

**CleanOpsStaff Program Administration Help**  
**Updated 6/6/2011**  
(Recommend you print this file)

**Contents**

**CleanOpsStaff Program Administration Help Updated 4/15/2011 ..... 1**

    More Help: When in doubt look for the nearest Help Button! ..... 3

    CleanOpsStaff Two Major Components:..... 4

Program Manager .....4

Main Program .....4

    Running CleanOpsStaff in Demonstration Mode:..... 6

    Purchasing Product Code:..... 6

    Requesting Your Activation Key:..... 6

    Activating CleanOpsStaff:..... 7

    Run CleanOpsStaff in Full Feature Mode:..... 7

    Run CleanOpsStaff in Specialized Training Mode: ..... 7

    Run CleanOpsStaff in UpGrade SubScription Mode: ..... 8

    Purchasing Upgrades: ..... 8

    Activating Your Upgrades: ..... 8

    Getting Latest Production: ..... 9

    Getting Latest Beta Release : ..... 9

    Configuration to Match Your Local Conditions:..... 10

    Entering you inventory data: ..... 10

    Navigating Within CleanOpsStaff Worksheet: ..... 11

    Generating Reports:..... 11

    Managing Space Inventory Files: ..... 12

    Backing Up Your Space Inventory Files: ..... 13

    Creating a Sixth Cleaning Level for a Standard Space Category: ..... 13

    Custom Standard Category File: ..... 14

    Local Space Categories:..... 14

    Granting Permission for Shared Users to Run CleanOpsStaff on the Same Computer: ..... 15

    File Locking and Protection:..... 16

    Steps for Locking and Protecting a Data File: ..... 17

**Available Upgrades..... 18**

(HCT-5x) *Upgrade to CleanOpsStaff-Pro and Purchase Increase Record Capacity* ..... 18

(HCT-9) *CleanOpsStaff-ProMobilePlus-PC/PDA* ..... 18

(HCT-10) CleanOpsStaff-ProMobilePlus-PDA Add-In ..... 18

(HCT-6) *CleanOpsStaff justDoNext Data Import Wizard*..... 18

(HCT-8) *CleanOpsStaff ProScheduler Add-In*..... 19

(HCT-11) *CleanOpsStaff-ProLocal*..... 19

**CleanOpsStaff Files: ..... 20**

## More Help: When in doubt look for the nearest Help Button!

The below documents are on your hard drive in the <C:\CleanOpsStaff Program Files> folder – they end with a .pdf or .ppt extension. The most recent version of the documents is on the CleanOpsStaff web site at <http://hunterconsulttrain.com/CleanOpsStaffHome1.aspx> at the bottom of the web page. If you are setting out to become a CleanOpsStaff power user to learn all the many powerful features of CleanOpsStaff in detail, then it is recommended that you print these documents and place them in a binder for ready reference.

Document and Content	How to Access
<p><b>This Help File:</b> this is the best document to read in its entirety since it covers all the main aspects of CleanOpsStaff in a summary manner.</p>	<ul style="list-style-type: none"> <li>• Click <b>Help Getting Started</b> button in Program Manager</li> <li>• Click <b>Getting Started</b> Button in the Main Program main menu worksheet</li> <li>• Click below link <a href="http://hunterconsulttrain.com/Documents/CleanOpsStaff Program Admin Help.pdf">http://hunterconsulttrain.com/Documents/CleanOpsStaff Program Admin Help.pdf</a></li> </ul>
<p><b>CleanOpsStaff PowerPoint presentation in PDF format:</b> This will give you a good overview of what CleanOpsStaff is and its capabilities.</p>	<ul style="list-style-type: none"> <li>• Click <a href="http://hunterconsulttrain.com/Documents/CleanOpsStaff-for web.pdf">http://hunterconsulttrain.com/Documents/CleanOpsStaff-for web.pdf</a></li> </ul>
<p><b>CleanOpsStaff User Manual:</b> This document can double as a training manual complete with screen shots and exercises from the APPA Guidelines book.</p>	<ul style="list-style-type: none"> <li>• Click <b>User Manual File</b> button on main menu in <b>Main Program</b></li> <li>• Click <a href="http://hunterconsulttrain.com/Documents/CleanOpsStaff-Documentation.pdf">http://hunterconsulttrain.com/Documents/CleanOpsStaff-Documentation.pdf</a></li> </ul>
<p><b>CleanOpsStaff Quick Help:</b> Contains step-by-step instructions for command buttons and other aspect of the basic program.</p>	<ul style="list-style-type: none"> <li>• Click <b>Quick Help File</b> button on main menu in <b>Main Program</b></li> <li>• Click <a href="http://hunterconsulttrain.com/Documents/Quick Help.pdf">http://hunterconsulttrain.com/Documents/Quick Help.pdf</a></li> <li>• Click Help buttons throughout the application to see portions of this file as contextual help</li> </ul>
<p><b>JustDoNext Import Wizard:</b> Instructions for use of the JustDoNext Data Import Wizard</p>	<ul style="list-style-type: none"> <li>• Click Help Button on <b>JustDoNext</b> Toolbox</li> <li>• click below link <a href="http://hunterconsulttrain.com/Documents/CleanOpsStaff Import Wizard Help.pdf">http://hunterconsulttrain.com/Documents/CleanOpsStaff Import Wizard Help.pdf</a></li> </ul>
<p><b>CleanOpsStaff-ProMobilePlus PDA Manager Help:</b> Instructions for use of the CleanOpsStaff-ProMobilePlus PDA Manager in the Program Manager</p>	<ul style="list-style-type: none"> <li>• Click <b>Help</b> button in <b>PDA Manager</b> in <b>Program Manager</b></li> <li>• Click below link <a href="http://hunterconsulttrain.com/Documents/PDA Manager Help.pdf">http://hunterconsulttrain.com/Documents/PDA Manager Help.pdf</a></li> </ul>
<p><b>CleanOpsStaff-ProMobilePlus-PC/PDA Help:</b> Instructions for use of the CleanOpsStaff-ProMobilePlus-PC/PDA</p>	<ul style="list-style-type: none"> <li>• Click Help Button on PDA Interface in Main Program</li> <li>• Click below link <a href="http://hunterconsulttrain.com/Documents/CleanOpsStaff ProMobile Help.pdf">http://hunterconsulttrain.com/Documents/CleanOpsStaff ProMobile Help.pdf</a></li> </ul>
<p><b>CleanOpsStaff ProScheduler Help:</b> Instructions for use of the CleanOpsStaff ProScheduler</p>	<ul style="list-style-type: none"> <li>• Click Help button in the ProScheduler tool</li> <li>• Click <a href="http://hunterconsulttrain.com/Documents/ProScheduler%20Help.pdf">http://hunterconsulttrain.com/Documents/ProScheduler%20Help.pdf</a></li> </ul>
<p><b>FlexScheduler Help.pdf:</b> Instructions for use of the CleanOpsStaff FlexScheduler</p>	<ul style="list-style-type: none"> <li>• Click Help button on the FlexScheduler tool</li> <li>• Click <a href="http://hunterconsulttrain.com/Documents/FlexScheduler Help.pdf">http://hunterconsulttrain.com/Documents/FlexScheduler Help.pdf</a></li> </ul>

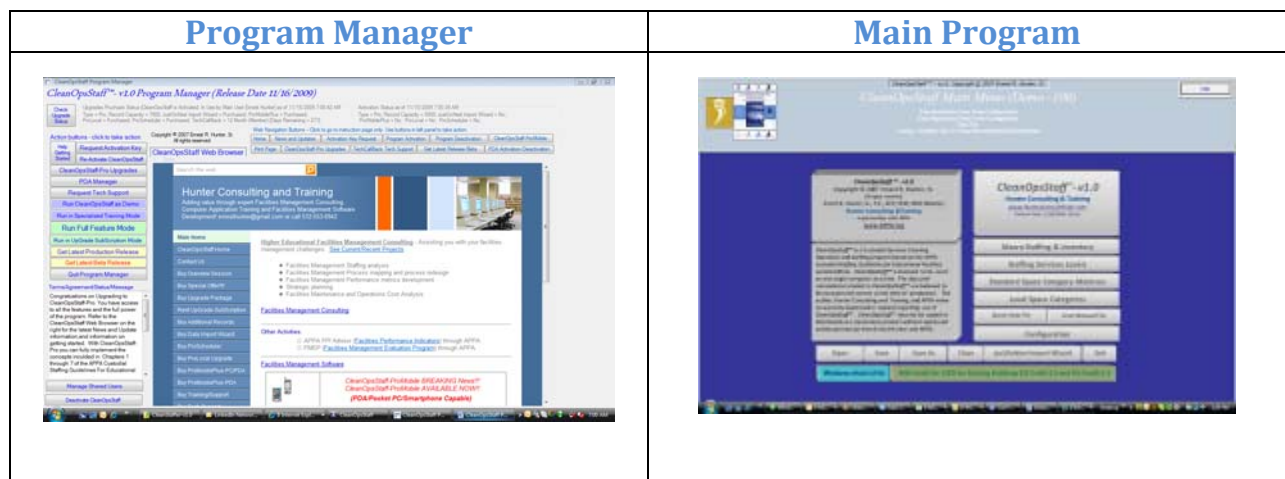
Downloading and Installing:

CleanOpsStaff can be downloaded from the Hunter Consulting and Training Web site

1. Go to <http://hunterconsulttrain.com/DownloadCleanOpsStaffSelfExtracting.aspx> and follow steps 1 through 11. In step 7, after you download and extract the CleanOpsStaff files, you will run **Setup.exe** in the [C:\CleanOpsStaff Program Files](#) to install CleanOpsStaff.
2. **NOTE TO IT STAFF:** If the computer user does not have administrative rights on the computer, it is recommended that you give them temporary administrative rights and run **Setup.exe** while logged in under the user's login ID. This will register the application to the user in the Windows register. See [Granting Permission for Shared Users to Run CleanOpsStaff on the Same Computer](#) in this help document for information on providing shared user access on computers with multiple users. It is important to note that you must run setup for all shared users if you intend to share use of **CleanOpsStaff** with other users with access to the computer.
3. **NOTE TO IT STAFF AND MAIN USER:** Before CleanOpsStaff can be used in full feature mode, it must be activated using the **Product Code** and **Activation Kkey**. It is important to be logged into the computer under the **Main User's login ID** when you activate CleanOpsStaff. CleanOpsStaff designates the **user who activates the program** as the **Main User**. The **Main User** can then designate other users as shared users (See [Granting Permission for Shared Users to Run CleanOpsStaff on the Same Computer](#) ). Only one user can activate CleanOpsStaff.

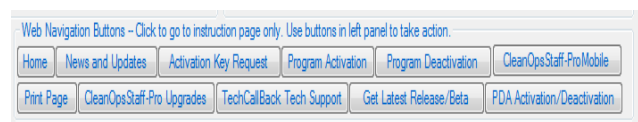
### CleanOpsStaff Two Major Components:

CleanOpsStaff has two major components: (1) **Program Manager** and (2) **Main Program**. The **Program Manager** is the first components you will see after you download and install **CleanOpsStaff** and the first component you will see each time you run **CleanOpsStaff**. The functions of the **Program Manager** are described in later paragraphs of this help document. You will launch the **Main Program** by clicking the **Run CleanOpsStaff as Demo** button, or the **Run in Full Feature Mode** button or the **Run in Specialized Training Mode** button, or the **Run in UpGrade Subscription Mode** button in the **Program Manager**. You can learn more about navigating around the Main Program by going to pages 19 through 25 in the User Manual <http://hunterconsulttrain.com/Documents/CleanOpsStaff-Documentation.pdf> .



### Program Manager Components

**CleanOpsStaff Program Manager Web Navigation Buttons –**  
These buttons are located at the top of the **Program Manager** screen above the **Program Manager Browser** and they are used to move around the **CleanOpsStaff web site** to get Information and instructions. Use these buttons to read the instruction web



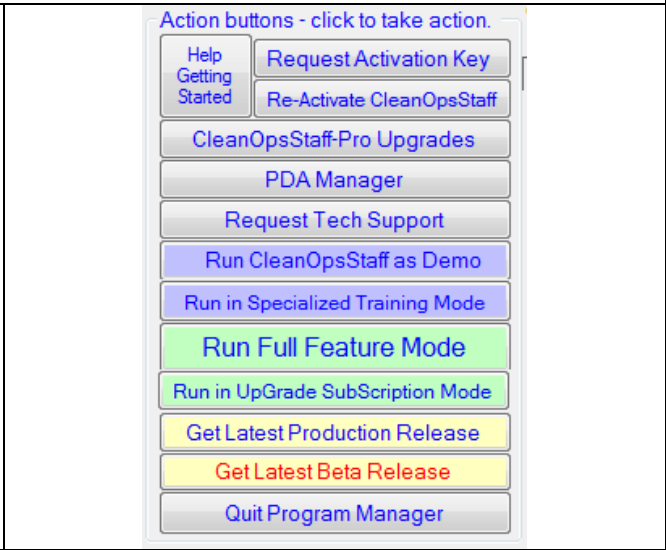
page on how to perform certain actions within the **Program Manager**. The buttons are also called **Information Buttons**.

**CleanOpsStaff Program Manager Web Browser Window** – This built-in web browser let you browse the **CleanOpsStaff** web site without leaving the **Program Manager**. Use this browser to stay up to date on **CleanOpsStaff** news and to read instructions on how to use the **Program Manager** and other parts of **CleanOpsStaff**.

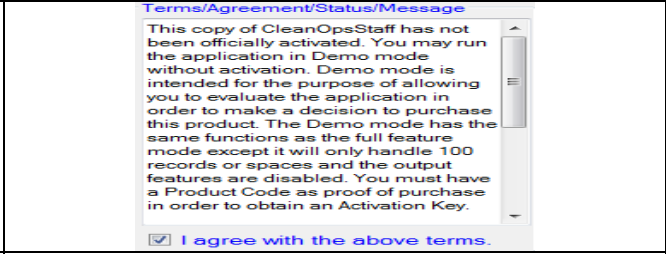


## Program Manager Components (cont)

**CleanOpsStaff Program Manager Action Buttons** – These buttons are located at in the **Left Panel** of the **Program Manager** screen and they are used to take action. You will click one of these buttons when you are ready to take the action indicated by the button’s caption. You can first use the **CleanOpsStaff Program Manager Web Navigation Buttons** to read the instruction on how to perform the action if you do not know how to perform the action of the action button.

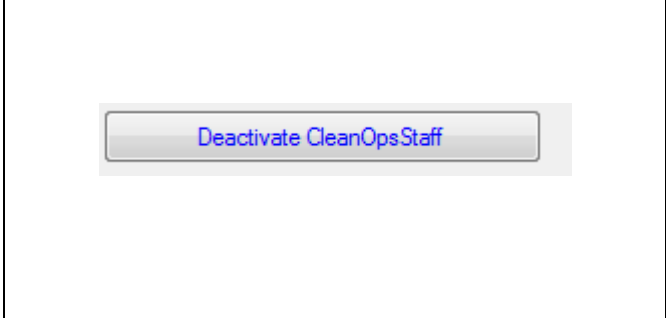


**CleanOpsStaff Program Manager Terms/Agreement/Status/Message Box** – you should read this box to make sure you understand the terms of the single user license and to get information on the activation status of your program. Do not check the **‘I agree with the above terms’** checkbox until you have read the text in this box.

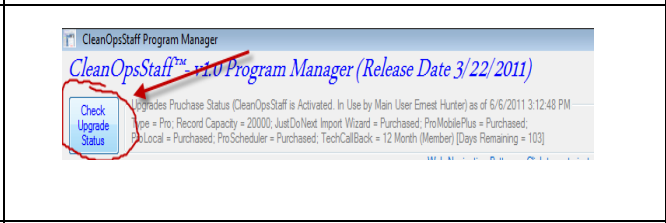


**CleanOpsStaff Program Manager Deactivate CleanOpsStaff Key** – Use this key to deactivate CleanOpsStaff on your computer. This does **not** remove or uninstall the program files from your computer and it does **not** remove your data files.

Use this button to deactivate **CleanOpsStaff** on the current computer so you can legally activate it on a different computer. An email will be sent to the **Hunter Consulting and Training** to record the deactivation in the **CleanOpsStaff** database.




**CleanOpsStaff Program Manager Check Upgrade Status Button** – Use this button to check the status of the **CleanOpsStaff-Pro** upgrades that you purchase. It will take several hours to register your upgrade purchases on the upgrade server. Use this button to confirm that your purchased upgrade has been registered in the **CleanOpsStaff** upgrade server.



## Running CleanOpsStaff in Demonstration Mode:

You can run **CleanOpsStaff** in Demo mode to evaluate it to decide whether you want to purchase it. In order to keep **CleanOpsStaff** a low cost high quality product, **Hunter Consulting and Training** has adopted a **No Return Policy** for all products and services purchased from **Hunter Consulting and Training**. It is therefore very important that you do a complete evaluation of the products and services before making a purchase to ensure it is what you need. The Demo mode provides all the functionality needed for you to make an informed purchase decision. Additionally, **Hunter Consulting and Training** will provide on-line demonstrations of **CleanOpsStaff** upon request.

<ol style="list-style-type: none"> <li>1. In the Program Manager, check the <b>I agree with the above terms</b> checkbox</li> <li>2. Click the <b>Run CleanOpsStaff as Demo</b> button</li> <li>3. The Main Program will be launched</li> <li>4. Allow a few moments for <b>CleanOpsStaff</b> to gather information about your computer to properly configure itself</li> <li>5. Immediately click the <b>Macro Staffing and Inventory</b> button and then return to the <b>Main Menu</b> to ensure CleanOpsStaff has gathered all necessary information about your computer</li> </ol>


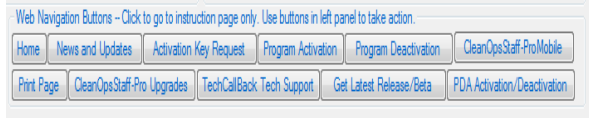


## Purchasing Product Code:

Before you can use the full features of CleanOpsStaff, you must purchase a Product Code from APPA

1. Go to [http://www.appa.org/Bookstore/product\\_browse.cfm?itemnumber=495](http://www.appa.org/Bookstore/product_browse.cfm?itemnumber=495) to purchase a product code.
2. APPA will email you your Product Code and ship the book separately
3. The book will contain an insert containing the Product Code
4. You can request your **Activation Key** immediately after receiving your **Product Code**

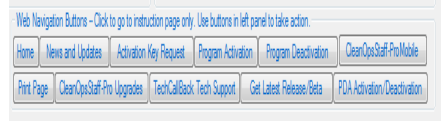
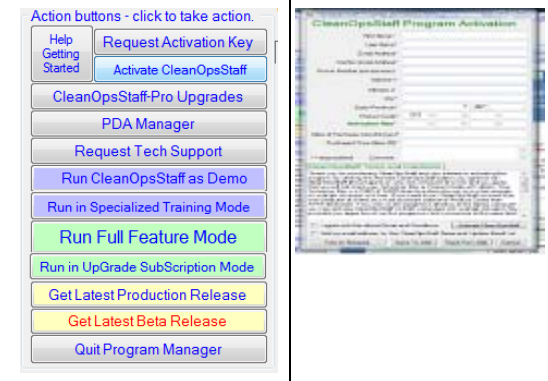
## Requesting Your Activation Key:

Once you get your Product Code from APPA, you will need to request an Activation Key from **Hunter Consulting and Training** using the **Activation Key Request Action Button**.


<ol style="list-style-type: none"> <li>1. OPTIONAL -- Click <b>Activation Key Request</b> Information Button and read the instruction in the CleanOpsStaff web browser window at <a href="http://hunterconsulttrain.com/CleanOpsStaffActivate.aspx">http://hunterconsulttrain.com/CleanOpsStaffActivate.aspx</a></li> </ol>	
<ol style="list-style-type: none"> <li>2. Click the <b>Request Activation Key</b> action button to launch the activation key request form.</li> <li>3. Fill out the <b>CleanOpsStaff Activation Key Request Form</b> including the <b>Product Code</b></li> <li>4. Check the 'I agree with the Terms' checkbox</li> <li>5. Click the <b>Request Key</b> button in the lower right corner of the <b>CleanOpsStaff Activation Key Request Form</b></li> <li>6. Allow a few moments for the Program Manager to connect with the Server and submit the form. Several message boxes will popup. Click OK when prompted to do so.</li> <li>7. You will receive an email containing your <b>Activation Key</b> within 24 hours, but most of the time you will receive the email within the hour or immediately depending of the volume of CleanOpsStaff server activity at the time.</li> </ol>	 

## Activating CleanOpsStaff:

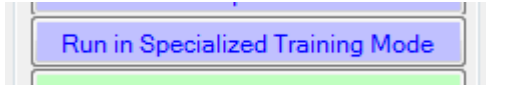
Once you receive your **Activation Key** from the **Hunter Consulting and Training** Activation Server by email, you can activate **CleanOpsStaff** to operate in **Full Feature Mode**. You will receive your activation key within 24 hours and most of the time within the hour and sometimes immediately.

<ol style="list-style-type: none"> <li>OPTIONAL -- Click <b>Program Activation</b> Information Button and read instructions in the CleanOpsStaff web browser window at <a href="http://hunterconsulttrain.com/CleanOpsStaffProgramActivation.aspx">http://hunterconsulttrain.com/CleanOpsStaffProgramActivation.aspx</a></li> </ol>	
<ol style="list-style-type: none"> <li>Click the <b>Activate CleanOpsStaff</b> button action button to activate the <b>activation</b> key request form.</li> <li>The <b>CleanOpsStaff Program Activation Form</b> will be automatically filled out except for the <b>Product Code</b> and the <b>Activation Key</b></li> <li>Fill in the <b>Product Code</b> and the <b>Activation Key</b> input boxes</li> <li>Read the <b>Terms and Conditions</b>. Check the <b>'I agree with the above Terms and condition'</b> checkbox</li> <li>Click the <b>Activate CleanOpsStaff</b> button in the lower right corner of the <b>CleanOpsStaff Program Activation Form</b></li> <li>Allow a few moments for the Program Manager to connect with the Server and submit the form. Several informational messages will popup. Click OK after reading each message.</li> <li>You program will be activated and you will see the word <b>"Congratulations"</b> in the <b>Terms/Agreement/Status/Message Box</b>.</li> </ol>	

## Run CleanOpsStaff in Full Feature Mode:

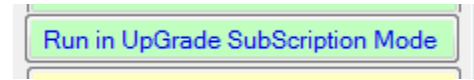
<ol style="list-style-type: none"> <li>After you activate <b>CleanOpsStaff</b> you can run it in full feature mode by clicking the <b>Run Full Feature Mode</b> button</li> <li>The <b>Main Program</b> flash screen will appear and the <b>Main Program</b> will be launched and start up in <b>Demo</b> Mode. Allow a bit of time for the Main Program to configure.</li> <li>Immediately after the Main Program has finished launching, click the <b>Macro Staffing and Inventory</b> button and then return to the <b>Main Menu</b> to activate full feature mode</li> </ol>	
----------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------	---------------------------------------------------------------------------------------

## Run CleanOpsStaff in Specialized Training Mode:

<ol style="list-style-type: none"> <li><b>Hunter Consulting and Training</b> offers specialized training in the use of <b>CleanOpsStaff</b> at the user site or online. During the training session, users can be granted access to all the full features of <b>CleanOpsStaff</b> and all the upgrades through the <b>Specialized Training Mode</b>. This allows the trainee to follow along with the <b>CleanOpsStaff</b> trainer and perform all the training exercises. Prior to the specialized training sessions, <b>Hunter Consulting and Training</b> provides the users with a <b>Specialized Training Access Code</b>.</li> <li>To run in Specialized Training Mode, click the <b>Run in Specialized Training Mode</b> button and enter the <b>Specialized Training Access Code</b></li> <li>The <b>Main Program</b> will be launched and start up in <b>Demo</b> Mode</li> <li>Immediately click the <b>Macro Staffing and Inventory</b> button and then return to the <b>Main Menu</b>. The <b>Specialized Training Mode</b> will be activated</li> </ol>	
----------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------	---------------------------------------------------------------------------------------

## Run CleanOpsStaff in UpGrade SubScription Mode:

1. **Hunter Consulting and Training** offers the **UpGrade SubScription** program to allow users to "**Rent-A-Upgrade**" by the month (subscribe). If you do not want to purchase an upgrade for any reason, or if you are not sure, you want to buy the upgrade, you can subscribe to the upgrade to try it out. If you only have a short-term need for the upgrade, you can rent it. Go to the web site and use the rent link in the left panel of the web site to subscribe to as many or as few upgrades as you wish
2. To run in **UpGrade SubScription Mode**, click the **Run in UpGrade SubScription Mode** button
3. The **Main Program** will be launched and start up in **Demo Mode**
4. Immediately click the **Macro Staffing and Inventory** button and then return to the **Main Menu** to activate **UpGrade SubScription Mode**.



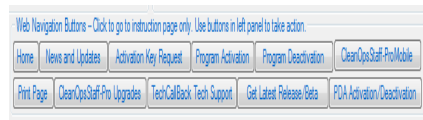
## Purchasing Upgrades:

1. It is best to use your normal Internet Explorer to purchase your upgrade. **Do not use the CleanOpsStaff Program Manager browser to purchase upgrades.**
2. In your Internet Explorer web browser go to <http://hunterconsulttrain.com/default.aspx>
3. Click on the "**Buy link**" in the left side panel of the web page
4. You can use your credit card or fax a Purchase Order to **928-563-0345**. You can also email a Purchase Order.
5. **We do instant activation over the phone if you would prefer to be talking to someone as you make your purchase. Send an email with date and time for a call back.**



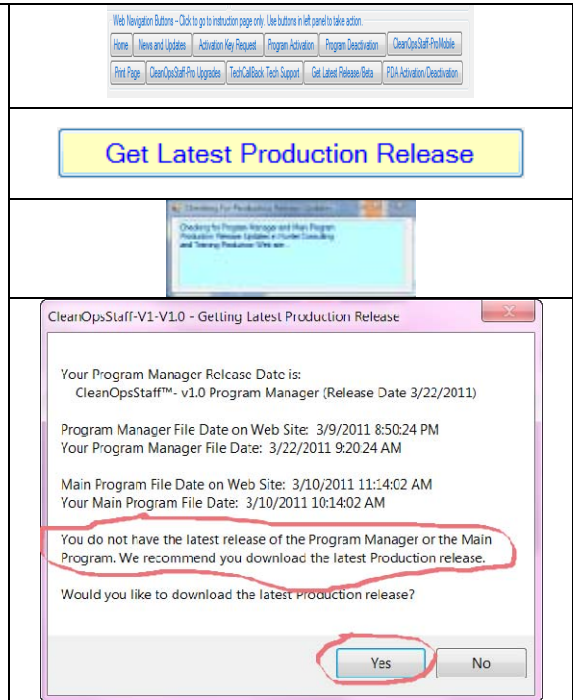
## Activating Your Upgrades:

1. To activate all your purchased upgrades:
2. OPTIONAL -- click the **CleanOpsStaff-Pro Upgrade** information button to read the instructions in the Program Manager web browser at <http://hunterconsulttrain.com/ActivateUpgrades.aspx>
3. Click the CleanOpsStaff-Pro Upgrades action button
4. The **Checking Upgrade Status** message box will appear. This will take a few moments—please be patient.
5. Once your upgrade status has been checked, the **CleanOpsStaff Upgrade and Add-In Status** form will appear
6. If you have purchased upgrade that you have not activated, Activate All **CleanOpsStaff-Pro Upgrade Prompt Box** will also appear
7. Click **Yes**



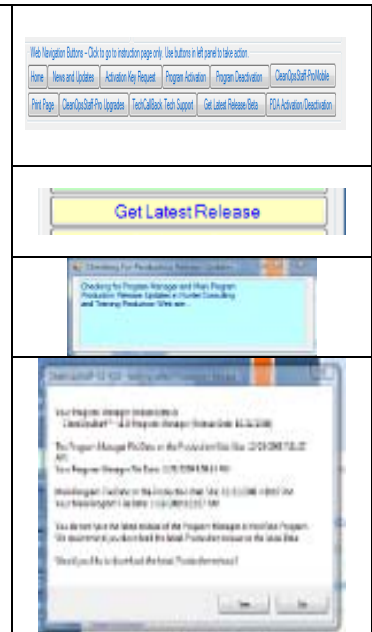
## Getting Latest Production Release:

1. Periodically Hunter Consulting and Training will upload a new release of **CleanOpsStaff** to the web site to add enhancements and to resolve reported issues.
2. OPTIONAL -- In the Program Manager click **Get Latest Release/Beta** information button at the top of the **CleanOpsStaff Brower Window** to read instructions in the Program Manager web browser at <http://hunterconsulttrain.com/GetLatestRelease.aspx>
3. Click **Get Latest Production Release** action button
4. Wait a few moments, while the Program Manager connect with the **CleanOpsStaff Release Update** server.
5. The **Getting Latest Release** information box will appear. Compare the file dates and read the note in the message box to determine if you have the latest release.
6. Click 'Yes' to get the latest release
7. You will be directed to the web site for download instructions



## Getting Latest Beta Release :

1. Periodically Hunter Consulting and Training will upload a new Beta release of CleanOpsStaff to the web site to add enhancements and to resolve reported issues.
2. OPTIONAL -- in the Program Manager click **Get Latest Release/Beta** information button to read instructions in the Program Manager web browser at <http://hunterconsulttrain.com/GetLatestRelease.aspx>
3. Click **Get Latest Beta Release** button
4. The Program Manager will connect with the **CleanOpsStaff Release Update** server
5. The **Getting Latest Release** information box will appear. Compare the file dates and read the note in the message box to determine if you have the latest release.
6. Click 'Yes' to get the latest release
7. You will be directed to the web site for download instructions



## Configuration to Match Your Local Conditions:

1. Once you have run CleanOpsStaff in Demo or Full feature mode and the **Main Program** is running, you can change the variables CleanOpsStaff uses to perform its calculations
2. From **Main Menu** click the **CleanOpsStaff Configuration** button to launch the **Configuration Form**
3. Click the **Help** button and read the help information provided for filling out this form.
4. You will enter information and write the form to memory for it to have an effect on the CleanOpsStaff Calculation. (NOTE: Entering information the form has no effect until you write it to memory or set the form as your default configuration).
5. To make the information in the form load up each time you run CleanOpsStaff, click the **Set as Start Up Default Configuration** button – this will make it so that you do not have to change the variables each time you run CleanOpsStaff.



## Entering you inventory data:

1. After completing the Configuration form, you will now want to get your space inventory data into CleanOpsStaff. If you have a small number of records or do not already have your data in electronic form, you will enter the space inventory data into **CleanOpsStaff Macro Staffing & Inventory** worksheet in much the same way you would into a regular spreadsheet.
2. From **Main Menu** click the **Macro Staffing & Inventory** button
3. Click the **Help** button to the right of the **Hide/Show** button in the upper right corner of the screen and read the help information for entering data
4. Click inside the first blank row under the **Building Name/Number** column and type the **Building Name** or **Number**
5. Press the Tab key to move to the next field and enter the required data elements (**Floor Name/Number**, **Space Name/Number**, and **CSF. Flex Field is optional**)

**NOTE:** Certain features require the space name or number to be unique for each floor of the same building. In other words, do not assign the same space name or number to more than one space on the same floor of the same building.

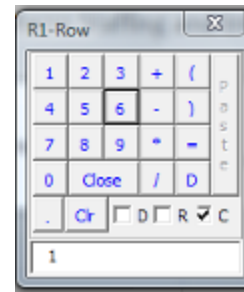
6. Tab to the **Standard Space Category Or Local Custom Space Category** column and select a **Space Category** from the dropdown list (you might have to scroll up to see the list)



7. Tab to the **Cleaning Level** and select a **Cleaning Level** from the dropdown list
8. When you enter the last require data element, CleanOpsStaff compute the vital custodial macro staffing information and summarized it in the summary row – gray background row above the data headings. You will select **Space Category** and **Cleaning Level** from a dropdown list
9. Repeat this process until you are ready to quit entering data

10. If you have a large amount of space inventory data and it is in electronic form, you can purchase the **JustDoNext Data Import and Conversion Wizard** upgrade and import and convert your data without typing it into CleanOpsStaff.

1. Use the **KeyPad** and **QEntry** tools to speed up data entry
  2. On the **MiniToolBox** in the upper left corner on the **Macro Staffing & Inventory** worksheet, click the **KeyPad** button
  3. Click the **Help** button on the **MiniToolBox** and read the instruction for using the **KeyPad**
  4. Click the **QEntry** button
  5. Click the **Help** button on the **QEntry** toolbox and read the instruction for using the **QEntry**
- NOTE: You can also use the User Manual for exercises to practice using these tools.



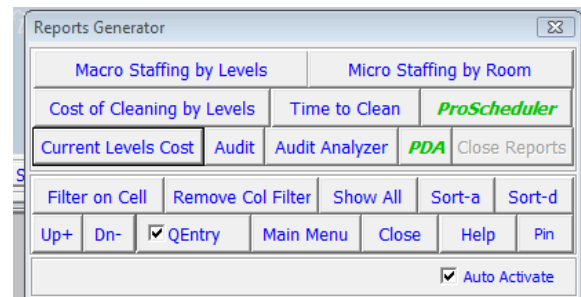
### Navigating Within CleanOpsStaff Worksheet:

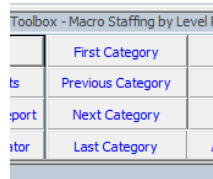
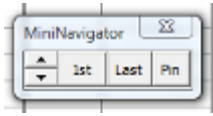
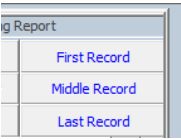

1. Once you have data in you inventory worksheet, you will move from row to row and column to column in the same way as you would in a regular spreadsheet. Practice using the **Arrow Keys**, **Tab Key**, **Shift-Tab Key**, **Page Up Key**, and **Page Dn Key**
2. CleanOpsStaff also has Navigation tools to help you move around
3. **Records Navigator** -- Click the **Help** on the **Records Navigator** and read the instruction on how to use it to move around a worksheet and for how to use the other command button on the **Records Navigator**



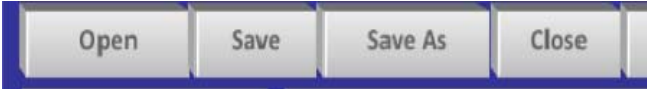
### Generating Reports:

1. Once you have complete data in the Macro Staffing & Inventory worksheet, you can generating the standard APPA reports as well as special reported added by CleanOpsStaff
2. On the **MiniToolBox** in the upper left corner on the **Macro Staffing & Inventory** worksheet, click the **Reports** button to activate the **Report Generator** toolbox
3. The report generator will let you run standard **APPA Guidelines reports** :
  - a. **Macro Staff by Levels**
  - b. **Micro Staffing by Room**
  - c. **Micro Staffing by Building (added April 2011)**
  - d. **Cost of Cleaning by Level**
  - e. **Time to Clean**
  - f. **Current Levels Cost by Room/Space**
  - g. **Current Levels Cost by Building (added April 2011)**
  - h. **Audit** – see **Quick Help** file for instructions. Or click the Help button on the Report Generator.
4. You can also run special reports added by



<p><b>CleanOpsStaff:</b></p> <ul style="list-style-type: none"> <li>i. <b>Audit Analyzer</b></li> <li>ii. <b>ProScheduler</b></li> </ul> <p>5. Click the Help button on the <b>Report Generator</b> toolbox and read the instructions for generating reports. The <b>Quick Help</b> file contains detail instructions for the audit report</p> <p>6. You can click the Help button on the <b>ProScheduler</b> interface to get instructions on how to use the <b>ProScheduler</b></p>		
<p>7. You can move around within report worksheets in much the same way you would in any a regular excel worksheet. CleanOpsStaff also has several tools to assist you in moving around.</p> <p>8. <b>Category and Record Buttons</b> - these buttons are on the MiniToolbox and allow you to go to the Next, Previous, First and Last item by clicking on the respective button</p>		
<p>9. <b>MiniNavigator</b> – if this tool is not already visible, <b>Right-Click</b> inside the worksheet and select MiniNavigator from the pop-up short cut menu</p> <p>10. You can move the MiniNavigator to any location in the worksheet you wish and click the <b>Pin</b> button to pin it to that location</p>		

### Managing Space Inventory Files:

<p>1. You will use the file management buttons at the bottom of the <b>Main Menu</b> worksheet to manage your space inventory files in much the same way you would manage regular excel workbook files.</p>	
<p>2. CleanOpsStaff appends “<b>-HECS-DATA.XLS</b>” to the end of all space inventory data file names and stores the file on the hard drive in a folder of your choice. The Default folder for space inventory data files is “<b>C:\CleanOpsStaff Data</b>”</p> <p>3. You can have as many Space Inventory files as you wish saved to any drive (local drive and networked shared drive) you have access to.</p> <p>4. You can also <b>right-click</b> in most worksheets, and select <b>Functions</b> from the short cut menu, and then select one of the file management commands.</p> <p>5. You will use the <b>Open</b> button to open a data file. It is important to note that opening a CleanOpsStaff data file behave the same way opening a file in excel behaves, except CleanOpsStaff actually only make a copy of the data in the data file and places it in memory, and remembers the file name. The work you do in CleanOpsStaff has no effect on the file on the drive unless you use the <b>Save</b> button.</p> <p>6. Because CleanOpsStaff remembers the file name that it Opened (copied data from) last, if you click the <b>Save</b> button, the data in the file will be overwritten with the data in memory.</p> <p>7. To save the CleanOpsStaff data file that is currently in memory under a different file name, you will use the <b>Save As</b> button. CleanOpsStaff will remember the file name used in the last <b>Save As</b> in the same way as Excel does and any subsequent <b>Save</b> operations will overwrite the file used by the last <b>Save As</b> operation</p> <p>8. To close a file in memory without saving it, and to clear the “<b>remembered file name</b>” you will use the <b>Close</b> button. The <b>Close</b> operation works the same as it does in Excel. It clears the data file from memory,</p>	

clears the **“remembered file name”** as well as reloads the default configuration information back into memory.

## Backing Up Your Space Inventory Files:

As with all your important files, you should make you have a file backup procedure that ensures you have backup copies of all your important CleanOpsStaff data files contained in the **CleanOpsStaff Data** folder and any other place you store data files. It is not necessary for you to back up the program files in the **CleanOpsStaff Program Files** folder since you can always use the **Get Latest Release** button in the Program manager to get them again. You should **NOT** use CleanOpsStaff files management buttons to manage your backup procedure. You should use the Windows File Explorer to copy the important data file to a different physical drive. These are the files that you should ensure you have backup copies of:

- Files that you create ending in **“-HECS-Data.xls”** (your data files). There is no need to backup the exercise/practice **“-HECS-Data.xls** data files since you can use the **Get Latest Release** button to get them again if you need to.
- Files that you create ending in **“-HECS-Cust.xls”** (your custom standard category files)
- Files that you create ending in **“-HECS-Loc.xls”** (your local category files)
- Files that you create ending in **“-HECS-Var.ini”** (your configuration Variable files)
- **CleanOpsStaff-HECS-Vars.ini** (the default start-up configuration file that determines the default configuration that is load upon startup and after a file **Close** operation.

## PROTECTING YOUR WORK IN PROGRESS:

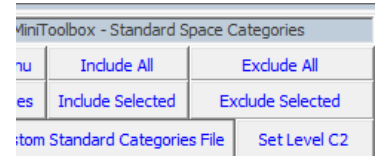
- CleanOpsStaff does not have an undo function and it does not have an auto-save function. Before you begin extensive data input or data modification work on a CleanOpsStaff data file or any file for that matter, it is recommended that you use the Windows File Explorer to make a copy of the file to another physical drive.
- After about 30 minute of work (or how ever amount of time you are comfortable with in the event of an unusual event such as a power failure that might cause you to lose data),
  - save the file using the CleanOpsStaff file management button,
  - and then using the Windows File Explorer, copy it to a another physical drive under a name not already on the backup drive and append a date and maybe time to the file name
  - Repeat this process at whatever interval you become comfortable with

## Creating a Sixth Cleaning Level for a Standard Space Category:

1. The Guideline has 33 standard space categories and five cleaning levels for each of them for you to choose from when entering your data into the inventory work sheet
2. If the five cleaning level does not properly reflect the cleaning activities and frequencies for your space, you can create your own cleaning level that CleanOpsStaff has designated as **Level C2**
3. From the Main Menu click the **Standard Space Category Matrices** button
4. In the **Standard Space Category Matrices Navigator** that pops up in the right side of the screen, click on the space you are interested in
5. Click the Help button in the **MiniToolBox** and read the instructions on how to change the frequency of the cleaning activities under Cleaning Level c2.

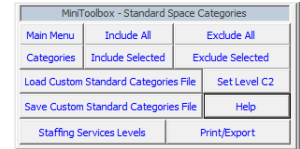


- You can also use the **Include** and **Exclude** button to exclude and include activities from all six levels. **NOTE: Please note that when you include and exclude activities, you would be incorrcet to refer to the level as an APPA standard unless you note the change you made to the frequency and/or the exclusion you made**



### Custom Standard Category File:

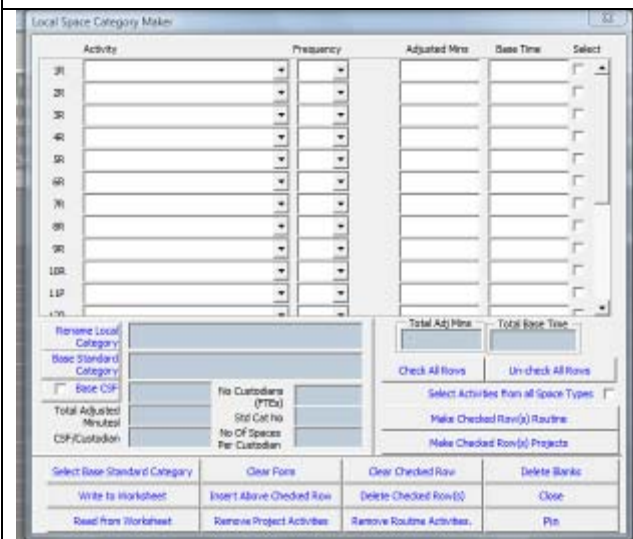
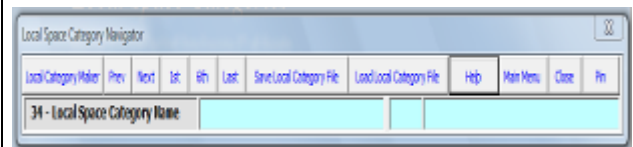
- Once you have made changes to customize standard space categories, you can save a **Custom Standard Space Category File** containing all 33 of the standard space categories including the changes you made
- While viewing one of the 33 **Standard Category Matrices**, Click the Help button on the **MiniToolBox** and read the instructions on **Custom Standard Categories** files
- Click the **Save Custom Standard Categories** file button on the **MiniToolBox**



- You can save and many **Custom Standard Space Category Files** as you wish to any drive your computer has access to.
- CleanOpsStaff appends **"-HECS-CUST.XLS"** to the end of all **Custom Standard Space Category File** names and stores the file on the hard drive in a folder of your choice. The Default folder for file is **"C:\CleanOpsStaff Data"**
- You can load them back into memory, one set of 33 at a time, for future use.
- You can also make any one of your **Custom Standard Space Category File** the **Start-up Default** by denoting it as such in the **Configuration** form

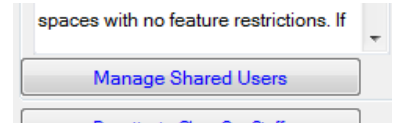
### Local Space Categories:

- You may have special spaces that are not well represented by any of the APPA 33 standard space categories. CleanOpsStaff allows you to create 15 of your own local space categories based on your own cleaning activities and your own frequencies and base times.
- From the Main Menu click the **Local Space Categories** button
- Click the Help button on the Local Space Categories Navigator and read the instructions for **Local Space Categories**
- You will use the **Local Space Category Maker** to create the local category using the instruction you get when you click the Help button on the **Local Space Category Navigator**.
- Once you have created local space categories, you can save a **Local Space Category File** to disk containing all 15 (**40 if you purchase the Pro-Local upgrade**) local space categories including the ones you created and the blanks ones. You can save as many **Local Space Category Files** as you wish.
- CleanOpsStaff appends **"-HECS-LOC.XLS"** to the end of all **Local Space Category File** names and stores the file on the hard drive in a folder of your choice. The Default folder for files is **"C:\CleanOpsStaff Data"**



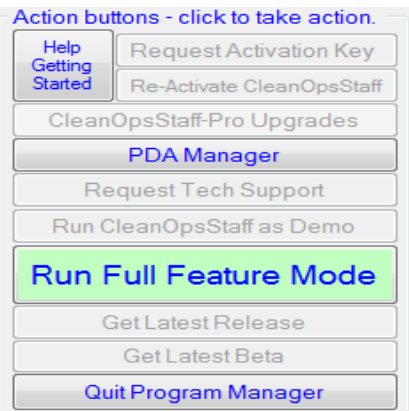
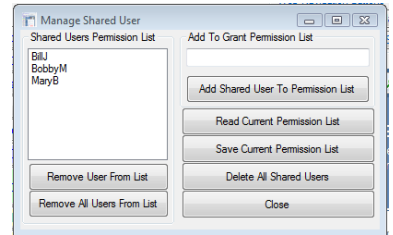
## Granting Permission for Shared Users to Run CleanOpsStaff on the Same Computer:

1. CleanOpsStaff is distributed under a **Single License Agreement**, and can legally only be installed on one desktop and one laptop under the same **Product Code** to be used by a single user. However, if the Product Code is activate on only one single computer, there is no limit as to how many people can use CleanOpsStaff as long as the program is only running on one computer at a time under the same **Product Code**.
2. You will use the **Manage Shared User** button to give other users who can log onto the single computer permission to run CleanOpsStaff in Full Feature Mode on the single computer.

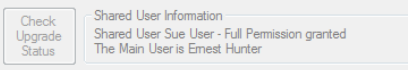


**IMPORTANT NOTE:** The first user on the single computer to activate CleanOpsStaff will be recorded by the Program Manager as the **Main User**. The **Main User** will be the only user who can grant permission to others to run CleanOpsStaff in Full Feature mode. Only one user should be logged on when granting permission and running CleanOpsStaff setup. Each shared user will need to log into the single computer and run CleanOpsStaff setup once to install CleanOpsStaff under their user name on the single computer.

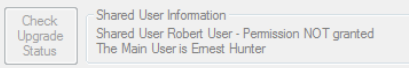
3. Click the **Manage Shared User** button to launch the **Manage Shared User** tool
  4. Enter a user name into the **Add User Input Box**.
  5. Click the **Add Shared User To Permission List**
  6. Repeat for all the shared users you want to give permission to.
  7. Click **Save Permission List** button to activate the permission list and confirm and save it to disk.
  8. Click the **Close** button
  9. Note: you may click on the **Read Current Permission List** button to retrieve the current permissions.
  10. When you log off the computer and a Shared User log on, the Shared user will run **Setup** to install CleanOpsStaff under their Log-in account. After installing CleanOpsStaff, shared users will run CleanOpsStaff as they do all other Windows programs. **Always ensure that there are no others user logged on to the computer when uninstalling and installing programs or running Setup.**
  11. The Shared user will not have access to all Program Manager functions, but will have access to all Main Program function that the Main user has access to. The Shared user will not have access to the grayed out disable buttons as shown in the screen shot to the right.
  12. The **Shared User Information** box at the top left of the screen will indicated the status of the shared user.
  13. If the shared user has not been granted permission by the **Main User** the **Shared User Information** box and the **Terms/Agreement/Status/Message** box will reflect this status and the Shared user will only be able to run in Demo mode
- Note: The Main User and all Shared Users will have access to the same two CleanOpsStaff Folders ("**CleanOpsStaff Program Files**" and "**CleanOpsStaff Data**")
14. The **Main User** can use the **Remove User From List** button and the **Delete All Shared Users** to revoke permission to Shared Users.



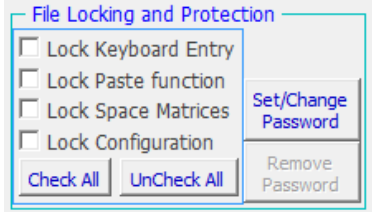
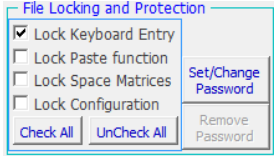
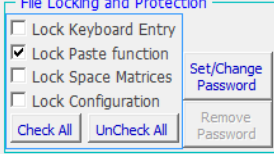
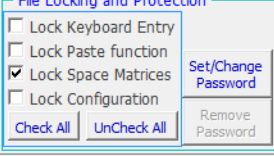
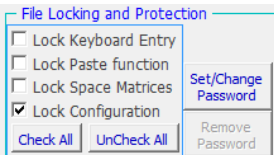
### CleanOpsStaff™- v1.0 Program Manage



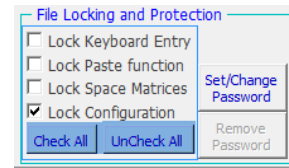
### CleanOpsStaff™- v1.0 Program Manage



## File Locking and Protection:

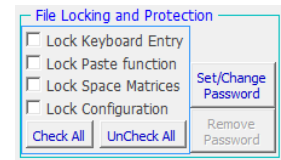
<ol style="list-style-type: none"> <li>1. CleanOpsStaff has a <b>File Locking and Protection</b> section in the Configuration form. This feature is useful for organizations who wish to centrally manage the data files and limit user from changing the data. The action performed in this section effect only the current file in memory.</li> <li>2. <b>File Locking:</b> You can set four different type of file locking in order to protect your data from being accidentally change while it is in memory. The screenshot to the right indicate that none of the functions are locked and that no password has been set.</li> <li>3. <b>File Protection:</b> You can apply password protection to your data before you save it in order to prevent others from changing the <b>Lock Status</b> of your files. Protection allows you to share your files with others so that can open them without the password; however, they would need the password to change any of the four lock statuses.</li> <li>4. The four locking statuses are contained in the data file when you save them. If you set a password before saving, anyone you share the file with can open it without the password, but users cannot change the locking status.</li> </ol>	
<ol style="list-style-type: none"> <li>5. <b>Lock Keyboard Entry:</b> Check this box to prevent being able to enter data in the <b>Macro Staffing and Inventory Worksheet</b> from the keyboard. This is useful to prevent accidentally changing data in the worksheet from the keyboard. With this box checked, all the input columns in the <b>Macro Staffing and Inventory Worksheet</b> become write protected. You can still paste data into the worksheet using <b>QEntry, Keypad, Rows and Cells Paste Right-Click short-cut menu</b>, and the <b>Paste</b> button on the <b>Staff Calculator (QStaff)</b>.</li> </ol>	
<ol style="list-style-type: none"> <li>6. <b>Lock Paste Function:</b> Check this box to lock out all the paste functions found in <b>QEntry, Keypad, Rows and Cells Paste Right-Click short-cut menu</b>, and the <b>Paste</b> button on the <b>Staff Calculator(QStaff)</b>. This box also locks out the row <b>Insert/Delete</b> function preventing users from being able to insert and delete rows.</li> </ol>	
<ol style="list-style-type: none"> <li>7. <b>Lock Space Matrices:</b> Check this box to lock out the ability to change the <b>Standard Category Matrices</b> and lock out the ability to make <b>Local Space Category Matrices</b>.</li> </ol>	
<ol style="list-style-type: none"> <li>8. <b>Lock Configuration:</b> This box prevent users from changing the configuration. This is useful when you want to ensure all users you share a file with do not change the configuration variables and other configuration aspects.</li> </ol>	

9. **Check All and UnCheck All:** You can check and uncheck all the Lock boxes at once by using the **Check All and UnCheck All** buttons. If you want to share a data file but do not want the user to be able to change any of the data, you would (1) click the **Check All** button, and then (2) click the **Set /Change Password** button, (3) enter password, and then (4) **save** the file.

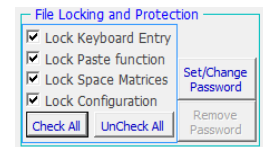


### Steps for Locking and Protecting a Data File:

1. The Locking and Protection section will look like the screen shot to the left if the file in memory is not password protected and no functions locked out. Note that the **Remove Password** button is disabled (grayed out) indicating that there is not password set for the data in memory

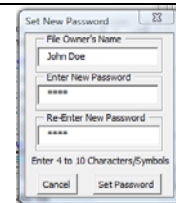


2. Click the Check All button to lock all four functions and the **File Locking and Protection** section will look like the screen shot to the right.



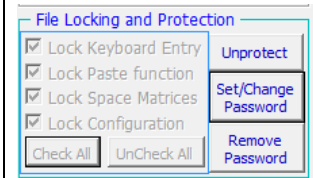
3. Click the **Set/Change Password** button launch the **Set New Password** box:

- Enter your Name (oprional)
- Enter a password ( 4 to 8 characters – letters, numbers and special characters of your choice)
- Reenter the password and click the **Set Password** button
- Click **OK**



4. This will place the data in memory in locked and protected mode. This means that you can not change any of the data in the Macro Staffing and Inventory worksheet and you cannot unlock any of the four locked features unless you click the **Unprotect** button and enter the password.

5. Note all the **Lock checkboxes** are disabled (grayed out) which means the data in memory is in **Protect** mode

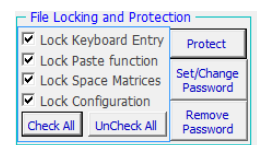


6. To regain access to the Lock Checkboxes while keeping the data under password, click the **Unprotect** button.

7. Enter the password and click **OK**



8. The **File Locking and Protection** section will now look like the screen shot on the right. The lock boxes are now available to be changed to allow you to work on the data until you click the **Protect** button.



9. Saving a **Locked and Password Protected** data file: regardless of the status of the **Protect/Unprotect** button, when you save a data file, the lock box status will be saved with the data file. If you have set a password, you will have to enter the password before you can save the file.

10. Users you share your password protected file with will not need the password to open the file, however, they will not be able to change the lock box status without the password. You can save the file with any combination of the lock boxes checked, with all of them checked or with none of them check.

## Available Upgrades

### (HCT-5x) Upgrade to CleanOpsStaff-Pro and Purchase Increase Record Capacity

<http://hunterconsulttrain.com/CleanOpsStaffPro.aspx>

#### Capabilities:

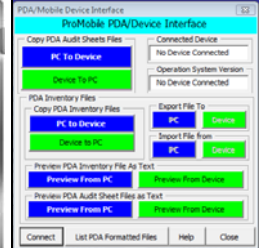
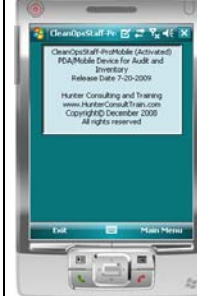
Add up to 15,000 additional record capacity in 2,500 records batches

### (HCT-9) CleanOpsStaff-ProMobilePlus-PC/PDA

<http://hunterconsulttrain.com/ProMobilePCPDAUpgrade.aspx>

#### Capabilities:

- Activate CleanOpsStaff-ProMobilePlus-PC on one Desktop and one Laptop
- Activate CleanOpsStaff-ProMobilePlus-PDA on one PDA
- Create Audit and Inspection files directly on the PDA and upload to the PC
- Download APPA cleaning audit/inspection sheets for 200 rooms from your PC to your PDA and record the results of your inspection on your PDA while in the field.
- Easily upload audit/inspection results from your PDA to CleanOpsStaff-Pro on your PC/Laptop
- Create space inventory files directly on the PDA and upload to the PC
- Download 200 space inventory records from your PC/Laptop to your PDA
- Use your PDA to collect and verify space inventory data and easily uploaded the verified data to CleanOpsStaff-Pro on your PC/Laptop
- Adds a fast efficient way to export and import partial space inventory data



### (HCT-10) CleanOpsStaff-ProMobilePlus-PDA Add-In

<http://hunterconsulttrain.com/ProMobilePDA.aspx>

#### Capabilities:

- Activates CleanOpsStaff-ProMobilePlus on one additional PDA
- See above for PDA Capabilities

### (HCT-6) CleanOpsStaff justDoNext Data Import Wizard

<http://hunterconsulttrain.com/DataImportWizard.aspx>

#### Capabilities:

- Convert external inventory data that already exist in excel spreadsheets to CleanOpsStaff data file format using a *justDoNext wizard*
- Use color coded **Red**, **Yellow** and **Green** command buttons a *SmartNext* button that guide you through process by simply clicking the *SmartNext* button
- Import multiple records from within worksheets within an external data spreadsheet
- Automatically convert your existing space/room name to APPA-CleanOpsStaff category names using keywords
- Easy click-to-select "*SpacePicker*" input tool for entering Category Names and Cleaning Levels in the inventory worksheet and in the import wizard
- Export CleanOpsStaff inventory data file to normal excel spreadsheets

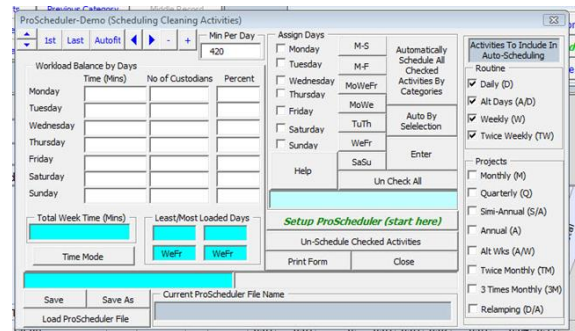
- Export CleanOpsStaff partial inventory data file to normal excel spreadsheets
- Edit CleanOpsStaff Data in the Wizard to copy and paste multiple CleanOpsStaff records
- Automatically convert space cleanable units from Square Meters to Square Feet and from Square Feet to Square Meter -- especially useful for our Canadian customers and for data exchange between users on the two different systems of measurement
- Serve as a data input interface that make more use of the native Excel spreadsheet environment

### (HCT-8) CleanOpsStaff ProScheduler Add-In

<http://hunterconsulttrain.com/PurchaseProScheduler.aspx>

#### Capabilities:

- Automatically schedule the Routine Cleaning Activities in a manner that balance day of week work loading, using CleanOpsStaff **"Least/Most Loaded Day"** scheduling method. With **CleanOpsStaff-ProScheduler**, you can automatically create a weekly schedule of routine activities that will automatically balance the time assignment for each day and inform you of the least and most loaded day to assist you in selecting days of week for scheduling project work. Then you can use ProScheduler to automatically schedule projects. Using the ProScheduler flexible activity selector, you can decide which frequencies you would like to automatically schedule. Produce route sheets to give directly to custodians.

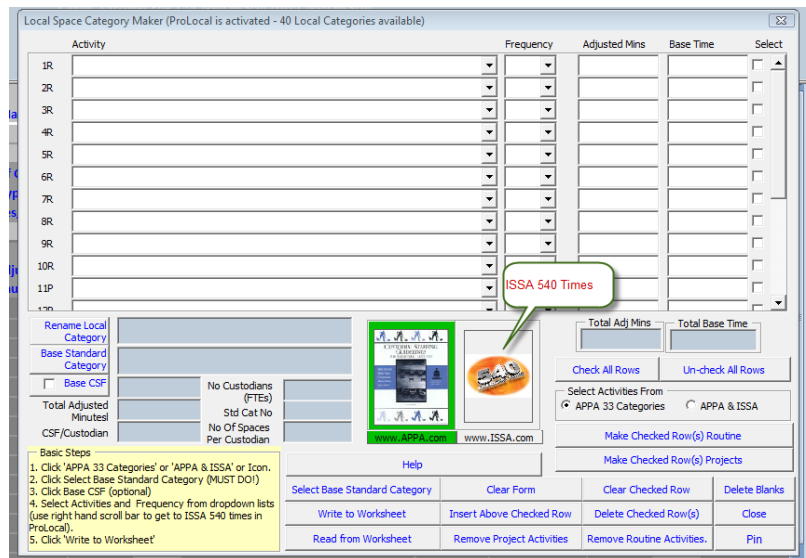


### (HCT-11) CleanOpsStaff-ProLocal

<http://hunterconsulttrain.com/PurchaseProLocalUpgrade.aspx>

#### Capabilities:

- Allow you to make 40 local categories instead of just 15
- Allow you to select Cleaning Activities/Tasks and Times from the ISSA 540 Times list
- CleanOpsStaff automatically compute the correct base time adjusted for the base CSF of the category you are making
- Allow you to combine APPA activities with ISSA task with CleanOpsStaff doing all the calculations



## CleanOpsStaff Files:

File	Purpose	Extension	Default Folder
Main Program File – “ <i>CleanOpsStaff.xls</i> ” (Excel 2003) “ <i>CleanOpsStaff.xlsb</i> ” (Excel 2007) ( <i>CleanOpsStaff Program</i> )	Contain CleanOpsStaff Main Program	.xls or xlsb	C:\CleanOpsStaff Program Files
Default Configuration Variable File “ <i>CleanOpsStaff-HECS-Vars.ini</i> ” ( <i>CleanOpsStaff System</i> )	Contain the configuration information that is loaded at start up and when you close a inventory file	-HECS-Var.INI	C:\CleanOpsStaff Data
Default Standard Space Category File “ <i>CleanOpsStaff-HECS-Cust.xls</i> ” ( <i>CleanOpsStaff System</i> )	Contains the 33 standard matrices with their default values	-HECS-Cust.xls	C:\CleanOpsStaff Data
Default Standard Space Category File “ <i>CleanOpsStaff-HECS-Loc.xls</i> ” ( <i>CleanOpsStaff System</i> )	Contains the 15 Blank Local Category matrices s default	-HECS-Loc.xls	C:\CleanOpsStaff Data
Data Field description and data collection template “ <i>CleanOpsStaff Data Input Template.xls</i> ” ( <i>System</i> )	To help you know how best to prepare your data for import when using <i>JustDoNext</i> Import wizard	.xls	C:\CleanOpsStaff Program Files
CleanOpsStaff-ProMobile.exe	PDA ProMobilePlus application program file	.exe	C:\CleanOpsStaff Program Files (on PC) \\Windows\Start Menu\Programs (on PDA)
Excel Environment Reset File “ <i>Reset Environment.xls</i> ” ( <i>System</i> )	Use to reset your Excel environment back to its default values in the event that <i>CleanOpsStaff</i> is shut down abnormally. Run Excel and use the Open command to open this file. Enable Macros.	.xls	C:\CleanOpsStaff Program Files
Custom Standard Space Category Files (User)	Contains the 33 standard matrices including any change you made to activities and frequencies of the 33 standard categories as saved by user	-HECS-Cust.xls	C:\CleanOpsStaff Data
Local Space Category Files (User)	Contains 15 local categories file including the one you created and the blank remaining ones as saved by user	-HECS-Loc.xls	C:\CleanOpsStaff Data
Audit Package file (User)	The file that contains all three Audit package documents ( <i>Audit Assessment Worksheet</i> report, <i>Audit Assessment Population</i> report, and the <i>Audit</i>	-HECS-Audit.xls	C:\CleanOpsStaff Data

	<b>Instrument Report.</b>		
Field Audit or Daily Inspection Audit Package file	The file created from a Field Audit file originating on the PDA. When you create a Field Audit or Daily Inspection file on the fly in your PDA it has the extension “ <b>-f-HECS-Audit.txt</b> ” and contains only the audit sheets. When you load the PDA file into the PC, an audit package is generated which you can save with “ <b>-f-HECS-Audit.txt</b> ” extension	-f-HECS-Audit.xls	C:\CleanOpsStaff Data
PDA formatted Audit Sheets.	This file contains PDA formatted audit sheets be used on the PDA. This file are created when you send PDA formatted audit sheets to the PDA or PC	-HECS-PDAa.txt	C:\CleanOpsStaff-Promobile Data (on PC) \CleanOpsStaff-Promobile Data (on PDA)
PDA Formatted Field Audit or Daily Inspection audit sheets.	This file contains PDA formatted audit sheets. This file is created on the PDA in the field to be loaded to the PC.	f-HECS-PDAa.txt	C:\CleanOpsStaff-Promobile Data (on PC) \CleanOpsStaff-Promobile Data (on PDA)
PDA formatted Space Inventory file	This file contains PDA formatted inventory data. It can be created on the PC or <b>created directly on the PDA.</b>	-HECS-PDAi.txt	C:\CleanOpsStaff-Promobile Data (on PC) \CleanOpsStaff-Promobile Data (on PDA)