

Spectrum Version 14

Overview Guide



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By Geoffrey Falk, CPA

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Spectrum®

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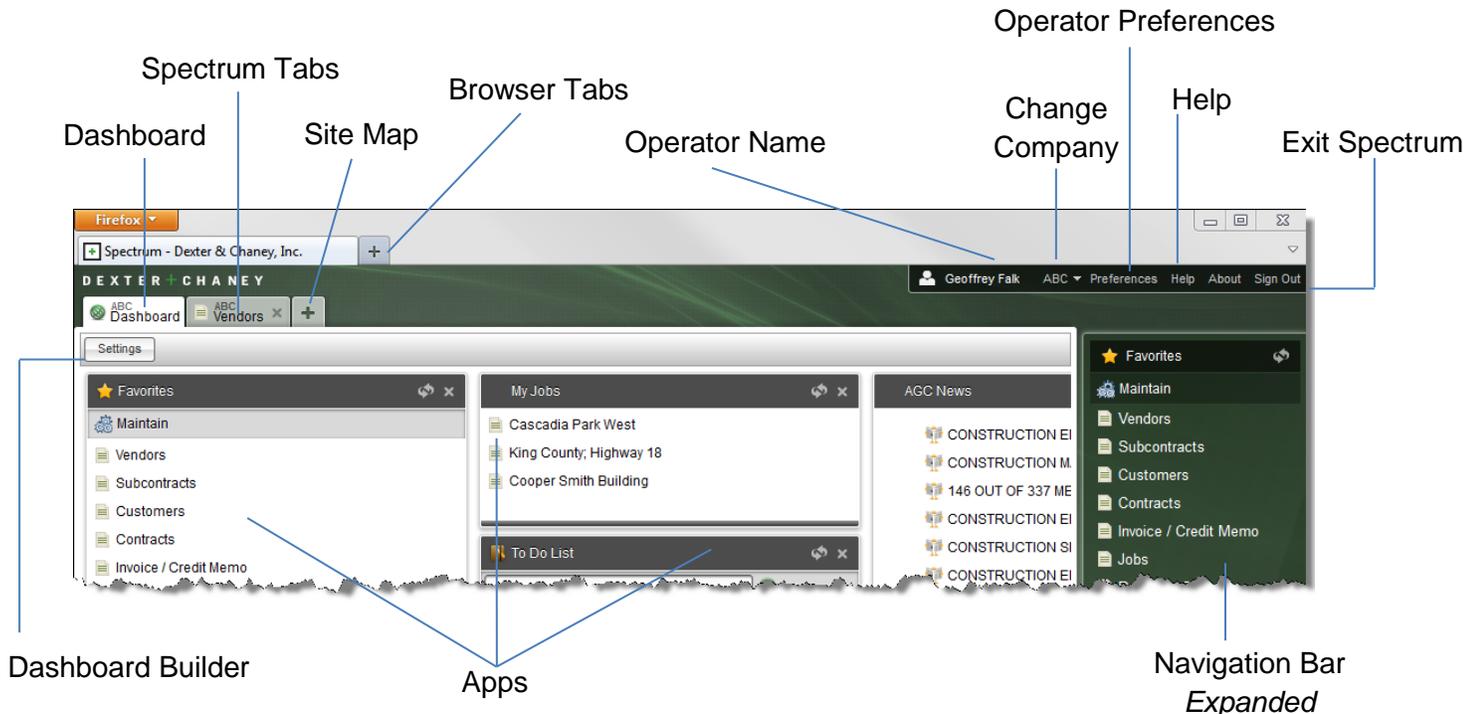
Welcome to Spectrum Version 14© 09/10/2012 Dexter & Chaney, Inc.

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Understanding the New Interface

The following provides a high level overview of the screen layout in version 14.

Welcome to the Dashboard!



After logging into version 14, you will start out at the **Dashboard**. Here you will see all of the apps assigned to you. Apps are a powerful new feature in Spectrum. They can be used to display an RSS feed, a list of your favorite Spectrum screens, or a list of all your jobs. In the future, we envision making hundreds of apps available on Dexter Chaney Online, as well as providing you the ability to create your own!

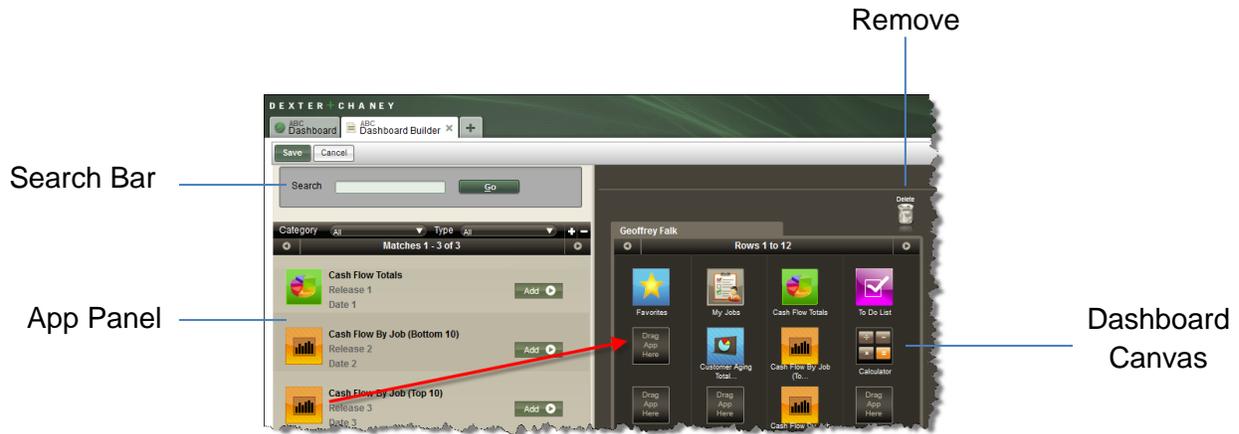
The **Navigation Bar** is always available and will contain your favorite screens as well as your personal menus. While the Site Map is also available, it will play a lesser role in our new browser design.

We have changed the way Spectrum counts an active user in the system. Even though the user had to log in to get to the Dashboard, this does not count as one of your company's licensed users. Only when users drill down or click on a link that takes them into Spectrum will they count as logged in.

The Dashboard Builder

From the Dashboard, click the **Settings** option to open the **Dashboard Builder**.

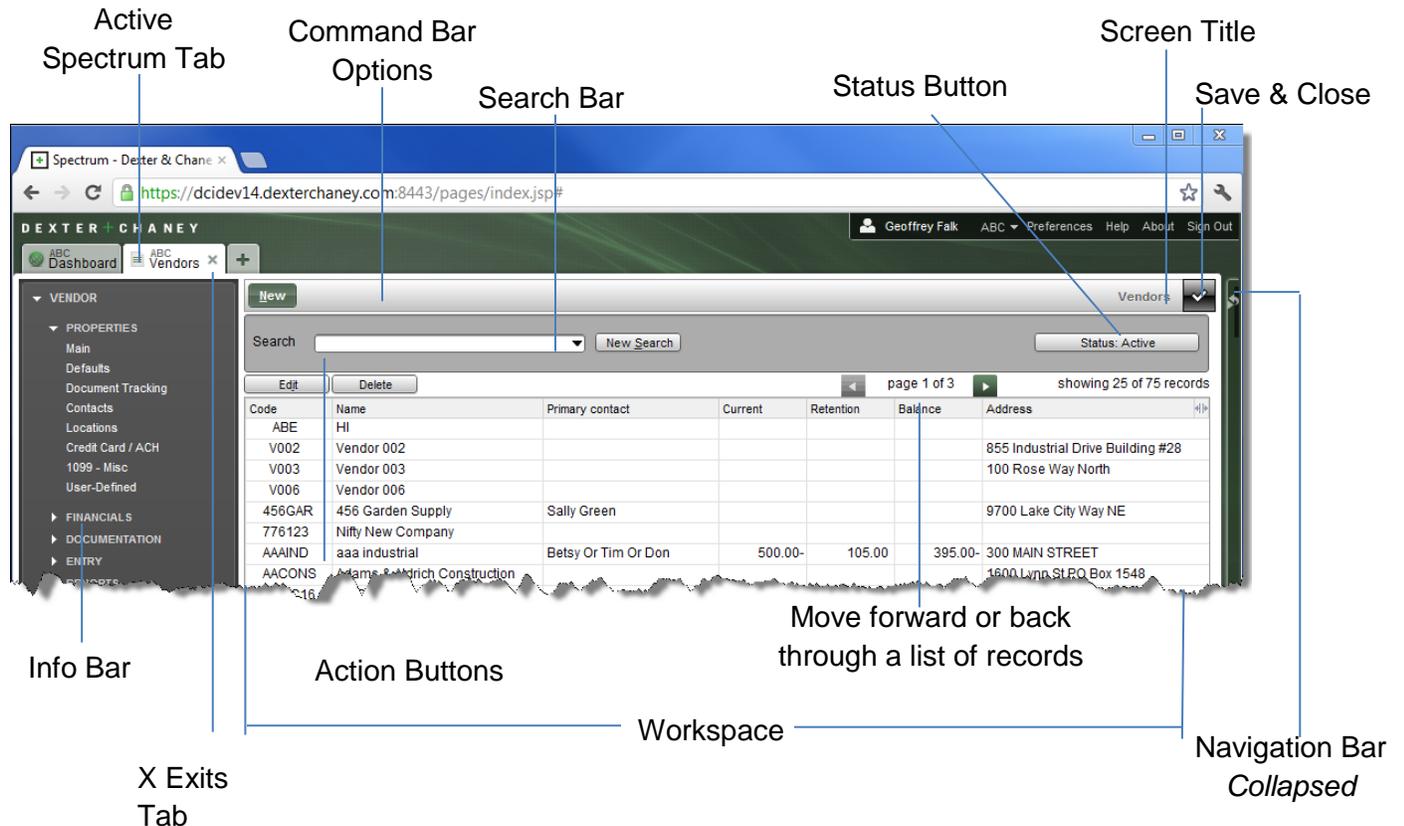
All apps that you have security access to will display in the **App Panel**. To add a new app to your Dashboard, drag and drop it onto the **Dashboard Canvas**.



Question	Answer
What is the Dashboard and where is it located?	The Dashboard is your main landing page when logging into Spectrum. Here you will see apps that will help you manage your job and alert you to potential issues.
What are apps?	Apps are “application” programs that run on the Dashboard.
How do I add or remove an app from the Dashboard?	Use the Dashboard Builder to add or remove apps. You can click the ‘x’ on the app to remove it as well.
What types of items are available on the Dashboard?	The following types of applications are available: <ul style="list-style-type: none"> • RSS Feeds • Menu Lists • Graphs (such as cash flow pie chart)
How do I control which apps my people see on their Dashboard?	You will be able to control access to specific apps through a new Security Profile.
Are there additional apps I can add to my dashboard?	Yes. Additional dashboard apps will be available in the future.
Does the Dashboard take a license seat?	No. Users can access the Dashboard and it will not count towards the company’s number of Spectrum licenses. However, launching into a Spectrum screen via an app does count.

General Screen Layout

This section discusses common features and attributes of screens in Spectrum v14.



Each **Spectrum Tab** displays the Company Code and an abbreviated screen title. Clicking the “x” here will exit the tab.

The **Command Bar** holds all key functions with the primary action highlighted in green. As you move through a screen, the options on the Command Bar will change, only showing the key actions.

Use the **Search Bar** to locate records quickly. Enter your search words and press <Enter>. Click the **New Search** button or <ALT+S> to start over. This is a partial search feature meaning that you only have to enter a few key words to perform the search.

The **Status Button** allows you to change the type of records that display.

Use the **Action Buttons** to control activity performed in Grids and List boxes. You will be offered different Action Buttons depending on which screen you are on. By design, there is no keyboard shortcut for the Delete button.

Keyboard Shortcuts

Create <u>N</u> ew	<Alt>+N
Ed <u>i</u> t Record	<Alt>+I
Insert <u>R</u> ow	<Alt>+R
<u>S</u> witch	<Alt>+W
Cancel	<Esc>
Save	F3
Search Window	F4
<u>P</u> review	<Alt>+P
<u>E</u> xport	<Alt>+X
<u>M</u> y Reports	<Alt>+M

Icons

	Super Select
	Images
	Edit Selection
	Date Calculator
	Pop Out to Browser Tab
	Add to Favorites
	System working indicator
	Info Bar Toggle
	Navigation Bar Toggle
	Closes the Tab
	Closes the Preview Tab

Keyboard Navigation Shortcuts

<Tab>	Right one cell
<Shift>+<Tab>	Left one cell
↓	Down one cell
↑	Up one cell

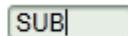
Screen Conventions



Drop-down arrow indicates that search window is available



Green button indicates typical action



Green shading indicates cursor position



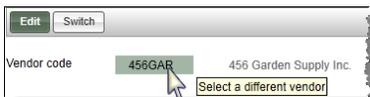
Spectrum tab displays company code and short screen title.



Slider Bar collapsed. Click to open Image or Map Pane.

[Total balance payable](#)

Hyperlinks will open additional information in a new Spectrum tab.



Green background indicates 'Switch' ability when hovering over with the mouse. <Alt>+W is keyboard equivalent.

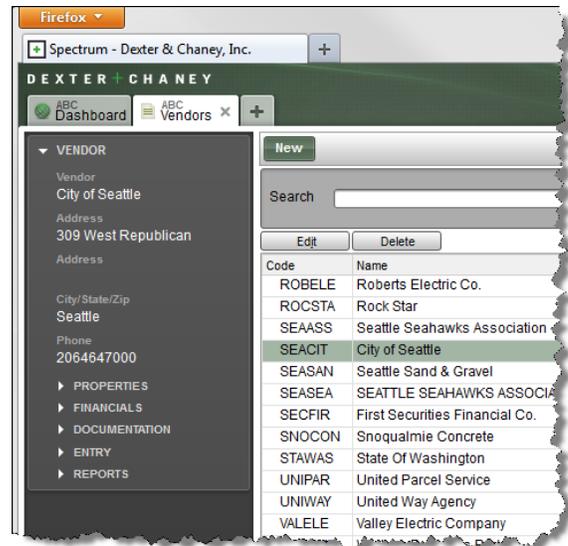
Using the Info Bar

The **Info Bar** shows data and links for the records currently being referenced. A setting in the Operator Preferences window lets you position the bar on the left or right side of your screen.

Additional Info Bars will appear in certain situations. For example, when looking at a vendor's subcontract record, the Subcontract and Job Info Bars will appear below the Vendor Info Bar.

Vendors, Subcontracts, Customers, Contracts, Jobs, Employees and Reports have Info Bars. Selected inquiry screens also have them as needed.

The Info Bar has three primary purposes:



Data Display: Key information about the selected record will display. Another way to say this is that this information is “in context” to the selected record.

Navigational Links: The Info Bar can be used to navigate to different screens while still retaining the record in context. This means that you can view information without having to back out to a menu and re-entering selections.

Report Templates: When calling up a report from the Info Bar, the code automatically defaults onto the start screen.

In general, the Info Bar is organized into the following categories:

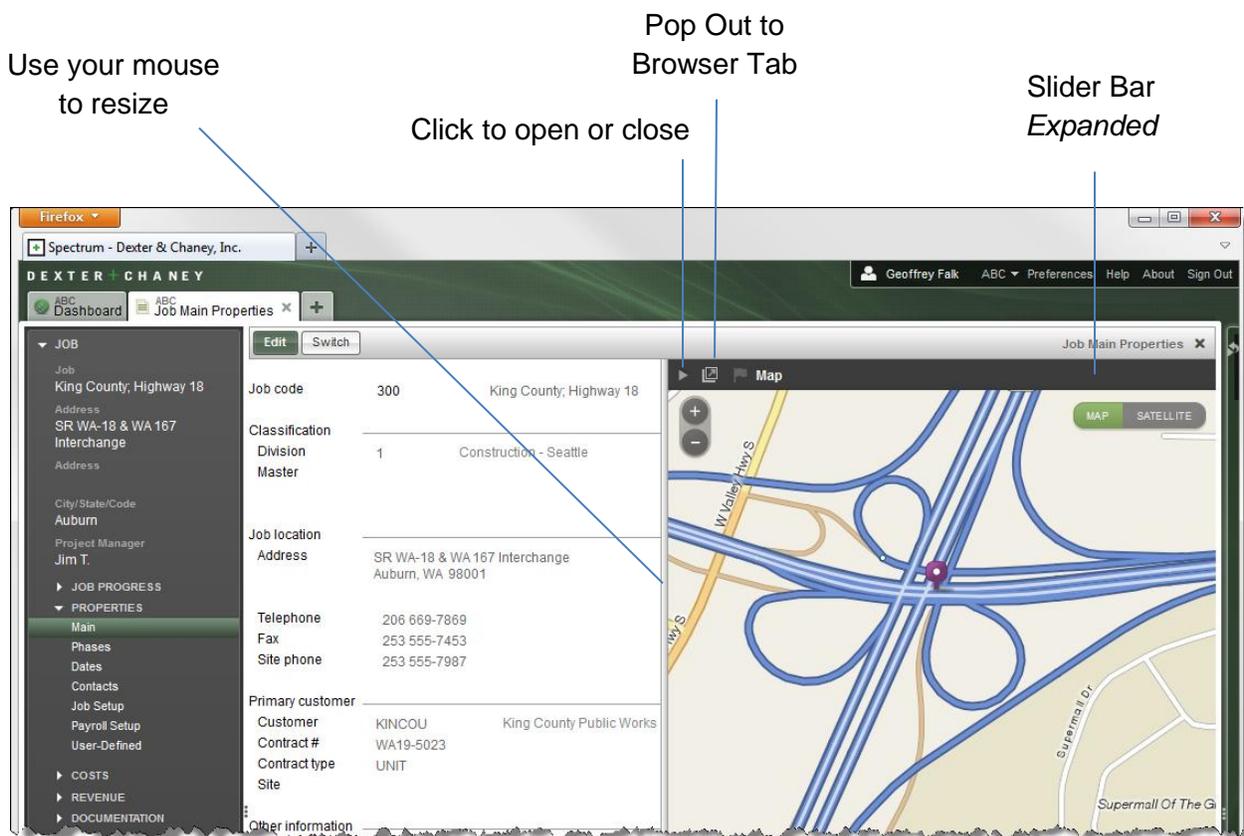
- **Properties:** Includes maintenance and setup screens.
- **Financials:** Provides a variety of inquiry screens showing dollar amounts and other key information.
- **Documentation:** Find the Notepad and Document Imaging here.
- **Entry:** This section includes typical data entry screens that you would call in context to the selected record.
- **Reports:** A subset of the most popular reports for this Info Bar.

Slider Bar

The Slider Bar is a window pane that displays scanned images or maps. It is located on the right-hand side of the Workspace and can be opened or closed by clicking the arrow toggle icon. When used with Document Imaging, the Slider Bar opens the Image Pane. As you move down the list of items, the Image Pane will dynamically display the new item. When in Jobs, Vendors or Customers, the Slider Bar will display the Map Pane for record.

Click the arrow to toggle the Slider Bar open or closed. Don't forget that you can use your mouse to resize the width of the slider bar to best fit your monitor!

You can "pop out" the Slider Bar to a browser tab by clicking the  icon. Once in a Browser Tab, you can drag it to another monitor, giving you the ability to view Spectrum and the item side by side.



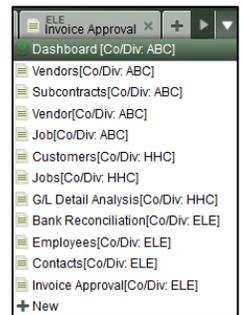
Managing Spectrum Tabs

Each user can have as many Spectrum Tabs open as they would like. These tabs do not count as an additional user logged into the system. Think of Spectrum Tabs as the equivalent to starting multiple sessions of Spectrum in prior versions.



Use the scroll arrows to see all open Spectrum Tabs. Alternatively, click the drop-down arrow to view a list and select the tab you want to go to.

Don't forget that you can always click the "+" tab to open the Site Map (formerly known as the menu system).

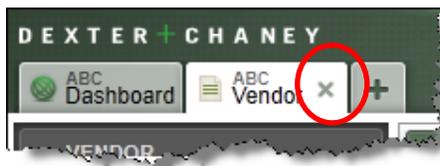
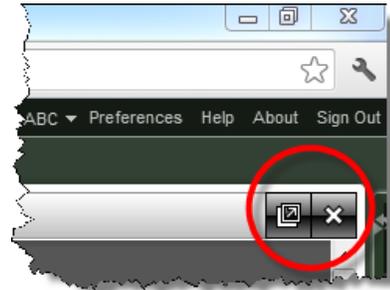


What's the difference between the 'x' on a report preview screen versus the Spectrum tab?

The  icon closes the preview tab.

This option is only available on report preview screens. Clicking the 'x' will close the Spectrum tab.

Notice that you can also "pop out" the report into a new browser tab by clicking the  icon.



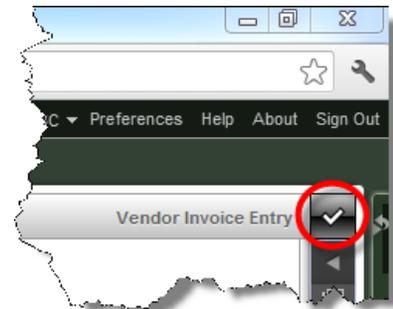
The Spectrum tab's 'x' escapes and closes the tab.

This is the equivalent to clicking your <ESC> key. With the exception of grids, changes will not be saved before the tab is closed. There are no warnings alerting you that your data is not saved. This is helpful when you want 'start over' on an entry screen.

The  icon closes the tab.

This option will be available until information is entered or changed. This is a visual indicator to alert you that it is OK to leave the screen.

Not seeing this icon is an indicator that you should save your work before leaving the screen.



Frequently Asked Questions

Info Bar

Question	Answer
What is the Info Bar and where is it located?	The Info Bar, a new feature in Spectrum version 14, shows data and links for the records currently being referenced. Preferences determine if it is located on the left or right side of the screen.
What is the Info Bar used for?	The Info Bar has three primary purposes. <ol style="list-style-type: none"> 1. Data: It displays key information of the selected item. 2. Navigational Links: It can be used to navigate to different screens while still retaining the record in context. This means that you can view information without having to back out to a menu and re-entering selections. 3. Report Templates: When calling up a report from the Info Bar, the code automatically defaults on the start screen.
Where will I find Info Bars in Spectrum?	The following is a list Info Bars in version 14: <ul style="list-style-type: none"> • Vendor • Subcontract • Customer • Contract • Job • Employee • Reporting • Inquiries
How is the Info Bar organized?	In general, each Info Bar contains the following categories: <ul style="list-style-type: none"> • Properties: Includes maintenance and setup screens. • Financials: Provides a variety of inquiry screens showing dollar amounts and other key information. • Documentation: Find Notepad and Document Imaging here. • Entry: Includes typical data entry screens • Reports: A subset of the most popular reports for this Info Bar.
Can I modify the information displayed?	Yes. Information displayed on the Info Bar can be modified.
Does the Info Bar always have to be on the left side of the page?	No. Preferences allow you to set the Info Bar on the right or left side of the screen.
Can I collapse the Info Bar until I need it?	Yes. Use Preferences to change your setting.

Navigation

Question	Answer														
What is the Navigation Bar and where is it located?	<p>The Navigation Bar contains your Favorites and Personal Menus. While it is available on every screen, you have the option to collapse it when it is not needed.</p> <p>Depending on your Preferences, it is located on the right or left side of the screen.</p>														
Can I collapse the Navigation Bar until I need it?	Yes. Use Preferences to always collapse the Navigation Bar.														
Where is the menu system? Is it gone?	No, the menu system is still available by clicking on the “+” at the end of your Spectrum Tabs. By the way, we have renamed the menu to “Site Map”.														
What is the difference between a Spectrum Tab and a Browser Tab?	<p>A Browser Tab opens is a new webpage.</p> <p>A Spectrum Tab opens a new page containing Spectrum information. You can open as many Spectrum Tabs as you need.</p>														
I am more of a keyboard person. It looks like I have to use my mouse to navigate around the system. Is that correct?	No. There are keyboard equivalent options that you can use instead of reaching for your mouse. For example, to add a new record you can press <ALT>+N instead of clicking the New button with your mouse.														
Is there a list of standard keyboard shortcuts?	<p>They are as follows:</p> <table data-bbox="711 1245 1079 1470"> <tr><td>Create <u>N</u>ew</td><td><Alt>+N</td></tr> <tr><td>Ed<u>i</u>t Record</td><td><Alt>+I</td></tr> <tr><td>Ins<u>e</u>rt Row</td><td><Alt>+S</td></tr> <tr><td>S<u>w</u>itch</td><td><Alt>+W</td></tr> <tr><td>P<u>r</u>eviuw</td><td><Alt>+P</td></tr> <tr><td>Ex<u>p</u>ort</td><td><Alt>+X</td></tr> <tr><td><u>M</u>y Reports</td><td><Alt>+M</td></tr> </table>	Create <u>N</u> ew	<Alt>+N	Ed <u>i</u> t Record	<Alt>+I	Ins <u>e</u> rt Row	<Alt>+S	S <u>w</u> itch	<Alt>+W	P <u>r</u> eviuw	<Alt>+P	Ex <u>p</u> ort	<Alt>+X	<u>M</u> y Reports	<Alt>+M
Create <u>N</u> ew	<Alt>+N														
Ed <u>i</u> t Record	<Alt>+I														
Ins <u>e</u> rt Row	<Alt>+S														
S <u>w</u> itch	<Alt>+W														
P <u>r</u> eviuw	<Alt>+P														
Ex <u>p</u> ort	<Alt>+X														
<u>M</u> y Reports	<Alt>+M														
What function keys can I use?	<p>They are as follows:</p> <table data-bbox="711 1528 1063 1627"> <tr><td>Save</td><td>F3</td></tr> <tr><td>Search Window</td><td>F4</td></tr> <tr><td>Cancel</td><td><ESC></td></tr> </table>	Save	F3	Search Window	F4	Cancel	<ESC>								
Save	F3														
Search Window	F4														
Cancel	<ESC>														

Usability

Question	Answer
What is the Workspace?	This is the area on the screen between the Info Bar and the Navigation Bar.
What is the Command Bar used for?	The Command Bar holds all key functions with the typical action highlighted in green. As you move through a page, the options on the Command Bar will change showing only the key actions.
Where is the Command Bar located on the screen?	The Command Bar is the gray bar near the top of the screen.
Why are there only a few options on the Command Bar?	For ease of use, the Command Bar holds only primary or key functions. All secondary options will appear as Action Buttons.
What does the Switch option do?	Click the Switch option to open a different record without having to leave the existing page.
How does the Search Bar work?	<p>Enter your search words and press <Enter> or click Go.</p> <p>This is a partial search feature meaning that you only have to enter a few key words to perform the search. To see a complete list of fields that the Search Bar reviews press F4 or click the drop-down arrow at the end of the Search field.</p> <p>This functionality is also available in Search Windows.</p>
What does the Status Button do?	<p>Displays the current filter setting and allows you to change the type of records that display. Statuses include active, inactive, not used, retired or complete.</p> <p>For example, the Status Button can be used to display active, inactive and complete jobs.</p>
What are Action Buttons?	<p>These control activity performed in Grids and List boxes. You will be offered different Action Button options depending which screen you are on.</p> <p>For example, these are used to perform additional tasks such as editing or deleting a record.</p>
How do I change modes in v14?	Data entry is “mode-less”, meaning that there is no need to manually switch between Add mode, Change mode and so on. The software will figure out the mode for you.

Question	Answer
What is the Slider Bar and where is it located on the screen?	<p>The Slider Bar is a window pane that provides additional information. Scanned images and maps will appear in the slider bar</p> <p>It is located on the right hand side of the Workspace.</p>
How do I open or close the Slider Bar?	Click the arrow on the Slider Bar to open or close.
What does “Pop out to Browser Tab” mean?	This is the ability to view a report or Document Image in a separate Browser Tab. Once in a new Browser Tab, you can use your mouse and drag it to another monitor, giving you the ability to view Spectrum and the item side-by-side.
What does “Split” mean?	<p>This is the ability to divide your page into two or more panes. For example, when reviewing a job 100, you can split the screen so you can also view job 200 at the same time.</p> <p>Use the Restore option to remove the split screen. (Right-click on the Spectrum Tab and select “Restore”.)</p>
How can I split my screen?	Right-click (or secondary mouse button) on the Spectrum Tab and select “Split.”
How can I remove the split screen?	Use the Restore option to remove the split screen. (Right-click on the Spectrum Tab and select “Restore”.)
Why doesn't F1 bring up Spectrum Help?	The F1 key will bring up your web browser's Help File. Click the Help link in the upper right-hand corner of the screen for Spectrum Help.
Can I change the order of fields within data entry screens?	No, though certain screens will allow you to skip sections of the screen.
What's the difference between the various ways to close a Spectrum tab?	<p>The black checkmark saves and closes the screen. Option will be available until information is entered or changed.</p> <p>The Spectrum Tab's “x” escapes and closes the tab. Changes will not be saved before the tab is closed.</p>

Contact Management

Question	Answer
How are contacts used in Spectrum?	<p>A contact is a person or role (i.e. a contact might be an Electrical Inspector).</p> <p>Spectrum allows you to set up contacts for vendors, projects, customers, sites and so on. Contacts can be affiliated with vendors, customers, other organizations and may also be your own employees.</p>
What are Other Organizational contacts?	These are contacts that are not affiliated with a vendor, customer or employee. An example could be an engineer for the DOT whose information is needed on the job, but the person is not an employee, customer or vendor.
Can contacts default onto a job automatically?	Yes. When properly configured, contacts can automatically default onto new jobs.
Can I have a vendor contact that is also a customer (or vice versa?)	Yes. On the Vendor Contacts, Customer Contacts or Job Contacts page, click the Add Contact button. Search for the person you would like to add and click OK . Now the contact is associated with both a vendor and a customer.
What are Attributes?	<p>Attributes are identifiers that are used with contact tracking. They can be specific responsibilities or roles that can be assigned to vendors, customers, organizations and employees.</p> <p>With regards to contact tracking, there are two types of attributes: Organizational and Contact Attributes.</p>
How are Attributes used in Spectrum?	Attributes are identifiers that are used with contract tracking. They are also used in certain Search window.
Are Attributes user defined?	Yes. You can have different attribute lists for vendors, customers, other organizations and for individual contacts.
Are contacts specific to one company in Spectrum or are they system wide?	System-wide. Contacts created in one company are available in every other Spectrum company.
Is there a way to keep a company's contacts out of the global list?	Yes. Select the "Sample company?" check box in Company Installation. This will remove contacts created in this company from the system-wide list.
What is the "Sample company?" check box option used for?	You may have demo data, test companies or even companies that are obsolete sitting in your Spectrum database. Selecting this check box will remove this company's contacts from the global list.

System

Question	Answer
What are the system requirements for v14?	The best answer is to navigate to Dexter + Chaney Online for the latest system requirements for version 14.
What web browsers will Spectrum support?	Spectrum supports the following web browsers: <ul style="list-style-type: none"> • Google Chrome® • Mozilla Firefox® • Microsoft Internet Explorer® • Apple Safari®
I don't want to run Spectrum in the "cloud", do I have too? Do I have to run Spectrum over the Internet? Does Spectrum have to be hosted outside of my company?	No. While you access Spectrum in a browser, it does not require that you run it over the Internet. As in previous versions, it can be loaded on your server and accessed within your company's internal network.
How are backups going to be managed?	The backup process does not change. Backups will be performed as they are today. If you opt to have Dexter + Chaney host your system, complete backups are done automatically for you. Disaster recovery options are also available.
What is the minimum screen resolution?	Minimum resolution: 1027 x 768 with the Navigation Bar closed and browser maximized (this is the display size for the iPad™ .) Recommended resolution: 1280 x 1024 or larger.
Will Spectrum run on a tablet or on an iPad?	Version 14 runs in a web browser. Provided that the tablet uses one of the four supported browsers (IE, Firefox, Safari and Chrome), Spectrum will run on it. There may be tablet-specific issues however. These include: <ul style="list-style-type: none"> • Screen resolution: The minimum screen resolution is 1027 x 768 (with the right pane closed and browser maximized). • Touch-based systems have their own idiosyncrasies with respect to how they respond to touch screen commands. For example, the user may have to enlarge the screen to be able to select a specific row of data.



Will Dexter + Chaney offer hosting services for version 14?	Yes. We are very excited about this new service. We have partnered with a world class SAS 70 Type II hosting facility. Call for pricing.
How will remote users access v14?	There are many options available for remote access. Check with your IT professional for the solution that best fits your company.
What does the phrase “zero footprint” mean?	This describes an application that does not require any software to be loaded on your computer.
Is Spectrum zero footprint?	Version 14 is a “zero footprint” application. This means that we are not loading any software on your computer. In prior versions, the reports had to be loaded onto your workstation to print directly. Now that we aren’t doing this, we can only print via the Preview window.

Printing

Question	Answer
Which version of Crystal Reports will v14 support?	<p>While we are still finalizing this, we expect to be able to support Crystal Reports XI Professional and Crystal Reports 2011 Professional.</p> <p>There may be some features in Crystal Reports 2011 Professional that are not able to be fully utilized by Spectrum due to the Crystal XI Run-Time Engine. These features can be used outside of Spectrum.</p>
How is printing handled in the browser?	<p>Reports will first be previewed and then printed out as desired. The report will preview in PDF format.</p> <p>Version 14 is a “zero footprint” application. This means that we are not loading any software on your computer. In prior versions, the reports had to be loaded onto your workstation to print directly. Now that we aren’t doing this, we only print via the Preview window.</p>
I have created my own Crystal Reports. Will they work in the new version?	<p>Yes, with the following exceptions. Version 14 continues to use Crystal Reports. This means that for the most part, your reports should still run just fine.</p> <p>There is a chance that the report may need to be updated due to enhancements in the database similar to upgrading between versions in the past (like v12 to v13). In this case, you will want to modify your report to accommodate these changes.</p> <p>As with all major upgrades though, you will want to test your reports and make any changes and updates as necessary.</p>

How do I know which tables have been changed?	Table changes will be outlined in the last section of the version 14 Release Notes.
What are "Saved Selections?"	This is the ability to save or store your report start screen settings. In earlier versions, these were called "Report Filters."
Where did the Report Filters go?	Report Filters have been renamed to "Saved Selections" and are available on the Reporting Info Bar.
Is it possible to set up default templates for all of my users?	Yes. Starting in version 14, Administrators can assign a default template for each user in Spectrum.

Technology

Question	Answer
What technologies are used in version 14?	<ul style="list-style-type: none"> • SQL[®] controls the database • PROIV[®] handles the business logic • JavaScript[®], Java[®] and AJAX[®] technologies are used to power the browser and user experience.
What is JavaScript?	A programming language that is used to create dynamic, interactive webpages. It is a zero footprint technology. Designed by Sun Microsystems [®] in conjunction with Netscape [™] .
What is Java?	An object-oriented programming language that is platform independent. Developed by Sun Microsystems.
What is AJAX?	<p>Asynchronous JAvascript and XML</p> <p>A technology that allows webpages to be more interactive and behave like local applications (also known as "rich client" applications.) AJAX allows the webpage to retrieve small amounts of data from the server without reloading the entire page.</p> <p>Spectrum uses AJAX technology to send data to and from the server asynchronously (i.e. in the background) without interfering with the display of the existing page.</p>

Upgrading Existing Clients

Question	Answer
How long will version 13 be supported?	We have not set a date here. In general, version 13 will be supported as long as long as existing clients remain on that version. As we work to upgrade existing clients to V14, we will notify everyone once we have decided not to issue year end and maintenance patches for V13.
When can I upgrade to version 14?	The answer depends on a few factors. You are welcome to sign up for an upgrade, but you will only be scheduled once all of your company's licensed modules have been released in V14.
My company wants to go to version 14 now, but not all of the modules we need have been released yet. Can we upgrade anyway?	Unfortunately not. As part of version 14, we are optimizing every screen to work in a browser. Version 13 screens do not always work in this environment, so your company will have to wait until all modules needed are released.
Do I have to wait until all of the modules I am licensed for are released to upgrade to v14?	Yes. As part of version 14, we are optimizing screens to work in a browser. Version 13 screens will not work properly in this environment.
When do you expect the first upgrades to take place?	The plan is to start performing test upgrades on client data starting in summer 2012.
Why is the Work Order module near the end of the release schedule?	We need the extra time to work on the Dispatch Schedule and Dispatch Board. We are going to create a Focus Group of clients tasked with helping us redesign these screens.