



User Manual



[Date]

Document Control

Version	Date	Changes	Description
x.x Final	[Date]	All revisions accepted.	Document is finalized.

Document Change Approvers

Function	Name	Signature	Date
Area	Approver	Signed	[Date]



TABLE OF CONTENTS

1 Introduction..... 4

1.1 Purpose of the Manual..... 4

1.1.1 Security.....4

1.2 User Interface 5

1.2.1 Header Message.....8

1.2.2 List of Values8

1.2.3 Navigation9

1.2.4 Cascading Lists10

1.2.5 Menu Buttons.....12

2 SAMPL Menu.....13

2.1 Projects.....14

2.1.1 Project.....14

TABLE OF TABLES

Table 1-1 User Interface Table..... 5

Table 1-2 Buttons12

TABLE OF FIGURES

Figure 1-5 Edit Address11

Figure 2-1 SAMPL Menu.....13



1 Introduction

SAMPL Release x.x introduces the rewrite of the SAMPL application.

1.1 Purpose of the Manual

The objective in the production of the SAMPL User Manual is to provide the user with the information necessary to operate the system application effectively. This User Manual is organized in a manner that is considered most expedient for the user; all information necessary to understand and complete a process or procedure in SAMPL is in the same chapter or set of paragraphs. Therefore, in reading the complete text of the manual, the reader will find redundancy, but this format has been prepared deliberately to save the reader the additional time needed to find separately discussed functions.

1.1.1 Security

The SAMPL data, hardware, and software integrity are protected by network access, database access, and table access. These protections are as follows:

- SAMPL is an Internet application accessed only with a Web browser. The user must obtain and employ a legitimate Password System generated ORACLE identification (ID) and password. If this user ID/password combination is incorrect, access is denied. Each area's database will disallow access to any ID that is not valid for that database.
- Each user has access to the SAMPL tables as defined by roles. The roles determine which table alterations can be performed by each user. This prevents table changes made by unauthorized roles.
- SAMPL System Administrators (SA) are responsible for assigning roles for new users and revoking those roles when they are no longer required by the user.
- Data integrity is maintained with field, screen, and table level edit checks built into the application.

1.1.1.1 Hardware Requirements

IBM-compatible personal computer (PC) to communicate with the database server and an Internet connection are the hardware requirements.

1.1.1.2 Software Requirements

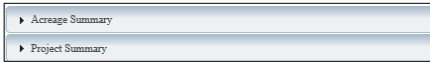

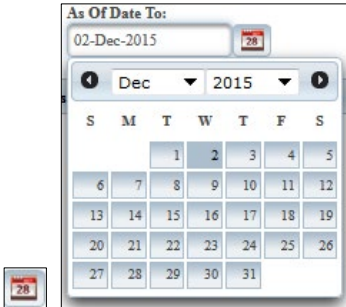


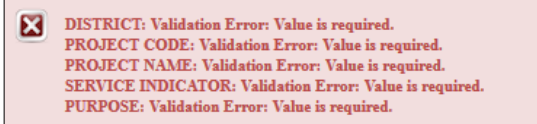
The software requirements are Virtual Private Network (VPN), if offsite, and Password Systems both on- and offsite, as well as Microsoft Internet Explorer 11.



1.2 User Interface

With the update to SAMPL x.x, the table below shows basic screen controls used within each module.


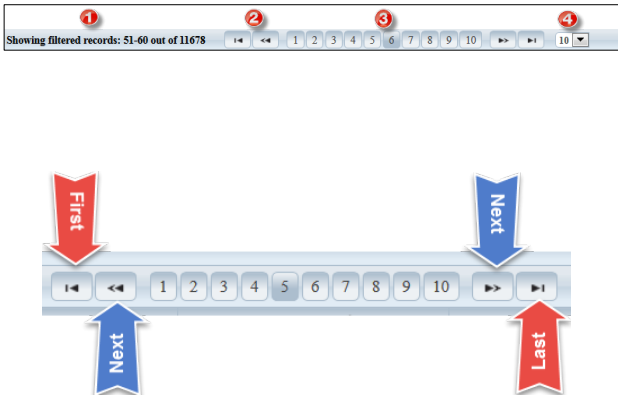
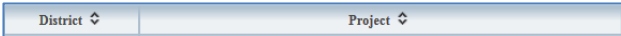



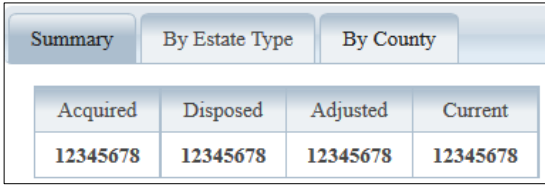
Table 1-1 User Interface Table

Function	Screen Prompt	Action
Cascading lists		Select the ► arrow on the Cascading list to expand the section.
Add		Displays on the tab in a Cascading list and allows a record to be added through the main screen
Calendar		Select the calendar box to display a full month then select the date to display in the field.
Collapse/Expand		The (+) and (-) signs collapse and expand the screens horizontally. The (>) and (<) arrows collapse and expand the menus vertically and the Cascading lists horizontally.
Count Viewer box		Indicates the number (10, 25 or 50) of records showing in the results table after a search. By selecting the drop-down arrow, the number of viewable records can be changed.
Header Message		The Header Message appears just below the toolbar and above the screen header. This section

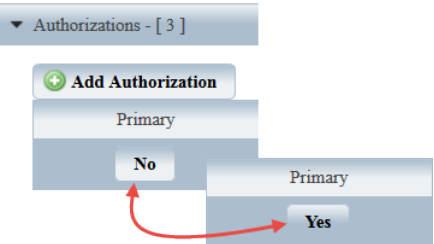


Function	Screen Prompt	Action
	<p>The form component needs to have a UForm in its ancestry. Suggestion: enclose the necessary components within <h:form></p>	shows that the screen is saved, if records are available and if any fields have errors.
List of values (Drop-down)		<p>A list drop-down opens when the user clicks the down arrow to the right of the field.</p> <p>Users can select Search All to search all available records or make a selection from the list on which to search.</p>
List of values (Pop-up)		<p>A pop-up list of values displays when the magnifying glass beside the field is selected.</p> <p>The Search within the list only searches within the values listed.</p>
Pop-up field/Defined Entry field		Data can be added to these dimmed fields by clicking the magnifying glass and selecting from the Pop-Up.
Red-Lined Field/Text	<p>TASK NAME: *</p>	Indicates information is required to save the record.
Required (*) Fields		Indicates a required field
Results Page Filters		By entering criteria into the Search field above the table then selecting Search, the results can be searched and filtered



Function	Screen Prompt	Action
		further. (See red highlight in Pop-Up section above)
Search (Field Level)		Click the magnifying glass to open a pop-up and select a record from the list; entries for this field are only available through the pop-up .
Search Filters and "Showing filtered records:" label; First/Last/Next arrows		<ol style="list-style-type: none"> (1) Shows the total records and how many are displaying (2) Forward and Back buttons; allows the view of previous and next records. (3) Table result screens, for example, the image shows 10 tables with 10 records each per page. (4) Records displayed – options are that 10, 25 or 50 can be shown.
Sort Bar/Filter Table Row		The top header row of the filtered results table displays the sort criteria (Project, etc.) and has an up/down arrow  allows the user to sort the column ascending (ABC) or descending (ZYX). The sort arrows will turn up  for ascending and  for descending
Tabs		Tabs display within the Cascading lists to show or allow the user to quickly add specific information within a main data screen. The highlighted tab (light blue) is the tab currently in use.



Function	Screen Prompt	Action
Toggles		Within the Cascading lists and tabs, toggle buttons will display to select Yes or No. Click the button once to change the option to Yes and click again to reset to No. No is the default.

1.2.1 Header Message

The SAMPL Build x.x screens will include a section for error and save messages at the top of each screen. This area will detail errors relating to required fields and whether the business rule has been violated. Additionally, the header message will show that all field data has been saved.

1.2.2 List of Values

Some of the SAMPL data fields provide a valid list of values. This list is accessed directly from data and query screens. The list displays a valid list of data items based on the user's selection particular to the field being filled. SAMPL Build x.x includes two (2) types of lists – drop-down and pop-up.

The pop-up window can be accessed by selecting the magnifying glass icon beside fields where a list is available. The window allows the user to select a data item from the list of valid data values, and the value will automatically populate the related field on the data screen. At the top of each list pop-up box is Search field which allows the user to narrow the list.

A second type of list can be opened from the drop-down arrow beside the data field. Search capabilities are available on this drop-down list as well. These lists are only available on data fields with a downward arrow displayed on the field.

1.2.2.1 Calendar Box

Valid calendar date lists are available on date-formatted fields. A user can manually enter dates by keying the date into the field (the format required is DD-MON-YYYY, e.g., 08-JAN-2020), or by clicking on the small calendar icon next to the date field. If the user selects the calendar icon, a calendar pop-up window is displayed. Simply clicking on the desired date populates the data field with the appropriate format.



1.2.2.2 Search Functionality

SAMPL Build x.x offers multiple methods to search for data. These include the ability to search within a screen, window, drop-down list, pop-up list, or in a field. A Search button displays on all screen toolbars and provides screen level search capabilities. The magnifying glass at the end of certain fields allows a query to be made on the contents of that field. Screen level searches can be further filtered with a pop-up list search. Additionally, a query can be made within a drop-down list to refine items in the list.

1.2.3 Navigation

Navigation for SAMPL Build x.x will be controlled by using the Main Menu to the left of the screens and the toolbar that stretches across the top of all screens. Users can select the options in the Main Menu to jump to a specific module. Most of the toolbar buttons remain the same for each screen – Save, Cancel, Search, and Print – however, other buttons will be limited to specific screens.

1.2.3.1 Login Screen

Once users have entered the SAMPL Build x.x URL, the Login screen displays. The window requires a Username and Password to access the application.

1.2.3.2 Main Menus

The Main Menu options are separated by module (Projects, Planning, etc.) and are further broken down into submenu items (Asset, etc.). All selections are available on the Main Menu to the left of the screen area in the application.

1.2.3.2.1 SAMPL Home

Home is located on the SAMPL Menu and is the user's central navigational hub for one- to two-click access for all primary and secondary screens.

1.2.3.2.2 SAMPL Help

SAMPL Help is available through the Main Menu or by selecting the Help button in the upper right corner of the screen. An eLearning module will be available through either selection specific to the screen.



1.2.4 Cascading Lists

The Cascading list screen data records will display the number of records, per list, prior to opening the screen. Cascading list folders will be automatically displayed when a new record has been saved. The Cascading list will also display when a record has been searched and selected from the search list results screen. The Cascading list folders correspond to related screens and their data records.

The process for entering data into a Cascading list depends on the type of information required for the screen. Review the steps below for the Cascading lists in SAMPL Build x.x.

1.2.4.1 Project Cascading lists

1.2.4.1.1 *Project Summary*

The Project Summary Cascading list has two tabs: Totals and Detailed Totals.

Fields for Tracts, Appraisal Amount, Paid to Owner, and Cost are shown for the project on the Totals tab.

Detailed Totals for the project display with Type, Total, Completed, Received and Approval fields.

1.2.4.1.2 *Addresses*

The Addresses Cascading list holds fields for Address Type, Street Type, Street Number, Street Name, City (County), State, Country, and Zip Code+4.

At least one address must be added for each record. The Address Type defaults to Physical. This can be changed by selecting the Address Type drop-down.

***Note:** The Physical and Mailing addresses are different. The Physical address can be used as mailing, but Mailing may or may not be the Physical address.*

The tab displays with a project address or addresses. Click the **Edit** button to make changes to the record. The Edit window will open to allow updates to be made.

To add a new address, follow the steps below.

1. Click **Add** (+) on the tab.
2. Select **View/Edit** pencil to add a new row to the Cascading table. The **Edit** window displays.
3. Type the address information or select from the pop-up drop-down list or click **Close** to save the new address.



Figure 1-1 Edit Address

4. The new address displays on the **Addresses** cascading list.

1.2.4.1.3 Authorizations

The Authorization cascading list allows the user to create a Primary authorization and add the authorization details.

Note: Authorization is required, and more than one authorization can be added; however, one of the authorizations must be designated as Primary.

To add a new authorization, follow the steps below.

1. Click **Add Authorization** (+) on the tab.
2. A new row displays with **Yes** displaying by default in the **Primary** column.
 - a. Click the **No** field to toggle to **Yes**, to change the primary authorization.
 - b. Select **No** as the default if the primary authorization does not change.
3. Select the magnifying glass to open the pop-up **Authorization** .
4. Select from the **Authorization** results list or click **Search** to find a specific record.
5. Click **Cancel** to clear the selection from the **Select One** field in the added row.

To search authorization, follow the steps below.

1. On the **Authorizations** cascading list, select the magnifying glass to open the pop-up **Authorization** .
2. Select from the **Authorization** results list or click **Search** to find a specific record.
3. Click **Cancel** to clear the selection from the **Select One** field in the added row.



1.2.4.1.4 Project Plans

Project Plans shows the plans associated with the selected project. Once the Project Plans Cascading list has been opened, click **Search** to view a list of project plans which will display inside the Project screen and Project Plans tab.

To add a project plan, click the Create Project Plan tab. This action opens the Create Project Plan screen. For details on creating a project plan, refer to the *Error! Reference source not found.* section.

1.2.4.1.5 Appraisals

Appraisal shows the appraisals associated with the selected project.

Once the Appraisals Cascading list has been opened, click **Search** to view a list of appraisals which will display inside the Project screen and Appraisal tab.

To add an appraisal, click the **Create Appraisal** tab. This action opens the **Create Appraisal** screen. For details on creating an appraisal, refer to the *Error! Reference source not found.* section in this User Guide.

1.2.4.1.6 Tasks

Tasks shows the tasks associated with the selected project.

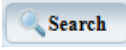



Once the Tasks Cascading list has been opened, click **Search** to view a list of specific tasks which will display inside the Project screen and Task tab.

To add a task, click the Create Task tab. This action opens the Create Task screen.

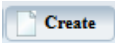
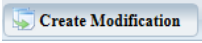
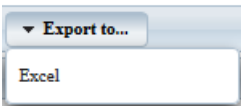
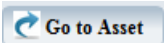
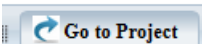
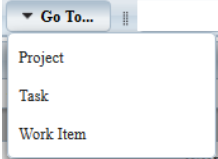



1.2.5 Menu Buttons

There are several buttons located on the query, list, and data screens. These buttons are located at both the top and the bottom of the page. A brief description of the buttons is shown below.

Table 1-2 Buttons

Function	Button	Action
Search (Screen Level Search)		Selecting this button will initiate a screen level search.
Clear/Cancel	 	Selecting the small icon will reset the associated field. Clear will reset the screen.
Copy		Copies the current record



Function	Button	Action
Create		Create allows the screen to reset and a new record to be created.
Create Modification		Allows the user to make a copy of then version a previous section.
Export to...		Allows the search results to be exported to Excel.
Go to Asset		Jumps to Asset from screens within Property module.
Go to Project		Jumps to Project from any screen with the button in the toolbar.
Go to...		Jumps to Project, Task or Work Item from any screen with the button in the toolbar.
Help		In final release of software, the Help button will open e-learning lessons for the application.
Print		Prints the current screen record
View/Edit pencil		Selecting View/Edit allows a record to be revised or viewed.

2 SAMPL Menu

The SAMPL Menu includes a Home option along with an arrow to select and open each module.

After logging in to the SAMPL application, the SAMPL Menu displays on the left side of the screen. Select an option from the menu.

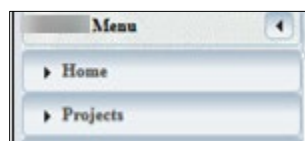


Figure 2-1 SAMPL Menu



2.1 Projects

The Projects menu shows options for Home and Project.

2.1.1 Project

This is the first module to be used for any new Real Estate project in SAMPL. It defines what needs to be acquired and acts as folder in which a project can be established. Few SAMPL records can be created without an existing project record. Note that only a System Administrator can create a project code; however, data will be added to the project by a Realty Specialist. The SA may also be the project manager.

The SAMPL SA must assign each project a unique identifier (project installation code) when creating a project record. This code can be up to six letters and/or numbers. All system references to the Project/Installation record will be made using this code.


2.1.1.1 Project Search

Search will be the opening screen for Project and users will begin with this screen.

1. On the SAMPL Menu, select **Projects**.
2. The menu expands, select **Project**. The **Project Search** screen displays.
3. Click **Search** to search all records.
4. Enter data into the fields to narrow the search and retrieve fewer records by:
 - a. Selecting the arrow to the right of the field to use the drop-down, or
 - b. Selecting the magnifying glass icon to use the pop-up
5. From the **Service Indicator**, click the drop-down arrow and select a service:

2.1.1.2 Project Search Results

Once the search has been initiated, the results display in the Project Search Results table.

1. To further filter the search results, enter an alpha or numeric term into the **Search** field and click **Search**.
2. To sort the results, click the up/down arrows located  beside one of the following fields: **District**, **Project**, **Program**, or **Purpose**.
3. Search results are pre-set to display the first 50 records. To view 10 or 25 records per page, select the drop-down arrow beside the **Count Viewer** box.
4. Click the numeric buttons or **First/Next/Last** arrows beside the **Showing filtered records** to view the next group of searched records.



2.1.1.3 Edit Project

Search results display with **Edit** in the far-left column.

1. Click **View/Edit** in the search results list.
2. The **Edit Project** screen displays.
3. Update any available fields not dimmed using the drop-down or make any additions or changes by typing into those fields on the **Edit** screen.

2.1.1.4 Create Project

A new project can be built in SAMPL Build x.x by using the Create option on the toolbar.

1. From the **Project** toolbar, click **Create**. The **Create Project** screen displays.
2. Complete the available fields by:
 - a. Selecting the arrow to the right of the field to use the drop-down, or
 - b. Selecting the magnifying glass icon to use the pop-up , or
 - c. Typing the information into open fields
3. Click the right arrow to slide the Cascading lists open and add data to following sections:
 - a. Addresses
 - b. Authorizations
 - c. Congressional District

***Note:** Details for adding information to the Cascading lists is located in the **User Interface** section.*

4. Click **Save** to save any changes made to the screen.
5. Click **Cancel** to reset the screen and remove all data.
6. Click **Print** to send the screen information to the printer.
7. To export the contents of the screen to Excel, click **Export to...** and select **Excel** from the drop-down list.
8. To copy the record, click **Copy** and the **Create Project** screen will display with the basic screen details to be copied.