



Basics

Software Solutions for Events Management

Manual

RUBIN Basics

This basics manual offers the user the look and feel of **RUBIN** aside of the **RUBIN** module actually being used. Many functionalities and shortcuts are the same in all **RUBIN** masks and apply to all modules as described here. The user defaults, which every user can edit individually in order to set up **RUBIN** in a way to suit their own way of working, are described in further detail.

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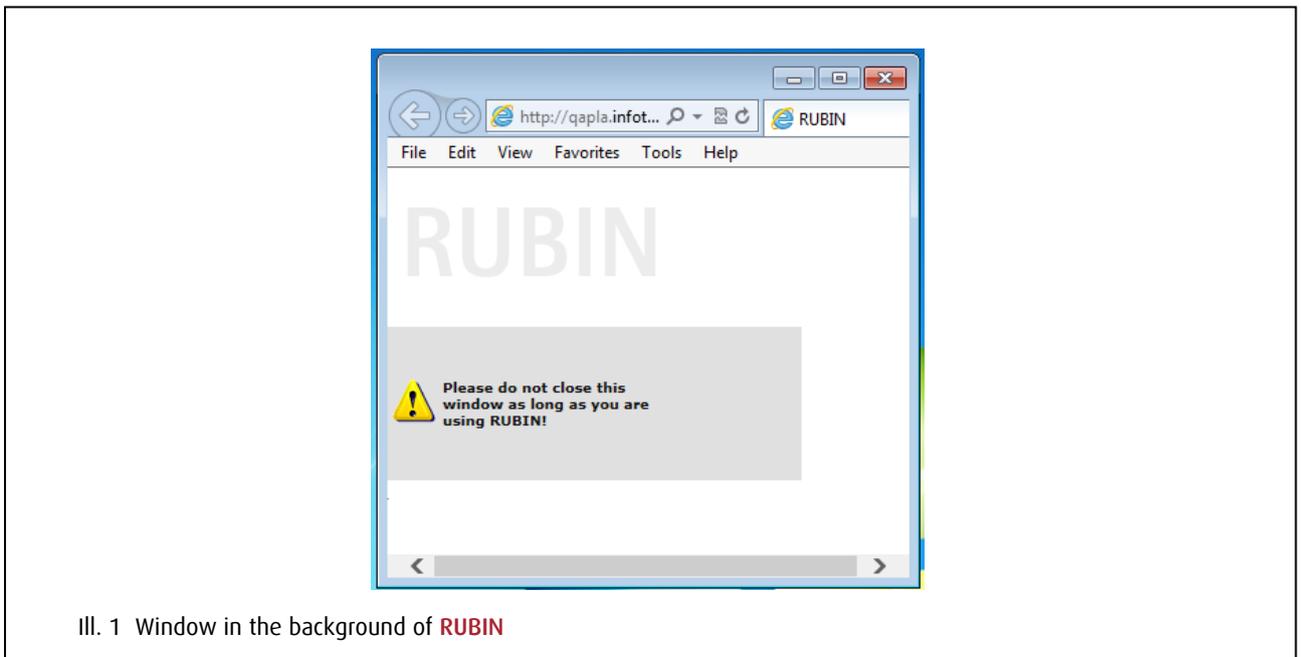
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1 Basic elements of the surface

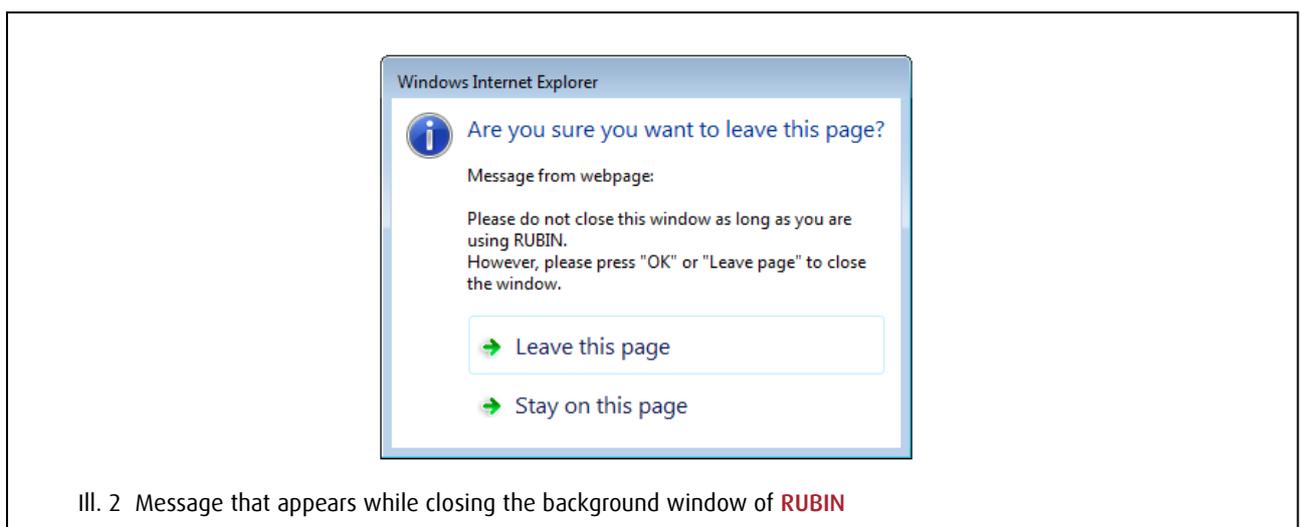
1.1 Session login

There is a link on your desktop that enables you to start RUBIN. RUBIN first opens a window that looks like this:



Ill. 1 Window in the background of RUBIN

This may not be closed while the application is running. If the user would still try to close this window, the following message appears:



Ill. 2 Message that appears while closing the background window of RUBIN

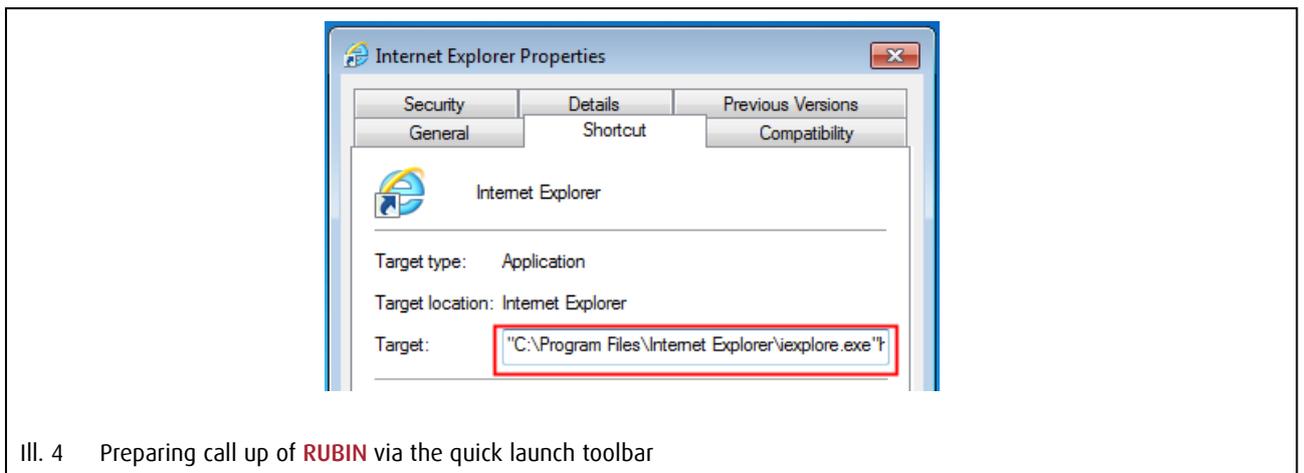
If you confirm this task with "OK", this mask will close along with RUBIN. It is also possible that Internet Explorer popups will try to open themselves in this mask. If you have installed a popup blocker, please exclude the RUBIN server from this function, since all lists also open in browser popups. The popup blocker message often opens particularly in this window. In this case, please permit the popup and simultaneously create the rule that the RUBIN server is excluded from the blockage. RUBIN also closes itself in this case, but the next time, the rule applies and the popup opens in its own window.

1.2 Second session in RUBIN

If you still should require a second RUBIN session, you can do this by opening a second Internet Explorer session. You can achieve this by directly starting the programme, e.g. from the quick launch toolbar.

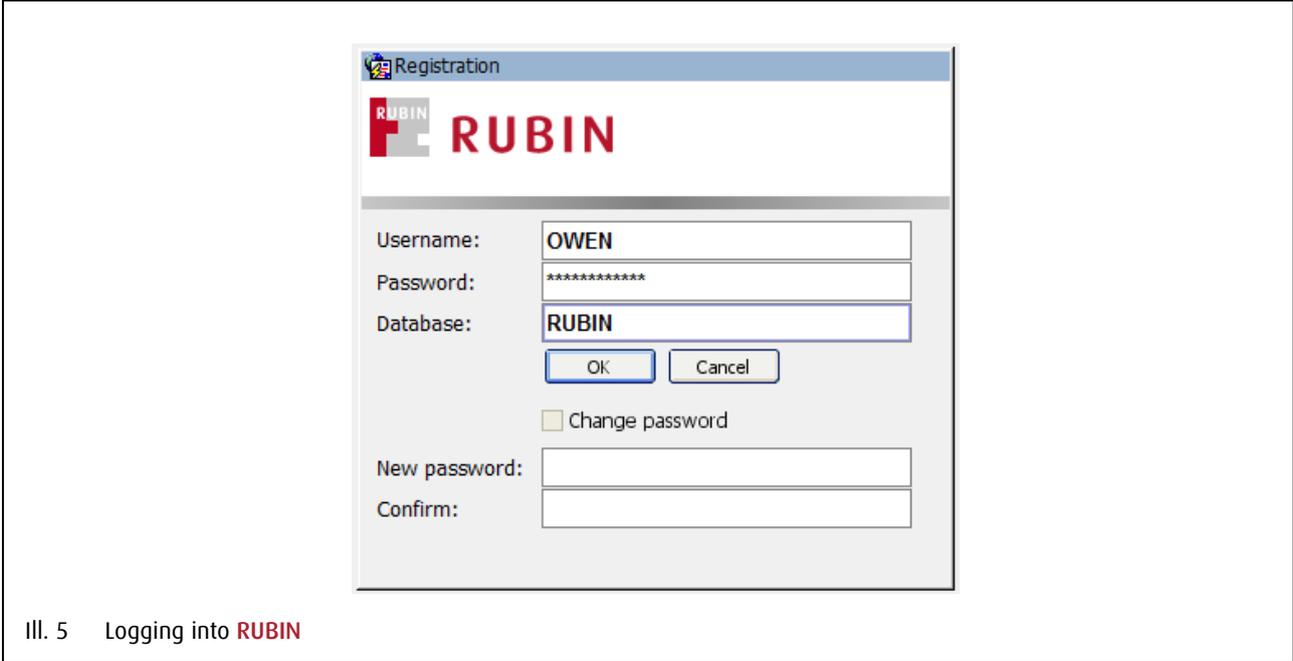


You can then save the RUBIN link as a favourite and easily start it in this manner. It is not possible to start the same RUBIN link twice, since in this case Internet Explorer is using the same process. Another option is calling up the quick launch toolbar with a link prepared for this. For this you would open the properties (right mouse click on the Internet Explorer icon) and enter the RUBIN link separated by a space behind the target (...iexplore.exe").



You can obtain this link from your technical contact person or through the RUBIN hotline.

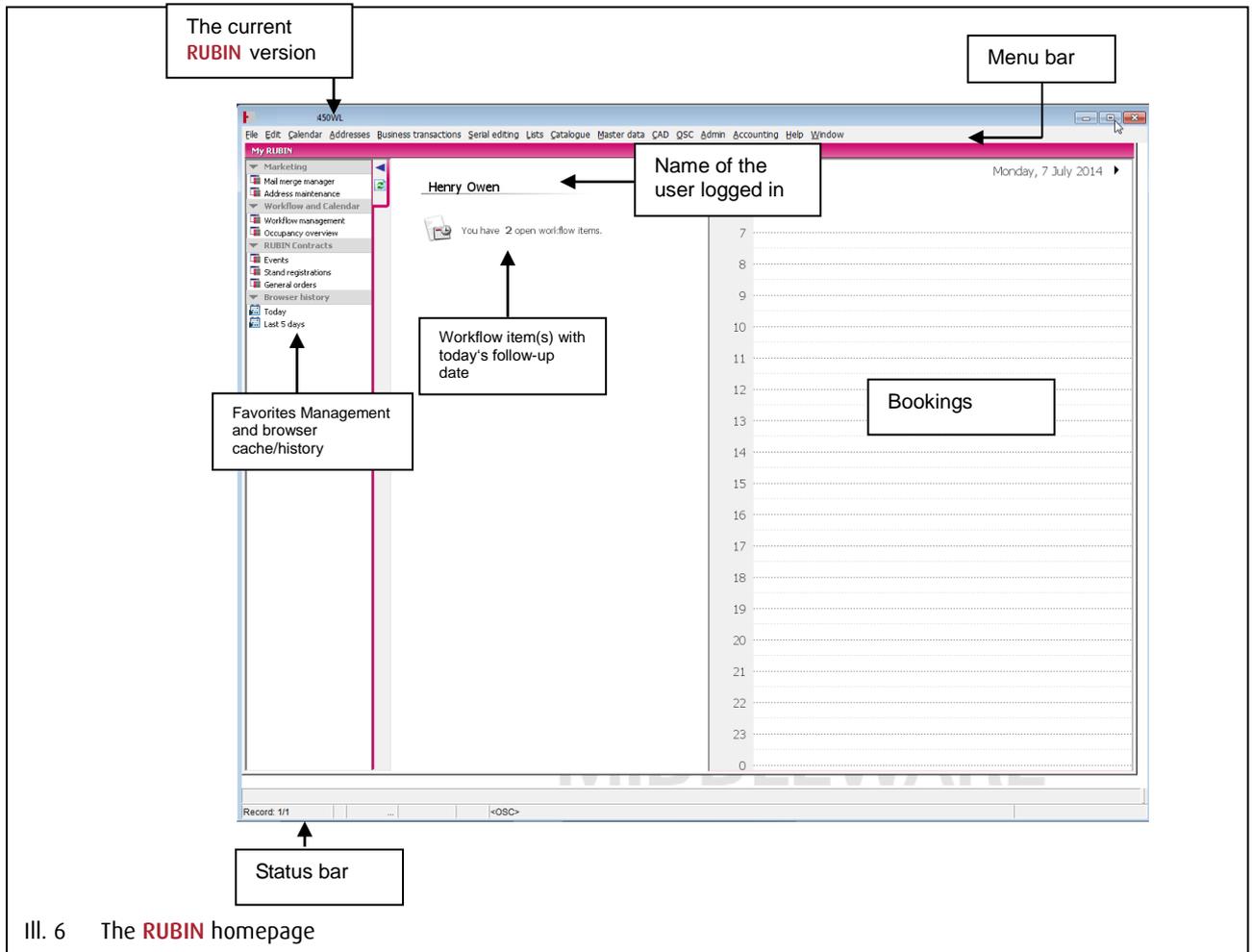
If you activate the RUBIN icon on your desktop with a double click or by starting the link via a link saved in your favourites in your Internet browser, you will be requested to log into the database with your username and password. You usually do not have to enter the name of the database.



III. 5 Logging into RUBIN

1.3 Homepage

If your database login was successful, you will be in the RUBIN dialogue programme. You will see the homepage illustrated below.



Ill. 6 The RUBIN homepage

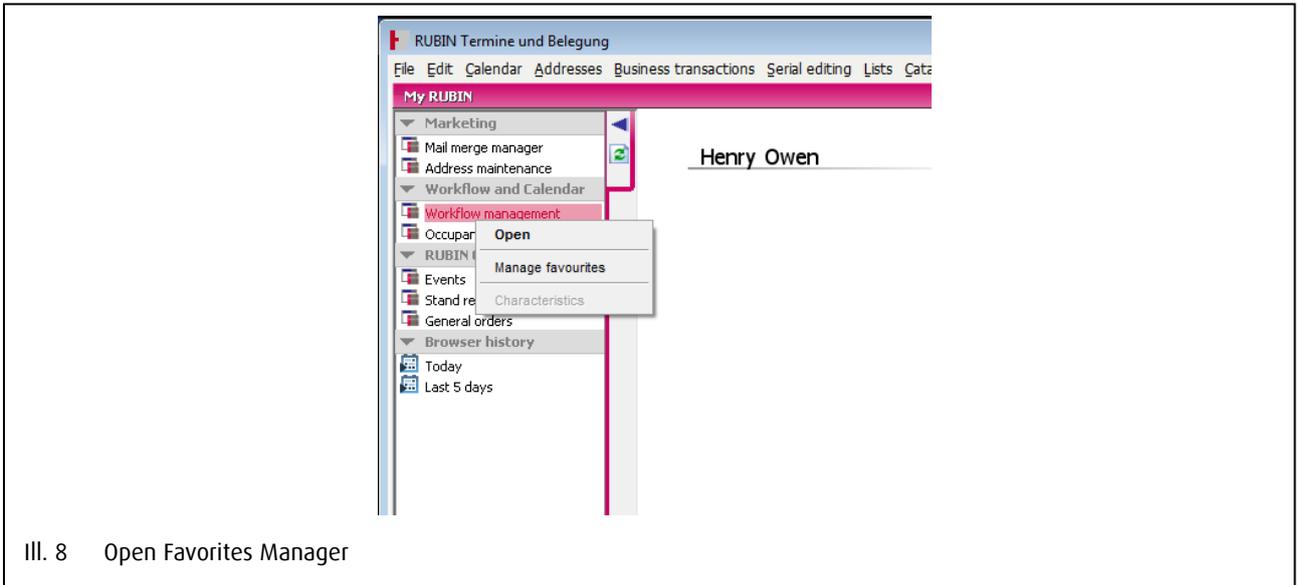
Workflow items: click on the text displayed and see which workflow items are open. The address / the order can then be directly opened via the context menu.



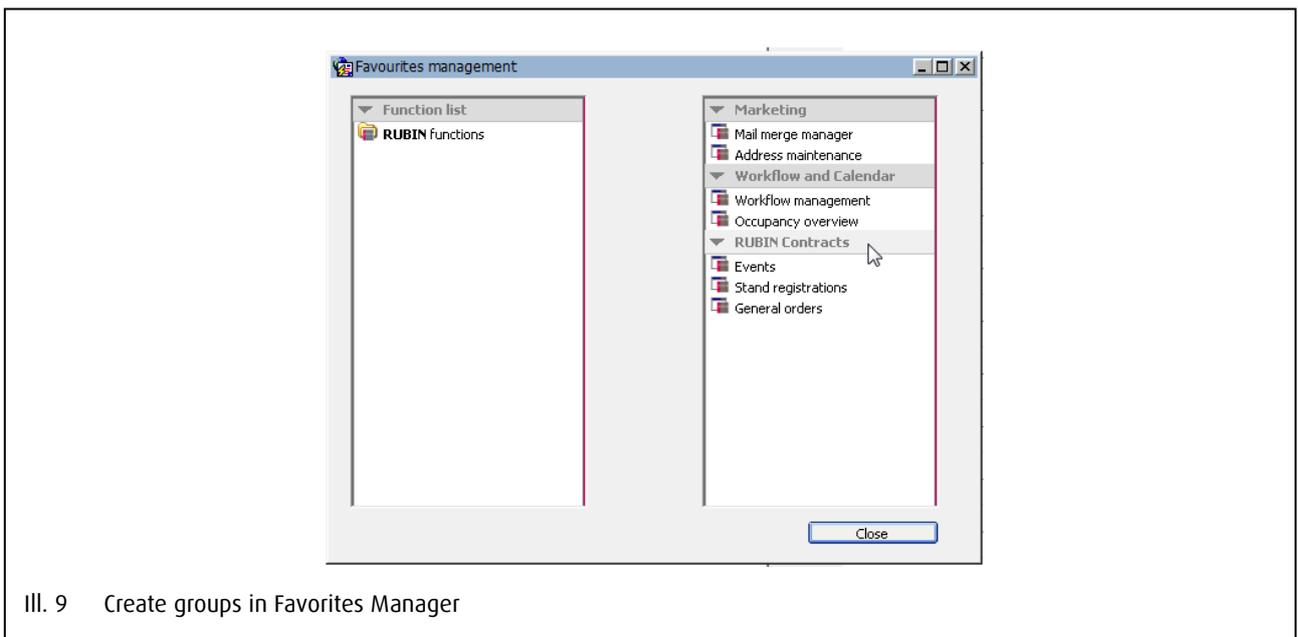
Ill. 7 Workflow items on the homepage

Bookings: today's events with the corresponding room bookings are displayed here. You can branch directly into the room booking with a double click. With the arrow buttons next to the date you can scroll by day. You can select other branch targets, e.g. the contract address of the event, by using the right mouse button.

Favorites Management: in RUBIN you can create favourites by starting "Favorites Management" via the context menu.

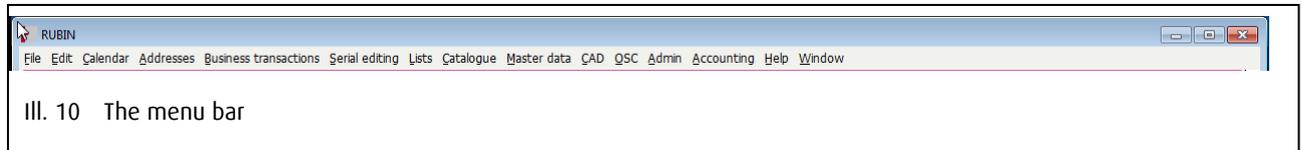


You can create headers (groups) to organise masks by topics, under which the actual menu items can then be listed. You can also create and name these groups here over the context menu. Please then open the menu item, which you would like to use, in the left function list and click on it with the mouse and pull it directly onto the group name. After you have released the mouse button, this menu item can then be seen in this group.



It is also possible to set up subfolders within the group via the context menu. Should entries no longer be needed, you can delete them from Favorites Management via the context menu.

1.4 Menu bar



- File: standard functions (open, print image, close)
- Edit: standard Windows functions for editing fields (cut, copy, paste)
- Calendar: Workflow management, occupancy overview (only with RUBIN dates and facilities)
- Addresses: address maintenance and the marketing functions with RUBIN Customer Relationship Management
- Orders: all order processing functions required for integrating the RUBIN modules
- Serial processing: the serial editing functions required for integrating the RUBIN modules, e.g. processing previously selected addresses, stand registrations, etc.
- Lists: reports, statistics and master data lists of the RUBIN modules deployed
- Master data: master data, workflows, business calendar, attributes
- Admin key, serial number, etc.

Attention!

The master data and admin menu items have only been set up for the RUBIN master data manager of the respective RUBIN modules. Only the user defaults are available to the standard user.

- CAD: functions of the CAD stand space allocation system (optional)
- OSC: functions for internet order processing
- Catalogue: functions for catalogue processing (optional)
- Accounting: functions for the accounting interface (optional)
- Window and help: standard Windows functions

Menu items are controlled via the user roles that have been allocated, i.e. every user can only view the menu items that correspond to his/her range of functions. Therefore the menus have been set up very differently and cannot be entirely described at this point. If a certain menu item that is described in the handbook is not available to you, but which you require to fulfil your duties, please direct your inquiry to the RUBIN manager in your organisation.

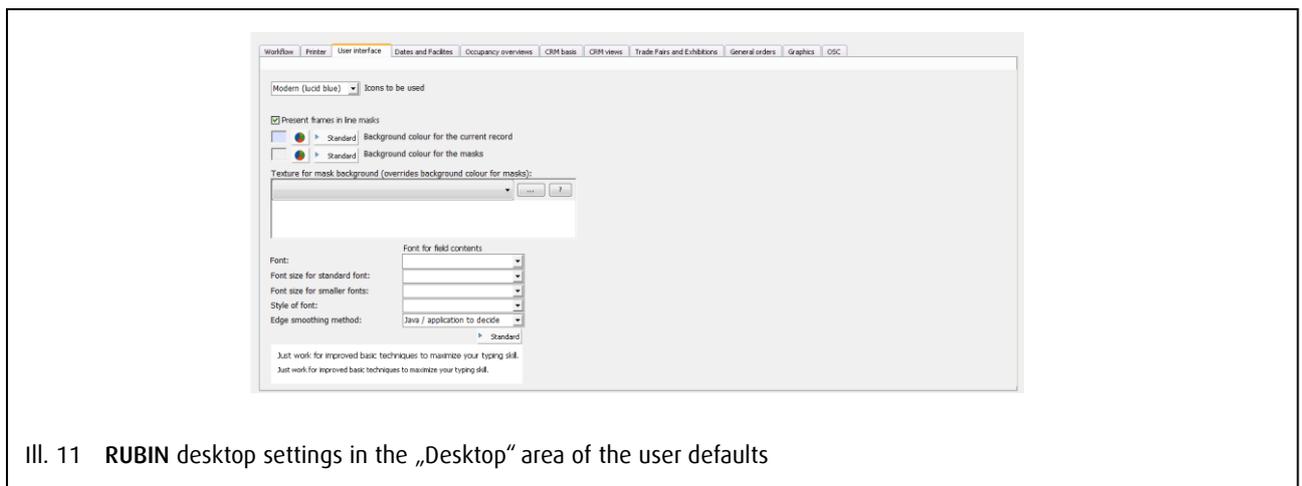
If you are authorised to access several RUBIN modules, then the menu items are subdivided with a line in the individual modules, in as far as this is possible and necessary. The general structure of the menu

bar is identical for all users, whereby only the menu items differentiate in accordance with the individually allocated range of functions.

There are three ways to close a programme: by clicking the „X“ button in the upper right-hand corner of a window, via the menu bar (Menu item /File/Close) or with the Ctrl + q shortcut key.

1.5 User defaults

The appearance of RUBIN can be changed in the user defaults in the tab „User interface“. The background colour, the background of the current record as well as the icon to be used can be selected. Furthermore the “Display frame in the line masks” option can be activated and a texture for the mask background can be set in RUBIN.



Ill. 11 RUBIN desktop settings in the „Desktop“ area of the user defaults

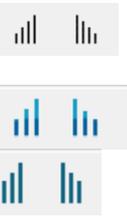
Also in the same mask, the font size for the standard font, the smaller fonts, the style (normal, bold, italics) and the edge smoothing method can be selected. The result is displayed with a sample text in a preview window. All settings refer to field content in masks – the user cannot change the menu items and labels in the masks.

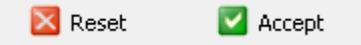
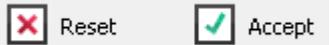
All changes take effect after RUBIN has been restarted.

The screenshots in this handbook respectively display the “Classic” icons next to the “Lucid blue” and “Modern simple” icons.

1.6 Icons

In the toolbars at the top of every mask there is a row of standard icons or icons that are either enabled or disabled depending on the characteristics of the individual mask.

	<p>The torch / lense activates the search mode. If this is already active the electric torch starts searching (F7: to switch into the search mode; F8: start search).</p>
	<p>This activates the „Create“ mode - a new record can be created (F6: activates „Create“ mode; F3: copy field content into the current record).</p>
	<p>This deletes record.</p>
	<p>With the blue arrows you can browse to the first, previous, next or last record found in the search process.</p>
	<p>These buttons show the list of the records found, the hit list.</p>
	<p>Buttons to sort the records found in an ascending or descending order by the field in which the cursor is positioned, depending on whether it is possible to sort by that field.</p>
	<p>The button to go to a certain position in the calendar - helps to make entries in date fields.</p>
	<p>The button to trigger a quick workflow (optional function). If you position your mouse cursor over these default buttons, a short description of the functionality appears over the button.</p>

 	<p>You can reverse all entries that you have made since you last saved with the „Reset“ button..</p> <p>You can save all of your entries in the database with the “Accept” button (F10: save).</p>
	<p>There may be other buttons in the edit mask. Two buttons that are often to be found are for switching to further fields in the programme. These buttons are available if the content of an edit mask does not fit on a single screen page.</p>
	<p>Another button that is often to be found is for branching into another mask.</p>

1.7 Multilingualism (optional)

For systems that have been set up for multilingualism, besides the dialogue language, up to four further/other correspondence languages can be used. Each order is assigned an order language. All fields that are important for correspondence (e.g. title, service descriptions) will then be entered not only the dialogue language but also in the order language. This enables creating documents (e.g. correspondence, technical records, invoices) that can optionally be in the dialogue language or in the order language.

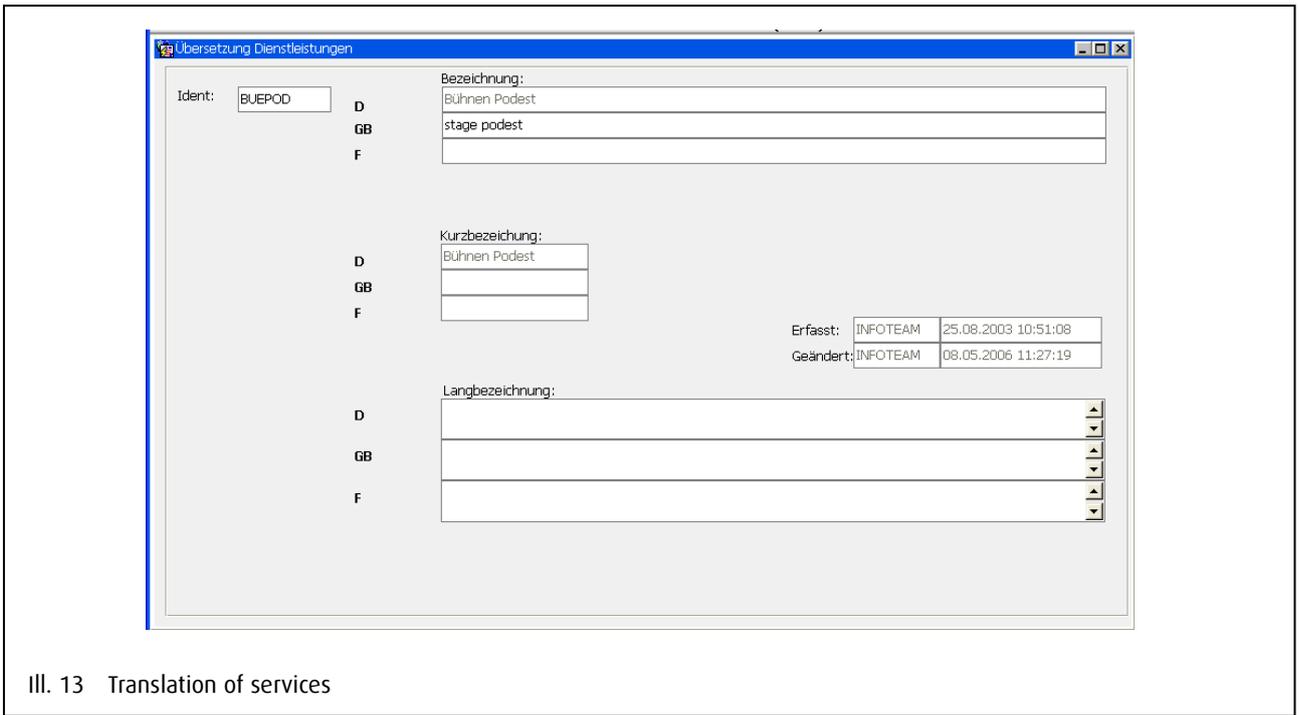
A prerequisite for the proper utilisation of multilingualism is creating all master data with descriptions in all correspondence languages. There are two possibilities for creating multilingual master data:

On the one hand you can get into the master data masks over the „Master data“ menu item. These master data masks have a small flag for each correspondence language in the upper right-hand corner. By clicking on the radio button to the left of the flag, you can switch the display to the respective language.



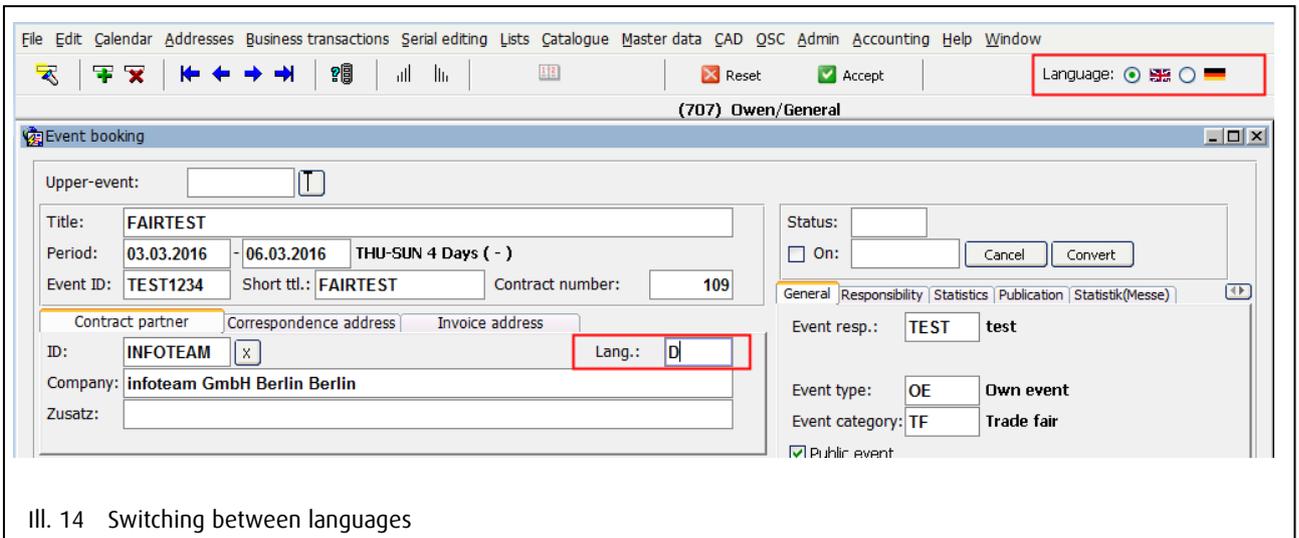
Ill. 12 Group of radio buttons to switch the language

On the other hand you can very easily augment the descriptions for buildings, rooms, resources, etc. in the correspondence languages via Master data\Translation of master data. However, for this the master data must already have been created in the dialogue language.



Ill. 13 Translation of services

When creating an order, the order language will be set as a default on the basis of the language code, which can be changed manually. As soon as the order language deviates from the dialogue language, the flags of the dialogue language and of the order language appear in the upper right-hand corner. By clicking on the radio buttons to the left of the flags, you can switch between the languages.



Ill. 14 Switching between languages

If an additional order language is being used, then all of the fields must also be filled for this language in order that no gaps occur in any documents.

2 How to search

2.1 Search mode

Basically the following applies for searching:

- The same mask is used not only for entering the search criteria but also for editing records. The former takes place in the search mode and the latter in the editing mode. s are the event and address mask. Special search masks have been developed for this mode to ensure that even mass data can be searched through.

The search mode can be recognized by the following criteria:

- *Search* appears in the upper left-hand corner in blue.
- When you write in a field the font colour is blue.
- In the search mode the programme is waiting for the user to enter/indicate which records are to be displayed.
- The search mode can be activated by pressing the electric torch button or F7.

After the search criteria have been entered you can start the search process by pressing the torch / lense button again or F8. Yet please consider that the search behaviour differs between using F8 and the torch / lense button in some masks.

The edit masks are opened in the search mode in order to spare you searching, except when there are only a few records that are immediately shown in the line format .

At any time you can activate the search mode again and conduct a new search.

Attention! Please remember that the edit masks are opened in the search mode! If you intend to create and you inadvertently fill fields in the search mode, then this is for naught!

2.1.1 Searching for addresses

The „Search address“ function is available in all masks in which the entry of an address ID is required. With a double click in the address ID field or with a mouse click on the  - button, you will branch directly into address maintenance.

Thereby, depending on the initial situation, the respective view is offered:

If an address has already been entered, the „X“ button will appear, instead of the „?“ button, through which you can branch directly into and edit this address, as required.

If another address was selected in address maintenance via the search mode, RUBIN will attempt to add this address as the contract address (for an order). While exiting address maintenance you will be queried whether you really would like to add the other address, the default is set on NO.

2.1.2 Editing invoice and correspondence addresses

Both of the invoice and correspondence address fields have the same functions available as described above for the contract address.

2.2 Enter search criteria

In the search mode you can search for terms or parts of terms in the designated fields.

While searching for text sections, the „%“ character needs to be used as a wildcard to replace the non-relevant section. The search term can be placed before, after or between texts. Please bear in mind that the programme always considers and compares the entire field content. It is safest to search with %SEARCHTERM%, but also results in the most hits and takes the longest. The unsafest means is by searching directly with the field content and yet for this reason the search result is the most conclusive.

To research you can choose several search fields. If you do not indicate a search criterion then all records will be shown in the hitlist.

2.3 Overview: search

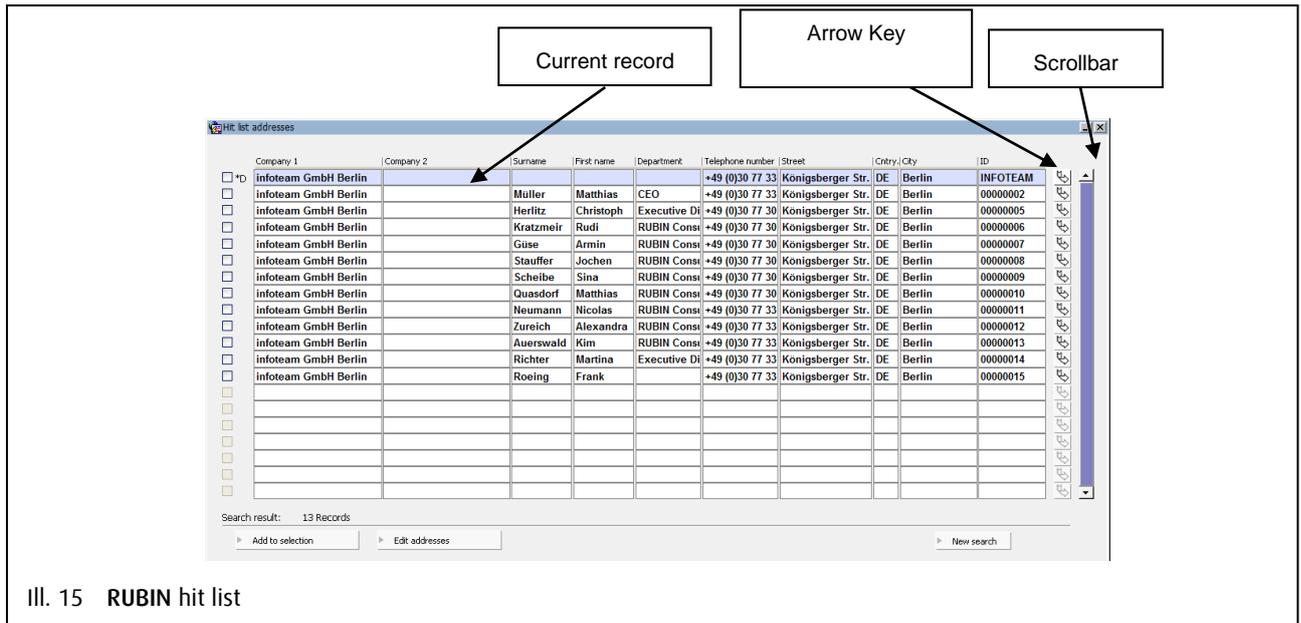
Step	How?	Example	Comments
Enable search mode	Torch / lense button or F7		
Recognize search mode	<ul style="list-style-type: none"> - „Search“ appears in the toolbar - “?” at the cursor position - The search criteria entered appears in blue 		The „?” at the cursor position can be deactivated/disabled in the user defaults.
Enter search criteria	Precise and quick	Berlin (only „Berlin“ is indicated in the field of the record for which you are searching)	Your entries are not case sensitive.
	Beginning + %	ber%	
	% + end	%lin	Not very quick, but in combination with other precise criteria, it is good.
	% + section + %	%er% %er%i%	Not very quick, but in combination with other precise criteria, it is good. The sequence of the text sections entered is important!
	Enter one word or several words (separated by spaces)	berlin gmbh“ („A1-Service GmbH Berlin“ is the record for which you are searching) in the field	Only possible in the address search mask (if it is activated/enabled). The word sequence is not important.
Start search	Torch / lense button or F8		

2.4 Hit list

If the result of search is a single record, it will immediately be displayed.

If the search result includes several records, the hit list will be displayed. The hit list displays the records found in the lineformat. With the arrow key ↓ or ↑ (or with the blue **standard arrow buttons** in the toolbar) you are able to browse through the records until you find the record required.

If more than ten records were found they can be displayed with the aid of the scrollbar. The record where the cursor is positioned is **marked blue**.



By pressing the “open record” (arrow) button the cursor goes to the record needed. By clicking the hit list button in the toolbar all hits in the hit list are shown and another record can be called up by clicking the arrow button.

If the cursor is not positioned on the Selection button in the hit list, but rather on one of the fields displayed, the record can also be called up with a double click.

2.5 Overview: hit list

Step	How?
Open hit list	"Hit list" button
Scrolling through the records found	Arrow key ↓ or. ↑ or arrow buttons in the toolbar
Open a record	Double click on the line or with the arrow key
Exit hit list	Open a record or close the hit list window

3 Navigating and editing fields

3.1 Navigating with the mouse

You can reach all enabled fields and buttons with the mouse. Where several records are displayed on one screen page in the line, you can also use the mouse to switch between records.

3.2 Navigating from record to record

It is possible to browse through the records found, just as in the hit list by using the arrow keys ↓ or ↑ or with the standard arrow buttons in the toolbar.

3.3 Navigating from field to field

You can navigate between the fields in an edit mask using Ctrl + tab. However you can often navigate with the tab alone. You are only restricted with multiline fields where the tab character is thereby inserted.

The difference between navigating with the tab key and the enter key is that the enter key also validates and executes.

You can go backwards from field to field with shift + tab. When the cursor is situated in a field that requires plausibility check, you cannot leave this field if the check has detected an error. In this case you can go to the previous field with SHIFT-TAB.

3.4 Moving around a field

If within a field you would like to move the cursor to the right or to the left, please use either the mouse or the ← or → arrow keys.

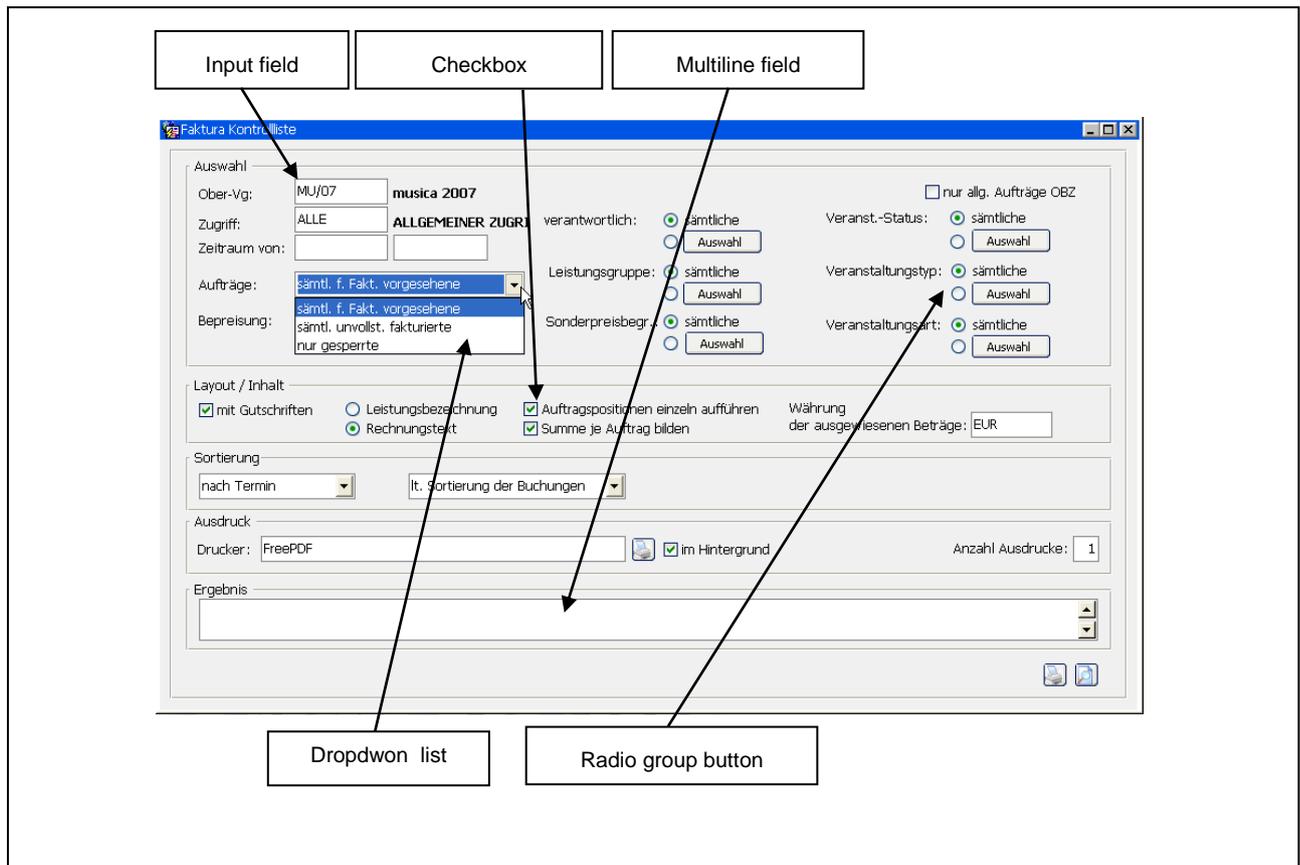
If you would like to delete the content of a field, this can be accomplished with the backspace key or over the *edit* menu item, empty field or by marking the content with the mouse and pressing the ENTER (↵) key.

Please consider that the *reset* key reverses not only the changes in the current field, but also reverses all changes made since you last saved.

3.5 Several screen pages for one record

Masks that span more than one screen page have the respective < and > keys. You can return to the previous screen page with < and with X (close window).

3.6 Field types



Ill. 16 RUBIN field types

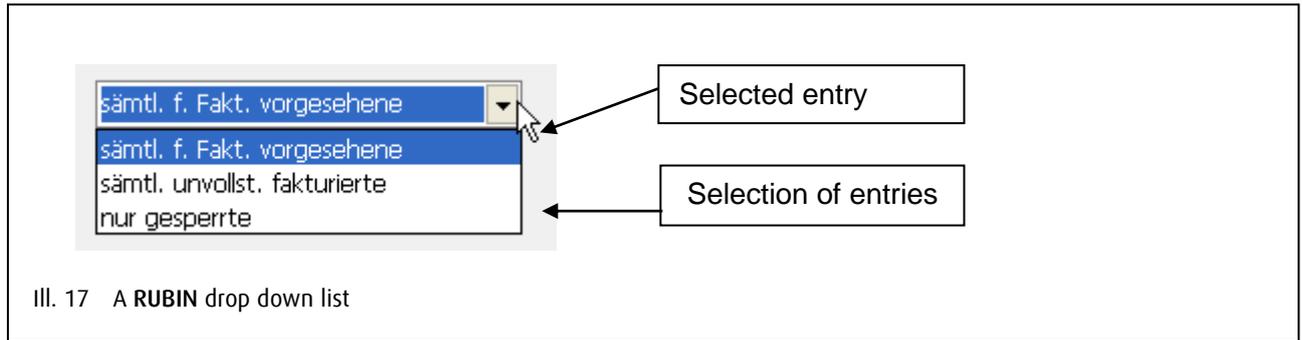
Normal input fields are rectangular with a white background. Entries are checked whether possible restrictions that have been defined are adhered to. Is the content, e.g. alphanumeric, numeric or does a date or an entry have the proper format?

A multiline field enables the entry of tabulators and multiline texts. There is a scrollbar available to view multiline texts that are not visible in the field.

A checkbox can be switched between „YES“ (content is a tick mark) and ‚NO‘ (checkbox empty) with a click of the mouse or by pressing the space bar.

A radio group has several round keys – only one key at a time can be enabled in a group. The keys are enabled or disabled with a mouse click or with the keyboard arrow keys ← and →.

One dropdown list is comprised of a white field, at the right end of which there is a key ↓ with an arrow pointing downward. By pressing this arrow key, a list with entries opens. If you now select one of these entries with a mouse click, the list closes and the selected entry is written into the white field. The selection of an entry in a dropdown list can also be accomplished by using the arrow keys on the keyboard. The entry is selected by pressing the ENTER key.



Ill. 17 A RUBIN drop down list

4 Create, edit and delete

4.1 Create

To create new records, you can either click on the key „Create record“ (green +) or call up an empty input mask by using the blue arrow key or move the arrow downward ↓ after the last record displayed.

Before you create a new record, please be careful that the „Search“ and the „?“ on the cursor are not displayed. Otherwise the system would recognise your entries as search terms and you would have to repeat your entries in the “Create record” mode. “Create record” should be shown in black font in the upper-left hand.

The background colour or the font colour sometimes indicates whether the field is available for data entry or edit.

Grey field: a field that is highlighted in grey cannot be changed by the user due to the current data constellation. Such a field can be made available dependent on the data content of another field.

White field with a grey font: a field that is highlighted with a grey font cannot be changed.

When creating, editing or deleting, the fields that can be changed are highlighted in white. An exception to this can be recognised in masks where several records are displayed on one screen. The record where the cursor is positioned is temporarily highlighted in blue, so that the user can immediately recognise in which record changes are being made.

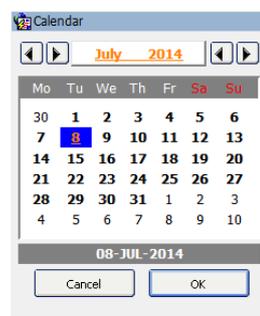
The length of an input field is not identical with the number of characters that can possibly be entered. When using „narrow“ characters, for instance „i“ or „f“, it is possible that input cannot be made to the end of the field. When using many “broad” characters, the field can scroll to the right. The number of characters that are permitted is decisive. .

Date fields can either

be entered with dots in the DD.MM.YY or DD.MM.YYYY format, whereby leading zeros may not be necessary (e.g. 1.1.98), or

be entered without dots in the DDMMYY or DDMMYYYY format, but using leading zeros.

It is also possible to open a calendar window with a double click on a field or with a click on the calendar keys.



Ill. 18 Example of a calendar window

You can page through the months with both left arrow keys and through the years with both right arrow keys. When the month and year required have been found, the date desired can be clicked on.

After all data have been entered, please press the „Accept“ key to save them in the database. As a rule, even when navigating out of the record, out of the mask or to the next screen, the system will query the user whether the changes are to be stored, if this has not already been done. There are exceptions in masks where several records are displayed in the line format. In these cases data are automatically stored without query when navigating into another record (on another line).

4.2 Edit

When editing an existing record, all the field functions correspond to those when creating a new record.

After the data has been completely edited, it must either be stored or reset, analogous to creating a new record.

4.3 Delete

Please select the record you wish to delete and then click on the delete button (red X) to delete. Before the record is actually deleted, the system will query the user: „Would you like to proceed and delete data?“. Only after you have confirmed this with „Yes“ does the system check the database as to whether the record is permitted to be deleted and, if applicable, then finally deletes it.

4.4 List of values (LOV)

Many fields may only be filled with special content, the permissible values of which are recorded in the master data. For fields in which only certain, defined entries are permitted, the „LOV available“ hint is displayed on the status bar. By pressing the F9 function key or the *Help/list* menu item, all of the permissible values appear in the LOV with their descriptions, if applicable. When there are very many entries in the LOV, the number of hits can be delimited by entering a search term in the „Search“ field. You can accomplish a search with the % wildcard, which will also consider the description texts.

Field entries are generally checked for validity, characteristics and admissibility. Of course, this cannot be accomplished for comments, description and other fields that can be freely defined. For fields with LOVs, the LOVs are automatically opened when invalid entries are made. Once you start making a valid entry, then the LOV is automatically delimited to entries beginning with the same characters. If there is only one entry with the same beginning, then the field is filled without displaying the LOV.

5 Output on the printer

5.1 Print an image

You can print a screen shot over the menu item File/Print image at any time. This is the standard window for which the print control appears in the Windows operating system and where you can execute the print output.

5.2 Report queries

For your work area **RUBIN** offers several predefined reports. The appropriate masks are available for print control.

5.2.1 Basic elements of the query masks

There are five parts to a report query mask:

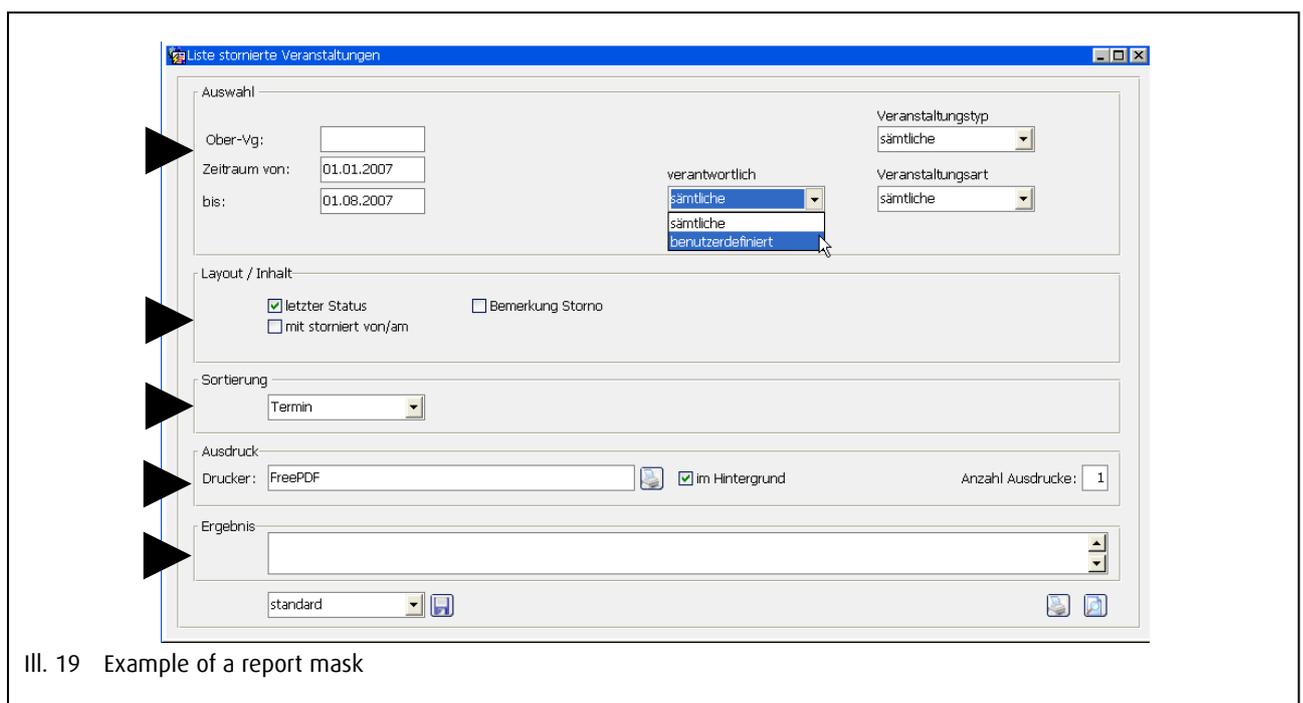
Selection: determines which records are to be included.

Layout / content: determines which fields are to appear in the report, respectively which content is to be printed in which fields.

Sort order: determines the sequence of the fields in the report.

Printout: determines the target printer, the number of printouts and whether printing is to run in the background.

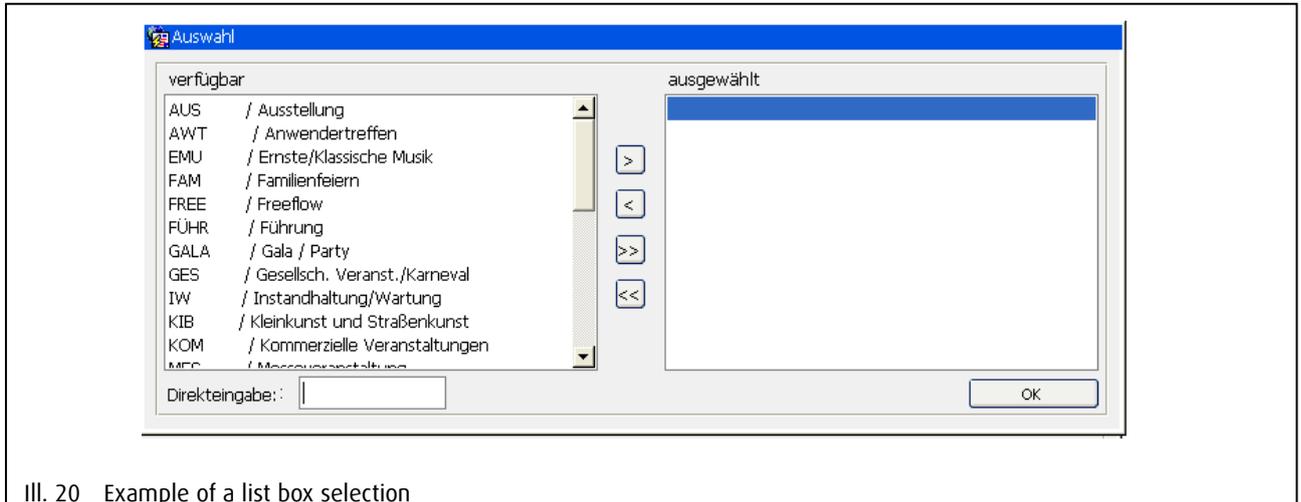
Result: a message describing process progress.



Ill. 19 Example of a report mask

In the example illustrated above there are three dropdown lists labelled „All“. You can select all „All“ criteria here or you can open a selection via „User defined“ in which you can select one or more characteristics as the selection criteria. In the following screen shot you can view a selection list box as an example for the selection of an event type:

5.2.2 List box options: handling tips



Ill. 20 Example of a list box selection

Several values may be selected.

A value is selected by marking it on the left side and placing it on the right side of the list box.

The > button places a value that has been marked on the left side into the right side.

The >> button places all values from left to right.

The < and << buttons permit movement from right to left.

The right side can be filled through direct input of values (IDs).

If the list of the values available is very long, you can go from the marked line into the area desired by typing in the first few letters of the area desired into the keyboard.

5.2.3 Printout variants

The target description is set from your user defaults.



The output can be displayed on your screen as a preview via this button. In this preview you can select either all or only select pages to be printed.



You can immediately print via this button.

im Hintergrund

If this checkbox is checked, you can continue working in other programmes while your printout is being completed. A preview appears on the screen, respectively as a button on the task bar, when the report has been printed.

6 Troubleshooting, tips and tricks

6.1 Troubleshooting

Messages that occur from the dialogue system most often appear in a small window in the middle of the screen. After pressing the OK button with your mouse or with the ENTER key, this window will be closed.



Ill. 21 Example of a system message

Messages can assist you in properly inputting your data. The example above informs you that a mandatory field must be filled.

If you receive a message indicating a system error, please send the screenshot and a description of the circumstances in great detail to your RUBIN manager, respectively the infoteam hotline.

6.2 Opening several windows

Via the menu bar, which is always visible and enabled, another programme may be opened while you are working in a mask. For example, while you are inputting data for a new event, an address or a stand registration, you can switch to your user defaults to enter and save something there, prior to finishing input in the first mask.

Attention! Only the window that was last opened is enabled! The window that was last opened must first be closed, before the previously opened window becomes enabled again for you to once again make input!

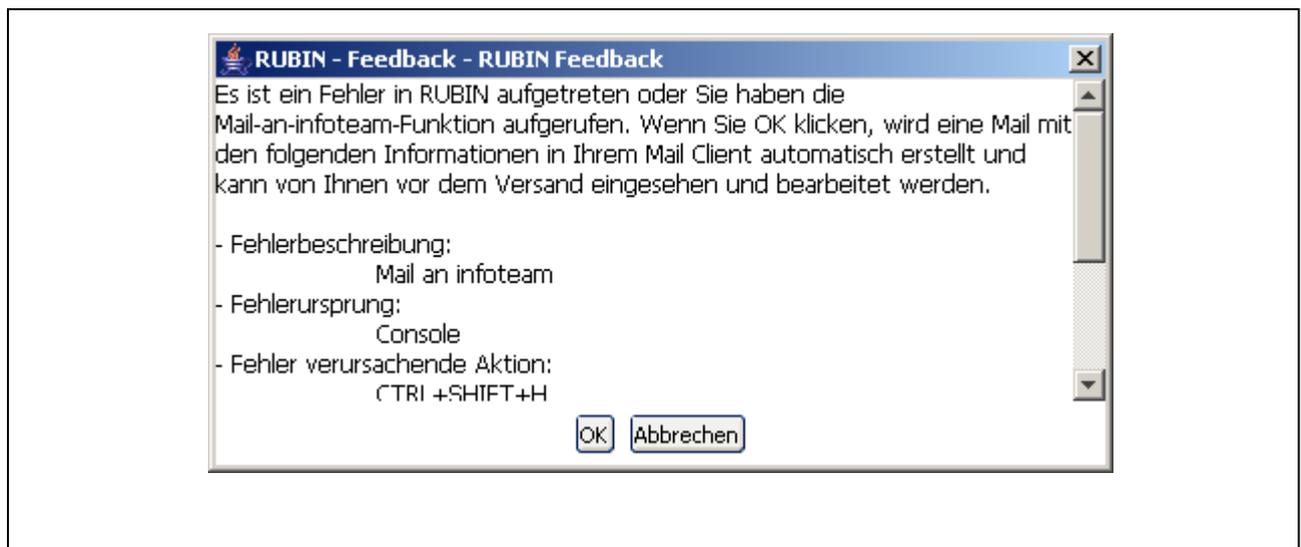
In some windows, in particular the further fields of a large edit mask, must be closed via the menu bar before you can work in another window. If you open another programme via the menu bar in such a window, the whole system appears to be hanging. Please close the open windows in succession with the X button in the upper-right of the outer frame.

You can view a list of the open windows and their sequence in the menu bar in the menu item „Windows“, should you have forgotten which programmes or windows are open. With a mouse click in this list you can also switch to another open window.

For any further questions....

We will be glad to answer any further questions, for which our hotline is available to you by telephone. When you incur any error messages or technical problems, please augment your call with an e-mail containing the screenshot of this error message and of the Java console. For this please press the key combination „ CTRL+SHIFT+H“.

Telephone number: +49 (0)30 / 77 30 31 31 or 0700 / infoteam



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