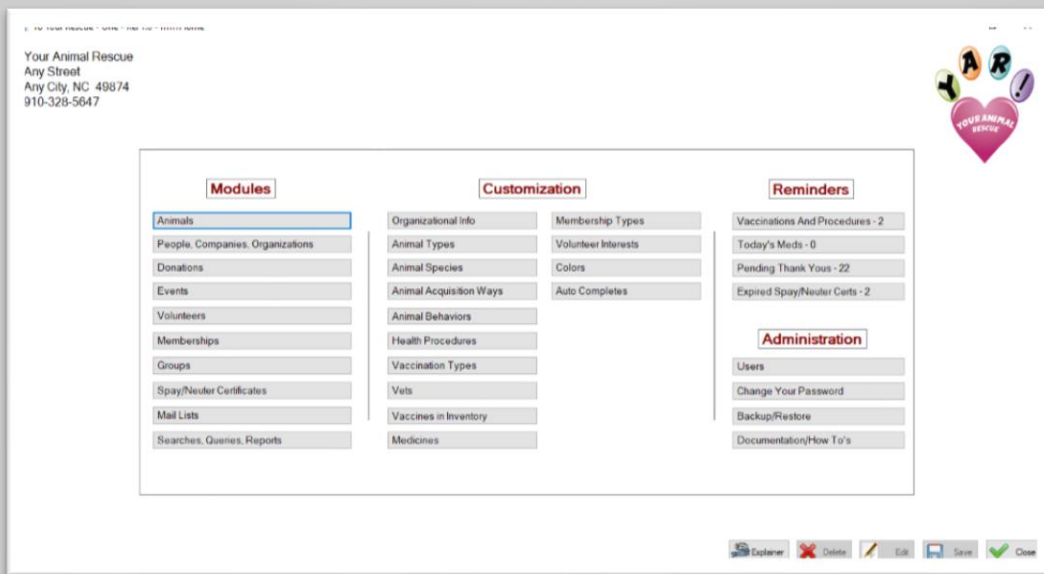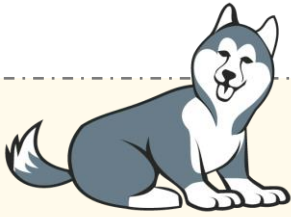# To Your Rescue

## Getting Started Guide

Welcome to To Your Rescue.   This 'Getting Started' guide is designed to get you 'in the know' about your new app in the fastest way possible.   You could just jump right in and start 'clicking around' but following the steps below will save you time and frustration.   It's simple and won't take long.   Do things in the order suggested and begin by reading this guide. The first chapter is about the TYR screens.   You need to know their basic structure and conventions.   The next chapter discusses the formats for entering amounts and names and how to handle the date time picker.   We then recommend some next steps and lastly, we encourage you to get in touch with us with questions and suggestions.

# Index

# 1. The TYR Screens

All TYR screens follow a pattern and design that make them easy to learn and use.  There are some commonalities for all TYR screens.   They are as follows:

## GENERAL vs SPECIFIC SCREENS

TYR screens are primarily of two types – General' or 'Specific'.

## General Screens

General, or sometimes called 'many', screens list many objects (animals, PCO's (People, Companies and Organizations), events, etc.)

From these screens access is made to 'specific screens'.  Select an object on a General screen by clicking a button to go to a screen specific for that particular object.

For all screens in the app we strongly encourage you to use the 'Close' button in the lower right corner and to not use the 'X' in the upper right corner.   The 'Close' button checks to see if any changes have been made and prompts you if you want to save before closing.

Examples of General Screens for Animals and People, Companies and Organizations follow.

## Manage People, Companies, and Organizations

| Last Name | First Name | Street | Street2 | City | State | Zip | Phone |
|---|---|---|---|---|---|---|---|
| Adopt Your Best Friend | | | | | VA | | |
| Baker | Bobby | | | | VA | | |
| Baker | Johnny | Main St. | | | SC | | |
| Bouchard | Greta | | | | OK | | |
| Cartwright | Joe & Betty | 5458 Poplar Ave. | | Huntsville | AL | 35649 | |
| ComeLately | Johnny | 586 Patton Dr. | Unit 3 | Bellefonte | IL | 34235 | |
| Comstock | Robert | 703 Rockefeller Blvd | | Terre Haute | IN | | |
| County Humane Soci | | | | | DE | | |
| Craft | Joe | 2499 McArthur St. | | Russell | KY | 23432 | |
| DeLozier | John | | | | CT | | |
| Dixon | Pamela | | | | KY | | |
| Evans | Doug | | | Newburgh | AL | | |
| Family Dentistry | | 2343 Fairlawn Dr. | | Holden Beach | NC | | |
| Farnsworth | Jimmy | | | | NC | | |
| Floyd | Jack | | | | NC | | |
| Gavigan | Dr. Rita | | | | NE | | |
| Giberson | John | | | | VA | | |
| Hatfield | Bob & Ann | | | | OH | | |
| Holland | Jim & Janice | 22 Brookdale Blvd | | Raleigh | NC | | |

Show: All
Searches: PCO's

49 PCOs

Donate
Connect to Event
Volunteer
Membership
Send Email
Copy Selection

Animal Transactions
Adopt an Animal
Surrender an Animal
Foster an Animal
Adoption Return
Foster Return
Spay/Neuter Certificate

Explainer | Delete | Edit | Save | Close

Note: In actual practice do not enter PCO's as you see them here. You want much fuller addresses; what you see here is just practice data.

## BUTTON FUNCTIONS

### Blue Buttons



Until you learn the function of the blue buttons, hover the cursor over each one and a 'Tool Tip' will appear explaining what that particular button does.

Icons are indicative of their function. Not every general screen has all of these buttons but all will have some of them. They appear on specific screens as well. These are their functions moving from left to right.

1. Plus Button – Add a new animal, PCO, event, donation, whatever the object is that you are working with.

2. Double Plus Button – Add multiple animals or PCO's.

3.  Details Button – View the details about a specific object selected in the grid

4.  History Button -View the history of an animal or PCO.  For PCO's you will see everything the PCO had done in connection with your rescue.

5.  Camera Button – Enter photos, documents, videos etc. pertinent to the animal, PCO, event, or your rescue.   These are very important for your rescue as you can enter all important documents like organizing papers and meeting minutes.

6.  Brain Button – Enter animal behaviors

7.  Printer Button - Get Animal Reports

## RIGHT SIDE BUTTONS

Buttons on the right side of the grid require a selection of at least one object.  Some buttons on the right allow selection of multiple objects and some only allow one selection. Buttons that allow the selection of more than one object has an asterisk after their name.

If a selection of more than one object is made and the button does not allow it a message to that effect will appear at the bottom left corner of the screen.

## LEFT SIDE BUTTONS

Buttons on the left side of the grid DO NOT require a selection of an object. They access queries and searches related to all the objects in the grid.  Example: If you want to know how many intakes or adoptions occurred in a specific time period, click the Milestone Query Button.

## BOTTOM RIGHT CORNER BUTTONS



These buttons are on every TYR screen.

Explainer - A very important button as you will be taken to a document that explains the screen that you are currently on.

Delete - Deletes the object selected – provides confirmation screen prior to deletion

Edit - Allows the user to change information about the selected object in the grid (separate screen appears for editing information)

Save - This button will be enabled if the screen you are on allows you to enter or change information on the screen.

Close - Closes the screen

Every General Screen and many Specific screens will have these.   To get the most from TYR you will need to know how to manipulate these grids.

To select an object on the grid, click in the blank first column (the row header) of the grid clicking will cause the entire row to turn color indicating selection.  **If the entire row is not highlighted and of a different color then it is not selected.**  To select multiple rows of the grid - Select one then hold the Ctrl key while clicking other row headers.

Double clicking a row header will cause the object to come up in editable or changeable mode

Select the entire grid - Double click the top left cell of the grid where the column headers and row headers meet.

Sort items on the grid - Click above the column to be sorted.

A characteristic of general screens is that they have no object identification information in the upper left and right corners.

## Specific Screens

Specific screens have information about the object (i.e. animal, person, event) in the upper left corner and a picture of the object in the upper right corner.  Access these screens by selecting the animal or person on the general screens and then clicking an appropriate button.  Here are a couple of screens that are specific to the dog Bentley.

**To Your Rescue - One - Rel 1.0 - frm1EditAnimal** — □ ×

Bentley - ID No - 183
Dog - Jack Russell Terrier, Tri-color
Male - Birth Date - 7/18/2010

## Animal Details

| | |
|---|---|
| Name | Bentley |
| Animal | Dog |
| Breed or Species | Jack Russell Terrier |
| Gender | Male / Female / Unknown |
| Color | Tri-color |
| Spayed or Neutered | ☑ |
| My Story | |

Let Computer Select

Explainer   Delete   Edit   Save   Close

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**To Your Rescue - One - Rel 1.0 - frm1Milestones** — □ ×

Bentley - ID No - 183
Dog - Jack Russell Terrier, Tri-color
Male - Birth Date - 7/18/2010

## Animal Milestones

| Milestone Date | Milestone | First Name | Last Name | Notes |
|---|---|---|---|---|
| 7/18/2010 | Birth | | | |
| 5/15/2018 | Intake | Bill & Kathy | Morrison | His parents are heartbroken; they are going into a nursing h... |
| 6/12/2018 | Foster | Greta | Bouchard | |
| 7/6/2018 | Foster Return | Greta | Bouchard | Greta said Bentley is perfectly well-behaved and is thrilled th... |
| 8/11/2018 | Adoption | Robert | Comstock | |

Explainer   Delete   Edit   Save   Close

# 2. Entering Information

You need to know the best way to enter money amounts and our recommended way of entering names and addresses.

## Entering Money Amounts

On many screens you are asked to enter monetary amounts.   You should not enter dollar signs ($) and if the amount is in whole dollars it is not necessary to enter the decimal plus the 2 zeros, just enter the whole dollar amount

Examples:        Enter $25.00 as 25

Enter $25.33 as 25.33

Enter $25.30 as either 25.3 or 25.30

## Entering Names and Addresses

Before entering a new PCO it is important to make sure they are not already in the database.   Do searches and try to find them in your database.    If you find them but their address or some other information is a little different than what you are currently entering then change the information to what you believe to be the most correct.   You do not want the same entity in the database more than once.    Do your verification before clicking the blue 'Add New PCO' button.

Titles - Enter titles in the first name field along with the first name.   Example:  Dr. John Smith should be entered with Dr. John in the first name field and Smith in the last name field.  It's best not to use titles like Ms, Mr, Mr and Ms, etc.

Names of couples - Enter the two first names in the first name field connected by an ampersand. Example:  John and Mary Smith would be entered as John & Mary in the first name field and Smith in the last name field.    You can use 'and' in place of the ampersand but in practice the use of the ampersand has proven to work good.

Middle initials are optional.   If you choose to enter them put them in the first name field.   We recommend omitting them.

You may have to enter the names of a couple that do not share a common last name.  Enter the first names of each in the first name field connected by an ampersand and the last names of the couple in the last name field connected by an ampersand.    Example: John Smith and Mary Jones would be entered as John & Mary in the first name field and Smith & Jones in the last name field.

Enter the names of companies and organizations in their entirety in the last name field with the first name field should be left blank.    If it is a business or an organization, often a club or other non-profit, then the entire name is entered in the last name field.

Use this table as a reference:

| Names to enter | First Name Field | Last Name Field |
|---|---|---|
| John Smith | John | Smith |
| John W. Smith | John | Smith |
| Dr. John W. Smith | Dr. John | Smith |
| John Smith and Mary Jones | John & Mary | Smith & Jones |
| ABC Corporation | | ABC Corporation |
| John Smith Dentistry | | John Smith Dentistry |
| The Garden Club | | The Garden Club |
| Paws and Claws Animal Rescue | | Paws & Claws Animal Rescue |

## Entering Dates

TYR requires you to enter many dates and we use something called a Date/Time Picker.  You need to know how to manipulate it so that entering dates is fast and easy.  If the date is in the same month then you just click the day, or if one or two months previous, then it may be faster to just click the left little arrow at the top to the left of the name of the month and that will show the previous month.   You can go back month by month by clicking that arrow.   But, if the date you are entering is a year or years ago you need a faster way to get there.   Clicking in the area between the left arrow and the month name will change the calendar to years and you then select the year.  It will go to month next and you select the month, and then the day.    If you click in this same area twice it will go to decades and you can select the decade and repeat the process.   It is unlikely you will need to go back more than a decade but you just may.   Practice some with this little widget and you'll become adept quickly.

# 3.  Next Steps

You've now installed TYR, learned the screen conventions, and know the recommended data formats.   Let's get going with actually using it.    We recommend following the steps below in the order they are presented.

1. Change your password.   TYR personnel will have assigned you a password and you should change it to one easier for you to remember. Click the 'Change Your Password' button in the lower right, Administrative section of the Home screen.
2. Add another administrative user.   There should be at least two administrative users.   Click 'Users' in the lower right, Administrative section of the Home screen.
3. Work in the Customization section of the Home screens.   Begin with 'Organization Info' and then work your way down the list.  Some buttons will not be applicable to your rescue so of course, there is nothing you need to do with them.   For the buttons that do apply, read the Explainer for each one and then follow the instructions contained therein.
4. Enter the health clinics that you work with.  They go in as a business in the PCO module.   Click People, Companies, and Organizations/Add New PCO (Plus sign button)/ check Company/Business at the top, enter information and check the Animal Hospital or Clinic box/Save.
5. Enter the vets that you are familiar with and that work in these clinics.
6. Enter the other animal rescues in your area with which you work and either take animals from or transfer animals to.   They go in as an organization in the PCO module.
7. Make a Backup – Click the 'Backup/Restore' button in the Administration section of the Home screen.  **Making backups regularly is your first line of data security.**

You are now well-equipped to move into the other parts of the app.   You know how the screens work, you've entered information that will appear in drop-down lists making data entry easier, and you know how to make backups.

Decisions on what to do next are yours.    TYR has many features and no group uses all of them.   We have one group that only raises money for animal organizations, they don't have any animals of their own so they do not use the Animals module.    Even though they do not use the Animals module they get great benefit from using the Memberships, Donations, Events, Volunteers etc. modules.   So, each group only uses TYR features that are important to them.

A good place to go next might be to the Animals screens and begin entering your animals and information about them.   Or you can go to the PCO screens and begin entering people important to your rescue.   Entering the names and addresses of your donors and as much historical information about their donations is an excellent way to proceed.   You be the judge. Just remember to visit the 'Explainers' and learn about the screen before actually using it.  You won't regret doing this.

# 5. Contacting Us

If you have problems or questions you can call 910-249-9696, leave a message and someone will be in touch shortly.   Or, you can send an email to contact@toyourrescue.org.   Maybe you have suggestions for improvements or items you want to put on your wish list.   Or maybe you want to report a bug.    We want any and all comments, suggestions, and wishes that you may have.   Send them to us.

If needed or desired, we can arrange an online meeting and share screens.   We can give you training and/or see any problem you may be experiencing.

We want to be a part of your team.  We'll get satisfaction knowing that we are helping you help your animals.