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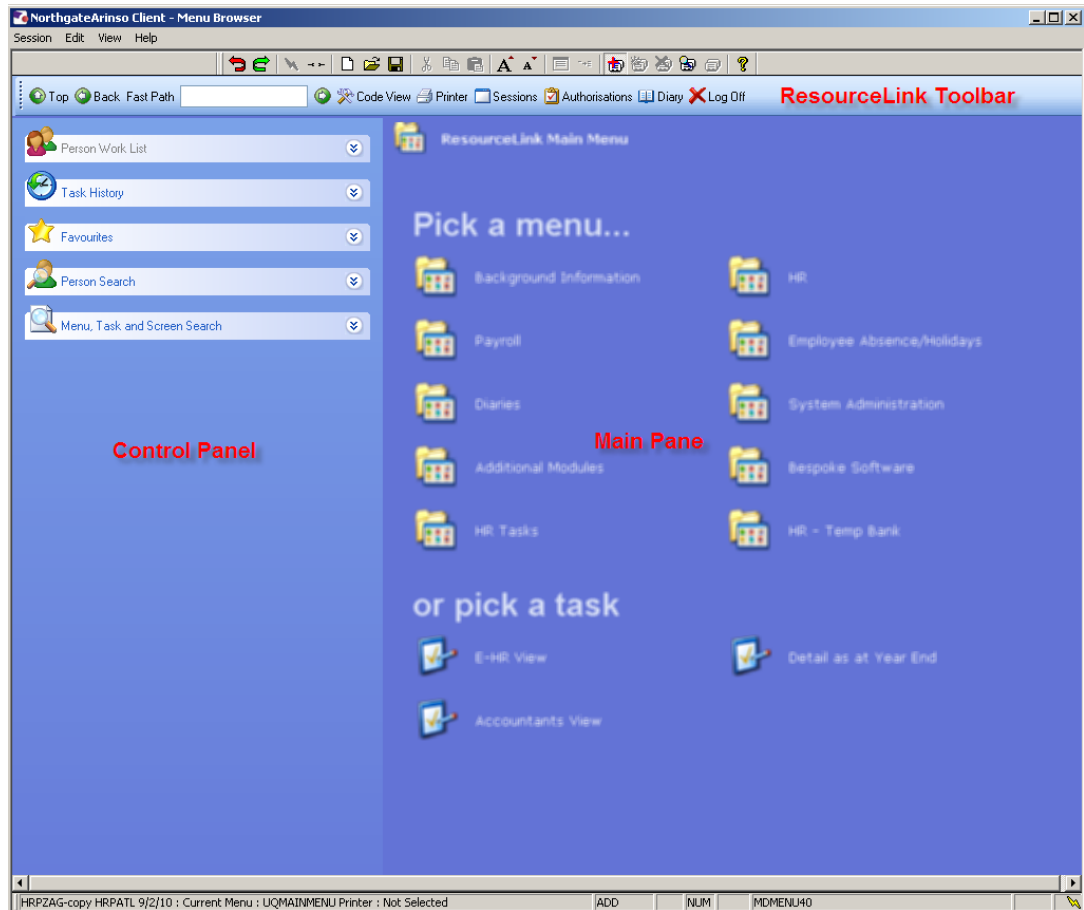
Navigating the System

This Work Instruction gives an overview of the basics of navigating the system from the Home Page.

For information about navigating the system when performing a specific task see the Work Instruction for that task.

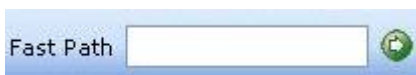|	
1	The Home Page
2	Using the Person Search
3	Using the Menu, Task and Screen Search

1   The Home Page

1.1   The ResourceLink Toolbar – the following tools are available from the toolbar:

	Displays the Home Page
	Displays the previous menu
	Enables you to enter a task or menu code so that you can navigate to that item directly.
	Displays the code view of the tasks and menus in the Main Pane. If this button is selected, the button changes to Title View so that you can toggle between the two views.
	Displays a list of printers or other output devices available for use.

Sessions	Displays a list of sessions that are currently active. Sessions displayed with a ✎ icon are currently open. Sessions displayed with a ▢ icon and an asterisk (*) have been closed, but are still active. You can click on an open session to select the session, or click on a closed session to re-launch the session.

You can use the **Restart All** option to re-launch all closed sessions.

Note: There is a limit of 3 active sessions. |
Authorisations	Not in Use
Diary	Not in Use
Log Off	Logs you off the system and returns you to the log in screen.

1.2 The **Control Panel** consists of:

- **Person Work List** – displays a list of those whose records you have accessed/modified during this session or whose records you have added from the Person Search.

  The people are grouped into four tabs according to the object type.

  Double-click on the ID number of a person to work with them. The icon changes from 👤 to 👤. You can then click on a task listed in the Task History or in the Main Pane to pull that person's details into the task.

  You can remove a person from the Person Work List by right-clicking on the person and selecting **Remove** or **Remove All** from the context menu.

  💣 Note: the Person Work List is cleared each time you log off.

- **Task History** – displays a list of the 10 most recent tasks that you have performed. You can quickly launch a task from the Task History by clicking on the name of the task.

  You can remove a task from the Task History by right-clicking on the task and selecting **Remove** or **Remove All** from the context menu.

  💣 Note: the Task List is cleared each time you log off.

- **Favourites** – displays your favourite tasks (just like Internet Explorer). You can store up to 10 favourites.

- **Person Search** – enables you to search for people who can be added to your Work List. See instruction 2 for more information.

- **Menu, Task and Screen Search** – enables you to enter a search term and search for menus, tasks and screens as per the ResourceLink theme. See instruction 3 for more information.

1.3   The **ResourceLink Main Pane** displays an icon view of menus and tasks. The content of the Main Pane will differ depending on your job role.

2   Using the Person Search

Use the **Person Search** to search for people who can be added to your Person Work List.

2.1   If necessary, click on the expand button ⌄ to display the Person Search Panel.

2.2   Complete the relevant fields.

Clicking on the drop-down arrows will display the available options for that field.

2.3   Click on **Search**.

2.4   The search results are shown in the list at the bottom of the panel.

💣 To scroll through the list, click and drag the scroll bar rather than use the scroll arrows.

2.5   Double-click on the Employee ID number to add the person to the Person Work list.

💣 You **MUST** do this to populate the Person Work List to be able to pull the employee's details through to the chosen task.

3 Using the Menu, Task and Screen Search

If you do not know which menu the task that you want to perform is on, use the **Menu, Task and Screen Search** to find it.

3.1 If necessary, click on the expand button to display the Menu, Task and Screen Search Panel.

3.2 Type a keyword or words into the Search field – if in doubt, follow the KISS principle (Keep it Simple Stupid) and type a single word such as add, amend, bulk, sickness, etc.

3.3 Select the relevant criteria that you wish to search.

3.4 Click on the **Search** button.

3.5 Double-clicking on any of the items in the list will open the item.

💣 To scroll through the list, click and drag the scroll bar rather than use the scroll arrows