Web Documents

Version 6.x
User Manual

Web Documents Version 6.x - Table of Contents

About this manual

Overview

This section explains the features of this manual. It is intended to assist the user in getting the most out of Web Documents, by knowing how to use the manual effectively.

This manual describes and outlines the set up procedures, maintenance, and day-to-day use of Web Documents in a manner that will fulfil the business requirements of your company.

The user must ensure they have Adobe Acrobat Viewer Version 4 or above installed on their computer in order to display this PDF user manual correctly.

How to use this manual

Overview

Introduction

This manual has been written to assist in setting up and using the Web Documents system.

Access aids

There are various access aids to help you to find the information required.

- Table of Contents – The listing of this manual's content, which is located at the front of the manual.
- Topic titles – The major headings on each page, for example, the heading "How to use this manual" located on this page.
- Block labels – The minor headings on each page for example, the heading "Access aids" located on this page.

Web Documents

Overview of Web Documents

Web Documents offers the functionality to define filters in order to display a grid type list of all documents that exist within the database, which meet those filter criteria set.

The documents when linked to Star Projects masterfiles are marked as read only, given a unique code by the system that consists of a GUID, followed by the document name and the original extension of the file.

Details that the documents screen displays are:

- ID (optional)
- Project
- Project Description (optional)
- Client
- Client Name (optional)
- Phase
- Phase Description (optional)
- Resource
- Resource Description (optional)
- Budget
- Budget Description (optional)
- Category
- Context (optional)
- Name
- File Name (optional)
- Summary
- Task (optional)
- Task Description (optional)
- Task Template (optional)
- Task Template Description (optional)

The ID field displays the unique code given by the system that consists of a GUID to the selected document.

The project field displays the relevant project code that the selected document is linked to within the database.

The project description field displays the name of the project that the selected document is linked to within the database.

The client field displays the relevant client code that the selected document is linked to within the database.

The client description field displays the name of the client that the selected document is linked to within the database.

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The phase field displays the relevant phase code that the selected document is linked to within the database.

The phase description field displays the name of the phase that the selected document is linked to within the database.

The resource field displays the relevant resource code that the selected document is linked to within the database.

The resource description field displays the name of the resource that the selected document is linked to within the database.

The budget field displays the relevant budget code that the selected document is linked to within the database.

The budget description field displays the name of the budget that the selected document is linked to within the database.

The category field displays the relevant category that the selected document is allocated to within the database.

The context field displays the system allocated number relevant to type of link for the selected document within the database.
Context 0 = client, 1 = project or phase, 2 = resource, 3 = budget, 4 = task, 5 = task template document link.

The name field displays the short name given to the selected document within the database.

The file name field displays the original file name of the selected document within the database.

The summary field displays a summary of the selected document within the database.

The task field displays the relevant task code that the selected document is linked to within the database.

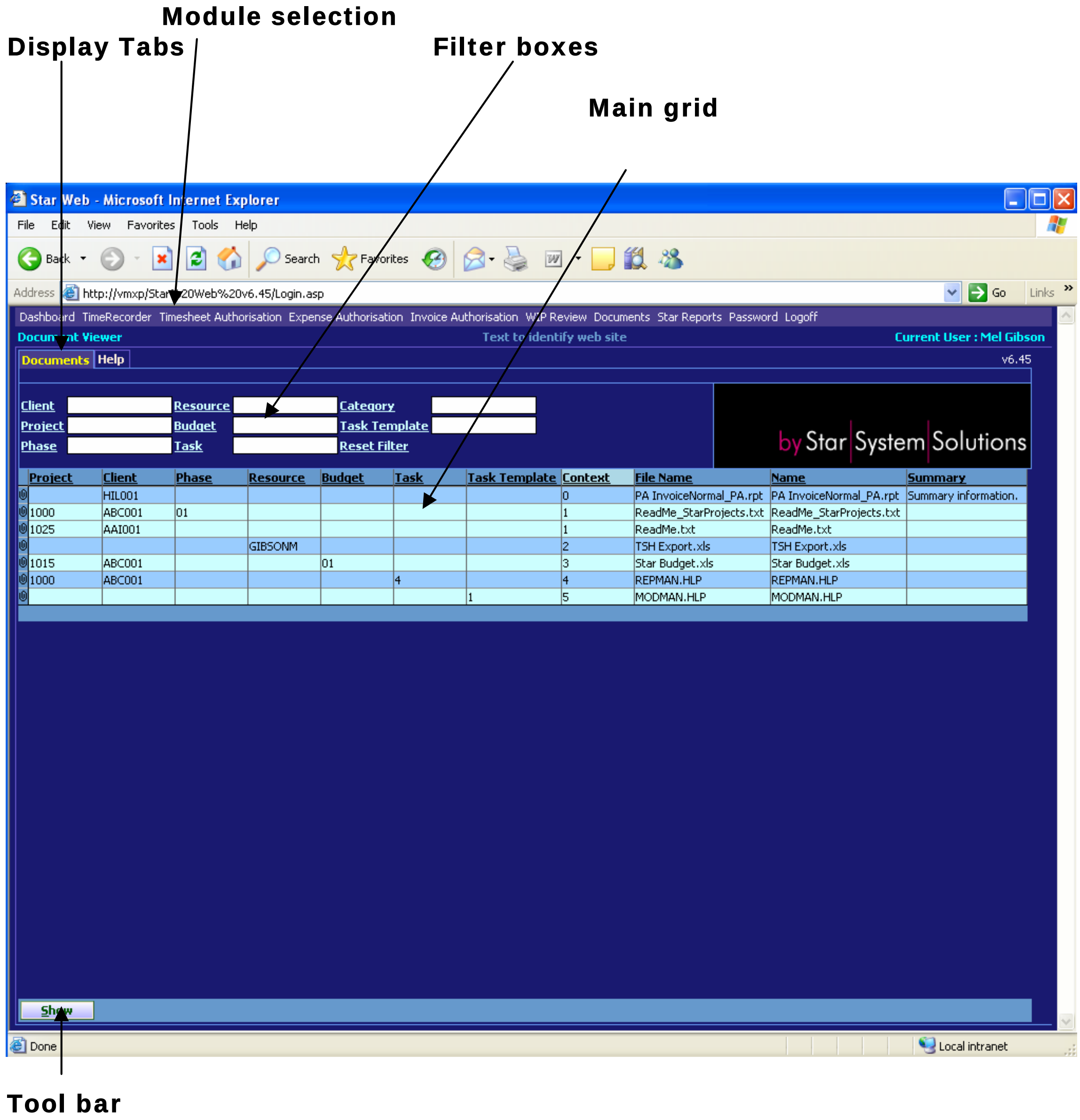
The task description field displays the name of the task that the selected document is linked to within the database.

The task template field displays the relevant task template code that the selected document is linked to within the database.

The task template description field displays the name of the task template that the selected document is linked to within the database.

Main screen

Web Documents – Main screen. The key functions and screen buttons are explained in the following diagram.



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Display Tabs – Enables access to documents and help.

Module Selection – Enables access to Documents module.

Filter boxes – enables selections to be made within the fields, which filter the documents that will be displayed. Documents can be filtered by Client, Project, Phase, Resource, Budget, Task, Category and Task Template.

Main grid – Displays the document line details for viewing.

Tool bar – Contains the show buttons which, when selected, displays the documents that match the filter criteria.

Moving around

Introduction

Web Documents provides a variety of navigational tools that will assist the user in moving around the system quickly and easily, including:

- Mouse and keyboard
- Data entry
- Common buttons

Mouse and keyboard – the user can use the keyboard to perform the same actions as the mouse. Some important keyboard actions are described below:

Keys	**Description**
Links	A link is an underlined word that can be selected using the mouse or enter key. Once actioned, a pop up list / window opens. Example: Client - will display the client search list;
F1	Display the online help for the Explorer program.
Alt Tab	Toggles between Web Documents and other open Windows applications.

Hot keys – A hot key is a combination of a, and the letter underlined in a button. Once actioned, a hot key will display a screen or perform the action required.

Data entry – data can be entered into the field on a screen two different ways; by direct entry, from a drop down list or pop up list.

- Direct entry – to enter text into a field place the cursor inside the field and type in the data.

- Pop up list – when a field label link is clicked on, the field is double clicked in or Ctrl + Z pressed a search pop up list box displays a list of options. The user selects an option either by using their mouse or using the keyboard tab and the enter key. Once selected the option will appear in the relevant field.

How to access and exit Web Documents

Introduction

There are two ways you can access the Web Documents, through your local LAN or through the Internet. Refer to the Web TimeRecorder Installation Guide for further information.

Conditions

The user must be set up in the external invoicing systems resource masterfile and have Microsoft Internet Explorer version 5 or later browser to access the Web Documents.

Procedure

How to log on:

1. From Microsoft Internet Explorer screen.
2. Select the File menu, select Open.
3. Enter the applicable Web Documents location based on how access have been setup;

   Access from the Local LAN - type the computer name eg. http://WEBSERVER1/WebTR
   Access over the Internet - type the fully qualified domain name (FQDN) eg.http://www.mycompany.com/WebTR

4. Select OK.

If the....	**Then....**
Star Web Log in screen appears.	you have accessed the Documents Web Edition site.

5. Enter the User Name, Password and select Log In.
6. Select from the list at the top the module Documents.

If the....	**Then....**
Documents Main screen appears.	you have accessed the Documents Web Edition.

Please note:

Integration with the Star System Solutions Pty Ltd's "Star Projects" allows the User Name to be either the Resource code or user name setup within the Resource Masterfile. The Module Manager / Settings / Login option determines the applicable user name. The Password is set within the Resource Masterfile.

Result: You have accessed the Web Documents.

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Procedure

How to exit:

1. From the Documents Main screen select the Log Off module selection.
2. Select Yes to confirm you want to log off.

Result: You have logged out of Web Documents.

Using Web Documents

Overview

Introduction This section explains how to use each of the different procedural functions within Web Documents.

In this section This section is divided into the following topics:

- ❑ Search links
- ❑ Parameters

Documents Functions:

- ❑ Show
- ❑ Open

Search links

Introduction

This section explains the search link maintenance functions available within Web Documents.

Condition

You must be logged into Web Documents. A field description must be underlined indicating a search link function is available, for example Client.

Procedure

For Example: To search and select a client code within the Documents filters.

1. click the Client or Tab to Client and press the Enter key to access the search link. Alternatively within the client field double click or press Ctrl + Z to access the search link.

2. The following screen will be displayed, listing a maximum 10 records at a time.

3. click on the code or name column heading to sort selected column.

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4. Use the search list of clients by drop down list to select the column you wish to search by, i.e. Code and where the column you which to search, i.e. Starts with.

5. Enter the search criteria in the field below the search options and select the Search button. The first 10 records that match the search criteria will be displayed.

Please note: The current field value can be set to default as the search criteria within the global settings, refer to the Star Web Install Notes for further information.

6. User the Next > button to scroll to the next 10 records and the < Previous button to scroll to the previous 10 records displayed within the search window.

7. 🖱 click the client code or client name to select the Client. Selection of a client closes the search link window and fills the Client field within the Documents filter with the selected Client.

Result: Clients have been search and required Client selected.

Parameters

Introduction

Module Manager parameters are normally setup by the Database Administrator, refer to the 'Web TimeRecorder Installation Guide' for further information.

Conditions

This option has significant effect on Web Documents and careful consideration has to be taken into account when any parameters within the system and field settings are defined or changed.

You must be logged into Module Manager and have the "Web Projects (WP)" module added, refer to the Web TimeRecorder Installation Guide section on Configuring using Module Manager.

Web Documents

Show

Introduction This section explains how to show documents within the database.

Conditions The user must be logged into Web Documents and have the appropriate security access profile that allows them to carry out this function.

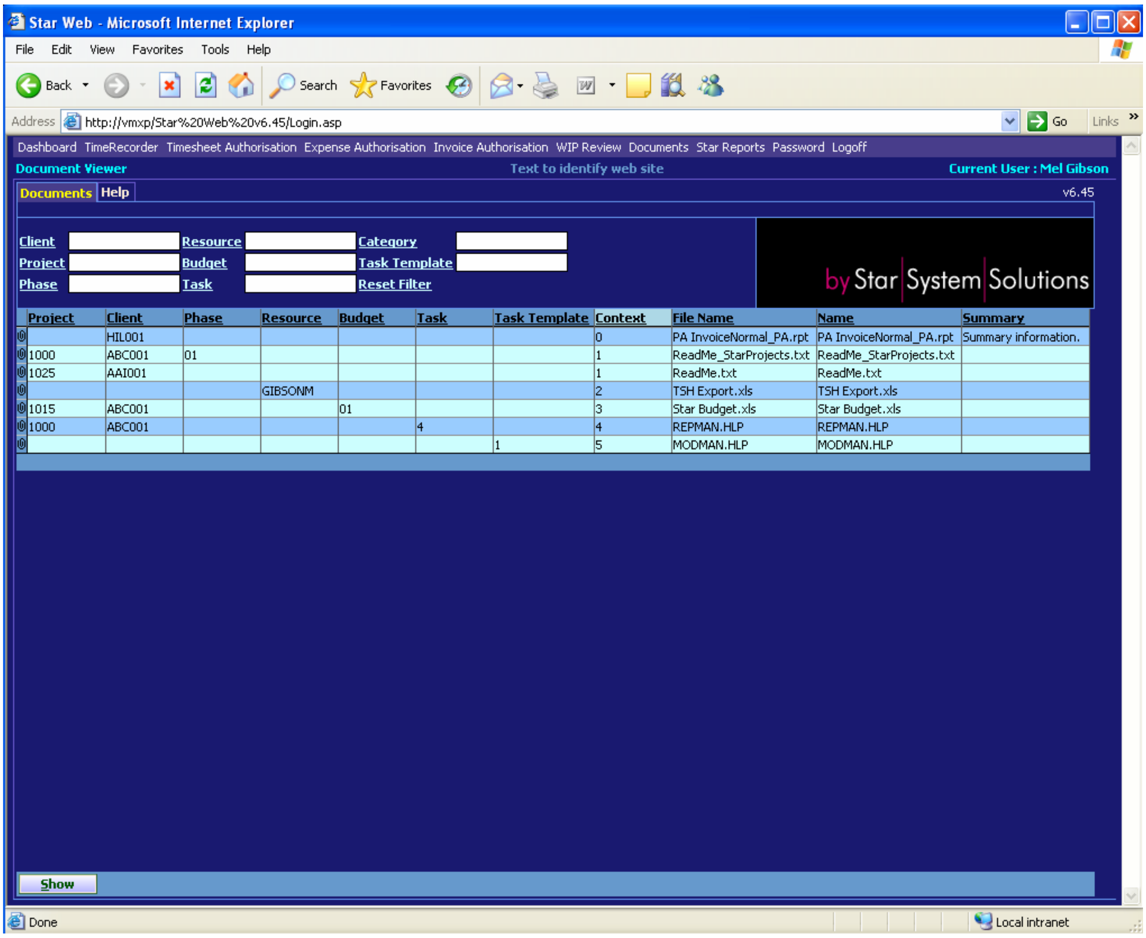
Procedure How to show documents.

From the Main screen:

1. Select the Documents module.

2. Use the search links to select the filter criteria as required for the Documents to be shown.

3. Select the 'Show' button to display within the grid all documents that meet the filter criteria.



Result: Documents within the database have been shown.

Open

Introduction This section explains how to open a document within the database.

Conditions The user must be logged into Web Documents and have the appropriate security access profile that allows them to carry out this function.

Procedure How to open a document.

From the Main screen:

1. Select the Documents module.
2. Use the search links to select the filter criteria as required for the Document to be opened.
3. Select the 'Show' button to display within the grid all documents that meet the filter criteria.
4. click on the paper clip at the start of the document line within the grid to be opened.

Result: The document has been opened.