashing underscore or as a block. The position of the cursor indicates the current entry field.

### 1.3 The RETURN or ENTER Key

Different Keyboards refer to this key as either the RETURN key or the ENTER key or simply as a symbol. This document refers to the key as the RETURN key.

This is the key you must press to indicate to the system that entry to this field is complete.

### 1.4 Logging on to the System

When you first switch on your computer or terminal you will see the PICK operating system copyright screen. The cursor will be flashing at the Logon prompt. Type in the name of your account in CAPITAL LETTERS and press RETURN. Consult your system manager if you are unsure of the name of the account.

You will see the TASKMASTER entry screen.

Enter your user ID followed by your password. If you are not authorised to access this account you will be logged off and must enter another account name.

The system will allow you three attempts to enter your password correctly. If the fourth attempt is still incorrect the system will log you off.

Once you have successfully entered a user ID and password you will see the main system menu.

Now that you have accessed the menu system refer to Section 1.5 which covers moving around the menus and selecting options.

### 1.5 The Menu System

After logging on you will see a menu screen.

#### Selecting an option

To select an option, move the highlighted bar to that option and press RETURN. This highlighted bar will be on the first option when you first access a menu. To move the highlighted bar:

1. Use the up and down arrow keys to move the bar vertically and the right and left arrow keys (where there are two columns) to move the bar horizontally and then press RETURN.

OR

2. Type the appropriate number and then press RETURN. Note: You must type the two digits, ie 01, 02, 11, 12 etc.

#### Getting Help in a menu

If you are unsure of the function of a menu option, go to that option and press the F1 - HELP key. A brief description of that option will be displayed.

## Menu Status Line and Information

Apart from the actual options on a menu there are a number of other features to note about the menu screen.

The highlighted bar at the top of the screen will display the following information:

**Port Number**  
**User Name**  
**Account Display Name**  
**System Date**

The underlined title in the middle of the screen will display the title of the current menu.

The status line at the bottom of the screen provides the following facilities:

### MAIN MENU

Press the letter M to go to the Main Menu. This option will not be visible if you are currently at the main menu.

### PREVIOUS MENU

Press the letter P to go to the previous menu. This option will not be displayed if you are currently at the main menu as there are no previous menus to access.

### GO TO TCL

Press the letter T to go to the TCL prompt. This option will not be available if you do not have TCL authority. Check with your system manager if you are unsure.

### LOGOFF ACCOUNT

Press the letter L to log off the system and return to the logon prompt.

## 1.6 Editing and Inputting

This section deals with the standard features of editing and inputting throughout the TASKMASTER system.

### (a) Status Line

The status line is the name given to the line of options which appear at the bottom of screens including menu screens.

To choose an option, you move the highlighted bar to the appropriate option and press RETURN. To move the highlighted bar either use the arrow keys or the space bar. In most cases you can also type the first letter of the option, eg F - Forward.

### (b) Multiple Screens

Where one of the options on the status line is Screen Menu this indicates that there are one or more linked screens. It will often be the case that you must go on to a second screen of entries before you have the option to file details away. When you see the Screen Menu option you can select it either by using the space bar or arrow keys to move the highlighted bar to it and press RETURN or simply by typing the letter S. A window with the linked screen titles will appear. Type the appropriate number to go to that screen.

### (c) Screen Banners

Every screen has a banner running along the top of the screen which details the following information:

DATE, MODULE, SCREEN TITLE, ACCOUNT NAME

### (d) Inputting Data

In a screen where the cursor is at a series of underlines, this indicates that the system expects you to

enter some information.

A prompt message will also be displayed at the bottom of the screen indicating what type of information the system is expecting. The F1 HELP key will give further information if required. (See Section 1.7 - Function Keys)

### **Defaults**

In a screen where you are creating a new record the cursor may come to a field where there is already an entry displayed, for example the date in a Batch Entry Screen. This indicates that you need only press RETURN to accept this default. If you require to change this to something else then first press F6 to delete the characters to the right of the cursor (See Section 1.7 - Function Keys) and then enter the appropriate information.

### **RETURN**

Pressing RETURN at an input field where there is no default showing will have the effect of leaving that field blank. Note: You will not be able to leave a mandatory field blank. The cursor will remain in the field and you will be prompted to make an entry.

### **Inputting Dates**

The system expects dates to be entered in one of the following ways. For example to enter 12th January 2006:

1. Type 12.1 and RETURN (Where 2006 is the current system year)

OR

2. Type 12/1 and RETURN ((Where 2006 is the current system year)

OR

2. Type 12 JAN and RETURN (Where 2006 is the current system year)

Where the year to be entered is not the current system year then you must type it in, eg 12.1.05, 12/1/05 or 12 JAN 05.

### **Inputting monetary values**

When inputting monetary values, the system does not require you to enter the decimal point if there are no pence.

For example:

Monetary Value - 320.00 Enter 320 and RETURN

Monetary Value - 320.10 Enter 320.1 and RETURN

Monetary Value - 320.11 Enter 320.11 and RETURN

Monetary Value - 320.01 Enter 320.01 and RETURN

### **(e) Editing Data**

Where a record already exists the cursor will take you directly to the status line prompt from where you can edit any of the fields by selecting the field and pressing RETURN.

### **Single Valued Fields**

Where the field you wish to amend is a single valued field, the cursor will take you straight to that field. You can now either:

- Overtyping what is currently in place. If certain of the existing characters are still required, use the arrow keys to skip to the characters to change. Remember to use the F6 key to blank out any characters to the right which are not required. (See section 1.7 Function Keys).
- Delete the entry completely by pressing F5. This will only be possible if the field is not a mandatory one. If it is, you will be prompted that you must make an entry. The cursor must be positioned on the first character in the line.
- Press RETURN to leave the field unchanged.

Remember to make full use of the function keys detailed in Section 1.7 when editing. Press F4 to

stop editing and return to the Status Line.

### **Multi-valued Fields**

Where the field you wish to amend is a multi valued field (for example an address or miscellaneous information line) you will be prompted to choose from a Status Line which will display some or all of the following options depending upon the particular field chosen:

#### **Add**

Type A to add a line of information to the existing lines. This is only available where the addition of a line will not exceed the maximum permitted. Once you have entered the information press RETURN. The system will take you on to the next line. Enter the details for this or press RETURN to go on to the next field.

#### **Move**

Type M to move a line of information to another line ( ie swap the order around). The system will prompt you to enter the line number to move. Do this and press RETURN. You will now be prompted to enter the line number to move it to. You can only move lines to lines which already exist. The system will return you to the status line prompt.

#### **Repeat**

Type R to repeat a line of information. This is useful where a line to be entered is almost identical to one which exists already. The system will prompt you to enter the line number to repeat. Do this and press RETURN. You will now be prompted to enter the line number to repeat to. The system will return you to the status line prompt.

#### **Delete**

Type D to delete a line of information. The system will prompt you to enter the line number to delete. Do this and press RETURN. The system will return you to the status line prompt.

#### **Forward**

Type F to page forward to see more lines.

#### **Backward**

Type B to page backward to see more lines.

#### **Line to amend**

To amend the details on one of the lines enter the line number and press RETURN. Use the usual editing facilities to amend the information and press RETURN.

You will now be taken on to the next line. Remember you can press F4 to end entries and return to the Status line prompt.

## 1.7 Function Keys

This section covers each of the function keys in turn. It is recommended that you familiarise yourself with these keys as they will facilitate the operation of the system.

### ESC

Pressing ESC quits you from your current operation. For example, if you are entering Invoice details, pressing ESC will return you to the Code prompt to start again and will not have saved the entries that you have made up to this point.

Pressing ESC at the the recordkey prompt of a screen will return you to the menu. Pressing ESC at a menu will return you to the previous menu.

### F1 Help

There are two levels of on-line help available to you. When the cursor is waiting at a field for you to input data, there will be a prompt displayed at the bottom of the screen giving you brief instructions, for example:

**"Enter the Customer Account Code"**

If this prompt is insufficient and you are unsure of the type of entry required, press F1 to see a Help message. This will display a window in the middle of the screen which gives an expanded description of the current field

Press RETURN to continue inputting or press F1 for more help.

If you press F1 for more Help you will be taken to Help level two which gives details about the actual entry required, eg maximum length, pattern etc.

Press RETURN to continue

### F2 Back Field

Pressing the F2 key in an entry screen will take the cursor back to the previous field to allow you to amend or delete this entry. The cursor must be positioned on the first character in the field.

### F3 Forward Field

Pressing the F3 key in entry screen will take the cursor to the next field. The cursor must be positioned on the first character in the field. Note: If you are creating a new record, the system will not allow you to jump forward and leave a mandatory field blank. If you try to do this you will see the following message at the foot of the screen:

**"Cannot Jump out as this is a mandatory field"**

### F4 End Entries

Pressing F4 in a screen will take you to the status line prompt at the foot of the screen. This is particularly useful when editing only one field in a screen and avoids having to step through every other field in the screen. The cursor must be positioned on the first character in the field. Note: You will not be allowed to end entries if you are creating a record. You will see the following message at the foot of the screen:

**"Cannot end entries whilst creating a record"**

### F5 Delete Field

Pressing the F5 Key on an entry field will delete that entry. The cursor must be positioned on the first character in the field. Note: You cannot delete a mandatory field. An entry must be made. A mandatory field can be amended by overtyping the existing entry.

**F6 Blank Field Forward**

Pressing the F6 key will delete all characters to the right of the cursor. If you are amending a field by overtyping and the new entry has less characters than the old, press F6 on the first of the surplus characters to delete them.

**F7 Blank Field Back**

Pressing the F7 key will delete all characters to the left of the cursor. If you are typing in a field and want to start back at the beginning of the field again, press F7 to delete the characters to the left and return the cursor to the beginning of the line again. Any characters which were to the right of the cursor will remain in place.

**F8 Data Search Key**

The F8 key provides a very useful data look up facility. This key can be used from any recordkey and can also be used to cross reference data in files other than the file you are currently accessing.

The recordkey refers to the identifier of a file, for example, the Supplier Code is the identifier of the Supplier details file. If you are looking for a particular Supplier's details but are unsure of the code, then you can press the F8 key to search for the appropriate code. You can either do a selective search or request a listing of all the codes on the system.

To do a selective search enter the first letters of the code you are looking for at the Code prompt and then press F8. For example, if you press the letter R followed by F8 the system will display a listing of all Employees whose code begins with the letter R.

You can now choose the appropriate Supplier by typing the number and pressing RETURN or end the search by typing E and pressing RETURN to go back to the code prompt. Press ESC at this point if you want to go back to the menu.

To do a complete search of all Suppliers on the system, simply press F8 at the code prompt.

The system will display a listing of all Suppliers in alphabetical / numerical order depending upon the code pattern. As there are likely to be considerably more codes than can fit on to one screen, the system gives you the following options displayed at the foot of the screen:

**Forward**

Type the letter F to move forward a page at a time. If there are no more pages to display this option will not be displayed.

**Backward**

Type the letter B to move back a page at a time. If there are no previous pages to display then this option will not be displayed.

**Number to display**

Enter the number alongside the code you wish to select and press RETURN.

**End Search**

Type the letter E to end this search and return to the Employee Code prompt.

**Page**

Type the letter P. You will be prompted to enter the page number to go to. The top left hand corner of the screen will be displaying the page you are currently on and also the total number of pages available. If the code which you are looking for begins with the letter T you will know that you should skip to near the end. If all of the codes fit on to one screen, this option will not be displayed.

**Output**

Type the letter O to print this listing on to the currently assigned printer.

The F8 key can also be used within screens to cross reference information. For example, each Supplier might be allocated to a Category. To find out what Category Codes are available press F8

at the Category Code field in Master File Maintenance.

### **SHIFT-F8 Secondary Data Search**

The F8 Key alone uses the Recordkey to search the file. As shown above this allows you to selectively look up all codes beginning with A for example.

The SHIFT-F8 Function allows you to search on fields other than the Recordkey. For example, you may want to do a look up of all Suppliers in a certain town.

At the Supplier Code prompt, hold down SHIFT and press F8.

The master file entry screen will appear and the cursor will be prompting you to enter the Supplier's Name etc. Press RETURN to leave the fields blank until you are on the first line of the address. You want to know all Employees in EDINBURGH so type [EDINBURGH] including the square brackets and press RETURN through the rest of the fields.

The system will select those records which have EDINBURGH in their address fields and display them for you to select the appropriate one.

If there are several hundreds of items you can stop the selection procedure at any time by simply pressing any key. You can enter any amount of information in each of the fields but remember to use the "[" and "]" maskers if you are unsure if there is anything before or after what you have entered.

### **F9 Scan Key**

The F9 key allows you to browse through records in a file. Similar to the F8 key you can either scan through all records or scan through a selective range. This facility is useful if a change or an entry has to be made across a wide range of records and avoids having to input the code each time.

To scan through all records, simply press F9 at the recordkey prompt, for example, the Supplier Code prompt on the Supplier Master File screen. The system will display the first Employee in alphabetical or numeric order depending upon the make up of your code pattern. The message "IN SCANNING MODE" will flash at the top right hand corner of your screen. The top left hand corner will display the number of records available to scan through. The following options will be displayed on the status line at the foot of the screen:

#### **Next Record**

Press return to skip to the next record.

#### **Previous Record**

Select this option by typing P or using the space bar or arrow keys to go back to the previous record.

#### **End Scan**

Select this option by typing E or using the space bar or arrow keys to end scanning mode and return to the menu.

#### **Amend Record**

Select this option by typing A or using the space bar or arrow keys to amend the currently displayed record. You will be taken to the status line of the record as in edit mode. Once you have made any changes and filed them you will be returned to the Scanning Mode options as detailed here.

#### **Go To Record**

Select this option by typing G or using the space bar or arrow keys. Enter the number of the record you want to go to. The top left hand corner of the screen will display the number of records available to scan through and the current record, eg 25 of 70.

To scan through a selection of records, enter the first letter(s) of the codes to scan through and then press F9. For example, if you press the letter T followed by F9 you will scan through all the codes

which begin with the letter T. The options will be the same as indicated above.

### **SHIFT-F9 Secondary Scan Key**

Similar to the SHIFT-F8 key described above, the SHIFT-F9 function allows you to scan through records selected by a field other than their code. For example, the F9 key allows you to scan through all records whose code begins with A. The SHIFT-F9 key will allow you to scan through, for example, all records with a LONDON address.

The procedures for using this key are the same as those detailed in the SHIFT-F8 Section above.

### **F11 Calculator**

The F11 key brings up a system calculator. This can be called up at any time and will not effect the screen you are currently working on. Use the numeric keypad at the right of your keyboard.

To use the calculator:

Enter the first number and press RETURN. This number will be stored at the TOTAL field.

Now enter the function you wish to perform, ie +,-,/,\*,%

Now type the next number and press RETURN and so on. (See the example given below).

Type the letter C twice to clear the calculator at any time.

Press ESC to return to your entry screen (or menu if you selected the calculator from a menu). See below for a worked example.

#### **EXAMPLE**

To add 250.16, 320.99, 450.16 and 390.00 together and take away 234.12 and then find out what 30% of the total is, do the following:

1. Press F11 to bring up the calculator
2. Press the letter C twice to clear any previous entries
3. Type 250.16 and press RETURN
4. Press the + sign
5. Type 320.99 and press RETURN  
The total will change to 571.15
6. Type 450.16 and press RETURN  
The total will change to 1021.31
7. Type 390 and press RETURN  
The total will change to 1411.31
8. Press the - sign
9. Type 234.12 and press RETURN  
The total will change to 1177.19
10. Press the \* sign
11. Type 30% (the percent sign is above the 5 on the main Keyboard) and press RETURN.  
The total will change to 353.157.

You may find that it would be more convenient if the Calculator was positioned in another part of the screen to allow you to see entries made. To move the calculator, hold down the SHIFT key and press the ">" key. The calculator will move to the opposite corner. Press these two keys again and the calculator will move down to the bottom corner and so on.



## 1.8 Exiting from the System

It is essential that every user exits from the system in the correct manner. It is also recommended that when a terminal is not in use that it should be logged off. This will ensure the security of your data as anyone attempting to access the system will then require to know a User ID and Password.

To exit from the system return from any screen to a menu by pressing the ESC key. One of the prompts on the status line will be:

LOGOFF SYSTEM

Press the letter L and the system will log your port off and return you to the logon screen.

To exit back to the desktop, type EXIT and return. NB – It is not necessary to exit all the way back to the desktop unless you are leaving for the day. It is however recommended that you log off the system (ie press L to logoff ) if you are to be away from your desk for more than a few minutes.