Job Control
Version 9

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Job Control tracks the processing of returns/jobs within the offices of the accounting professional.

Custom Data Centre is associated with Gitzel & Company CPAs


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User Guide

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Accounting Expertise

Custom Data Centre is associated with Gitzel & Company Chartered Professional Accountants. This relationship provides Custom Data Centre with the accounting expertise that makes it possible for us to provide our customers with software that satisfies current accounting standards.

Because this document contains sample screen images and makes use of different colours, it is suggested that this document be viewed with a PDF Reader or printed using a colour printer. Use the "Bookmarks" feature in your PDF Reader to assist in navigating this document.
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Introduction

Job Control was developed to track the processing of returns/jobs within the offices of the accounting professional. The job tracking process is initiated by a client's request for the completion of a return/job and the processing begins with the recording of the job in the Job Control database. For each job, the Client's Name, the date of the request (Date In), the type of Return (Job Type) requested, and the name of the Employee Responsible for the client's account is recorded. The program also allows for the Assignment and Sub-assignment of each job to other staff members. When a job is started, the Start Date is recorded. When the job is completed, the Finish Date is recorded. Once the job has been checked, the Checked Date is recorded. When the finished job is provided to the client or government department, both the Date Out and the Method of Disposition are recorded.

Important information for users of previous versions of Job Control

If your firm is upgrading from Job Control Versions 2, 3, 4, 5 or 6 please contact Custom Data Centre for assistance.

If your firm is upgrading from Job Control V7, it is recommended that the following upgrade procedures be observed:

- Uninstall Job Control V7 from the Job Control Administrator’s computer.
- Install Job Control V8 on the Job Control Administrator’s computer using the Complete installation option. When installing Job Control V8 select your current Job Control database folder as the Database Folder.
- Uninstall Job Control V7 from all other Job Control user’s computers.
- Install Job Control V8 on all other Job Control user’s computers using the Additional Computer installation option.
Chapter 1: Installing Job Control

Perform the software installation procedure on all computers that will run Job Control. It is not necessary to install the Job Control software to a computer that is being used as a server only. If you intend to store the Job Control databases on a server computer, Job Control users must have unrestricted access to the files in this folder.

This program is designed to operate under the Microsoft Windows Vista, Windows 7, Windows 8.1 or Windows 10 operating systems. Operating Job Control on a “Home” version of any of these operating systems is not recommended. It is assumed that the user can perform the following Windows tasks:

- Start and end programs.
- Choose commands from a program menu.
- Use scroll bars.
- Minimize and maximize windows.
- Control and switch between different printers.
- Use the Windows Start Menu and Windows Explorer.
- Copy and rename files.
- Create folders (directories) on a network server and assign the required level of user security.

If you are upgrading from a previous version of Job Control you must uninstall the previous version before proceeding with this installation. Removing a previous version of Job Control will not affect your data files.

Before attempting to install Job Control it is recommended that the individual performing the installation have an understanding of the required folder (directory) structures. Job Control employs 2 different folders:

Destination Folder
This folder contains the program and report files and it will be created automatically during the installation. The default folder name that will be offered by the installation program is:
- “C:\Program Files\Job Control” when installing to 32-bit versions of Microsoft Windows.
- “C:\Program Files (x86)\Job Control” when installing to 64-bit versions of Microsoft Windows.

Database Folder
- This folder contains the Job Control database. The default folder name is “JData” and for new installations this folder will be created in the user's Documents folder. For Single-User Job Control installations, the default folder should be satisfactory but the user is free to use the folder of their choice. This folder will be created by the Job Control Installation Wizard.
- Multi-User and network installations require that this folder be located on a network share or the JData folder name be substituted with the name of a shared folder that resides elsewhere on the network. This shared folder may reside on a dedicated server computer, or for networks that do not have a dedicated server, on another workstation computer. All Job Control users should have unrestricted access to the database folder.
- If the database folder is not found by the Job Control Installation Wizard, the folder will be created. If the database folder is found but is empty, the Job Control Installation Wizard will copy the required files to the folder.
- Subsequent installations of Job Control will not result in the database folder being overwritten. There is no risk that an active Job Control database will be overwritten with the contents of the installation media during subsequent installations of Job Control.
- This folder should be included in your daily backup routine.
The Job Control installation media has been programmed to automatically open a web page when the disk is loaded. If the Autorun feature has been disabled, open \texttt{X:\readthis.html} to see the important information contained in this document. (Where X: represents the drive letter of the CD/DVD drive.)

- If an evaluation copy of the software has been downloaded from our website then X: should be substituted with the path to the folder in which the installer was unzipped. The default folder is \texttt{C:\Job Control Evaluation}.
- The Job Control installation media can be copied to local or network disk to facilitate shared access to the installation program. Substitute X: with the path to \texttt{readthis.html}.

The web page called \texttt{readthis.html} also contains a link to the installation program. Click on the link to \texttt{setup.exe} to start the installation of Job Control.

Prior to the installation of Job Control, the installer will determine if the Microsoft .Net Framework 4.0 needs to be installed. Click the \texttt{Install} button when prompted to install this required software.

Once the operating requirements have been met, the installation proceeds with the preparation of the installation wizard. When the Installation Wizard has been prepared, the Job Control Welcome window will be displayed.

Click the \textbf{Next} button to proceed with the installation of Job Control.

The next step in the installation process is to provide the path to the \textbf{Destination Folder}. This is the folder where the program files will reside. Unless it is absolutely necessary, we recommend acceptance of the default destination folder.

Click the \textbf{Next} button to proceed with the installation of Job Control.
The next window is used to specify the path to the **Database Folder**. Click the **Change** button to browse to the desired database folder. The installation program will copy the shared database files to the folder that you specify as the database folder. If more than one user is to have access to the database folder, this folder should reside on a network server and should be a folder in which all Job Control users have both “read” and “write” privileges.
When the proper location has been specified, click the **Next** button to continue with the installation.
Now the type of installation must be selected before installation can proceed. Examine the 2 optional setup methods and make the appropriate selection.

- If Job Control will be used on just 1 computer, the Administrator Install should be selected.
- If Job Control will be used in a network environment with multiple users, the Administrator Install option should be performed only once and all subsequent installations should use the Additional Computers setup type.

When the appropriate option has been selected, click the Next button to continue with the installation.

![Ready to Install the Program dialog box](image)

At this point, the Job Control installation program has gathered all of the information required to copy the program and support files to this computer.

Click the Install button to perform the installation.
The progress of the installation of Job Control can be seen in a window like the example shown above. If it becomes necessary to stop the installation before it has completed, click the Cancel button. If the installation is cancelled, all previously completed installation tasks will be reversed.

When the installation process has been completed, the following window will be displayed.
Click the Finish button to end the installation program.

The installation process will create a Desktop Shortcut like the example shown here:

To complete the installation process, start Job Control and specify values for the following fields:

- **Data**
  - The first time that Job Control is opened, this field is blank.
  - Click the Browse button and select the Database Folder that you specified during the installation of Job Control.
  - Network locations may be in the form of a mapped drive letter or a UNC path.

- **Layout**
  - The first time that Job Control is opened, this field is set to C:\Program Files\Job Control\Layouts. Some computer users may encounter difficulty using this folder if their Windows user account does not have sufficient privileges in this folder.
  - As an alternative to using the default folder, use a sub-folder of the My Documents folder or a folder created within the user’s personal storage space on a network server.

- **Download Location**
  - The first time that Job Control is opened, the Not Used option is selected.
  - To download program updates automatically from our website, select the option that contains the address of our website (http://www.customdatacentre.com).
  - For an explanation of the Shared Folder and Set as Update Server options, please see the chapter on Software Updates.
Click the **Save** button when your selections have been made.

Click the **Yes** button to close the Program Setup window and go to the Opening Window.

You may return to the program Setup window at any time by clicking the **Setup** button on the main program window to change the configuration of your Job Control software.
Chapter 2: Before Using Job Control

By default, the Admin Only functions are password protected, enter the Job Control Administrator password in the space provided and then click the OK button. The default password is PASSWORD and Job Control administrators are advised to replace this password with a more secure password. The password can be changed by clicking the Password for Admin Only… button.

2.1 What You Will Need before You Start

<table>
<thead>
<tr>
<th>Lists</th>
<th>Description</th>
<th>Format</th>
</tr>
</thead>
<tbody>
<tr>
<td>Employees &amp; Employee Codes</td>
<td>Although the database does contain each employee’s full name for reporting purposes, there are places where only the employee’s code is used. This is done to conserve space on printed reports and on the Job Grid displays.</td>
<td>The Employee Code can contain up to 10 alpha-numeric characters. Because the Employee Code appears on the Job Grid display, a contraction of the employee’s name, such as the employee’s first initial and up to 9 characters of the employee’s surname, makes a better Employee Code than a numeric value. Employees will appear on lists in ascending order of Employee Code.</td>
</tr>
<tr>
<td>Job Types &amp; Job Codes</td>
<td>The Job Type describes the type of work being performed (T1, T2, GST, AUDIT, etc.). The Job Type will appear on reports and on the Job Grid displays. Job Codes are used internally by the program.</td>
<td>Job Codes are a numeric value and Job Types will appear on lists in ascending order of Job Code. The Job Type can contain a description of up to 15 alpha-numeric characters.</td>
</tr>
<tr>
<td>Job Status</td>
<td>Describes the current state of the job. (Optional)</td>
<td>Maximum of 50 alpha-numeric characters.</td>
</tr>
<tr>
<td>Disposition Methods &amp; Disposition Codes</td>
<td>The Disposition Method describes how the finished job was provided to the client or government department. (MAIL TO CLIENT, E-FILE, TAKEN BY CLIENT, etc.). Disposition Methods appear on reports and on the Job Grid displays. Disposition Codes are used internally by the program.</td>
<td>Disposition Codes are a numeric value and Disposition Methods will appear on lists in ascending order of Disposition Code. The Disposition Methods can contain a description of up to 15 alpha-numeric characters.</td>
</tr>
<tr>
<td>Jobs In Progress</td>
<td>A list of the jobs currently in progress should include at least the following data items: CLIENT NAME, FILE NUMBER, EMPLOYEE RESPONSIBLE, JOB TYPE, DATE IN.</td>
<td>CLIENT NAME – Maximum of 25 Alpha-numeric characters. FILE NUMBER - Maximum of 10 Alpha-numeric characters. EMPLOYEE RESPONSIBLE – Selected from the Employee list. JOB TYPE - Selected from the Job Type list. DATE IN – Can be selected from the drop-down calendar or typed in MM/dd/YY or MM/dd/YYYY format.</td>
</tr>
</tbody>
</table>
2.2 Disposition, Employee, Job Type and Job Status Tables

Before any jobs can be entered in the Job Control database, at least 1 entry must exist in the Disposition, Employee, and Job Type tables. This is necessary because every job in the database must be associated with an item in each of these tables.

Disposition Codes
The Disposition Codes table is accessed by clicking the button labeled Dispositions – add, edit and delete from the Admin Only section of the opening window.

The Dispositions table is presented in ascending order of Disposition Code. You can type over the existing text to change the Disposition Method that has been associated with an existing code.

Changes to the Disposition table are saved automatically when the cursor is moved to a different row and when the Return button is clicked.

To add a new Disposition Code and Method, click the empty row at the top of the table. This will cause a new line to be added to the table where you may enter a new Disposition Code and Disposition Method of your choosing.

To Delete a Disposition from the table, click on the item to be deleted and then click the Delete button. Only Dispositions that are not currently associated with a Job may be deleted. Attempts to delete a Disposition that is currently in use will be prevented.

Click the Reload button to refresh the table display with the contents of the database.
Employee Table
The Employee table is accessed by clicking the button labeled Employees – add, edit, set active/inactive and delete from the Admin Only section of the opening window.

The Employee table is presented in ascending order of Employee Code. You can type over the existing text to change the Employee Name that has been associated with an existing code. Once saved to the database, Employee Codes cannot be changed.

Changes to the Employee table are saved automatically when the cursor is moved to a different row and when the Return button is clicked.

To add a new Employee, click the empty row at the top of the table. This will cause a new line to be added to the table where you may enter a new Employee Code and Employee Name.

In order for an Employee to be associated with a Job, the Employee must be flagged as Active. If an Employee leaves the firm, the Active flag should be turned “off”. This will prevent the Employee from being associated with any new Jobs but they will remain associated with any Jobs that are still in progress or have already been completed.

To Delete an Employee from the table, click on the Employee to be deleted and then click on the Delete button. Only Employees that are not currently associated with a Job in the database may be deleted and attempts to delete Employees that are currently associated with a Job will be prevented.

Click the Reload button to refresh the table display with the contents of the database.
Job Types Table
The Job Types table is accessed by clicking the button labeled **Job Types – add, edit and delete** from the **Admin Only** section of the opening window.

The Job Types table is presented in ascending order of Job Code. You can type over the existing text to change the description of the Job Type that has been associated with an existing code. Once saved to the database, Job Codes cannot be changed.

To add a new Job Type, click the empty row at the top of the table. This will cause a new line to be added to the table where you may enter a new Job Code and Job Type.

Changes to the Job Types table are saved automatically when the cursor is moved to a different row and when the **Return** button is clicked.

To Delete a Job Type from the table, click on the Job Type to be deleted and then click on the **Delete** button. Only Job Types that are not currently associated with a Job in the database may be deleted and attempts to delete Job Types that are currently associated with a Job will be prevented.

Click the **Reload** button to refresh the table display with the contents of the database.
Job Status Table

The optional Job Status table is accessed by clicking the button labeled Job Status – add, edit and delete from the Admin Only section of the opening window.

The Job Status table is presented in ascending order of Job Code. You can type over the existing text to change the description of the Job Type that has been associated with an existing code.

To add a new Job Status, click the empty row at the top of the table. This will cause a new line to be added to the table where you may enter a new Status Code and Job Status.

Changes to the Job Status table are saved automatically when the cursor is moved to a different row and when the Return button is clicked.

To Delete a Job Status from the table, click on the Job Status to be deleted and then click on the Delete button. Only Job Statuses that are not currently associated with a Job in the database may be deleted and attempts to delete a Job Status that is currently associated with a Job will be prevented.

Click the Reload button to refresh the table display with the contents of the database.
2.3 User Defined Fields

Job Control provides 7 User Defined Fields that you can use to customize Job Control so that it better suits your firm’s needs. There are 2 date fields, 3 * 20-character note fields, a 6-character alphanumeric text field and a 10-character alphanumeric text field.

The Job Types table is accessed by clicking the button labeled User Defined Field Titles – default or customize from the Admin Only section of the opening window.

The User Defined Field Names list is shown below. To change the title of a User Defined Field, simply replace the text in the Title column with your preferred Title.

Changes to the User Defined Fields table are saved automatically when the cursor is moved to a different row and when the Return button is clicked.

Click the Reload button to refresh the table display with the contents of the database.

The use of the User Defined Fields is optional but the list of User Defined Fields cannot be deleted from the database.
Chapter 3: Job Grid

3.1 What Is The Job Grid?

The Job Grid is the most frequently used interface to the Job Control database. The Job Grid consists of a series of columns and rows, much like a spreadsheet. Each job in the database occupies a row in the grid.

3.2 Job Grid Cells Defined

The default view of the Job Grid can be seen below. Job records may be edited by typing directly on the Job Grid or by using the drop-down lists provided.
S (Started), F (Finished), C (Checked)
- These cells are used to mark the status of a job.
- These cells must be checked in the order that they are shown. As each cell is checked, the current date is placed into the corresponding date field.
  - Start Date
  - Finish Date
  - Checked Date
- These cells may also be unchecked in the reverse order. As each cell is unchecked, the recorded date is removed from corresponding date field.

Date In, Date Required, Date Out
- Dates are entered into each of the cells in MM/DD/YY or MM/DD/YYYY format.
- The Date In field documents the date that the job was provided to the firm by the client.
- The Date Required is used to help ensure that jobs are completed in the proper sequence.
- The Date Out field documents when the completed job was provided to the client and/or government department.
- To remove a date from any of these fields, first “Select” the date by clicking on the cell and dragging the cursor across the date, and then press the “Delete” key.

Status
- This is an optional field. Choose the appropriate status from the drop-down list.

Client Name
- This is a required field so the contents of this cell may be edited but cannot be deleted.

File No
- Enter the client’s file number.
- This field has a size limit of 10 characters.
- This is a User Defined Field and your system administrator may have renamed this field.
- The use of User Defined Fields is optional.

**Job Type**
- Choose a Job Type that describes the work to be done by selecting a Job Type from the drop-down list.
- This is a required field that must contain one of the Job Types that have been prescribed by your system administrator.

**Responsible, Respons2, Assigned, Sub-Assigned**
- Type a valid Employee Code or choose an Employee Code from the drop-down list.
- It is mandatory to select the employee who is Responsible for this job.
- The use of the 2nd Responsible (Respons2), Assigned and Sub-Assigned fields is optional.

**Disposition**
- Type a valid Disposition Method into this field or choose a Disposition Method from the drop-down list.
- It is mandatory to provide a valid Disposition Method for jobs that have a valid date in the Date Out column.

**Trns (Transmittal) No**
- Enter the Transmittal number for the job.
- This field has a size limit of 6 characters.
- This is a User Defined Field and your system administrator may have renamed this field.
- The use of User Defined Fields is optional.

Columns on the job grid that are not required by your firm can be hidden from view. It is even possible to hide columns that may not be of interest to a certain individual. Likewise, there are columns that have not been described above because they are hidden by default. These columns are described below.

**UDNote1, UDNote2, UDNote3 (User Defined Notes 1, 2, and 3)**
- These are User Defined Fields and your system administrator may have renamed these fields.
- These fields may be used to attach from 1 to 3 notes of up to 20-characters in length to a job.
- The use of User Defined Fields is optional.

**UDDate1, UDDate2 (User Defined Dates 1 and 2)**
- These are User Defined Fields and your system administrator may have renamed these fields.
- These date fields may be used to attach from 1 to 2 additional dates to a job.
- The use of User Defined Fields is optional.
### 3.3 Job Grid Buttons

The table shown below describes the commands that are available on the Job Grid button bar. Buttons are enabled and disabled depending on the actions that have been performed against the contents of the Job Grid.

<table>
<thead>
<tr>
<th>Button</th>
<th>Description</th>
</tr>
</thead>
<tbody>
<tr>
<td><img src="image" alt="Open Single Job" /></td>
<td>Opens the Single Job view of the selected job in the grid. This view can be used to make changes to the job details.</td>
</tr>
<tr>
<td><img src="image" alt="Reload Grid" /></td>
<td>Reloads the job grid from the database.</td>
</tr>
<tr>
<td><img src="image" alt="Search Grid" /></td>
<td>Shows the Search tool which can then be used to search the grid for character strings that match the search criteria provided by the user.</td>
</tr>
<tr>
<td><img src="image" alt="Customize Grid" /></td>
<td>Allows the user to customize the grid display by applying one or more logical expressions to the contents of the grid.</td>
</tr>
<tr>
<td><img src="image" alt="Total Jobs" /></td>
<td>Toggles the display of the total number of jobs in the current grid.</td>
</tr>
<tr>
<td><img src="image" alt="Theme Grid" /></td>
<td>Applies a visual theme to the current grid.</td>
</tr>
<tr>
<td><img src="image" alt="Save Layout" /></td>
<td>Allows the user to save a grid layout for future use. Saved layouts are stored in the My Layouts section of the opening Job Control window.</td>
</tr>
<tr>
<td><img src="image" alt="Preview Print" /></td>
<td>Provides a preview of what would be printed if the Print button was clicked. The impact of cosmetic changes such as margin sizes and zoom can also be tested before the report is committed to paper. Also allows the report to be exported as a PDF, HTML, MHT, XLS, XLSX, CSV, Text, Image, or XPS file.</td>
</tr>
<tr>
<td><img src="image" alt="Print Grid" /></td>
<td>Prints the job grid to a user specified printer.</td>
</tr>
<tr>
<td><img src="image" alt="Close Grid" /></td>
<td>Closes the job grid and returns to the opening window.</td>
</tr>
</tbody>
</table>
3.4 Job Grid Navigation

In addition to using the scroll bars that appear on the bottom and right-side of the Job Grid the following keyboard shortcuts may also prove useful:

<table>
<thead>
<tr>
<th>Keyboard Shortcut</th>
<th>Purpose</th>
</tr>
</thead>
<tbody>
<tr>
<td>Enter or TAB</td>
<td>Moves to right.</td>
</tr>
<tr>
<td>Shift &amp; TAB</td>
<td>Moves to left.</td>
</tr>
<tr>
<td>Page Down</td>
<td>Move down through the Job Grid, one page at a time.</td>
</tr>
<tr>
<td>Page Up</td>
<td>Move up through the Job Grid, one page at a time.</td>
</tr>
<tr>
<td>End</td>
<td>Position the cursor in the right-most column of the current line.</td>
</tr>
<tr>
<td>Home</td>
<td>Position the cursor in the left-most column of the current line.</td>
</tr>
<tr>
<td>Control – End</td>
<td>Position the cursor at the end of the contents of the current cell.</td>
</tr>
<tr>
<td>Control – Home</td>
<td>Position the cursor in the beginning of the contents of the current cell.</td>
</tr>
</tbody>
</table>

3.5 Job Grid Shortcut Keys

When in a date field, pressing **F4** will display a calendar.

When editing a field, pressing **ESC** will return the field to its previous value. ESC must be pressed before the cursor leaves the field.
Chapter 4: Working with Jobs

4.1 Adding a New Job

Add New Job Buttons

<table>
<thead>
<tr>
<th>Button</th>
<th>Description</th>
</tr>
</thead>
<tbody>
<tr>
<td><img src="image" alt="Clear" /></td>
<td>Clears the contents of all data fields in the window.</td>
</tr>
<tr>
<td><img src="image" alt="Save" /></td>
<td>Saves the job details to the database.</td>
</tr>
<tr>
<td><img src="image" alt="Delete" /></td>
<td>Deletes the currently displayed job from the database.</td>
</tr>
<tr>
<td><img src="image" alt="Reload" /></td>
<td>Reloads the job details from the database.</td>
</tr>
<tr>
<td><img src="image" alt="Search" /></td>
<td>Search the database for clients that match the user provided search criteria. The % character may be used as a “wild-card” character.</td>
</tr>
<tr>
<td><img src="image" alt="Preview" /></td>
<td>Provides a preview of what would be printed if the Print button was clicked. The impact of cosmetic changes such as margin sizes and zoom can also be tested before the report is committed to paper. Also allows the report to be exported as a PDF, HTML, MHT, XLS, XLSX, CSV, Text, Image, or XPS file.</td>
</tr>
<tr>
<td><img src="image" alt="Print" /></td>
<td>Prints the job details to a user specified printer.</td>
</tr>
<tr>
<td><img src="image" alt="Close" /></td>
<td>Closes the job grid and returns to the opening window.</td>
</tr>
</tbody>
</table>
New jobs are added to the Job Control database by clicking the **Add Job** button on the opening window.

Before a job can be added, valid data must be entered in each of the required fields. These fields are marked by an asterisk (*) and include **Client**, **File No.**, **Responsible**, **Job Type**, and **Date In**. Input may be provided for any of the fields in the form, not just the required fields. The **Save** and **Repeat** buttons are enabled when all of the required fields have been completed.

By default, the **Date In** field is set to the current system date on the computer but this date may be changed by typing a different date or by selecting a different date from the drop-down calendar.

Batches of similar jobs can be recorded more efficiently by using the **Repeat** menu item. This menu command saves the current job to the database but does not erase the data from the form. The completed form then serves as a template for the recording of another similar job by allowing the user to make changes to only those fields that need to be changed.

When all new jobs have been recorded, use the **Return** button to return to the opening window.

### 4.1.1 Find Client

Job Control provides a method to locate existing clients using all, or part, of their name or file number. Enter the full Client Name, full File No., or a portion of either of these fields along with one or more wild-card characters (%).

In the example below, the name “howard” is being searched for and the % is used to widen the search. If 'howard%' was entered, only clients whose names started with 'howard' would be located. But, if
"%howard%" is used, all clients with the character string ‘howard’ anywhere in the client name will be found.

If multiple matching jobs are located they are listed in a Find Client window. Double-click on the desired client to use this client’s name and file number in the Add Job window.
Alternatively, the file number can be entered and the Find Client button can be used to locate the client’s name. In the example below, the search criteria is all file numbers starting with a 3.

![Find Client button example](image)

Clicking the Find Client button returns the following:

![Find Client result](image)
4.2 Updating Job Progress

As jobs are started, finished, and checked, their progress can be documented in the Job Control database. There are 2 methods of updating a job’s status.

First, the check-boxes for Started, Finished, and Checked status can be checked-off by clicking the appropriate box directly on the Job Grid. This action also causes the current system date on the computer to be entered into the corresponding date field. If the current system date is not appropriate, the correct date may be typed in its place. If a status box is checked in error, simply click the check-box again to remove both the check-mark and date from the Job Grid.

It is also possible to simply type a valid date into the Start Date, Finish Date, or Checked Date fields and Job Control will mark the appropriate check-box.

The other method of updating a job’s status is to use the Details button to open the Single Job View. Prior to clicking this button, click once on any column (except S, F, or C) belonging to the job to be updated.

![Single Job View](image)

The Single Job View provides drop-down calendars in the date fields and shows all of the data fields for the selected job in a single window. This eliminates the need to scroll from left to right in order to see all of the columns in the Job Grid.

Regardless of the method used to update the status of a job, the Started, Finished, and Checked statuses must be completed in the proper sequence.
4.3 Job Out

The completion and disposition of a job can be documented by providing a Date Out and Disposition Method directly on the Job Grid and from the Single Job View. When working with a small number of jobs, these methods are reasonably efficient.

When a large number of jobs must be marked as “out”, this task is best accomplished using the Job Out tool. This tool is accessed by clicking the Job Out button on the opening Job Control window.

To mark a job as “out”, click on the Date Out check-box. This will cause the Date Out to be completed using the computer’s current system date and the Disposition Method will be populated with the first method in the Dispositions Codes table. These 2 fields may be edited to reflect the actual Date Out and Disposition Method.
If any of the Start, Finish, or Check dates had been left blank, the Job Out tool will mark any empty checkboxes and complete any missing dates with the computer’s current system date. If any of these dates are incorrect, they may be edited before the Save command is issued.
4.4 Finding Jobs

The **Find Job** tool is provided to assist in the retrieval of job records from the database. The Find Job tool can be opened using **Find** button.

The Find Job tool examines the current layout to find jobs that match the user’s search criteria.

Upon clicking the **Find** button a search field appears above the grid. To start searching, begin typing the characters that you wish to search for. Job Control will begin its search with the first character that you type.

The example below shows a job grid but the search criteria field is still empty.
As characters are typed in the search criteria field, the grid will show only those jobs that match the search criteria. In the example below, the letters Pa have been typed into the search criteria field causing the job grid to show only those job records that contain these letters.

As seen in the example below, the typing of additional characters causes the job grid to be updated to reflect the new search criteria.
4.5 Deleted Jobs

The Deleted Jobs tool is provided to assist in the viewing and, if necessary, restoration of deleted jobs. The Deleted Jobs tool can be opened from the Layouts group menu.

As with other standard layouts, this layout can be customized using the Filter and Totals buttons. In addition, the Find button can be used to locate deleted jobs.

Jobs that appear in the deleted jobs grid may be returned to active status by doing the following:
1. Click anywhere on the row occupied by the job that is to be returned to active status.
2. Click the Restore button.

Jobs may be permanently deleted from the database by doing the following:
1. Click anywhere on the row occupied by the job that is to be deleted.
2. Click the Remove button.

Please note that this action cannot be reversed.
Chapter 5: Customizing the Job Grid

5.1 Job Grid Layouts

The Job Grid can be reorganized in various ways in order to make the grid present job information in different formats. This can be useful for narrowing the focus on the database so that only those jobs that matter to the task at hand are shown in the job grid. In addition, different staff members may need access to different information at different times and sometimes it is more efficient if that information is presented in a different format.

Each unique grid design is called a Layout. Job Control requires that each user have at least 1 layout designated as their Default Layout. This default layout will be used whenever the user opens the Job Control program.

Customized layouts may be designed and saved by each Job Control user. Each user’s layouts are independent of other users and any changes that a user makes to their saved layouts will not affect the layouts of other users. Layout information is stored in a file that is external to the Job Control database. These files may be stored in a folder on a local or network disk drive and the saved layout files should be included in your backup procedures.

There are 3 pre-configured layouts that are provided with Job Control:

- All Jobs
- All Jobs Except T4, T4A & T5
- T4, T4A & T5

These layouts are coded into the Job Control program and they cannot be edited or deleted. In order to use these layouts, the Job Types T4, T4A and T5 must be defined in the Job Types table.

The Job Grid can be modified in the following ways:

- Columns may be hidden from view.
- Previously hidden columns may be shown.
- The order in which Columns appear may be reorganized.
- Jobs may be sorted in ascending, or descending, order based on the contents of any column.
- The job grid may be filtered so that only jobs containing specific characteristics will be displayed.

Once the Job Grid has been modified to suit a particular need, the settings can be saved as a Layout for use in the future.
5.2 Custom Layouts

5.2.1 Creating and Saving a Custom Layout

Job Control provides each user with the option of creating as many as 12 custom layouts. These layouts appear on the Job Control program window under their default names, Jobs 0 through Jobs 11, in the My Layouts group.

As custom layouts are created, the default names can be replaced with names that better describe the content of each layout.

To create a custom layout, click once on the button representing one of the 12 custom layouts. If the selected layout has not yet been customized, a message like the example shown below will be seen.

This message is merely advising the user that the selected layout has not yet been customized and therefore the job grid will be opened with all jobs shown. To proceed with the creation of a custom layout, click the Yes button.

A new window containing a job grid that has been populated with all jobs will now be shown.
Notice the text **Drag a column header here to group by that column** in the area above the job grid. The next example shows what happens to the job grid when the Job Type column header is dragged into this space. (To reverse this action, simply drag the column header back down to the header row.)
Now we have a job grid with the jobs sorted into categories representing each of the various Job Types. Notice that the number of jobs in each group is shown at the end of each group header line.

Clicking on the + symbol on a group header line causes the group to be expanded so that job details are visible.

![Job Control Grid](image)

Additional customization of the grid can be applied by rearranging the order in which the grid columns appear.

Notice in the example shown above that in addition to being grouped by Job Type, the job grid detail lines are also sorted alphabetically by Client Name within their groups.
In the example below, the **File No** column header has been clicked to sort the jobs in ascending order of their File No. (Clicking the column header again will reverse the sort order.)

The order in which grid columns are shown can also be customized. Simply drag and drop a column header to your preferred position. Notice in the example below that the File No and Client Name columns have swapped positions.
The **Filter** button is used to eliminate from the job grid, all jobs that do not match the user’s criteria. The Filter tool is intended to provide the user with a way of narrowing the focus of the job grid.

In the example presented below, the job grid will be filtered so that it only shows those jobs for which the staff member ARANGER is responsible. Click the **Filter** button to open the Filter Editor.

The Filter Editor window is used to build the filter that is then applied to the job grid. Begin by clicking the button to add a new condition to the filter.
Click the button to select a grid column.

In this example we will choose the Respon field.
For the purposes of this example, the next part of the filter, *Equals*, can remain as it is. However, this operator can be changed to a large number of possibilities, depending on which grid column has been selected.

Click on *enter a value* and select the desired value from all of the values that can be currently be found in the *Respon* column in the job grid. In this example, we will select FASTRA.

Click the **Apply** button to update the job grid with the filter contents.
This example describes a basic filter. It is possible to build much more complex filters and you are encouraged to experiment with the filter tool as no damage can be done to your database by experimenting with filters.

Columns may be removed from a layout by right-clicking on any Column Header (the space between the column name and the sort order button) and choosing Show Column Chooser from the menu. Drag unwanted columns by the Column Header into the Column Chooser window. Should a column be required in this layout in the future, choose Show Column Chooser again and drag the required column out of the Column Chooser and drop it into the desired position.

When the job grid has been properly customized, click the Save button to save this layout in the My Layouts section of the Job Control program window.

Click the Yes button to save this layout with a meaningful name.
Type your preferred name for this layout and click the **OK** button.
5.2.2 A Frequently Used Layout

The following instructions can be used to create a custom layout that is frequently used. This layout will produce a job grid showing all jobs that have been assigned to a staff member where those jobs have not yet been checked. This layout can be used by individual staff members as an easy way to review their workload.

To create a custom layout, click once on the button representing one of the 12 custom layouts. If the selected layout has not yet been customized, a message like the example shown below will be seen.

This message is merely advising the user that the selected layout has not yet been customized and therefore the job grid will be opened with all jobs shown. To proceed with the creation of a custom layout, click the Yes button.

A new window containing a job grid that has been populated with all jobs will now be shown.

The Filter button is used to eliminate from the job grid, all jobs that do not match the user’s criteria. In this example, the job grid will be filtered so that it only shows those jobs that have been assigned, or sub-assigned, to the staff member ARANGER. Click the Filter button to open the Filter Editor.

Click the And button and choose Add Group from the menu.
Add a second group to the filter by clicking the first **And** button again and choosing **Add Group** from the menu. The Filter Editor should now look like the following example.
Click on the second **And** button and choose **Or** from the menu. The Filter Editor should now look like the following example.

Click the + button next to the **Or** statement to add a new condition to the group. The Filter Editor should now look like the following example.
Now complete the filter so that it looks like the example shown below except that ARANGER will be replaced by an actual staff member.

Click the **OK** button to close the Filter Editor and return to the job grid.

Additional customization may now be performed. For example, clicking the **Date In** column header to sort the jobs in chronological order will cause the jobs to be displayed in the order in which they were received.

Click the **Save** button to save the layout in the My Layouts group for future use. Be sure to give the layout a meaningful name such as “All Jobs Assigned to {Me/Employee Name}.”
5.3 Managing Layouts

5.3.1 Editing a Layout

Layouts may be edited simply by opening the layout and reorganizing the job grid until it meets the user’s needs.

Columns may be added or removed using the **Column Chooser**. Right-click on any column header and choose **Show Column Chooser** from the menu.
The **Show Column Chooser** window can be moved around as necessary so that it does not block access to other column headers.

Columns that are not current on the current Layout can be dragged from the Column Chooser and dropped into the desired position among the existing column headers.

To remove a column from the layout, drag the column header to be removed to the Column Chooser.

When the addition and removal of columns has been completed, close the **Column Chooser** window.

If a filter has been applied to the layout, clicking the **Filter** button will display the Filter Editor where the filter may be modified as necessary.

If a filter has not been applied to the layout, clicking the **Filter** button will open the Filter Editor where a new filter can be created.

### 5.3.2 Renaming a Layout

After editing a layout, it may become apparent that name of the layout is no longer appropriate. It may even be true that the name that was originally given to a layout is incorrect or misleading.

You can rename a layout, by opening the layout and then clicking the **Save** button. This will cause a window like the following example to be displayed.

The original name of the layout will be shown in the message. In this case, the layout was called “Custom Layout”. A more meaningful name can be given to the layout by clicking the **Yes** button.
Now you can type a meaningful name in the space provided and then click the **OK** button to save the layout under the new name.

If you do not enter a new name, and simply click the **OK** button, the layout will be saved with its original name of "Jobs1", "Jobs 2", etc.
Chapter 6: Printing Reports & Lists

6.1 Report & List Descriptions

The table below describes the reports that can be prepared by Job Control. Reports can be prepared from the Active jobs or Archived Jobs sections of the database.

<table>
<thead>
<tr>
<th>Report</th>
<th>Description</th>
</tr>
</thead>
<tbody>
<tr>
<td>Client Report</td>
<td>Prepares a report of all jobs in the database, arranged by Client. The report can be prepared for a single client, or for all clients.</td>
</tr>
<tr>
<td>Responsibility</td>
<td>Prepares a report of all jobs in the database, arranged by the Responsible, 2nd Responsible, Assigned or Sub-Assigned employee. The report can be prepared for a single employee, or for all employees. If the &quot;all&quot; option is selected, a page break will occur after each employee.</td>
</tr>
<tr>
<td>Progress Report</td>
<td>Provides a count of the number of jobs at each level of progress (In, Started, Finished, Checked, Out, Left) for all, or selected job types in the database. Jobs may also be selected by their Responsible, 2nd Responsible, Assigned, or Sub-Assigned employee. The job counts can be provided by employee, date, or a daily count can be provided for a selected date range.</td>
</tr>
<tr>
<td>Average Days</td>
<td>Provides an analysis of the average number of days that it takes for a job to be completed. This report provides the option of including, or excluding, statistics for the Start, Finish, Checked, and Out statuses. This report can also be prepared for all or selected employees, and for all or selected job types.</td>
</tr>
</tbody>
</table>

All reports and lists may be sent to the user’s default printer or previewed on the screen. To send a report to a printer other than the default printer, first preview the report and then direct the report to any available printer using the button.

Because all reports can be previewed before they are committed to paper, Job Control users are encouraged to prepare reports on their own and experiment with the reporting options in order to gain an understanding of the program's reporting capabilities.
6.2 Exporting Reports

All previewed reports may be exported to a file in any of the following formats:

- PDF
- HTML
- MHT
- RTF
- XLS
- XLSX
- CSV
- Text
- Image
- XPS

Below is Preview of the Client Report.

![Preview Report]

This report can be exported to a file by clicking on the button to expose the list of available export formats. Select a format by clicking on it with the mouse.

An Export Options window will be shown upon selecting an export format. Each format has its own unique Export Options but it is not necessary to enter any Export Options in order to export a report.
Click the **OK** button to proceed to the Save As phase of the export process.

The default destination for the exported file is the user’s **Documents** folder but the Save As dialog will allow you to save the exported file to any available storage device. The export file will also be given a default name but this too can be changed to suit your requirements. Click the **Save** button when you are satisfied with the file name and export location.
When the export has completed, you will be asked if you would like to view the exported report.

![Image of export dialog box]

The exported file can now be opened using the appropriate application software.

No harm can come from experimenting with the different export formats and we encourage you to try exporting reports in various formats to compare the results and practice with the various options settings.

In addition to being exported, previewed reports may also be printed to any available printer by clicking on either of the **Print** buttons on the Preview Report toolbar.
Chapter 7: Admin Only

New to version 5, there is no longer a separate Maintenance Program. The functions have now been incorporated into Job Control under Tasks > Maintenance.

7.1 Job Types, Disposition Codes, Employees and User Defined Fields

These Maintenance items have been addressed in Chapter 2.
7.2 User Layouts – Remove for Past Employees

This task can be performed in order to remove from the database, all of the custom layouts that were created by employees. This task can be performed when an employee leaves the firm.

If the Admin Only functions have been password protected, enter the password in the space provided and then click the OK button. The initial password is PASSWORD.

The User Maintenance window will be displayed with a list of employees who have layouts defined in the database.
Click on the check-box in the **Remove User** column next to the name of the employee whose layouts are to be removed from the database. Repeat this process for each employee who has been identified for removal. Alternatively, click the **Select All** button to select all employees.

Click the **Remove** button to proceed with the removal the layouts created by former employees.

Click the **Return** command when finished using this maintenance tool.
7.3 Password for Admin Only – Set, Change, Remove

By default, the Admin Only functions are password protected. The default password is PASSWORD and Job Control administrators are advised to replace this password with a more secure password. The password can be changed by clicking the **Password for Admin Only...** button.

![Change Password](image)

Enter the Current Password, the New Password, and then re-enter the New Password for confirmation purposes. If the New Password is left blank, the Admin Only tasks will no longer be password protected.

Click the **Save** button to record the new password.

![Password Change Successful](image)

Click the **OK** button to return to the Job Control program window.
7.4 Archive Completed Jobs

This maintenance task is used to reduce the size of the active jobs list by relocating all of the jobs that have a status of Out, as indicated by the presence of a date in the Date Out field, and a disposition method in the Disposition field. The Archive Jobs process moves these jobs from the active job table to an archival table.

The archival process contributes to improved program performance by eliminating completed jobs from the list of jobs that must be processed when job grids are displayed and reports are prepared.

The archival process can be performed at any regular interval that makes sense for your office. For instance, if you have a busy personal income tax practice, it may make sense to perform an archival after the filing deadline has passed and all of the T1 jobs that were filed have been given a Date Out.

The default date is one year prior to today’s date. All jobs that contain a Date Out that is older than the date selected will be archived and an information message will be displayed when the archival process is complete.
7.5 View Archived Jobs

Archived jobs may be viewed by clicking the **Archived Jobs – Requires Admin Password** from the Job Control program menu.

Archived Jobs are displayed in the same grid format as active jobs.

As with other standard layouts, this layout can be customized using the **Filter** and **Totals** buttons. In addition, the **Find** button can be used to locate deleted jobs.

Jobs that appear in the archived jobs grid may be returned to active status by doing the following:

3. Click anywhere on the row occupied by the job that is to be returned to active status.
4. Click the **Restore** button.
7.6 Job Color Rules

The administrator can establish rules that force job grid detail lines to be shown using different colors to draw attention to jobs that have been in the system for some time but have not yet reached a specific stage of processing. For example, a rule could be established that would apply color to jobs that have been in the database for a period of time but have not yet been started.

Clicking the Job Color Rules button causes a list of the rules that are currently defined to be shown. If there are no rules then this window will be empty.

Click the New button to create a new color rule.
Complete the fields in the Job Color Rule window:

- **Color Rule #** Must be unique.
- **Description** Enter your own description of the color rule.
- **Date Trigger** Select from the list of date fields the date that will be the trigger for this rule and enter the number of days that must elapse before this rule is applied.
- **Over** Select the job types to which this rule will be apply.
- **Background** Select the color that will be applied as a background to the cells in the job grid.
- **Foreground** Select the color that will be applied to the text in the job grid detail line.

When the rule has been defined, click the **Save** button.
The color rule is now ready for use and will be applied to the all job grid displays for all Job Control users. Additional rules can be added and unwanted rules can be deleted at any time.
7.7 Data Location

The Data Location command is specified on the Program Setup window which can be opened by clicking the Setup button on the opening window. The Data folder tells the program where the Job Control database can be found. This folder can be changed at any time if a reorganization of network resources has resulted in a change in the location of the Job Control database.

Click the Browse button and select the Data folder.

Once the Data folder has been selected, click the Save button.
Chapter 8: Software Updates

8.1 Manual Updates

The Job Control page on our web site contains the following 2 download links:

- **JobControl-32** for 32-bit versions of Microsoft Windows.
- **JobControl-64** for 64-bit versions of Microsoft Windows.

These downloads are in the form of self-extracting Zip files which have been configured to extract themselves into the default destination folder that is applicable for each version of Microsoft Windows.

- **C:\Program Files\Job Control** for 32-bit versions of Microsoft Windows.
- **C:\Program Files (x86)\Job Control** for 64-bit versions of Microsoft Windows.

Once the required file(s) have been downloaded, simply double-click on the downloaded file to begin updating the Job Control software. The downloaded file(s) may be copied to portable media, or to a shared folder on a network to facilitate installing the update(s) on multiple computers.

8.2 Automatic Updates

While the above update method is still provided, Job Control is equipped with an automatic update feature. By enabling this feature, Job Control users will be able to have program updates delivered to their computer by the Job Control Automatic Update agent.

To enable automatic updating, click the **Setup** button on the opening Job Control program window.
By default, the Download Location will be set to **Not Used**. As long as this selection is enabled, the Automatic Update feature is disabled. When a computer's Job Control software is configured in this manner, program updates must obtained using the manual update method.

Selecting our website as the Download Location will cause the computer to obtain Job Control updates directly from our web site. Once a program update has been downloaded, the user will be notified that an update is ready to be installed. The user may then choose either to proceed with the installation of the update, or postpone the installation until a more convenient time.

Organizations that license Job Control for use on multiple computers in a networked environment can select a computer to act as the Update Server. This computer is then configured with the path to a shared network folder. The Update Server will then download program updates from our web site to this folder. All other Job Control users on the network can retrieve their updates from the shared network folder. This reduces the volume of Internet traffic on the organizations network because all Job Control users will be updating their software from a single download.

To use the Update Server method of obtaining Job Control updates, select **Set as Update Server** on the computer that will perform the downloading of updates. Then, use the **Browse** button to select the shared network folder into which this computer will place the downloaded program updates.

- The shared network folder must be specified using the UNC path. The use of mapped drive letters is not permitted.

To complete the automatic update configuration, open the Program Setup window on all other computers that run Job Control and select **Shared Folder** as Download Location. Then use the **Browse** button to select the shared network folder into which the Update Server will place the downloaded program updates.

- The shared network folder must be specified using the UNC path. The use of mapped drive letters is not permitted.

**Do not select** the Update Server option on these computers. Computers configured in this manner will look for Job Control program updates in the folder specified by the UNC path.

Click the **Save** button when the Automatic Program Updates section of the Program Setup window has been completed.

### 8.3 Update Notifications

The selection of an update method is a matter of personal preference combined with your organization’s computer security policies, and you should consider factors other than simple convenience when choosing an update method. For example, if the user accounts on your computers do not permit the installation of programs, then there is no benefit in choosing the Automatic Update method.

Regardless of the update method that you choose, the release of any program updates will always be accompanied by the receipt of an email message announcing the availability and the content of the program update. These Job Control Program Update Notification email messages will be sent to the email address that you provided to us on your Job Control Order Form. If you would like us to send these email messages to a different email address, please advise us of the new email address and we will update our records accordingly.
Chapter 9: Tile Management

9.1 Tiles

Beginning with Job Control Version 7, program features are accessed by clicking on Tiles. This design mimics the tile interface that was introduced with Microsoft's Windows 8 operating system.

Unlike menu based programs, Job Control's tiles may be reorganized in a manner that suits each user's preferences. The tile layout can be reorganized as often as required as the users preferences change over time. Once a tile layout has been established, the layout may be saved in the user's personal Layout Folder. The location of this folder can be found by clicking the Setup button on the opening Job Control program window.
Tiles can be dragged around the Job Control program window and dropped wherever the user would like them to reside. When a suitable arrangement of the tiles has been achieved, the user should click the **Save Layout** button. Job Control will then display the tiles in the user’s preferred layout each time that the program is executed.

To restore the original tile layout that was established when Job Control was installed, click the **Reset Layout** button on the opening Job Control program window.
9.2 Editing Group Titles

Job Control provides 5 default groups (Tasks, My Layouts, Layouts, Reports, Admin Only) for organizing tiles. Sometimes it is desirable to make changes to the titles of these groups. Begin by clicking the Edit Header button.

In this example we will change the title of the “Layouts” group to “Common”. Select the Layouts group for editing by performing a right-click on the first tile in the group (All Jobs).
The Headers will now become active and editable.

The Group Title field can now be edited so that it contains our desired title.

Click the Save Layout button to cause Job Control to remember the new tile layout for future use. Then click Edit Header to disable Header Editing Mode.
9.3 Making A New Group

When a tile is dragged and dropped between existing groups, a new group is created. In the example below, a new group has been created to the right of the Tasks group, the left-most group.
After dragging the desired tiles into the new group, you can edit the header using the Edit Header button like in the previous example.

Click the Save Layout button to cause Job Control to remember the new tile layout for future use. Then click Edit Header to disable Header Editing Mode.
9.4 Sizing Tiles

Job Control provides each user with the ability to reclaim screen real estate by reducing the size of user selected tiles on the main Job Control program window. This can be done by right-clicking the tile.

When Job Control is installed, all of the program tiles are set to a default size. By shrinking tiles, the screen space requirement can be significantly reduced.
9.5 Theme

Job Control provides each user with the ability to reclaim screen real estate by reducing the size of user selected tiles on the main Job Control program window.

The Theme button can be used to select between the available background colour themes.
Make your selection and the theme will change automatically. To make the theme persist the next time you start Job Control, click the **Save** button. The new setting will be applied the next time that the program is opened.
Chapter 10: Getting More Information

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