**System Standards in CAPTAIN - required reading BEFORE beginning data entry.**

System Standards introduces many of the standard features in the System.  It would be good practice to launch any screen and refer to this section to view, identify and locate the common features of all the screens.

**Required Fields**

Any field with a RED asterisk to the left of the field literal is a required field.  If the User attempts to click the SAVE button without all the required fields completed, the System will not save the record.  Instead, the screen will flash an orange exclamation mark identifying all required fields that have not yet be completed.

**Optional Fields**

Any active field without a RED asterisk will always be optional.  The User will be able to save the record if an optional field(s) has not been completed.  While Users can ignore optional fields, the more data you collect the higher the integrity of your reporting will be.  Always teach Users that more is better.

**Tool Bar**

The example tool bar above is from the Client Intake Screen.  It's one of the most expanded tool bars in the system.  Other screens may have some, but not all, of the images available.

 The Add Button allows the User to engage the screen/tab in ADD mode and enter NEW information into the screen.

 The Edit Button allows the User to engage the screen/tab in EDIT mode and update/change information to an existing record.

 The Delete Button allows the User to delete a specific record or application.  Deletions are permanent and cannot be recovered.

 The Image Upload Button is the access point to the system document management files.  (This is not a standard feature, please contact CAP Systems to learn more.)

  The History Button allows a User to review changes made to the application from its original saved condition.

 The Print Button will allow you to print something available in the screen.  Do NOT confuse this with Print Screen.  Print Screen is governed by your PC and it engaged with the PrtSc key on your keyboard.

 The Case Notes Button (sometimes referred to as Progress Notes) opens a window where you can post notes that will stay attached to the application for all Users to review.

 The Help Button is the universal access point to the system help files.

**Hide the Tree** on the left hand side of your working system

Often times Users want more working/viewing space available to the while using the system.  If that's the case click on the link below to collapse the Tree (make it go away).

***Close Tabs***on the right hand side of your working system

When you call up a Screen from the Tree on the left hand side, it stays open in the original tab.  If you call up a second Screen from the Tree it adds it into the working system.  Now you have two tabs available to work with.  You can manage as multiple Tabs to be able to reference and resource areas of the system quickly and easily.

You can close the active Tab (the actual Tab is white) by clicking on the RED X on the very far right hand side of the working system.

You can close all the Tabs at once by clicking on the Close All Tabs link at the very top of the working system.  It is directly underneath Hide Tree.

***Additional Page Indicator***

The example image below tells the User that there is a second page of records that can be reviewed.

**Sort Data that is Displayed in Table Format**

When you are interacting in screens that have table format with column headers you have a double-click sorting option available.  You can change the way the data or records are being displayed by double clicking on the column header to change or reset the sort.

**Active Data/Records vs. Inactive Data/Records Displayed in Table Format**

Red Row, inactive.

Black Row, active.

Contact your System Administrator if you think an inactive row should be active.