Settlers Park Retirement Village

Intranet User Manual

Version: 1.9

Author: Rob Crothall – rob@crothall.co.za

Copyright © 2019-2022 Settlers Park Association
(U.S. and international notice, and original material was added in each indicated year.)

Table of Contents

Introduction

The Settlers Park Association intranet site can be found at http://sprv.co.za . Administrative and technical details about the site can be found in the "SPRV Website Administrators Manual".

Registered users should use the allocated username and password and should change their password on the first logon.

Residents and Associate Members of Settlers Park who do NOT have an allocated password should use their Settlers Park account number (from their statement) as their username and their ID number as their initial password. Once logged on, the password can be changed to one that you can remember.

Appendix A will help new Users of the system to get started.

Accessing the Intranet

Finding the website

Open your browser (FireFox, Chrome, Edge, etc.) on a PC, tablet, or phone, and visit http://sprv.co.za. Select "Staff and Residents Only".

Registering as a User

If you are a member of staff, you need to be registered on the site to have appropriate access levels assigned. Please contact Reception to get the correct procedure.

All Residents are already registered. Use your Settlers Park account number as a username and your ID No as an initial password.

Menu functions

From the Login screen onwards, various functions will be displayed under the blue band heading. These include information about who is logged on and time date – these are useful if you print a screen because of something you want to query. This information is also used in logging activities.

Under the static information line, there is a grey band containing menu items. These represent functionality of the site. If you do not see a menu item listed that is described in this manual, it means that you are not currently authorised to use that function. If you feel that you should have access to that function, feel free to submit a request to the General Manager, who will arrange access, if necessary.

Logging On

After selecting "Staff and Residents Only", you will be taken to a logon screen. Enter your Username and password and you should be sent to the Search screen. "Breaking News" may be displayed immediately after logon – you will be able to select "I have read it" to stop this specific news item from being shown next time.

Logging Off

The "Log Off" function secures the site by ensuring that no one else can use your sign-on to access data. Please log off whenever you are not actively busy with the site.

Roles and Authorities

Visitor

Anyone who has not used a Username and password to access the site is classed as a visitor. All they can do is log on or send a message to the Administration team.

Associate Member

A paid-up Associate Member has access to certain contact details of residents and staff. More functionality may be added later.

Resident

Residents have access to certain contact details and can log and monitor their own tasks. They can change their password, view approved Policies and Procedures, and display general information about the Park and selected information about their own accounts.

Staff Member

Most functionality is available to registered staff members. Certain functions (e.g. access to medical records, or accounting functions) are restricted to specific individuals.

Administrator

Has full access to everything on the site.

Departmental Roles

Medical Staff

Staff must have specific authorisation to see medical history and record medical details. Tasks can be assigned to the Care Centre and staff are able to work with those tasks.

Facilities Staff

Mainly concerned with maintenance tasks.

Financial Staff

Interfaces to the Pastel Partner accounting system and history of resident resource usage e.g. electricity, phone, etc..

Administrative Staff

General staff access.

Hibiscus Room Staff

General staff access.

Menu Functions

Log Off

As described above. This secures the site and prevents unauthorised user access.

Contact

This allows you to contact Systems Administration staff. Complete all fields.

Password

Allows the User to change her/his password as often as s/he likes. Passwords should contain at least one each of lower-case, upper-case, and special characters (e.g. !@#$%^&*():"_+-={} etc.) and should be more than seven and less than thirty characters long.

Policies and Procedures

Selected policies and associated procedures can be viewed or downloaded, depending on browser settings. Useful manuals, like the Resident's Handbook, can also be read or downloaded.

Search

This allows you to search for people, based on a variety of fields. Use a "%" as a "wild-card" symbol e.g., "cro%" will find "Crothall" and "Croukamp". Searches are case-insensitive i.e. upper- and lower-case work in the same way.

Tasks

Create a new task

Any User can click on "Create a new task" to log a task request for any department.

The user should create the basic task, with a summary, more detailed description and completion criteria, the person requesting the service (it may not be you), the target department (i.e., the department responsible for doing the work, NOT your own department), and a few more details. This will later be fleshed out by the manager or administrator in the target department to include who has been assigned to the task, deadlines, etc.

Managers and senior staff can create a task and assign it to a member of their own staff as a form of delegation, with control. When following up, or meeting with the staff member, the manager or staff member concerned can list the open tasks assigned to the staff member. As soon as the task is closed by the staff member, an email will alert the manager and the task drops off the "Open Tasks" list.

Show Tasks

This allows staff and residents to list tasks by various classifications e.g., open tasks, late, etc. Lists can be limited to a particular department, a particular discipline, severity, originator, project, asset, technician, or status.

Residents can see the tasks they logged, while staff can see all tasks assigned to their department(s).

Relevant staff can then assign and schedule the tasks based on various criteria. Status reports help manage the backlog of work.

Residents are only able to monitor their own requests.

Planned Maintenance scheduling and automated generation of scheduled maintenance tasks results in the creation of tasks to be assigned and delivered in accordance with a Service Level Agreement (SLA).

Procedure for Departmental Admin Staff

1. First thing in the morning, select your department and "Not Read" jobs. Go through each one and:
    a. Check that the requirement is clearly stated, correctly completed, and that the technician has enough information to allow her/him to deal with the problem without having to ask more questions.

    b. Based on the type of work required, assign the task to an appropriate member of staff or an external contractor. This will send an email showing any changes that you have made to the Originator of the request and to the person assigned to the job. If the staff member does not have access to email, print the job card.
    c. If parts or equipment need to be ordered, and the task cannot be resolved until those parts arrive, then place the order and schedule the task for a time when you expect everything to be available. This tells the originator when to expect the service and keeps the task off the "Late" list.
2. Then select "Not assigned" jobs. Check the job and assign it to an appropriate member of staff or an external contractor. If the staff member does not have access to email, print the job card.
3. Select open jobs and print lists by discipline, using the "Jobs Report" menu function. When the senior team member comes into the office, ask for signed-off jobcards for everything on the list.
4. Assigned persons should mark job cards as completed online if they have access to our intranet. If not, they need to bring completed job card printouts of the jobs and you can mark the job as closed. When a job is "closed", an email is sent to the Originator and to the person assigned to it, and it drops off the "Open" list.
5. During the day, **check the statistics at the top of the screen**. You will also see if more jobs have arrived because "Not Read", or "Not Assigned" counts will be non-zero. Follow up on critical and urgent jobs during the day. Follow up on "Late" jobs and understand what is causing the delay. Escalate to your manager if you cannot mitigate the delay.
6. As soon as a task has been completed, the assigned person, or the administrator, should close the task, preferably after completing information regarding time and resources used. This will send an email to the originator, and the task will be dropped from the "Open" list.

Procedure for Head of Department

Job cards can give you statistics on your service level and highlight staff shortages and issues. It is also a convenient way of delegating tasks to any member of your staff in a way that allows easy follow-up later.

For delegation, create a job card and assign it to a member of your staff. Jobcards can be Specific, Measurable, Achievable, Relevant, and Time bound i.e., SMART objectives.

For control, select "Jobs" -> "Jobs Created" menu function to see a graph of jobs created for your department by day.

Select "Jobs" -> "Jobs Closed" menu function to see a graph of jobs closed by your department, by day.

Select "Show Jobs" and look at the statistics at the top of the screen. You will quickly see if things are going well or if intervention is required.

Look at individual lists of jobs by severity, discipline, or technician to see where resource constraints exist.

Identify the history of individual Originators, where you suspect abuse.

Tasks report

This allows you to select various tasks based on selection criteria (e.g., late, open, a technician, etc.) and print it in a reasonable format. Use this when discussing issues with a team leader or your manager.

Tasks Created

This displays a graph showing the number of tasks created each day for the past thirty days.

Tasks Closed

This displays a graph showing the number of tasks closed each day for the past thirty days. There may be a delay between the day the task is finished and the day on which the task is closed.

Hours worked

This displays a graph showing the number of hours work logged on maintenance tasks on each day for the last thirty days.

Administration

This has a sub-menu that allows for system maintenance.

People

People records – maintenance of static data, a history of events, relationships with other people e.g.:

- Spouse – the two are/were married. Allows us to extract wedding anniversaries for Silver Threads
- Partner – they live together but are not formally married. Anniversaries optional
- Employer – of a registered gardener or domestic
- Carer – of a Resident
- Sibling – a brother or sister. Allowing visits
- Parent – of child. Allowing visits
- Family – some other relation. Allowing visits
- Other types can be added, as required. Each person can have many relationships.

People and Assets

It is possible for a resident to have use of an asset (e.g. workshop, or garage) for which they are billed every month. When two people occupy a single cottage (e.g. a husband and wife), one will be responsible for paying the levy and associated charges.

- Navigate to "People and Assets" on the menu.
- If another person has been related to this specific asset, remove their record.
- Add a relationship between the Person and the Asset. In future, all billing for that asset will be directed to the appropriate account code in Pastel.

Password Force

When a User forgets their password, or when we need to remove their access to the system, this function allows an administrator to change another user's password.

Register

Permits the registering of a new User.

Users

Allows an administrator to maintain data in a User's record, such as their role, or the spelling of their name.

Care Centre

Maintenance of medical records and creation of certain billing records. Restricted to specific people.

Finance

Various financial functions, including:

Electricity Billing

All cottages and various other buildings and devices have electricity meters. These are read around the 21st of each month and the readings are sent to Manalec for data capture into a custom spreadsheet and identification of anomalous readings. The spreadsheet, in Excel form, is sent to Settlers Park accounting staff. The following procedure should be followed on receipt of the spreadsheet, normally via email.

1. Double-click the attachment and it should open in Excel.
2. Check that the date of the file is correct for the current month and that the unit cost seems reasonable. Check for warnings or remarks from Manelec.
3. Save the first tab of the spreadsheet (it has a list of cottages and amounts) as a “Text (Tab-delimited) (*.txt)” file in a standard directory. Use a file naming convention such as “elecYYYYMM.txt”, where YYYY is the current year and MM is the current month e.g. “elec202010.txt” for October 2020. Accept the message saying that only the active tab will be saved. Quit from the spreadsheet.
4. Open the Settlers Park intranet website using your favourite browser – the following notes reflect what you will see with FireFox, but other browsers will give similar experiences.
5. Sign on using your email address and your password.
6. Select Finance -> Electricity Billing from the menu.
7. Select the current month number – 1 for January, 12 for December. The default will probably be correct (it assumes the current month).
8. Select the date on which the meter readings were taken. If they were taken over several days, choose the date on which the readings were all completed.
9. Select the file you saved earlier (e.g. elecYYYYMM).
10. Click on “Submit Query”.
11. A new page will be displayed summarising the options previously selected, some warning or error messages, and some summary totals. Print the page and file it.
12. Review the messages and decide on action to take. In each case, you have to decide if you will ignore the message, prepare a manual accounting transaction, or correct the problems and re-run the process.
13. Once satisfied that the messages are being addressed, click on “Download” to get a file of Pastel transactions to be imported directly into Pastel. Confirm that the batch total from the Pastel import matches the “Total billed” value on the report page. Print the batch report from Pastel and file it with the file conversion report filed above.

The process followed by the conversion program is as follows:

- Headings in the spreadsheet are ignored.
- Rate per kw/h is extracted from the last heading line.
- Each meter reading is processed, line by line.
- Individual fields are considered and processed, displaying error or warning messages as required.
- We check if the meter belongs to an asset which is assigned to a specific resident e.g. a garage, a workshop, a pump, or even a cottage.
- If no account number is found, we check to see if the meter belongs to a cottage with a current resident. Where two residents occupy the cottage, a guess is made regarding which one should be billed.

- If no account number is found, we check to see if the meter belongs to a Park asset (e.g. the Don Powis Hall). If so, the account code is set to “Overhead” and, if not, an error message is issued.
- The readings are written away to an electricity history table. This allows residents and staff to display a graph of electricity history, on request.
- Further checks are performed, and error or warning messages may be issued – see below.
- Four journal entry records are prepared, using the selected account code and data from the spreadsheet row, converted to the correct format.
- After all rows have been processed, control totals are displayed.

There are several types of error and warning messages generated by the conversion program. All messages relating to the content of the spreadsheet are prefixed with the meter name, and a diagnosis of the cause of the message may require a review of the original Excel spreadsheet and possibly the correction of People records in the intranet database. Messages in Red are errors that should be corrected. Blue indicates a warning. Green indicates “Overheads”, and black messages are control totals. The following messages may be generated:

- **Meter = ‘xxx’ Amount = Rxxx.xx – No account number found**. This is an error and needs to be corrected and the conversion rerun or recorded manually.
    - If the meter is associated with a cottage, then the cottage is currently unoccupied. Assign the cost in a manual transaction, if appropriate, or update the record of the new occupant. If the meter is not for a cottage, associate the asset with the correct resident before re-running the conversion.
- **Meter = ‘xxx’ Usage = xxx – Calculated value (xxx.xx) differs from spreadsheet (xxx.xx)**. This is a warning, but journal entries will be created.
    - This usually indicates that the spreadsheet is including part or all of another meter in its calculation, or that the size of the cottage (used in the calculation of the rebate) in the spreadsheet does not match the size reflected in the Asset record.
        - In the first case, the preferred approach would be to allocate a standard charge for the shared resource and do not allow the spreadsheet to perform opaque calculations that are not understood by residents or staff. It is not desirable to have one person’s invoice influenced by their neighbour’s actions.
        - In the second case, establish the correct size of the cottage and ensure that both records are correct.
- **Meter = ‘xxx’ Amount = Rxxx.xx – Usage (xxx) is unusually high! Average = xxx.xxxx**. This is a warning, but journal entries will be created.
    - This indicates that the usage is more than 50% higher than the previous 100 days (three months). Check the usage graph and see if it is unusual. If so, investigate and pass manual adjustments, if necessary.
- **Meter = ‘xxx’ Usage -xxx – Meter was replaced?** This is an error and needs to be corrected and the conversion rerun or recorded manually.
    - The opening meter reading was higher than the closing, indicating that billing should be done manually. Either the meter was replaced, or it has reached its maximum value and gone back to start from zero.
- **Meter ‘xxx’ Amount = Rxxx.xx – Settlers Park overhead.** This is for information. No action is required.

Other errors of incorrect Pastel account allocation can occur which are only detected by Pastel or by complaints from residents. These are generally caused by out-of-date information relating to "People" and "People and Assets". These include:

- A resident moves into or out of a cottage and the "People" records are not updated. Update the record – cottage number or status, but fix everything including phone numbers and history.
- Of two people who live in a cottage, the wrong account number is selected. Link the preferred Person to the Asset.
- The spelling of the account number in Pastel differs from the account number created when the Person record was created. The intranet keeps track of many more people than are currently recorded in Pastel, so the account number in Pastel must be made to match the person's record on the intranet.

In addition to error messages and warnings, there are totals at the bottom of the report.

- **Total units used** – This should be roughly similar (but is unlikely to be identical) to the units reported on the monthly municipal invoice showing total units.
- **Total cost incurred** – This should be roughly similar to the amount due, including availability charges, for electricity on the municipal invoice. Significant variances should be investigated and explained.
- **To be billed normally** – Should balance **exactly** to the total value of the batch of journal entries imported into Pastel.
- **To be billed manually** – Should balance exactly to the batch of manually created electricity transactions posted to Pastel, with variances explained in writing and filed for audit review.
- **Total billed** – the sum of normal and manual transactions.
- **Total overhead** – the sum of all meters flagged as overhead.
- **Total rebate granted** – the sum of all electricity rebates actually granted to residents based on floor area.
- **Recovery variance** – the difference between the sum of (normal and manual journals, overhead, and rebate granted) and the amount that should be on the municipal invoice. If the value is positive, then we are over-recovering.

Hibiscus Room billing

A billing summary is generated every month by the Pilot system used in the Hibiscus Room. This file, in Excel format, is sent to the Settlers Park accounting staff via email. Use this function to convert the spreadsheet into Pastel journal entries:

1. Double-click the attachment and it should open in Excel.
2. Check that the date in the file name is correct for the current month.
3. Save the first tab of the spreadsheet (it has a list of names, account numbers, and amounts) as a "Text (Tab-delimited) (*.txt)" file in a standard directory. Use a file naming convention such as "hroomYYYYMM.txt", where YYYY is the current year and MM is the current month e.g. "hroom202010.txt" for October 2020. Accept the message saying that only the active tab will be saved, if it appears. Quit from the spreadsheet.
4. Open the Settlers Park intranet website using your favourite browser – the following notes reflect what you will see with FireFox, but other browsers will give similar experiences.
5. Sign on using your email address and your password.
6. Select Finance -> Hibiscus Room Billing from the menu.

7. Select the current month number – 1 for January, 12 for December. The default will probably be correct (it assumes the current month).
8. Select the date on which the extract was taken – probably the 21st of the current month.
9. Select the file you saved earlier (e.g. hroomYYYYMM).
10. Click on "Submit Query".
11. A new page will be displayed summarising the options previously selected, some warning or error messages, and some summary totals. Print the page and file it.
12. Review the messages and decide on action to take. In each case, you have to decide if you will ignore the message, prepare a manual accounting transaction, or correct the problems and re-run the process.
13. Once satisfied that the messages are being addressed, click on "Download" to get a file of Pastel transactions to be imported directly into Pastel. Confirm that the batch total from the Pastel import matches the "Total billed" value on the report page. Print the batch report from Pastel and file it with the file conversion report filed above.

The process followed by the conversion program is as follows:

- Headings in the spreadsheet are ignored.
- Each account is processed, line by line.
- Individual fields are considered and processed, displaying error or warning messages as required.
- We check that the account number given belongs to a resident of the Park.
- Journal entry records are prepared, using the selected account code and data from the spreadsheet row, converted to the correct format.
- After all rows have been processed, control totals are displayed.

Telephone billing

A billing summary is generated every month by the telephone switchboard and extracted by a System Administrator. This file, in Excel format, is sent to the Settlers Park accounting staff via email. Use this function to convert the spreadsheet into Pastel journal entries:

1. Double-click the attachment and it should open in Excel.
2. Check that the date in the file name is correct for the current month and note the exact date of extract.
3. Save the first tab of the spreadsheet (it is in the form of a report, with headers and detail lines) as a "Text (Tab-delimited) (*.txt)" file in a standard directory. Use a file naming convention such as "phoneYYYYMM.txt", where YYYY is the current year and MM is the current month e.g., "phone202010.txt" for October 2020. Accept the message saying that only the active tab will be saved if it appears. Quit from the spreadsheet.
4. Open the Settlers Park intranet website using your favourite browser – the following notes reflect what you will see with FireFox, but other browsers will give similar experiences.
5. Sign on using your email address and your password.
6. Select Finance -> Telephone Billing from the menu.
7. Select the current month number – 1 for January, 12 for December. The default will probably be correct (it assumes the current month).
8. Select the date on which the extract was taken – probably the 21st of the current month.
9. Select the file you saved earlier (e.g., phoneYYYYMM).
10. Click on "Submit Query".
11. A new page will be displayed summarising the options previously selected, some warning or error messages, and some summary totals. Print the page and file it.

12. Review the messages and decide on action to take. In each case, you must decide if you will ignore the message, prepare a manual accounting transaction, or correct the problems and re-run the process.
13. Once satisfied that the messages are being addressed, click on “Download” to get a file of Pastel transactions to be imported directly into Pastel. Confirm that the batch total from the Pastel import matches the “Total billed” value on the report page. Print the batch report from Pastel and file it with the file conversion report filed above.

The process followed by the conversion program is as follows:

- Headings in the spreadsheet are ignored.
- Each account is processed, line by line.
- Individual fields are considered and processed, displaying error or warning messages as required.
- We check the telephone extension number against the People database and extract the account number of a resident of the Park.
- Journal entry records are prepared, using the selected account code and data from the spreadsheet row, converted to the correct format.
- After all rows have been processed, control totals are displayed.

General

Birthdays

Birthday lists for Silver Threads – this includes birthdays and anniversaries for a specific month. Ages and Anniversary years are calculated from the day after the end of the month selected. Where the month selected is before the month prior to the current date, the effective date for calculating ages is assumed to be in the following year. For example, if the current month is September 2020 and birthdays are selected for October, then the date used in age calculations will be the current year i.e. 2020-11-01. If, however, the month selected is January, the date used for age calculations will be 2021-02-01.

Electricity consumption trend graphs

When the price of electricity changes or when weather patterns change then residents are sometimes surprised that their electricity usage changes. This can also happen if the electricity readings are taken later or earlier than the 21st of each month, or if a meter is changed or if a new device (e.g. air conditioner, heater, or underfloor heating) is installed.

To see a pattern of usage in graphical form, do the following:

- Logon to the intranet and search for the person’s record, preferably by name. If two people live in a cottage, either one can be selected.
- Select “Read” to display the person’s details and identify the cottage number to the system.
- From the menu, select “Electricity Usage” – a graph of the recent 24 months electricity usage will be displayed.

Note that usage in kw/h is displayed, which removes the distraction of price.

The graph can be printed directly from the browser.

Organisation Chart

A chart of the reporting relationships of senior staff can be displayed. This will eventually be extended to cover all staff, but only once it can be generated dynamically.

Telephone charges trend graph

This is like the trend graph for electricity but will reflect total cost of phone calls through the Park switchboard, by month.

Library Members

This function is only visible to members of the Library Group. It displays a list of Associate Members who are also members of the Library. All **residents** are automatically members of the Library.

Librarians can:

- List the members, showing name, paid-up status, and Library status
- Add members from a list of Associate Members
- Update the Library status from Validated to Terminated, or Excluded
- Update contact details if they have changed

When an Associate Member becomes a Resident, they are automatically a member of the Library so they are automatically removed from the list of Library and Associated Members.

Setup

There are various "static" tables that are used in the intranet system, and some facilities that should only be used by the System Administrator. Most users will not see these menu items.

- Account number – change the account number of a Person.
- Address types – a list of possible address types e.g., postal, residential.
- Asset types – e.g., Cottage, Care Centre Room, Computer, etc.
- Assets – a list of all the cottages and other assets
- At The Gate – maintaining a relationship between our database and At The Gate
- Audit Trail – various audit trail reports
- Billing Responsibility – where a resident is responsible for her/his cottage and another asset (e.g., a garage, or workshop), we can assign the charges to the responsible person.
- Colour – a list of colours
- Companies – a list of groupings of people and the companies they are associated with.
- Countries – used in addresses
- Departments – the name of various departments.
- Department membership – associates a person with a department
- Disciplines – e.g., plumber, painter, management action.
- Distribution lists – e.g., staff, Associate Members, Residents
- Documents – that need to be controlled and/or approved and displayed
- Electricity records – where billing was corrected and rerun
- Tasks History – we maintain a log of all changes to tasks for a while
- Logon history – who logged on, when, from where, etc.
- Medical Procedures – the list of typical medical procedures performed in the Park
- News – news articles, and which ones have been read by each user
- News Reports – the news reports themselves
- Occupation – Create or maintain a list of occupation or professions to be associated with people.
- Parameters – direct maintenance of some system parameters

- Payments – payments made and recorded for selected functions. Normally handled by Point of Sale.
- Phone Records – Maintenance and analysis of detailed phone records
- Phone responsibilities – assigning responsibility for multiuser phones, and overhead costs
- Places – used for addresses. Places within regions within countries.
- Planned Maintenance – maintain records of planned maintenance
- Projects – maintain the list of projects e.g., refurbishing of cottages
- Regions – for addresses
- Residents and Services – associate a R&S representative to each cottage
- Roles – used for function authorisation e.g., only Care Centre staff can see medical records
- Skills – skills available within the park e.g., hydrologist, woodworker, philosopher
- Status – a list of possible stati e.g., Resident, Associate, Deceased, etc.
- Titles – standard titles e.g. Dr, Mr, Ms, etc.
- Vehicles – physical vehicles in the Park belonging to residents, visitors, contractors, etc.

Problem and Change Management

Tasks are used to log and manage issues and changes required. Incidents are logged, resources are assigned, costs are allocated, and resolutions logged. Service levels are calculated and reported to management.

Planned Maintenance

Scheduled tasks are recorded, with frequency and required resources. As the task becomes due (e.g. renew road markings) it is injected into the Tasks queue and are dealt with according to service level agreements.

Additional functions

From time to time, additional functions will be provided which will be documented in this manual. If you believe that there is a function that should be provided, please send your suggestion to the General Manager.

--== End of Document ==--

Appendix A – Getting Started for Residents

To get started with the Settlers Park intranet, please do the following: -

- Open your browser (FireFox, Chrome, Edge, or Internet Explorer) and navigate to www.sprv.co.za . Alternatively, click on the link and the browser will open automatically.
- Select "Staff and Residents Only" and sign in using your Settlers Park account number (from your statement) as the username. Use your ID number as a temporary password. Once logged in, you will be asked to select a new password that you can remember.
- You can change your own password at any time – you will see a menu item at the top of the screen that helps with this task.
- Choose "Search" and look for your own name. Choose "Read" and see what we have captured about you. Select "Back" and get back to a list of people.
- Select "Update" for your own record and fill in all the missing fields. If you are satisfied that the data is correct, update the "Checked" field (near the bottom) and make it a "Y". Select "Save". Now choose "Read" again and see if your changes are present.
- Look at other records and get comfortable using the system. Remember that the data is real – only change what should be changed. Try the "Search" function to find out who lives in cottage 195. Select all records where "Status" is "Deceased" between 2020-06-01 and today – have we missed anyone?
- Look under P&P (Policies and Procedures) to find documents of interest, including the Resident's Handbook.

If you are having trouble signing on, ask Reception to "Force" a password change on your sign-on. They can set your password to a temporary password so that you can log on and then change it to something that you can remember.

The Protection of Personal Information (POPI) Act has come into full effect. This means that we need to ask permission before we make certain personal information available to others. These items of data include a person's birthday, their mobile phone number, and their personal email address, and this affects our phone list and Silver Threads.

Please update your own record on the intranet to indicate if we may disclose the sensitive information on the SP phone list. For example, on the update screen, you will see your birth date listed. Just below it, there is a field asking, "Birth date disclosure" – you have three options: "?", "Y", or "N". By default, it is "?". Please change it to "Y" or "N".

Then do the same for your mobile phone information and home email address.

The "?" indicates that we have not yet asked the person if the information can be disclosed, "Y" indicates that we have received permission, and "N" indicates that permission to disclose the information has been denied.

To see the graph of electricity usage for a cottage:

- Select "Search" and look for your name.
- When the list of matching people shows, select "Read" on the line that you want.
- Select Administration -> Electricity History
- View the graph and, if appropriate, print it.

If you feel that there should be other data or functions available for you to use, please contact the General Manager.

Appendix B – Getting Started with Tasks – Residents

To work with Tasks, open your browser (FireFox or Chrome or Edge) by clicking on this link: https://www.sprv.co.za and logging on – See Appendix A.

Select "Tasks" and "Show tasks" from the menu – a list of open tasks will be displayed. Residents will see their own tasks and staff will see all of them. Select a department from the heading above the list – "Facilities" will be the one you use most often – and then click on "Refresh". A list of open Facilities tasks related to your cottage or tasks that you have created will be displayed.

Play with selecting tasks that are there already or add one – use "Test" in the beginning of the subject unless you are recording a real task.

You can choose all open tasks by discipline (e.g., for plumbers, or carpenters, etc.), any level of urgency (e.g., critical, or urgent, or any level), the originator, and some analysis reports. Once you have made your selection, click on "Refresh" to get the new list.

You can see (and print) the task by clicking "Read". You can change it by clicking "Update", and update some of the fields. Other fields are used by the office.

You can open a new task – only the initial fields are needed there. Staff members assign the task to the right person from the Update page.

All staff and residents will be able to log on and enter a task, although residents can only see a limited amount, and only about their own tasks.

This will be used by other departments too, so if you need something from Admin, you can log it here.

If you have a problem using this function, please contact Reception for help.