



# **Associations**

# **User Manual**



## The Baldwin Group, Inc.

7550 Lucerne Drive

Suite 306

Cleveland, OH 44130

(440) 891-9100

FAX (440) 891-9458

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## **Overview**

**Associations** are a document management system that is a part of HDIS.

Instrumental to the online O/M, **Associations** provides a new way to store notes and files with records and accounts stored in HDIS.

This feature is a step towards using a new database system, **MariaDB**, which is coupled with **OpenSSL** (communication security) to efficiently store information.

Instead of changing the FoxPro database tables, **Associations** uses a device driver that communicates between the FoxPro tables and MariaDB.

In order to properly set up **Associations**, the server would need to have **MariaDB**, **OpenSSL**, **VFPOLEDB**, and **Microsoft Visual C++ Redistributable** installed.

After BGI has this installed on the server, each workstation then needs to install the **VFPOLEDB** driver in order to successfully use **Associations**.

BGI will provide the installation and can answer any questions during or outside the process.

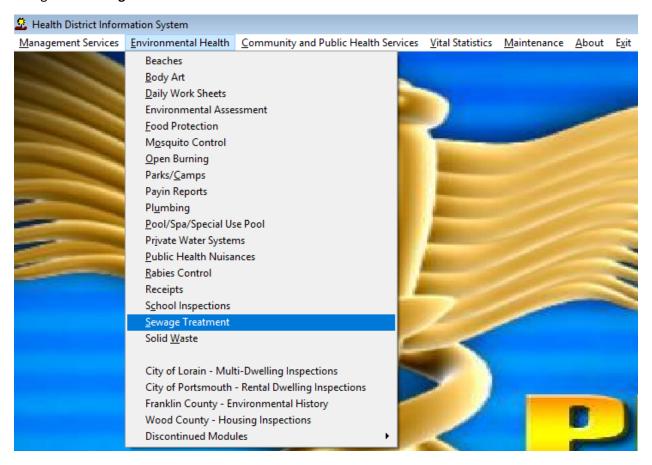




## **How To**

## **Notes Navigation 1-2**

Navigate to **Sewage Treatment** Module





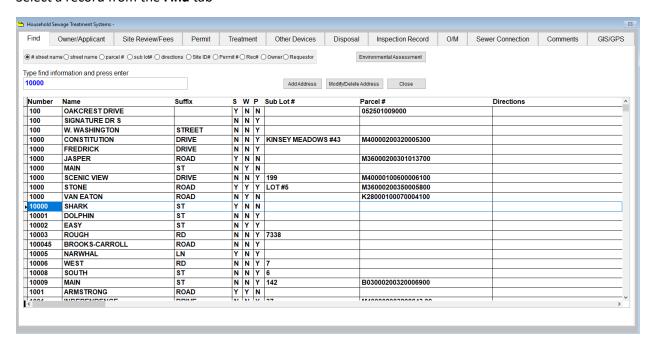


## **Notes Navigation 2-2**

Once in Sewage Treatment Module, navigate to Household Sewage Treatment Systems



#### Select a record from the Find tab

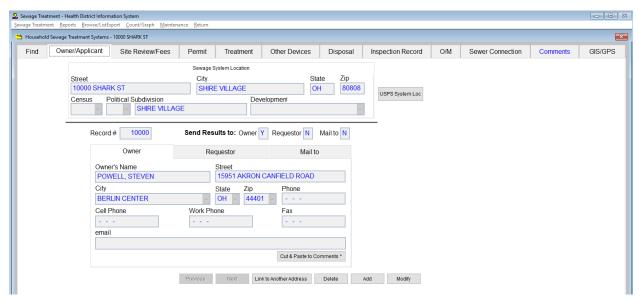


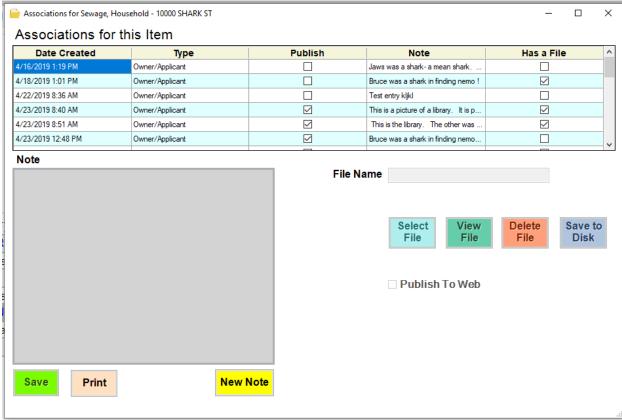




#### **Notes Screen**

When on a record, hit the keys Alt-n on the keyboard



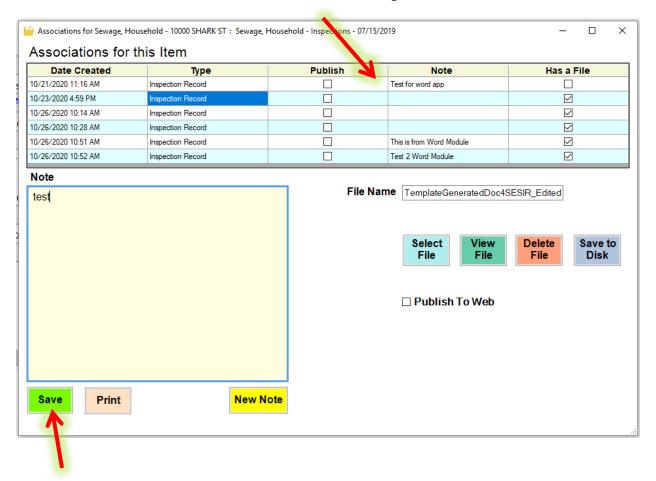






## **Open Note**

Double-click on the note to view selected details or make changes



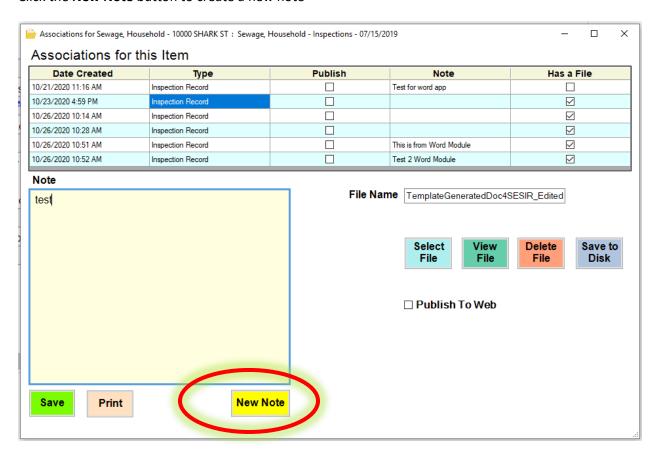
Click Save button to save any changes made to a note





## **New Note**

Click the **New Note** button to create a new note







### **Actions**

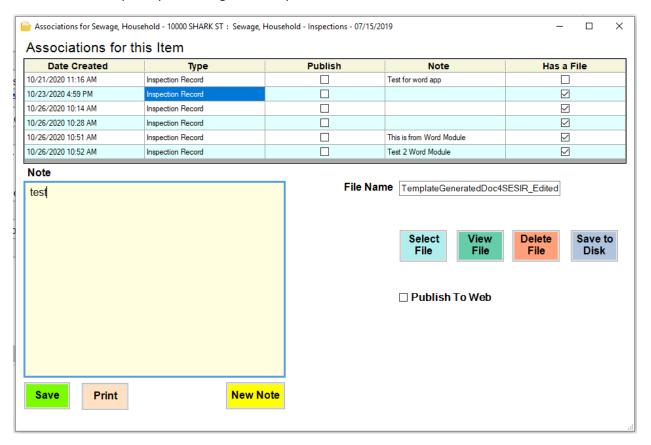
Publish to Web checkbox will allow the note to be published to the web

**Select File** button opens File Explorer to add a file to the note

View File button will automatically open files attached to note

Delete File button will delete the file currently attached to note

Print button will open a print dialogue box to print out the note

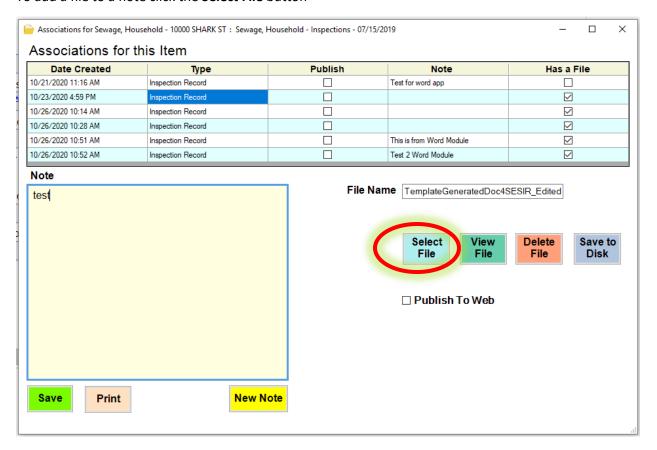






## **Add File**

#### To add a file to a note click the **Select File** button



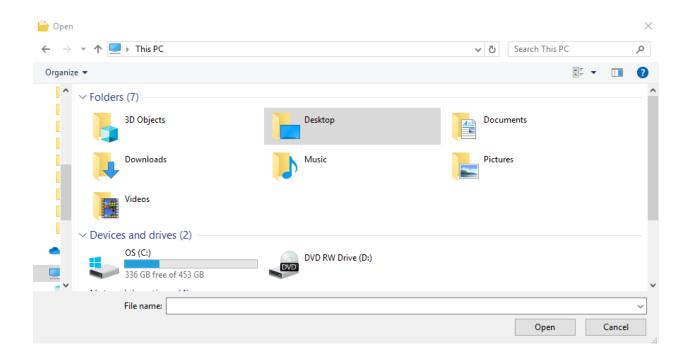




## Save File 1-3

This should open up a File Explorer window allowing you to find the needed file to attach

Select the file and click the **Open** button to add the file with the Note

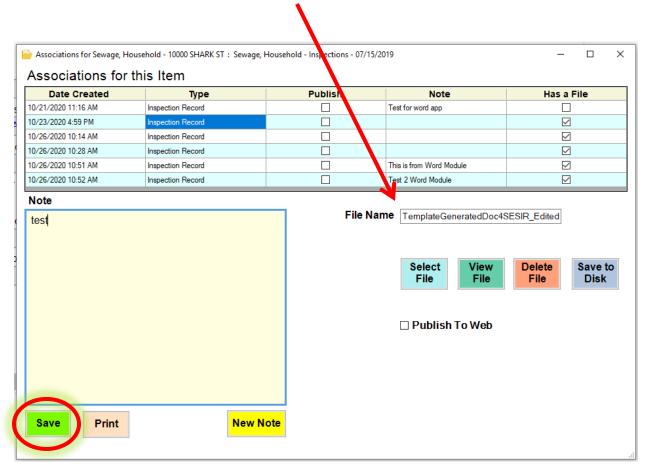




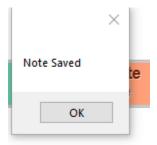


## Save File 2-3

Once you see the file name appear next to File Name, click the Save button to save the file to the record



Once the note is saved a window will pop-up to indicate the action.







## Save File 3-3

To make sure the file was saved to the note, look through the list

Make sure **Has a File** column is populated with a checkmark

Has a File	^	
$\square$		
	*	





## **Save to Disk**

To save a file locally, click the **Save to Disk** button.

This will open up File Explorer.

Find a location, for example "Desktop," and a copy of the selected file will be saved.

