

# How to Approach This Manual

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I'm sorry; I hate this sort of section in any manual I use. I'm putting this in anyway because I think it'll be useful to spend a little time telling you about how this manual was written, and why it's divided the way it is.

## **Independent, stand-alone sections**

Because PEPbase is still under development, sections of this manual will undoubtedly be changing – and changing not only in content, but in their length and therefore their pagination. Rather than making you reprint the entire manual every time one section is updated, we've put every section into its own independent file, and numbered the pages independently within each section. This also means that you can choose to print out only the section(s) that particular folks within your agency might need – *PEPbase in Routine Use...*, for instance, for your hosts, and *Coordinator Functions* for those who work with household updating, product definitions, and report generation.

Of course, since we know that these sections may be used independently, you'll often find repeated material – the discussion of product definitions, for instance, shows up in *Getting Started*, in *PEPbase in Routine Use*, and in *Coordinator Functions*.

However, treating the sections as independent, stand-alone sections means that it will be easier to download and print from the Pantry web site:

[www.zionmadison.org/Personal\\_Essentials\\_Pantry.html](http://www.zionmadison.org/Personal_Essentials_Pantry.html)

To help keep you aware of where you are, each page of the manual has a running footer showing the section and the page number within that section (this section has the footer *How to Approach This Manual...*) and a header identifying it as part of the **PEPbase User's Manual**.

## **Typography conventions**

We've been liberal in our cross-referencing to other pertinent sections of the manual, both within each section and across each section. To help you keep track of where things are, you'll find that we use (well, we try to use) some standard typography and formats:

- If the discussion being referred to is within the section you're reading, you'll find it listed *in italic font*, along with a page number (or, if it's reasonably close to you, listed as "above" or "below"). For example, if we were to direct you here to the discussion of terms used in this manual, that would be shown as:

(See *Terms used in this manual*, below.)

- If the discussion being referred to is within a different section of this manual, we'll always give the discussion title *and* the section title; the *discussion title* will be in italics, but the **section title** will be in bold-face italics, and without any page reference, as:

(See *The Household database* in **Getting Started**.)

Generally, these references will be to the specific discussion title, but if we refer you to a reasonably short section, it may show up as a reference just to the section, as:

(See **Installation and Set-up**.)

- We also make references to the actual PEPbase screens or sections shown on the screen. For these references, we'll actually switch fonts to Arial, as:

Clicking on the **Submit Check** button will look for....

If we're directing you to a titled or named section of the screen, that will be shown in **bold-faced Arial**, as:

With the **Notes** field showing a reminder that...

Hopefully, we've been consistent in this, and the wording itself of the reference will reinforce the typography.

## Tables of Contents

To help you know what's where, we've included an overall Table of Contents for the Manual as a whole. This is set up to use a preprinted indexing system, Avery® Ready Index® Table of Contents Dividers 11135. You are, of course, free to use any indexing system you wish; we had to choose *something* as our format.

However, because we want to be sure that you can find things easily, sections that run more than two or three pages will also have a more detailed table of contents for that section as the first page *of* that section. **Getting Started: Understanding the Process**, for instance, runs to 20+ pages, with three major

sections and some dozen-plus sub-sections. That's a lot to subsume under the simple listing of *Getting Started*.

### Terms used in this manual

One of the things that I discovered as I was getting this prepared is that the manual is full of references to the specific terminology that's developed over time here in-house. In an attempt to save myself some work but not unnecessarily confuse you, let me include here a few definitions of commonly used terms here. I've also tried to make sure that these are always capitalized in the running text; Host, for example, should always appear as Host, not as host.

However, please note that since this manual is currently still in the development stage, this *Terms used* section is almost certainly *not* complete. I'll try to update it before each release, but if you encounter a term in the manual that doesn't make sense, or that we use in a unique or unusual fashion, you might drop me an e-mail.)

- **Host:** This is the person on duty during the Pantry's hours of service who is handling the guest registration and log-in. We presume that this person will need to locate the records for returning guests and gather the necessary household information for new guests. The Host should be right at the computer, with PEPbase up and running and available to him/her. PEPbase functions available to the Host include:
  - Finding registered guests;
  - Registering new guests;
  - Updating shopping records
- **Picker/Filler:** These are the folks who help fulfill guest orders. Their interaction with PEPbase is more indirect; they're the ones who will be recording any information you gather on what was actually in the order as it was given to the guest. How much of this you do will depend on the degree to which your agency uses PEPbase to control inventory and to report on product disbursement.
- **Data Entry:** This is a pretty self-explanatory role: the data entry staff are those folks who handle recording the data from the guest shopping lists. They may also handle updating the household records from new guest

registrations or revisions to the information on returning guests. Shopping data is accessed through the Host menu; household changes must be accessed through the Coordinator level, which requires a separate password.

- **Coordinator:** The Coordinator handles higher-level, behind-the-scenes work with PEPbase. Functions reserved to the Coordinator level (which requires a separate password) include:
  - Generation of reports;
  - Dealing with data on individual members of guest households;
  - Updating product specifications;
  - Updating secondary databases (shelter specifications, languages, help menus, staff privileges, etc.);
  - Database maintenance and error checking.
- **Cover Sheet:** This is the record sheet printed out for each household. It provides the guest with Pantry policy information at the time of registration, and solicits the necessary information on the household membership.
- **Shopping List:** This is the list that PEPbase will generate for each household as they visit each time. It is generated from the information about the household and the product definition database. It also provides space for pickers/fillers to record what was actually given.

### **Present Capabilities versus Future Capabilities**

As I write this – in early May of 2009 –PEPbase, although pretty much fully usable, is still under development. As a result, you'll find that some of the manual refers to capabilities that *will be* in the software that aren't yet ready. Again, you have my apologies; many of these capabilities are central to the underlying philosophy of the software, and it's difficult if not impossible to talk about the philosophy without including these. Generally speaking, though, you'll find such present tense references only in the overview sections, but not in the role-specific sections detailing how to do what you need to do (for example, *PEPbase in Routine Use* and *Coordinator Functions*). In those sections, we'll be sure to differentiate between what's up and running right now, and what will be

up and running the future. And, of course, as these capabilities get added, those more specific sections will be revised and made available to you.

## **Index**

Unfortunately, a side effect of doing this manual in independent sections is that it's very difficult to create an index for easy reference. As we get the software, and therefore the manual, finalized, we'll get an index added. In the meantime, we'll see what we can do to create some sort of interim index for you, and put it in the *Appendices*.