



# Bowman Systems, LLC

TECH NOTE # 112304B

## MAXIMIZING SYSTEM PERFORMANCE

(End User)

SERVICEPOINT™

### OVERVIEW

The purpose of this paper is to offer solutions that end users can implement to improve the performance of ServicePoint on their workstations. These solutions are divided into two main categories:

- End User Solutions
- Browser Settings

### END USER SOLUTIONS

This section offers some best practice suggestions for minimizing delays while using the ServicePoint system.

#### CLOSE OTHER PROGRAMS

Close other programs while running ServicePoint. Some software, such as antivirus programs that are actively scanning the hard drive, and defrag programs that are running while using ServicePoint, will severely degrade system performance. (See Figure 1) It is best to schedule these tasks to run automatically after business hours.

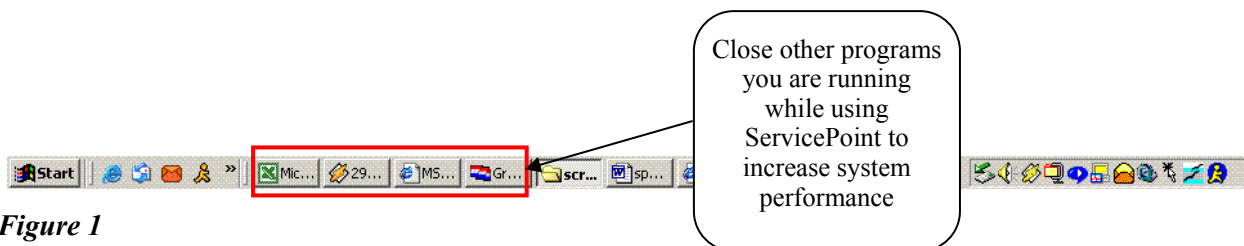


Figure 1

## CLOSE PROGRAMS IN SYSTEM TRAY

Close unnecessary programs that are running in the system tray. The system tray is located on the right hand side of the Windows toolbar. Some examples of programs that appear in the system tray are AOL Instant Messenger or a pocket PC sync program. (See Figure 2)

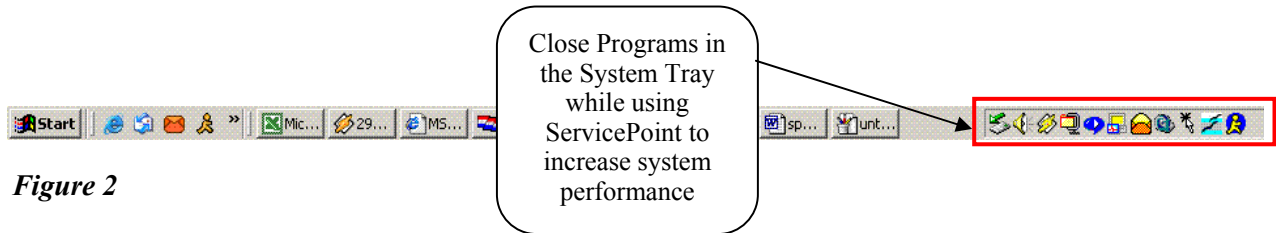


Figure 2

## DOUBLE CLICKING

Because ServicePoint is a web program, you should not click more than once on any button within the application. Clicking multiple times on a button will send multiple requests to your ServicePoint server. This will cause an added delay in receiving the data you requested.

## SHORTCUTS

Use the following key combinations on your keyboard to help navigate through ServicePoint and other applications in a more effective and timely manner.

<b>Home</b>	Returns the user to the beginning of a document or text box
<b>End</b>	Takes the user to the end of a document or text box
<b>Tab</b>	Takes the user to the next field
<b>Shift + Tab</b>	Takes the user back one field
<b>Alt + Tab</b>	Brings other web pages or applications forward
<b>Ctrl + C</b>	Copies selected items
<b>Ctrl + V</b>	Pastes selected items
<b>Ctrl + Z</b>	Undo last action

## SEARCHING FOR A CLIENT

- **Search for clients in ClientPoint and ShelterPoint using the SkanPoint feature.** If this feature is available to you, it will appear at the bottom of the ClientPoint search screen. (See Figure 3).

The screenshot shows the ClientPoint search interface. At the top, there is a navigation bar with tabs: Home, ClientPoint, ResourcePoint, ShelterPoint, SkanPoint, Reports, Admin, Help, and Logoff. Below the navigation bar is the 'Quick Call Information' section, which includes a checkbox for 'Grant ROI for call', a 'Start Call' button, and a 'Start Quick Call' button. The main section is titled 'Add as New / Search for Existing Client' and contains various search criteria: Last Profile (dropdown), First and Last name fields with a 'MI' checkbox, Date of Birth (mm/dd/yyyy), SS# (three separate boxes), Gender (dropdown), Race (dropdown), Ethnicity (dropdown), and a 'Search Filter' checkbox for 'Exact Match?'. Below these fields are two buttons: 'Add / Find Client' and 'Add As Anonymous Client'. A red box highlights the 'Search client through his id card.' section at the bottom, which includes a 'Scan or Enter Client id' input field and a 'Search this id' button. A callout box with an arrow pointing to the red box contains the text: 'Search for a client by ID number to speed up the client lookup process'. A note below the red box states: 'Note: Only First, Last, and SS# are used for search'.

Figure 3

To use this feature, you must know the client's ID number. This is not the client's unique ID, but their internal ID. You can locate the client's internal ID by going to their ClientPoint profile or reading it on their ServicePoint ID card. (See Figure 4)

The screenshot shows the ClientPoint profile page for 'Client - Test, Jessica (#59)'. The navigation bar at the top is the same as in Figure 3. Below the navigation bar, there are tabs for 'Profile', 'Assessments', and 'Service Transactions'. The 'Profile' tab is selected, and the client's name and internal ID are displayed. A red box highlights the internal ID '#59'. A callout box with an arrow pointing to the red box contains the text: 'View the client's Internal ID Number Here'. Below the client information, there is a 'Release of Info: None' label. At the bottom right, there is a security bar with icons for 'ENTRY/EXIT', 'ROI', 'CASE WORKERS', and 'SECURITY'.

Figure 4

This search method is more efficient than searching by client information. When searching by client information, the system searches for and retrieves all client

records that could potentially match your search. When the system searches for the client's ID number, it is looking for and retrieving only one file, thus making the process more efficient.

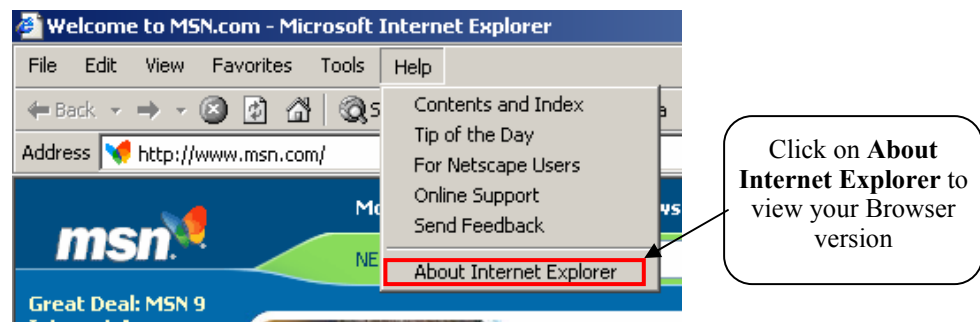
- **If SkanPoint is not available to you, search for client names by using a full first name and full last name.** This reduces the number of client names that are being searched against and will return those names faster.
- **Do not use % when searching.** The % sign is a wild card that returns all clients. Searching for all clients will take much longer to return names and longer for the page to build out.

## ***BROWSER SETTINGS***

Verify that your Internet Browser is either Internet Explorer 5.5 or higher, or Netscape version 7.1 or higher. Bowman Systems has conducted tests that show that ServicePoint works best when using these browser versions. To check your Browser's version number, see below.

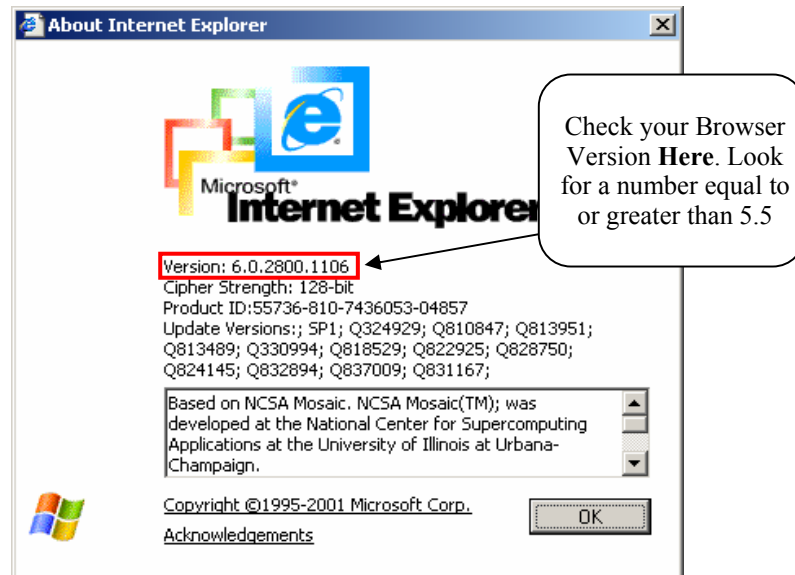
### **Internet Explorer:**

- Open Internet Explorer.
- Locate the Browser toolbar and click on **Help**.
- Click on **About Internet Explorer** from the menu that appears. (See Figure 5)



*Figure 5*

- The first line of the information that appears will tell you your Browser version. (See Figure 6)



*Figure 6*

- If you are NOT running Internet Explorer 5.5 or above, then go to [www.microsoft.com](http://www.microsoft.com).
  - Click on the **Downloads** link. This will bring you to a page where you can search for downloads.
  - Type “Internet Explorer” into the **Keywords** box and click on the **GO** button.
  - Click on the appropriate download from the results that appear.

## Netscape

- Open Netscape. When Netscape opens, the Browser version may be listed on the opening screen. (See Figure 7)



Figure 7

- If you did not see the Browser version when you opened the browser, locate the Browser toolbar and click on **Help**.
- From the menu that appears, click on **About Netscape**. (See Figure 8)

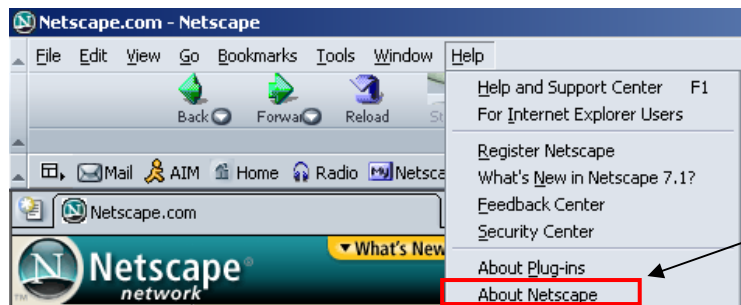


Figure 8

- A new window will appear with information on the Browser. The Browser version number should be listed at the top. (See Figure 9)

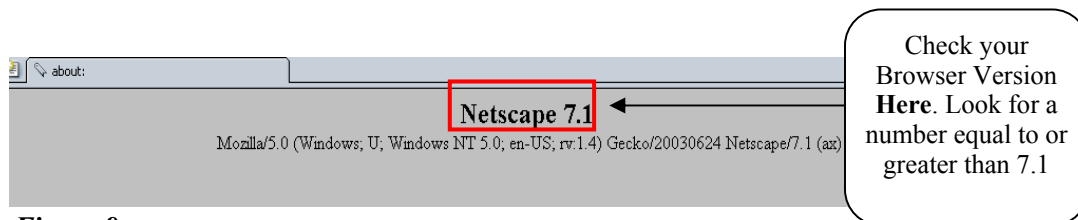


Figure 9

- If you are not running Netscape 7.1 or higher, then go to <http://home.netscape.com>.
  - Under tools, click on the **Netscape 7.2** (or greater) link. The page will refresh and display the Netscape download screen.
  - Click on the **Free Download** button to download and install this browser.

## **ADJUST INTERNET EXPLORER SETTINGS**

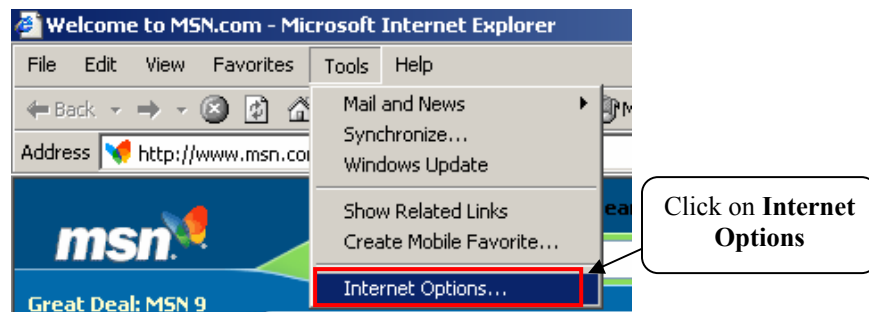
There are a several Browser settings that can be adjusted to improve your ServicePoint experience.

### 1. **Verify that your Cache settings are set to “Every visit to the page.”**

To change your Cache settings:

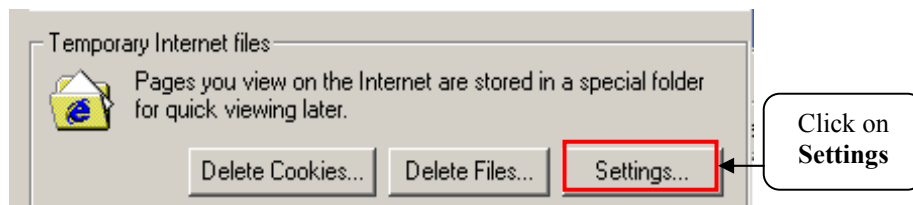
Open Internet Explorer.

- Locate the Browser toolbar and click on **Tools**.
- Click on **Internet Options** from the menu that appears. (See Figure 10)



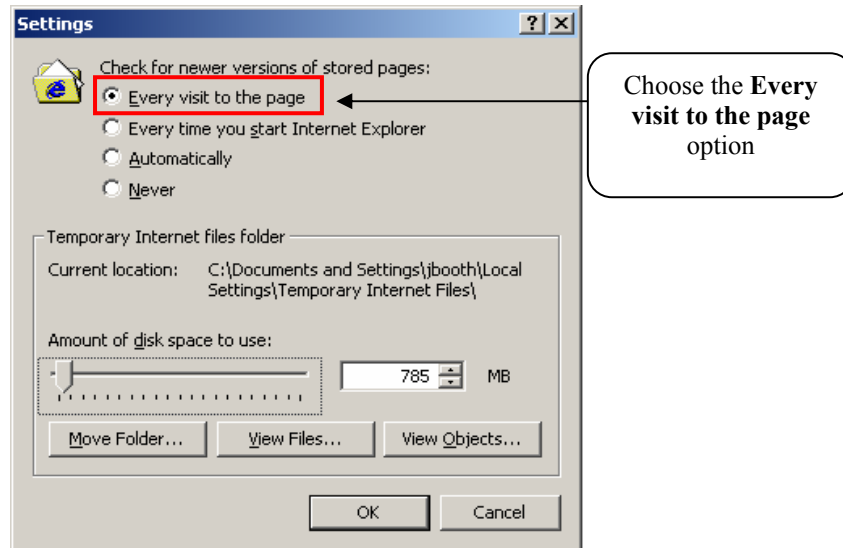
*Figure 10*

- The Internet Options window will pop up. (See Figure 11) Locate the **Temporary Internet Files** section of this window and click on the **Settings** button.



*Figure 11*

- After the Settings page appears, click on the radio button next to **Every visit to the page**. (See Figure 12)



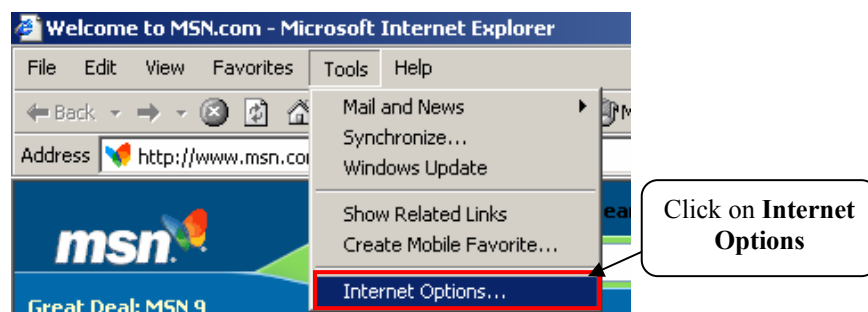
**Figure 12**

- Click on the **OK** button.

## 2. Periodically Delete Temporary Internet Files.

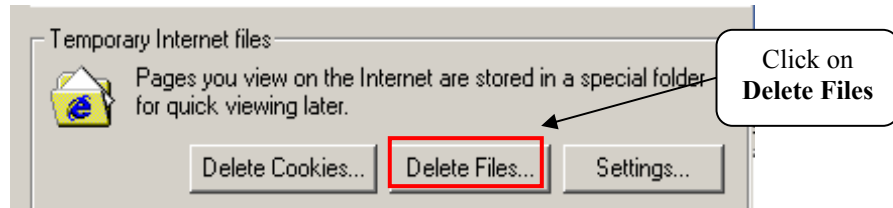
*To Delete Temporary Internet Files:*

- Open Internet Explorer.
- Located the Browser toolbar and click on **Tools**.
- Click on **Internet Options** from the menu that appears. (See Figure 13)



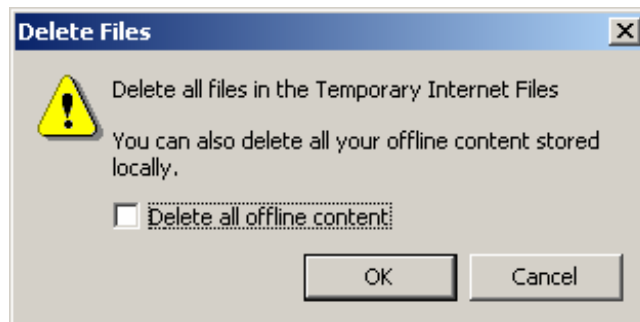
**Figure 13**

- After the Internet Options window appears, locate the **Temporary Internet Files** section. (See Figure 14)



*Figure 14*

- Click on the **Delete Files** button. The Delete Files popup window will appear.
- Click on the **OK** button. The files will be deleted. (See Figure 15)



*Figure 15*

### 3. Restore your Browser's Default Settings.

To restore settings:

- Open Internet Explorer.
- Locate the Browser toolbar and click on **Tools**.
- Click on **Internet Options** from the menu that appears. (See Figure 16 below)

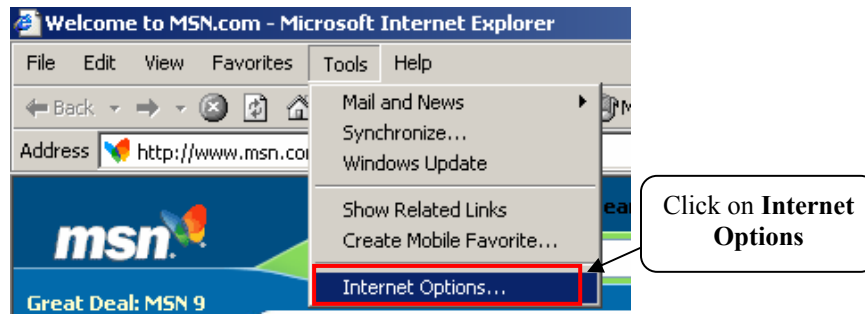


Figure 16

- Click on the **Advanced** Tab after the Internet Options pop-up screen appears.
- Click on the **Restore Defaults** button. (See Figure 17)

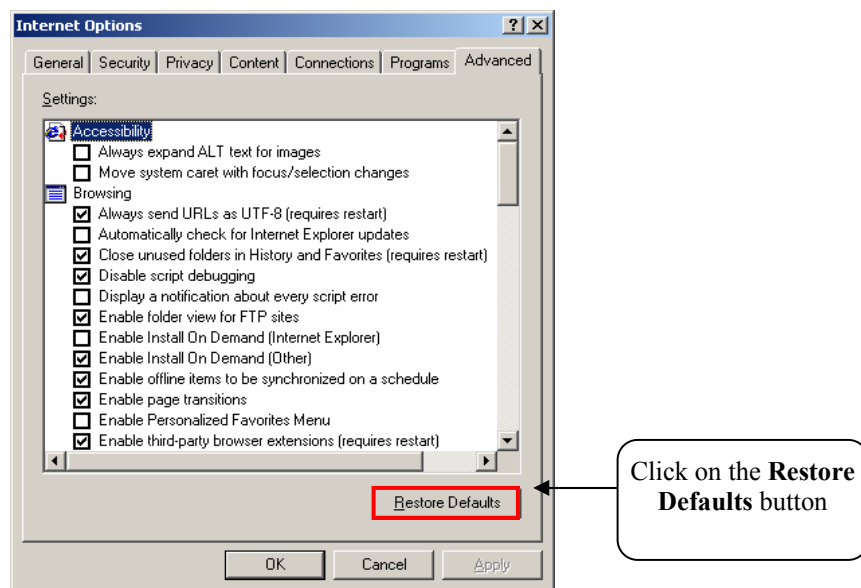


Figure 17

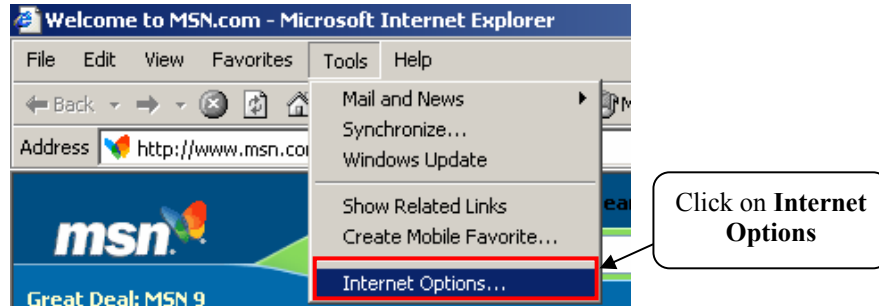
- Click on the **Apply** button.

#### 4. Turn off the Automatically Detect Setting option.

*To turn off this option:*

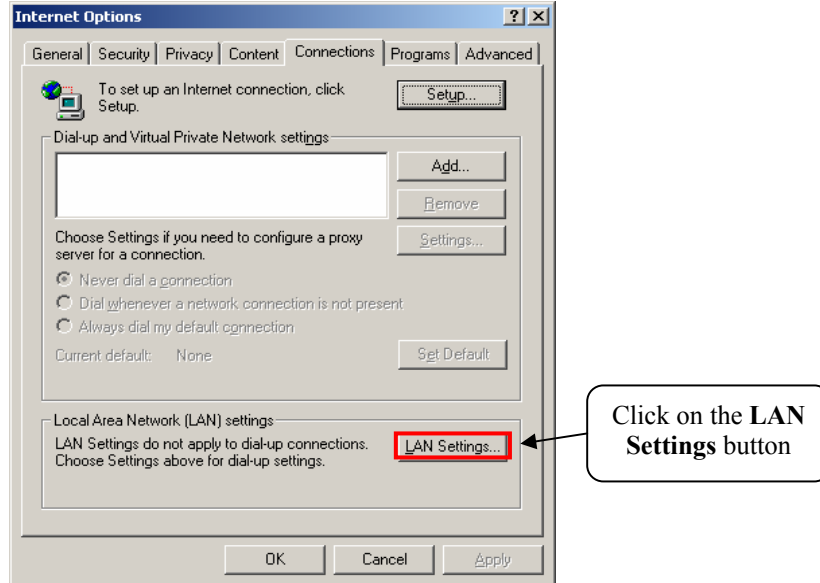
- Open Internet Explorer.

- Locate the Browser toolbar and click on **Tools**.
- Click on **Internet Options** from the menu that appears. (See Figure 18)



*Figure 18*

- Click on the **Connections** Tab after the Internet Options pop-up screen appears.
- Click on the **LAN Settings** Button. (See Figure 19)



*Figure 17*

- The LAN Settings window will pop up. Uncheck the checkbox next to **Automatically Detect Settings**.
- Click on the **OK** button.

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