

# Systems Support

## Swift Training



### Basic Use of Swift

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Northumbria Healthcare 

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**NORTHUMBERLAND**  
COUNTY COUNCIL



# Contents

<b>LOGGING ON TO SWIFT .....</b>	<b>1</b>
Login to Windows Terminal Server.....	1
Login to Swift.....	1
<b>SWIFT LAUNCH PAD .....</b>	<b>2</b>
Module Icons.....	3
Accessing Modules from the Launch Pad.....	3
Menu Bar.....	3
Toolbar.....	3
<b>SWIFT SCREEN DISPLAY .....</b>	<b>4</b>
<b>ELEMENTS OF THE SWIFT SCREENS .....</b>	<b>4</b>
Header.....	4
Tabs.....	4
Fields.....	5
Using Drop Down Box Fields.....	5
Selecting Information from a Drop Down Box List.....	5
Quick Search Facility for Drop Down Box Lists.....	6
Finding Information from a Drop Down Box Search.....	6
Quick Search Facility for Drop Down Box Search.....	6
Quick Search Facility for Hospitals and GP Practices.....	6
Using Date Fields.....	7
Date Shortcuts.....	7
Accessing the Calendar.....	7
Using Check Box Fields.....	8
Using Free Text Fields.....	8
Summary Lists.....	8
Viewing a Record.....	8
Entering a New Record.....	8
Deleting a Record.....	8
Searching for Information.....	8
Buttons.....	9
Forward/Back Scrollers.....	9
<b>NAVIGATING AROUND SWIFT .....</b>	<b>10</b>
<b>OPENING MORE THAN ONE WINDOW.....</b>	<b>10</b>
Moving Between Open Windows.....	11
<b>PRINTING FROM SWIFT .....</b>	<b>11</b>
Produce a Screen Print.....	11
Retrieve a Swift Report.....	13
<b>SWIFT PASSWORDS .....</b>	<b>13</b>
Password Rules.....	13
Changing Your Swift Password.....	14
Problems Changing Your Password.....	14
Changing Your Password Before Auto Expiry.....	15





**EXITING SWIFT .....16**



## LOGGING ON TO SWIFT

You must first log into the NHA (Health) network via the Windows Terminal Server screen in order to display the Swift login screen.

### Login to Windows Terminal Server

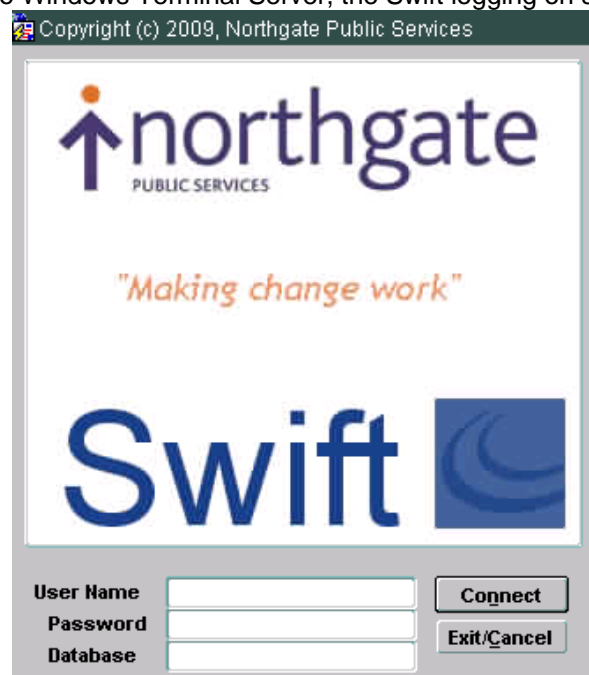
- Double click on the Swift icon  on the Desktop.
- The Windows 2000 Terminal Server login screen will appear and you will need to enter your **NHA** network login and password (this is the same as the user name and password you used to log onto your PC), and click on :



Enter your NHA network login and password. NHA should be displayed in the Log on to: field.

### Login to Swift

Once you have logged into Windows Terminal Server, the Swift logging on screen will be displayed:



You will need to enter your Swift User Name and Password. The Database will automatically be entered.

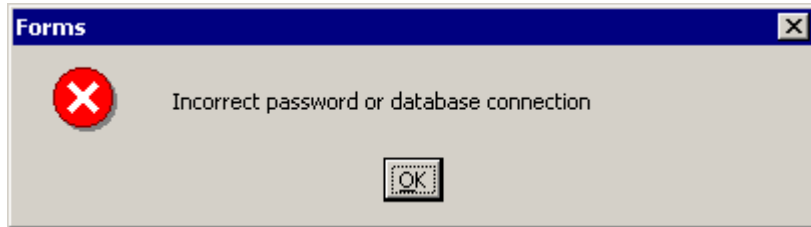
- Enter your Swift User Name, this will be in the format of your initial and surname, for example JBloggs.

## Swift - Basic Use of Swift - Swift Launch Pad

- Press your tab key once to take you to the Password field.
- Enter your Swift password.
- Click on **Connect**

If you have been successful in logging on, the Launch Pad will appear.

If you have not successfully logged on, you may receive the following message:



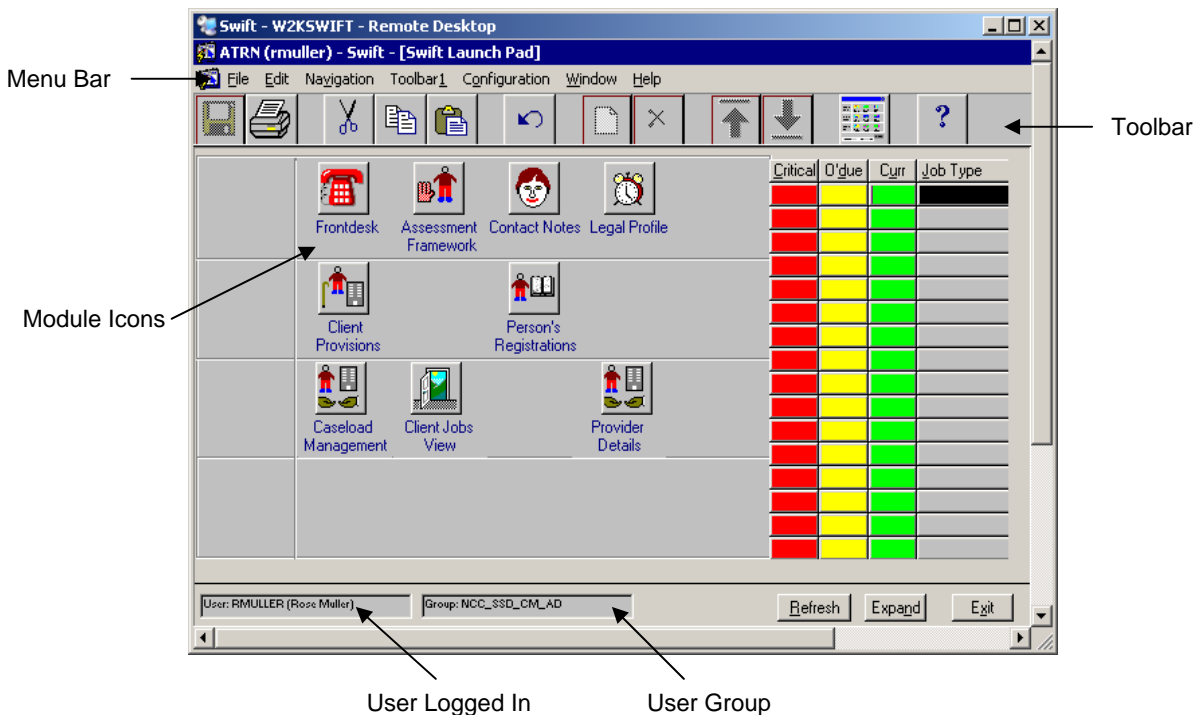
- Click on **OK** to return to the login screen.
- Re-enter your Swift password.
- Click on **Connect**

*Note: if you continue to have problems logging on or if you have forgotten your password contact the Systems Support Help Line on (01670) 622 450.*

## SWIFT LAUNCH PAD

Once you have successfully logged on to Swift the first screen you will see is your Launch Pad which is your Swift main menu.

Your Launch Pad will be different depending upon your role and you will only have access to the areas of Swift you need.





## Module Icons

On the Launch Pad you will see lots of icons. These icons are the different modules of Swift where information can be viewed/entered.

### Accessing Modules from the Launch Pad

- To access a particular module click once on the relevant icon.
- You will be taken to the module and if the module you have accessed is one that holds client information you will need to carry out a search to find the client. Refer to the *Frontdesk Manual – Finding a Person* section of this manual for guidance.

## Menu Bar

The following menu appears at the top of the Swift window:







File Edit Navigation Toolbar<sub>1</sub> Configuration Window Help

The menu bar consists of a standard set of options throughout Swift, many of which should not be used. Only options that should be used are detailed below:

Menu	Function
File	Used to exit out of Swift. Refer to <i>Basic Use of Swift - Exiting Swift</i> section of this manual.
Configuration	Used to change your Swift password. Refer to <i>Basic Use of Swift - Changing Your Password Before Auto Expiry</i> section of this manual.
Window	Used to move between Swift Screens. Refer to <i>Basic Use of Swift - Opening More Than One Window</i> section of this manual.

## Toolbar



The toolbar consists of a standard set of picture icons throughout Swift, many of which should not be used. Only the icons that should be used are detailed below:

Icon	Function
	Print. Refer to <i>Basic Use of Swift – Printing from Swift</i> section of this manual.
	Insert a new record.
	Delete a record.
	Go to first record on a summary list.
	Go to last record on a summary list.
	Go to the Swift Launch Pad (without closing the current window)

# SWIFT SCREEN DISPLAY

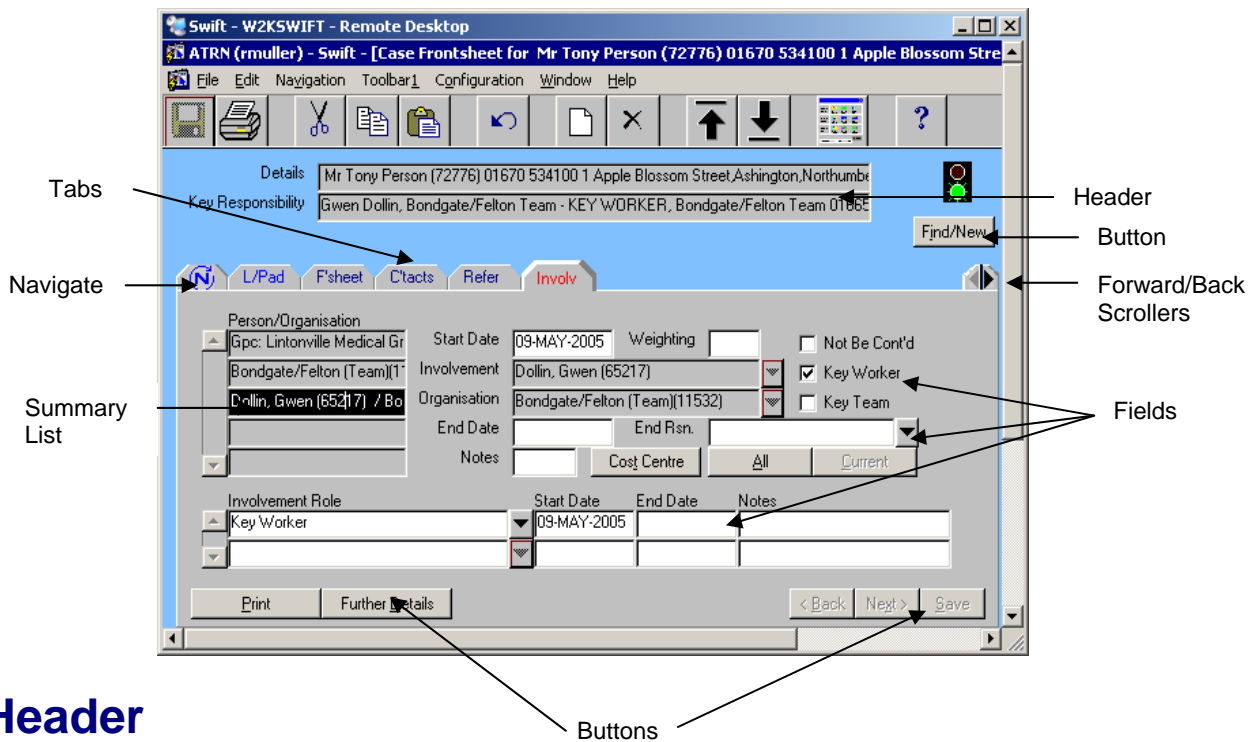
When you access Swift it will fill the full screen and will cover your desktop completely so you will not be able to see the toolbar at the bottom where the start button is or the icons on your desktop.

There is a task bar at the top of the screen that allows you to;

- Click on  to minimise the Swift window onto the task bar along the bottom of the screen and then you will be able to see your PC desktop.
- Click on  to reduce the size of the window so that you can see the Swift screen as well as your PC desktop.

# ELEMENTS OF THE SWIFT SCREENS

The following screen details the common features which appear on most Swift screens. The screen shown is the Involvements screen in Frontdesk:




## Header

The Header, in most instances, displays the client's name, Swift ID, telephone number, address, and the client's key worker and key team.

## Tabs

Tabs are the screens available to use within a window. By clicking on a tab, you can view/update the details within it. The text on the tab you are currently in will be displayed in red.

If you have accessed a set of tabs via  the first tab displayed is the previous set of tabs you have come from.

The first tab you see on any of the screens is  (Navigate). This provides a quick way of moving around Swift modules whilst retaining the current client's record. Refer to *Basic Use of Swift - Navigating Around Swift* section of this manual.

## Fields

There are a number of different types of fields that are used within Swift:

- ◇ Drop down box fields
- ◇ Date fields
- ◇ Check box fields
- ◇ Free text fields



Where you cannot see all of the information recorded in a particular field, double click in the field to bring up a smaller window displaying the full information.

## Using Drop Down Box Fields

Drop down box fields have a ▼ at the end of the field and although they look identical there are two types of drop down box fields:

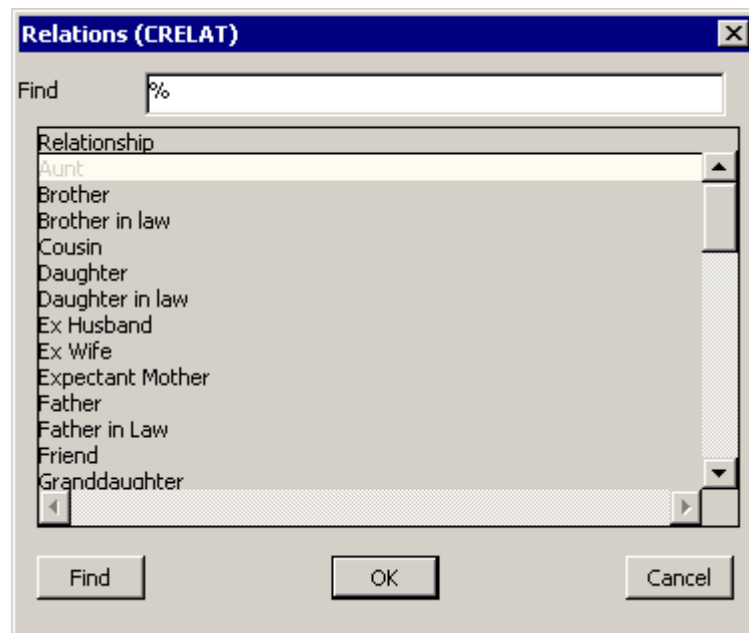
- ◇ Drop Down Box Lists – give you a list to select information from.
- ◇ Drop Down Box Searches – take you into a search for a person or organisation

*Note:* you will not be able to see if the field will give you a list to select from or take you into a search for a person or organisation until you actually click on ▼.

## Selecting Information from a Drop Down Box List

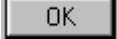
- To see a full list available from a drop down box list click on ▼.



The list will appear as follows:



The above screen print shows the list of relationships available from the Relationship screen in Frontsheet/Further Details but any list selected from a drop down box list will display in this way.

*Note:* the list will always appear in alphabetical order.


- Click on the option you wish to enter in the field and click on .
- You can scroll up/down the list using the scroll bar to the right of the list of options or if the list is very long you can use the Find box at the top of the screen to enable you to quickly find what you are looking for.
- Enter as much text as necessary into the Find box to find the option you require. The wild card can be used if you are unsure of how the information appears on the list e.g. %son%in%law%.

- Click on  to display a list of options matching the information you entered in the Find box.
- Click on the option you require and then click on .

*Note: if an option you require does not appear on the list you will not be able to enter it into the field. Contact the Systems Support Help Line on (01670) 622 450 to request a new option to be entered onto the list.*

### Quick Search Facility for Drop Down Box Lists

Rather than viewing the full list of options available you can display options beginning with a certain letter/s.

- Instead of clicking on ▼, enter the first letter or first few letters directly into the drop down box field and press tab. This will display the options that match the letter/s you have entered.
- If there is only one match for the text you entered this will automatically be entered into the drop down box field. If there is more than one option matching the text entered you will need to click on the option you require and then click on .


<b>Example</b>	To select a relationship of Aunt, enter <b>A</b> directly into the drop down field and press tab. If there is only one relationship beginning with the letter A this will automatically be entered in the field.
----------------	--

### Finding Information from a Drop Down Box Search

Where a drop down box details a person or an organisation, when you click on ▼ it will take you to a search screen. Refer to the *Frontdesk Manual – Finding a Person or Frontdesk – Finding an Organisation* section of this manual for guidance on using the search screens.

### Quick Search Facility for Drop Down Box Search

You can use a quick search facility when using a drop down box field to search for a person or organisation.

- Instead of clicking on ▼, enter the first letter or first few letters directly into the drop down box field and press tab. This will take you directly to the Person or Organisation Search Results screen which will display a list matching the text you entered.
- Click on the person/organisation you wish to select and click on  to enter the person/organisation into the drop down box field.

<b>Example</b>	To find a worker named Muriel Proops, enter <b>proops</b> directly into the drop down box field and press the tab key. This will find all persons with a surname of “Proops”. To find the YPD North team, enter <b>ypd</b> directly into the drop down box field and press the tab key. This will find all organisations with a name beginning with “YPD”.
----------------	---

### Quick Search Facility for Hospitals and GP Practices

There is quick way of finding a hospital or a GP Practice set up on Swift:

- Enter **hosp** directly into the drop down box field to find all hospitals set up on Swift or enter **GP** followed by one of the following letters directly in the drop down box field to find a GP Practice:
  - N** for practices in the North area of the County e.g. Berwick, Alnwick
  - S** for practices in the South area of the County e.g. Blyth, Cramlington
  - C** for practices in the Central area of the County e.g. Morpeth, Ashington
  - W** for practices in the West area of the County e.g. Hexham, Prudhoe
  - O** for practices not in Northumberland but in the surrounding areas e.g. North Tyneside, Scottish Borders

- Press tab to display a list of hospitals or GP Practices.

- Click on the hospital or GP Practice you require and click on .

**Example** To find a list of GP practices in the Blyth area enter **GPS** directly into the drop down box field and press the tab key.

## Using Date Fields

You can enter a date into a date field in almost any format. For example the date 5<sup>th</sup> November 2001 can be entered in any one of the following ways:

- ◇ 5/11/01
- ◇ 051101
- ◇ 5.11.01
- ◇ 05-11-01

After the date has been entered you need to press the tab key, which will then convert the date to the following format:

- ◇ 05-NOV-2001

## Date Shortcuts

You can enter the date using a format previously mentioned, or you can use one of the following shortcuts:

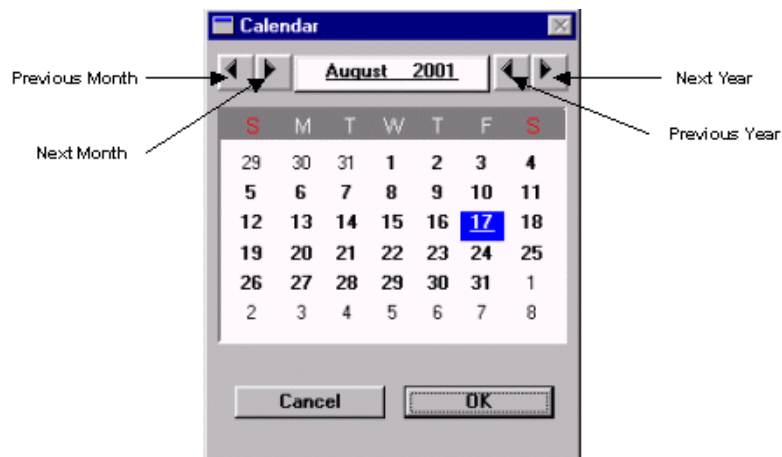
- ◇ d Today
- ◇ d-1 Yesterday
- ◇ d+1 Tomorrow
- ◇ d-4 4 days ago
- ◇ d-2w 2 weeks ago
- ◇ d+6m 6 months time
- ◇ d-1y 1 year ago

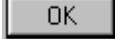
After the date shortcut has been entered you need to press the tab key, which will then convert the date to the following format:

- ◇ 12-JUN-2004

## Accessing the Calendar

When you double click on a date field the following calendar appears:





- To use the calendar to select a date, click on the date you require and click on . The date you selected will appear in the date field.

### Using Check Box Fields

- To enter a tick in a check box field click on it once.
- To remove a tick from a check box field click on it once.

### Using Free Text Fields

These fields allow you to enter your own text into them such as Telephone Number.

- Click in the field and enter the relevant information.
- Double click on any free text field and a window will appear to allow you to display all of the information recorded in the field.
- To close this window click on  or  (Close).


## Summary Lists

Some Swift screens have a summary list which gives you a row for each piece of information.


### Viewing a Record


- To view a record in the summary list click on a row and the details will display on the right hand side of the screen.
- Use the scroll bar or your cursor keys to move up/down the rows in the summary list or you can use the icons on the toolbar to move to the first and last record in a summary list.

### Entering a New Record

- To create a new record in a summary list press .


### Deleting a Record

- To delete a record from a summary list select the row you wish to delete by clicking on it and click on  (Delete).

*Note:* if  (Delete) is greyed out this means you are not able to delete the information due to access restrictions. Contact the Systems Support Help Line on (01670) 622 450 to request the deletion.

### Searching for Information


If the summary list is very long, instead of scrolling down the summary list to find the information you need, you may find it quicker to use the search facility.

- Press  to clear all the information and begin the search. This will hide the information and the right hand side of the screen will change colour.
- You can now search on any of the fields that are highlighted in blue or you can combine a search using more than field.



- In the field that you wish to use for the search, select the information you wish to search on from a drop down list or by typing what you wish to search for in the field.


*Note:* searches are case sensitive so you must enter the text exactly the way it has been recorded in Swift using a wild card where you are uncertain of the spelling or exactly how the text has been recorded. Where possible it is advisable to select the search criteria from a drop down list.

*When using date fields to carry out a search you need to enter the date in the following format; dd followed by a hyphen (-) the first three letters of month followed by a hyphen (-) and then the full year, for example 07-JUN-2001, 07-APR-2001. To search for an approximate date the wildcard (%) can be used in place of the day, the month or the year.*

- Repeat this process in other fields if necessary.
- Once you have all the search criteria entered, press  to carry out the search.

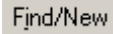
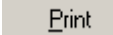


A summary list will be displayed on the left of the screen showing only the items that match the criteria you have entered.

*Note:* if no list appears either some information has caused the search to fail or the information you are looking for is not on Swift. A message will be displayed at the bottom of the screen "Query caused no records to be retrieved. Re-enter". Amend the criteria and press  again. If you need to begin an entire new search, delete all the criteria and press  to restore the full summary list.

- Once you've found the information you've been looking for, if you wish return to the full summary list, press  again.


## Buttons

There are standard buttons on most Swift screens:

Button	Function
	This button takes you to a search screen, for example a person search.
	This button will enable you to produce a screen print. It will also allow you to retrieve a Swift report such as a printable caseload list. Refer to <i>Basic Use of Swift – Printing from Swift</i> section of this manual.
	This button takes you to a further set of tabs relating to the record you are in.
	This button saves the record you are in.


## Forward/Back Scrollers


The forward/back scrollers are arrows at the end of a set of tabs that take you to another set of tabs:


 There are only a few places in Swift where scrollers are active and these scrollers will be coloured black. If the scroller is not active it will be coloured grey.

- To use a scroller click on the arrow and you will be taken to another set of tabs.
- To return to the previous set of tabs, click on the arrow that is not greyed out.

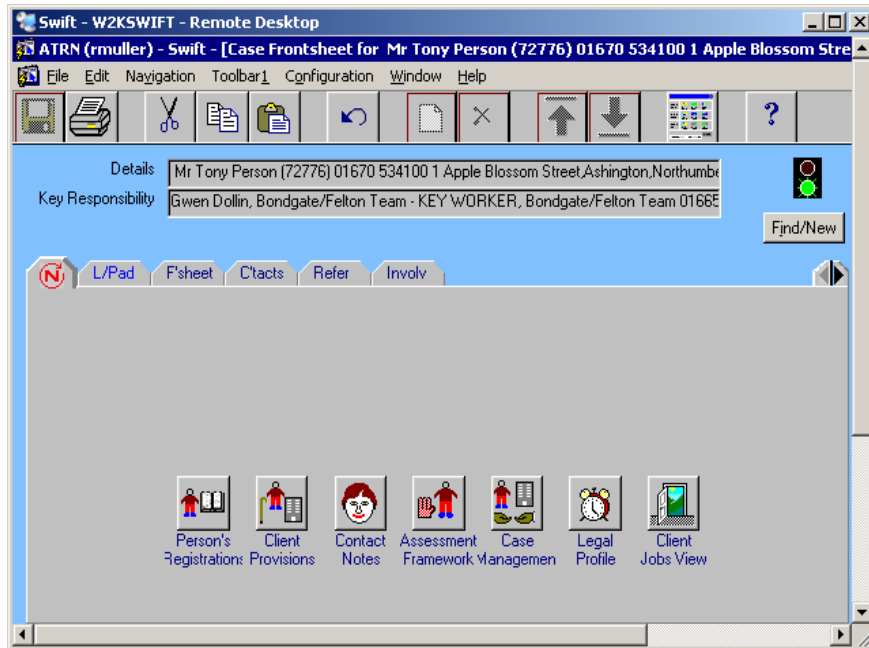
## NAVIGATING AROUND SWIFT

When you are in a client's record and you wish to go to another module of Swift to view that particular client's details you should use  (Navigate) so that when you reach the other module it is not necessary to carry out a search for that particular client.

Within all of the screens in Swift the very first tab is  (Navigate).

- Click on .


*What is displayed on the screen will depend upon where you are in Swift, however the screen will look very similar to the following screen:*





- Click on the module you wish to go to. Swift will take you to the module you requested whilst retaining the client record.

## OPENING MORE THAN ONE WINDOW

When you are using Swift it is possible to open more than one window at a time.

- Click on  (Launch Pad) on the toolbar. This will open a new Launch Pad and leave the previous window open in the background.

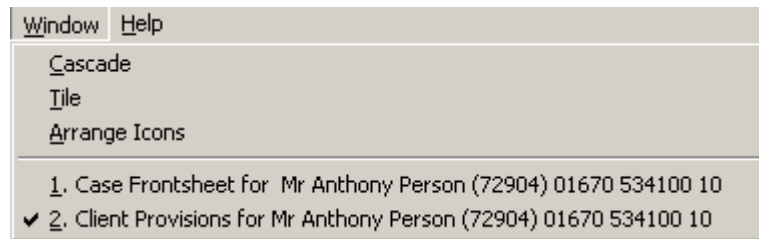
- Click on the new module icon you wish to open e.g.  or  etc.



## Moving Between Open Windows

- Click on **Window** on the Menu.


The following menu options will display:



*Note:* the options on the lower part of the menu tell you that there are two Swift screens open; Case Frontsheet and Client Provisions, the tick next to Client Provisions signifies that this is the screen that is currently on display.

- Click on the window you would like to view and this will then display as your current Swift screen.

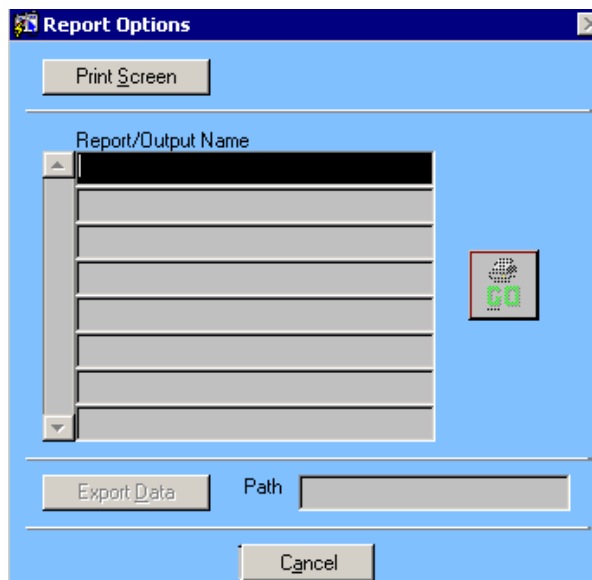
## PRINTING FROM SWIFT

By clicking on **Print** or  you will be able to produce a screen print or retrieve a Swift report.

### Produce a Screen Print

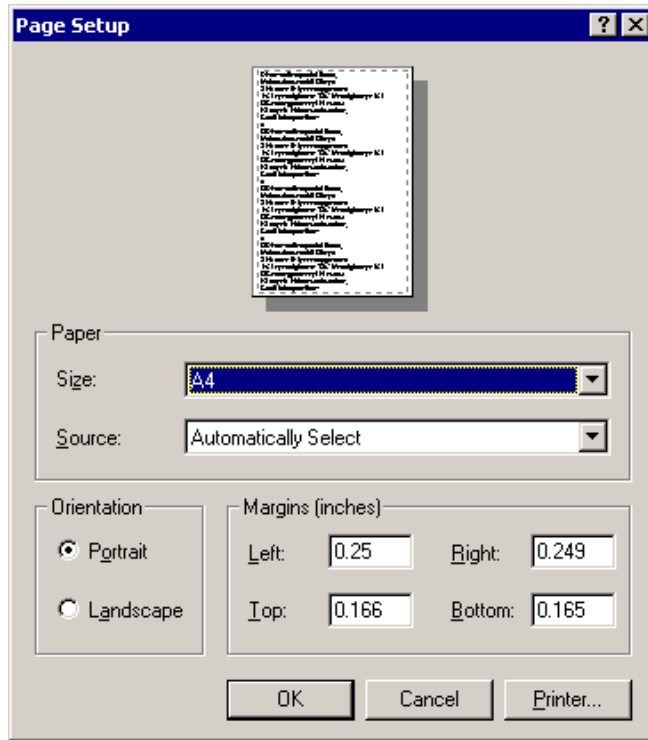
- Click on **Print** or .


The following screen will be displayed:



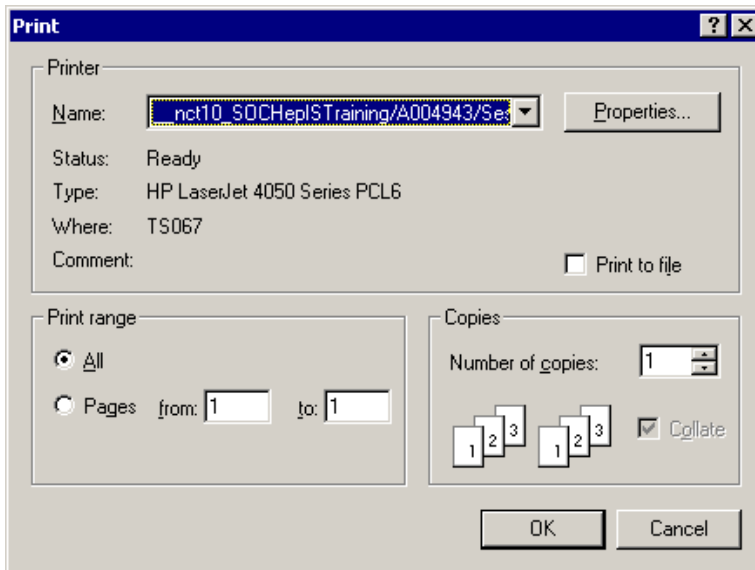
- Click on **Print Screen**.


The following screen will be displayed:



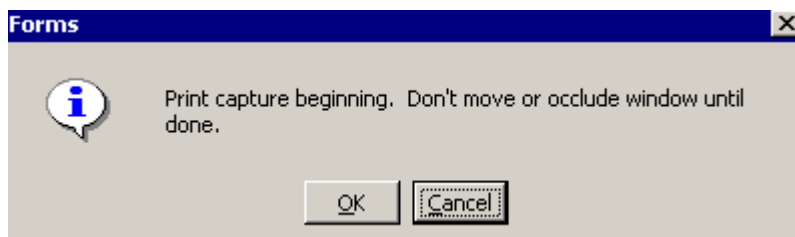
- Click on .

The following screen will be displayed:



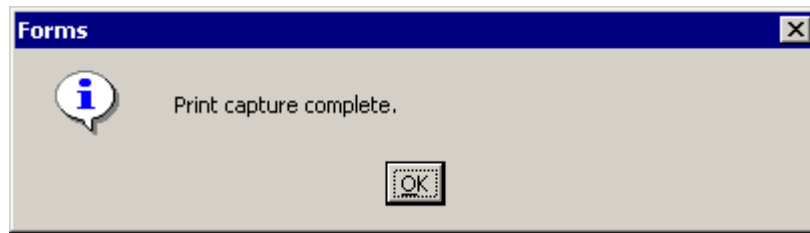
- Click on .


The following message will appear:



- Click on .

The following message will appear:

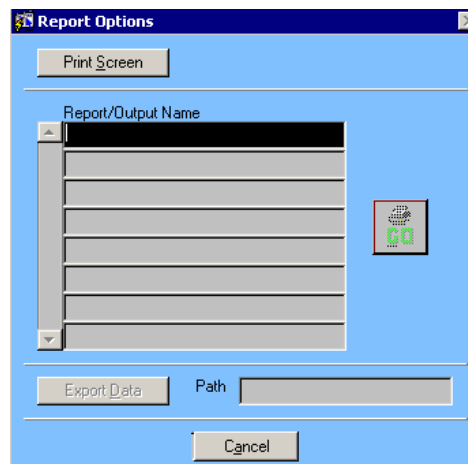



- Click on  and your screen print will be printed.

## Retrieve a Swift Report

- Click on  or .

The following screen will be displayed:



- Select the relevant report by clicking on it and click on .

# SWIFT PASSWORDS

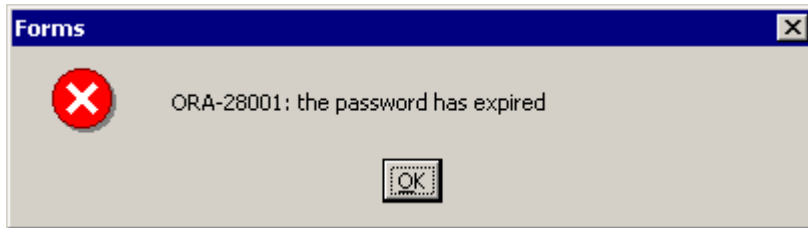
## Password Rules


Every 30 days your password will expire and you will have to choose a new one. You need to follow the rules below to ensure that your password will be accepted.

- ◇ Your password is unique to you and you should never disclose this to anyone. You should take care to ensure that it cannot be guessed by anyone else.
- ◇ Should not be proper names, birth dates or dictionary words.
- ◇ Cannot be the same as any of the previous 8 passwords used.
- ◇ Passwords must be 6 or more characters with at least 1 numeric, however numerics cannot be used as the first character/s of your password.
- ◇ Cannot contain consecutive characters which are the same e.g. RD11NML, KW7SSY.
- ◇ Punctuation characters can also be used, however these characters cannot be used as the first character/s of your password.

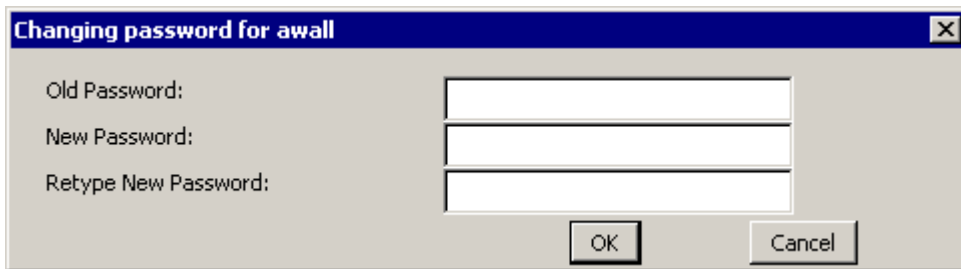
## Changing Your Swift Password

Every 30 days your password will expire and you will have to choose a new one. The following message will appear to tell you that you need to change your password:




- To change your password, click on .

The following screen will be displayed:



- Enter your Old Password, New Password and re-enter your new password in the Retype New Password box.

*Note:* your new password may be rejected by Swift if it does not comply with the rules outlined in *Swift – Basic Use of Swift - Password Rules* section of this manual. You will need to try again, with the password amended to conform to these rules.

- Click on .

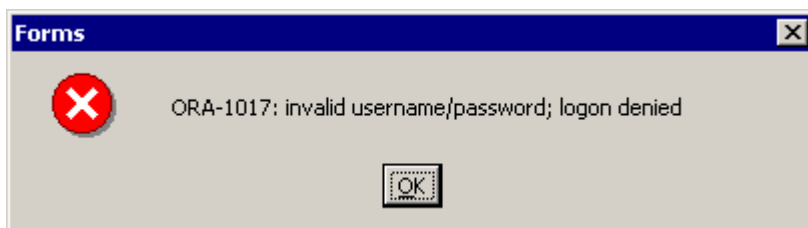
If you have been successful in changing your password your Launch Pad will be displayed.

If you experience difficulty in changing your password refer to *Basic Use of Swift - Problems Changing Your Password* section of this manual.

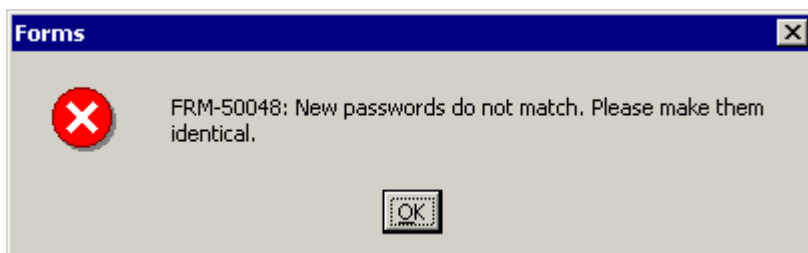
## Problems Changing Your Password

There are various reasons why your attempt at changing your password may fail. The following details the reason why you are unable to change your password and the error message that will display:

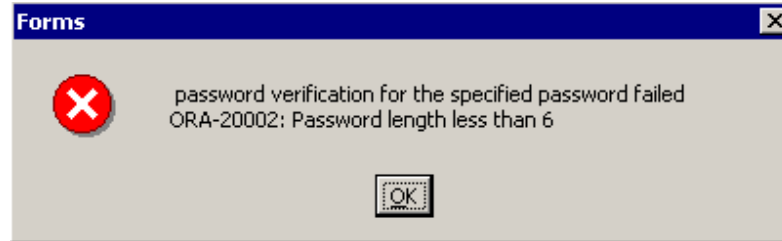
- ◇ You have entered your Old Password incorrectly:



- ◇ The information you entered in the New Password and Retype New Password fields do not match:



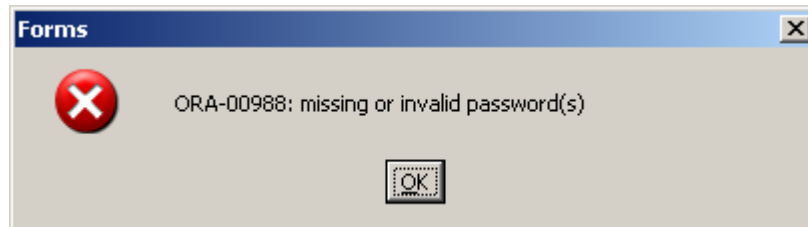
- ◇ Your password is less than 6 characters long:



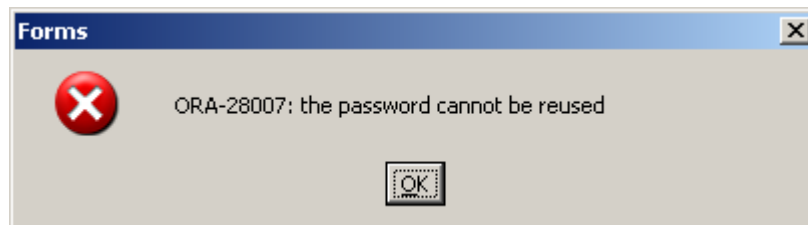
- ◇ Your password does not contain 1 or more numeric characters:




- ◇ You have used punctuation or numeric characters at the beginning of your password:



- ◇ You have entered a password that you have previously used as one of your last 8 passwords:



- If any of the error messages appear, click on .
- Enter your Old Password, New Password and re-enter your new password in the Retype New Password box.

If you continue to experience problems changing your password contact the Systems Support Help Line on (01670) 622 450.

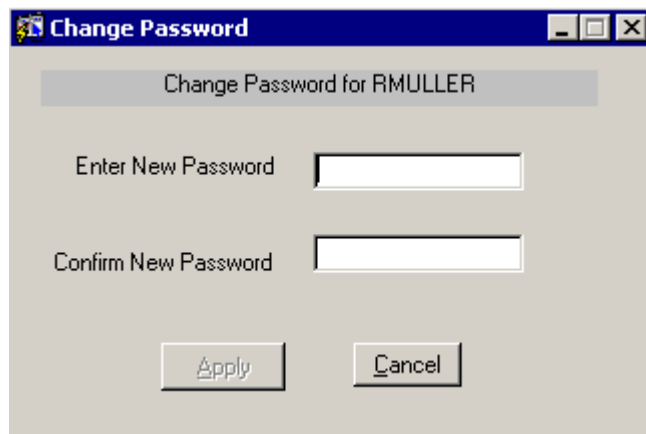
## Changing Your Password Before Auto Expiry


You can change your password before Swift prompts you at 30 days.

- From your Launch Pad click on **Configuration** on the menu bar.

- Click on Change Password.

The following screen will be displayed:






- Type your new password in Enter New Password and re-type your new password in Confirm New Password.
- Click on 

If you have been successful in changing your password you will be returned to Launch Pad.

If you experience difficulty in changing your password refer to *Basic Use of Swift - Problems Changing Your Password* section of this manual.

## EXITING SWIFT

- Click on  and select Exit from the menu, or
- Click on  in the bottom right hand corner of the Launch Pad.

*Note:* do not use the close button () to exit out of Swift as this will exit you out of the session incorrectly.