INTRODUCTION TO SARS·GRID

Welcome to the SARS-GRID MANUAL. In this book, you will find the information you need to become a skillful user of the SARS-GRID features so that you can effectively carry out your responsibilities as a System Administrator, a counselor, a scheduler, or technical support specialist.

The purpose of this Manual is to provide an easy-to-follow, non-technical, step-by-step guide for setting up and using SARS-GRID.

What Is SARS·GRID?

SARS-GRID is a multi user scheduling program that is being used by school counseling centers and other offices that are automating their scheduling activities. Using SARS-GRID makes it easy to find an available appointment slot, schedule the appointment, print and/or e-mail appointment receipts, and view reports.

How to Use this Manual

You do not need to read this book from cover to cover, as you would a novel. The Manual is organized in a manner that will enable you to use it as a reference guide. The topics are presented more or less in logical order, progressing from the initial steps of installing the software and setting up the system for first-time use, using the system to schedule appointments, maintaining the system, and generating useful reports. The topics also include features for counselors, including how to write and view notes about students.

Initial Assumptions

This Manual assumes that you have basic knowledge in the following areas:

- Using a personal computer
- Using Windows 95, Windows 98, Windows 2000, or Windows NT, whichever is applicable to your system
- Using a mouse

For example, we assume that you know how to turn your computer on and off, how to use the keyboard to type information, how to use directional keys, function keys, and “hot keys” (letters of words that are underlined and may be typed in lieu of clicking with the mouse). We also assume that you know how to use your mouse to “click” on objects, how to “double-click” to execute certain functions, how to drag an object, and how to re-size screens.

If you are unfamiliar with any of the above, we strongly urge you to first become familiar with basic personal computer, Windows, and mouse concepts.
Organization of the Manual

This Manual is organized into six functional sections. Individual chapters address the main topics with a series of step-by-step instructions. Most tasks have a Who—When—Where—Why—What—How format. These will help the user to understand who is the likely person to perform the task, when the task should be performed, where to go in the program to perform the task, why the function needs to be done, what the function does, and how to accomplish the task.

Part I – Getting Started will assist the manager in deciding whether to set up separate locations, will provide step-by-step instructions to enable the technical specialist to install the software, and will provide instructions for all users on how to gain access to the SARS-MENU.

Part II – Setting Up a New Application is for System Administrators. A System Administrator is the individual who is responsible for establishing the initial settings in SARS-GRID that will be used by all of the other users. The System Administrator also will be the person who maintains the database in SARS-GRID. The System Administrator does not need to be a computer expert, but he or she should have some basic knowledge of computers, Windows, and—most important—the scheduling and information needs of the office that is using SARS-GRID.

Part III – Using the Application is for any user of SARS-GRID -- the System Administrator, the counselors, and the schedulers.

Part IV – Maintaining the Application is for the System Administrator and designated schedulers. This part talks about the AUTO ADD feature, the STUDENT MAINTENANCE feature in UTIL and DATABASE utilities.

Part V – Reports has all the information you need to view, generate, and print a variety of reports that may be useful to your scheduling operations.

Part VI – Technical Issues will be of interest to the network administrator, computer support staff, and possibly the System Administrator. If you are just an every day “user,” you can skip this Part.

Where to Find Other Information

This manual is posted in PDF format in the Client Zone of our website at www.sarsgrid.com. In addition, an on screen help feature is available at any time while working with SARS-GRID simply by pressing the F1 function key.

Other tools that come with SARS-GRID are:

• Workbook for Administrators
• Quick Guide for Schedulers
• Quick Guide for Counselors

Note for Persons with Disabilities

SARS-GRID contains accessibility features for the visually and manually impaired. For information on configuring these features, see Appendix G. If the text-to-speech component is used in Professional mode, we recommend that users temporarily turn off third-party text-to-speech components. To ensure privacy of information, we also recommend that earphones be used when the text-to-speech function is activated on a computer that is located in a public area.
If You Encounter Problems

As you probably know, computers and the programs that run on computers sometimes fail to operate properly. It is often difficult to ascertain the source of the problem. Some possible sources of problems are:

• Your hardware. A part of your computer or a peripheral (keyboard, printer, mouse, etc.) may have failed. If so, you will need to identify the part that is not working and either replace or repair the part.

• Your network. A failure may have occurred in your overall network. If so, your network administrator needs to be alerted to correct the problem.

• Software other than the SARS-GRID software, such as the operating system on a workstation. If so, you need to obtain assistance from your technical support specialist.

• You, the user. Don’t take this personally. Even sophisticated users sometimes inadvertently cause the system to crash. Often, the solution to clearing the problem is as simple as rebooting the computer.

• A problem in SARS-GRID itself could actually be the problem. If so, see the next section.

When You Need to Contact Us

SARS-GRID has a web site on the World Wide Web. This web site may be a useful source of information. If you have access to the Internet, you may want to take a look at what the site has to offer by going to www.sarsgrid.com.

If you have a specific question and do not need the answer immediately, you may send us a fax message at (415) 226-0038. If you prefer to send an e-mail message, we can be reached at support@sarsgrid.com.

To speak directly with our customer support staff, the person designated under the Support Agreement as our contact person may call (415) 226-0040 during the following hours: Monday through Friday, 8:30 a.m. to 5:30 p.m. (PT).
OVERVIEW OF SARS·GRID FEATURES

The Visuals

When you open the SARS·GRID MENU icon, you will be prompted to enter a USER NAME and a PASSWORD and then click on CONTINUE. If you successfully pass this test and you have full access rights, a menu will appear on your screen that contains eight options to select. It looks like this:

![SARS·Menu](image)

These features are not listed in any particular order in terms of use. In fact, UTIL (which is short for “utilities”) is the first feature that needs to be used by the System Administrator when setting up a new application (see Part II).

Most schedulers will probably be using THE GRID (the “guts” of the program), DROP-IN, and perhaps MEETING MAKER and REPORTS, as well as the all-important EXIT.

Counselors most likely will be using the COUNSELOR’S GRID and DROP-IN.

Some of the choices lead to another, more detailed tool bar or menu. These are shown below.

Click on UTIL; another tool bar will appear that looks like this:

![SARS-UTIL](image)

Notice that when you view the screen, there is no text describing the icon. To view the description, rest your mouse pointer on the icon for a brief moment (do not click). The text description will appear below the icon to assist you in understanding whether you are selecting the desired feature.
When you click on REPORTS, a menu will appear that looks like this:

![SARS Reports Menu](image)

**Navigating around SARS-GRID Features**

You should feel free to browse through the various features that you see in SARS-GRID. If you are a user but not the System Administrator, and the system is already set up, you may find that you are unable to obtain access to a particular function. This does not necessarily mean that the system is failing to work properly. It may mean that based on your role in the office, you have not been provided access to the function. This is a safeguard that is built into the system to prevent unauthorized or unnecessary changes to the underlying set-up. If your role requires that you have access to a denied-access function, speak with your System Administrator.

**Terminology**

Because schools' formats for student ID's differ, the generic label “ID” is used for the field that accepts a student identification number. This field may accept such ID’s as Social Security Number, Banner ID, Datatel ID, PeopleSoft ID, or other student ID numbers, and the label for the field will be a school-assigned label. All names and ID’s used in the examples in this Guide are purely fictitious. Any resemblance to actual people or ID numbers is purely coincidental.

**Where to Start**

Now let’s move on. If you are a System Administrator, you may want to start at the beginning. If you are a counselor or scheduler, you may want to briefly review Part I, Section 3, and then go to Part III.