ProteanPAPER's System Administration Guide

Introduction

 As you are reading this, you have access to ProteanPAPER's back office menu. From here you can setup everything you need to run your business. This guide assumes that you have just subscribed to the ProteanPAPER system for the first time. Thus, you have recently received a temporary password which you used to log into your company. You have clicked on the system admin. guide from the main menu and here you are, reading this. The first step, to secure your system, is to change your password. The temporary password was sent to you via e-mail and this may not be secure. Once you have changed your password, guard it carefully as anyone who knows a system administrator's password and user ID has nearly unlimited power as a system administrator.

You can change your password by returning to the main menu and clicking on the "change password" menu option. However, one really nice thing about using a browser based product like ProteanPAPER, is that you can open multiple windows into the software. So, open another window or tab in your browser by right clicking on the "Menu" button displayed on the heading bar showing in the upper right portion of every screen. When you right click, you will be shown a small window that you may select from "open", "open link in new tab", or "open link in new window". Click open in a new window. Now you have the new menu displayed and this guide is still open in the last window. You can switch back and forth between the two easily, or you can re-size the windows to show both on the same screen.

In the window with the menu, click on "Change Password". A very simple dialog window is displayed which shows your user ID and has three input fields. The first input field is labeled "Your Current Password" so type in or paste the temporary password you were given via e-mail when you subscribed to ProteanPAPER. The next fields are labeled "New Password" and "New Password Again". Enter whatever password you want to use into both of these fields, identically. Take care to select a password which is both easy to remember and, at the same time is difficult for anyone to guess. The password must be typed identically in both fields for the password to be changed. When you are comfortable with your selection, click on the save button. Provided the current password was entered correctly and the new passwords match, you will receive an acknowledgment screen and an e-mail will be sent to your e-mail letting you know that your password has been changed. The new password will not be sent to you, nor will it display anywhere. So, if you forget the password, there is nothing that can be done to retrieve it other than to contact the ProteanPAPER web administrator and try to convince them that you are the legitimate administrator and that your password should be reset.

If any person, other than yourself, should maliciously change your password, an e-mail will be sent to the system administrators address. This e-mail informs you of the change and is meant to alert you if you did not intend for your password to be changed. If this should happen, contact your ProteanPAPER web administrator immediately. The system admin. functions will be suspended until everything can be made secure again. (If any other user has been given administrator privileges legitimately, that person can be informed and can disable system privileges for your user ID also)

If you entered any information incorrectly while trying to change your password, simply click on the back arrow of your browser and try again. Retype anything you entered incorrectly and click the submit button again. You can continue this until you succeed.

Once your system is secured with a password known only to you, you can configure the rest of the system to allow for others to use it and to determine what the system will look like to customers and other users.

Moving On and Configuring Your System

Once the system has been secured for one or more administrators, you will want to configure the system for additional security, branding and user functionality. These first steps provide information to the ProteanPAPER system about your company and what you want the back office to look like. The list below highlights what you may want to do next. This may sound like a lot of work, and it is a significant effort, but you will be surprised at how fast you can get all this working. After the system parameters are configured, you will then want to configure the functional modules you have subscribed to, and begin the process of entering or importing data.

1. Sign up for an evaluation or a subscription to the ProteanPAPER system and the functional modules you want to use (shopping cart system, Production Activity Control, Checkbook and General Ledger, etc.). (we assume you have already done this.)
2. Use the "Change Password" function under "Company Settings" on the main menu to set a password for yourself that is different that the temporary password assigned in step one. (you will already have done this if you followed the steps mentioned in the introduction.)
3. Use the "Review Session Logs" function under "Company Settings" on the main menu to ensure no one other than yourself logged into the system prior to your changing the password. If someone did, that person had access to your e-mail. Make sure that this individual did not set up an employee with unauthorized administration privilege. The session log can be used to monitor usage of the system in the future if you have any concerns about unauthorized access to your company's data.
4. Use the "Contact Information" function under "Company Settings" on the main menu to enter information for your company. Most of this information is displayed on the header of each page of the ProteanPAPER back office. Some of the data may display on customer screens, so care should be exercised to make the information correct. For example, web site and e-mail information should be valid. All web site URLs used within ProteanPAPER should be complete. E.g. http://www.mywebsite.com   Pay particular attention to the fields

titled, "Private Contact E-mail" and "E-mail Contact Semaphore". These fields are used when the system is communicating vital system status. See the box below for a discussion of what an e-mail "Semaphore" is.

5. Use the "Employee List" function under "Company Setup" on the main menu to enter information about all the employees who will be using the system. Make sure that your information is accurate and that your e-mail semaphore is what you desire. In addition to being the administrator of the system, you are an employee and will receive system information periodically as a result of your use of the system. Again, read the box below if you are not clear about the meaning and use of an e-mail "Semaphore". Your administrator and employee semaphores may be different if you wish. It is not critical that all user employee information be entered at this time. However, it is useful if at least their name and company Id is entered as this information may be required as you enter more information in the function modules. For example, you may need to indicate an employee to be responsible for a work center.

6. Use the "Appearance and Colors" function under the "Company Setup" on the main menu to setup the color for the header bar, background and foreground colors for all system generated pages, and to upload or reference a Logo Image for the back office pages. These settings add a professional presentation to the system and lend authenticity to your system to make it more difficult for a malicious party to spoof your system to your customers or employees.

7. Use the "Manage Services" function under the "Company Setup" on the main menu to change the modules that you want to work with for your company. You can add new modules for either evaluation or for immediate application in your company.

After these steps are concluded, your company is setup. Now you will need to consult the user guides for each of the modules you selected to use and follow their setup procedures. These will include entering data or uploading data. The setup phase of any computer system is arduous, but the a well thought out setup on a well thought out system will deliver paybacks almost immediately. You will likely notice benefits to the organization of the data as you enter it and may find that even the setup process lends a degree of organization to your company that you appreciate.

The following paragraphs provide more detail about the seven steps summarized above. If you have any questions after referring to this guide, feel free to e-mail the ProteanPAPER web administrator for your system.

1) Establishing Your Company within ProteanPAPER

We are assuming you have already done this and can log into ProteanPAPER's Back Office menu system. However, if you can not, then go to http://proteanpaper.proteanlogic.com and click on the link "Evaluate ProteanPAPER for free". Follow the instructions there to create a bare bones company and a super-user (yourself) to administer the company. While you are at the home screen you can click on the links describing ProteanPAPER and its philosophies for a chuckle or two.

When you establish a company, you need to enter a few basic items. These are a code to refer to the company by, the company's formal name, and an e-mail contact for the administrator of the company (presumably your e-mail). It is very important that this e-mail be valid as you won't get very far with your company if it is not. You also have to supply information for the super user who will be administering the company (again presumably you). Enter a user name for the super user and enter his/her name. Then check the modules you will be using/evaluating for the company. Last of all click CREATE. This will set up the bare bones data base for you company.

You will get an error if the code you selected for your company is not unique. If this happens click the back arrow on your browser and select a different code. Assuming that your code is unique, you will get a screen indicating that the company was successfully created. Now you will need to open your e-mail reader and look for an e-mail sent to you by the ProteanPAPER robot. In this e-mail is some more disclaimer text and a temporary password for the super user. You need to log into your newly created company and change this temporary password as soon as possible. This ensures that the company is secure, even if someone had intercepted the e-mail. The temporary password is a random collection of numbers and characters, so you might want to cut the password from your e-mail reader and past it into the login screen for ProteanPAPER to eliminate any possibility of input error.

Once you are logged into ProteanPAPER's menu system click on the "Change Password" function and select a new password for the super user. Now your system is secured and you can begin the process of bringing your store online.

2) Change your Temporary Password

In step one, you were e-mail a temporary password. To ensure that your system is secure and remains that way, you should change your password as soon as possible. This is done by clicking on the "CHANGE PASSWORD" function under "COMPANY SETTINGS" on the main menu.

The change password dialog window has three input fields. The first input field is labeled "Your Current Password" so type in or past the temporary password you were given via e-mail when you subscribed to ProteanPAPER. Because the temporary password is a random collection of letters and numbers, you may wish to use windows the cut and paste functions (<ctrl><C> to copy and <ctrl><V> to paste) to enter your current password. The fields labeled "New Password" and "New Password Again" are used to enter your newly crafted password.

A password for a system administrator user ID is a crucial security element. The password should not be anything that can be easily guessed. Furthermore, care should be taken that no sees what you type when you enter it. If you choose to write down your password, make sure that location is private and you may wish to "encode" the password by transposing letters or something like that.

It is equally important that you remember the password. The password is necessary to perform setup functions, to maintain employee security parameters, perform data backups and other vital functions. If you forget the password, it is difficult to reset it without the web administrator's

assistance and that individual will likely require verification of your identity before a new temporary password will be issued.

Once the password is changed you will receive an acknowledgment screen and an e-mail will be sent to your e-mail letting you know that your password has been changed. The new password will not be sent to you, nor will it display anywhere.

If you will be a frequent user of the system, you may wish to create another user ID for yourself that does not have administrative privilege. That way, you can use the less powerful ID and password for your day to day tasks. This reduces the likelihood that anyone will discover your admin. ID and password. It also prevents the situation in which an admin. logged in browser is left unattended. It also eliminates the possibility that you accidentally change a system parameter during your day to day activities.

3) Review the Session Log for Your Company

This step is useful as it allows you to verify that no one gained access to your company's system while the temporary password was in effect. The Log is simply a list of all the persons who have accessed the company and data indicating the amount of time they were logged in. More than likely, if you are just establishing your company, there will only be a few sessions in the log and you should be able to easily verify that they were in fact you on line setting up the company. If a situation ever occurs where you suspect an unauthorized individual is gaining access to your system, you may review this log and check with the individuals at your company to determine if anyone is using an ID fraudulently.

4) Entering Your Company's Information

The company contact information is pretty self explanatory for the most part. Click on the "CONTACT INFORMATION" function under "COMPANY SETTINGS" of the ProteanPAPER menu. This page allows you to enter and edit the contact information. The company code cannot be changed and is shown for reference only. The company name should already be set from when you created the company. You can change it here if you need to. The Company EIN is the federal employee identification number which is used with payroll applications and which is a common requirement for company's that buy from you. (They have to report this number to the IRS). The company address is obvious. However, The Country, Foreign and Zip code fields might be confusing, especially if your company is located out of the United States of America.

Addresses used by ProteanPAPER will format in one of two ways. Either by the USA standards of City, State Zip code or by a non-formatted standard where state and Provence and postal code are entered in the field called "foreign". Which standard is used depends upon what the Country is. If the country is "United States of America", then the standard is the USA standard.

The Country field is a drop down combo box. Initially, the only country available is the United States of America. Sorry, if this seems USA centric, but this product was written in the USA on the assumption most users would be in the USA. To enter a country other than the USA, you must enter it into the shipping methods database for the shopping cart. The same limitation exists for your customers. The only options they have for selecting a country, are those you have

indicated that you ship to. So.... Make sure you enter a shipping method for all countries you expect to sell to on a regular basis.

Okay, presumably we have made it through the address section of the company contact information screen. Next enter the telephone numbers and the e-mail addresses and your web home web site. Your home web site does not need to be the same as the sales site. The public sales e-mail will appear on sales based communications. The web master e-mail will appear on communications pertaining to the web site itself and the private contact e-mail is used to communicate with the administrative contact for the company. (presumably you). A note of interest is the contact e-mail semaphore. This value will appear in the subject line of all e-mail to the company contact. So, you can use this in conjunction with your e-mail client to filter and mark these e-mails. This allows you to identify e-mails from ProteanPAPER as separate from all spam or other e-mails.

> **What is an E-mail Semaphore?**
> A semaphore is nothing more than a symbolic controlling device. The gates at rail rode crossings are called semaphores. An e-mail semaphore is a symbolic expression or abbreviation that appears in the subject of an e-mail. You can configure your e-mail client (MS Outlook, Outlook express, Eudora, Thunderbird, etc.) To recognize the semaphore and move all e-mails that contain the semaphore into a special mailbox. This is useful, not only to organize e-mails, but also to validate them, and to lend priority to them.

5) Grant Access to Other Employees so they can use ProteanPAPER

Now you need to let any additional employee's have access to your system. To do this, click on the "EMPLOYEE LIST" function under "COMPANY SETTINGS" of the ProteanPAPER menu. Here you will see a list of employees that have been entered for your company. At this point, the only employee will be the administrative super user (presumably you). Here you can enter more employees. Not all employees entered need be granted access to the ProteanPAPER menu. Certain modules may need the employee record to grant them access as a known user of limited functions (like interoffice communications, or the payroll system). Other employees may be given access to some but not all functionality within ProteanPAPER, while other employees may be given full access as backup administrators.

The employee list introduces you to the basic list maintenance methodology used throughout the ProteanPAPER system. Any time there is a list of data items to be maintained the way in which you view, add, and edit items on that list will be similar. It makes no difference whether the list is a list of employees, transactions, inventory items, news items, work orders, or anything else. Every list contains a column trailing bar. The left hand side of this bar will have a link called "Add Blank" and the right hand side will say "End of List". If the list is empty, this bar is the only thing displayed.

If there is at least one item in the list, a column heading bar will appear followed by the list items. The column heading bar has a left hand part containing the link "Add Blank" and a right hand part which displays the names for the columns of the list.

Each displayed list item also has a left hand part which displays action links like "Edit", "Copy", "Print" and so on. If you want to edit the list item shown, you click on the "Edit" link. If you want to create a new item on the link but start with data similar to the list item shown click "Copy". Depending upon your login privileges, some of these links may not be active.

If the list you are dealing with has a lot of items, the items will display by pages, where only a fixed number of items will appear on a single page. To access subsequent pages and more of the list items, the column trailer bar will have a link called "next items". Click on this to access the next page of items. Any page that has prior pages of list items will have a bar that appears above the column header bar with a link "previous items". Click that to access previous pages of items. In this manner, you can access all the items on the list.

Some lists will present a table of options at the top of the column headers. These options will allow you to change the way the items are sorted, displayed, or filtered. Not all lists will give you these options, but the larger lists most likely will. If you want a different list presentation, just change the parameters and click on the "Update List" button of the parameters.

When you click on "Add Blank","Edit", or "Copy", you will be sent to a page that is a collection of fields. It is in this field presentation that you actually enter and alter data for items on the list. In the case of the Employee list, you will see fields like Employee name, Address, Social Security Number, Employee number etc. At the bottom of the field presentation, you will see six action buttons. These buttons are almost always the same for all field presentations for lists. The buttons are
:
• UPDATE (4) - Which submits the data displayed, saves it in the database and then redisplays the field presentation for further changes. Often update is used to gain access to additional data or options based upon the date recently entered.
• SAVE THEN LIST (5) - Which submits the data displayed, saves it in the database then returns the browser to the list of items.
• SAVE THEN COPY (6) - Which submits the data displayed, saves it in the database, then creates a new item with data taken from the submitted data. This is useful when you are entering a lot of data items into a list that are similar and differ only by the contents of a few fields.
• SAVE THEN BLANK (7) - Which submits the data displayed, saves it in the database, then creates a new item with the data fields blank. This is useful when you are entering multiple data items into a list that are not very similar.
• SAVE THEN ASK (8) - Which submits the data displayed, saves it in the database, then displays an acknowledgment of the data update followed by a list of links giving you options for what to do next.

- CANCEL (9) - Which submits the data, but does NOT save it in the database. The browser is returned to the list and none of the immediately preceding changes made in the field presentation are captured to the database.

Most browsers will allow you to hold down the <alt> key and press a number between 4 and 9 to activate the corresponding form button. This makes a nice shortcut when you are keying in data.

Fields for pages that are not part of a link still follow the basic paradigm. There are no lists or additional items, but the data can be "updated", "saved", or "canceled".

The Employee fields are as follows:
- ❖ Employee Code: The unique ID for this employee used throughout the system. This is the code the employee uses to log in and is the code used as reference for all transactions within the company.
- ❖ Employee Name: The name of the employee as it is to appear in the system
- ❖ E-mail: The e-mail for the employee. Whenever the system needs to send a notification to the employee, this is where it will be sent. If ever the employee forgets his/her e-mail, when the password is reset, this is where the temporary password will be sent.
- ❖ E-mail Semaphore: This is the routing and identification phrase that appears in the subject line of all e-mails to be sent to this employee.
- ❖ Login Permission: This box must be checked for this employee to gain access to the back office of the ProteanPAPER system. If this box is not checked, then this employee is not considered a user of the system and the employee name is only used
- ❖ Supervising Manager: A select list indicating what other employee directly manages this employee. This is the manager responsible for reviews and handling personnel issues.
- ❖ Is Employee a Manager of Others: If checked, this employee appears as a manager
- ❖ Budgetary Manager: A select list indicating what other employee oversees purchases this employee requests.
- ❖ Is Employee a Budget Supervisor for Others: If checked, this employee appears as a budget authority.

6) Appearance and Colors of ProteanPAPER's Back Office

This page of fields is used to set parameters for the appearance of the pages throughout the system. The following parameters are available to implement either one large graphic header or a logo with contact information. There are two means to display your logo. One, is to reference the logo at some URL which is hosted elsewhere. The other is to upload a copy of your logo to the ProteanPAPER server. One point to remember, whenever you are accessing images on other servers, be sure and use the SSL path to those images. If you do not use an encrypted path, your company users and possibly customers will receive a browser message advising that there is both secure and unsecured items on the page. This message may scare away users who do not understand what it means.

For colors, a 6 digit hexadecimal value is used. The first two digits are the red intensity, the next two digits are the green intensity, and the last two digits are the blue intensity. Thus white is

FFFFFF and black is 000000. Bright red is FF0000, bright green is 00FF00, and bright blue is 0000FF. When all the values for the colors are identical you end up with a shade of gray for example, 3F3F3F is a dark shade of gray. You can change these values and click the update button to see the results.

7) Manage Services or Subscriptions to ProteanPAPER's Back Office Modules

The ProteanPAPER system is divided into modules. There currently are seven modules and many more are planned for a whole host of data purposes. It is unlikely that any single user will have use of the modules. Therefore, you can manage which modules you want included in your system. This keeps the system easier to navigate and more efficient. If you are using ProteanPAPER in a remote hosted situation, you will obviously not want to pay for any modules you are not using.

However, ProteanPAPER is designed as a try before you buy system. Meaning there is a relatively long free evaluation period. Even if you purchased a license outright for some or all of the ProteanPAPER modules, you may not want all the modules turned on. Again, the "MANAGE SERVICES" function under "COMPANY SETTINGS" is the place to select the modules you want.

For each module, the current status is displayed which lists a "paid through" date and indicates if any order is pending. For each module you may enable or disable the service. You can also select automatic renewal (only has meaning to remote hosted situations). A field to indicate the number of quarter years you wish to subscribe to is also included.

If you make changes to these settings that involve the ordering of additional services, you will be taken to the shopping cart system for the remote host where your shopping cart will contain the additional subscriptions you have ordered. The system keeps track of the free evaluation periods and ensures that you receive that period free of charge.