Company Creation Initial Procedures

Welcome to the ProteanPaper MRP/ERP system. Now that you have created a company in our database, the next step is to establish your company in the ProteanPaper system. This step by step guide will detail the necessary tasks, help you accomplish these tasks, and provide insight to completing particular operations in the ProteanPaper system. Once completed you will have created access for yourself, entered your business information, created access for your employees, and selected modules to evaluate depending on your company requirements.

Throughout this guide we make use of several assumptions about the user. First of all, we are assuming that the majority of our users are working in a MS Windows environment. Therefore all keyboard shortcuts, mouse controls, dialogue options, etc. are consistent with standards used in Windows.   Users of other operating systems such as OSX or Linux will likely know the equivalent action in their system.

The second assumption is the majority of users will be using Internet Explorer. ProteanPaper, being web based, is compatible with all operating systems and browsers. However specific commands vary by operating system and browser. Once again, the actual procedures for completing any given operation in a browser are generally very similar but ultimately the user will need to determine how to complete these commands.

Finally, it is assumed by virtue of access to this guide you have already completed the steps to create a company in the ProteanPaper database. If you have not completed these steps already, please visit the Company Creation Page to get started. Should you require help or have questions about the company creation process please let us know by email at help@proteanpaper.net.

Let's begin by logging into ProteanPaper for the first time.

Step 1 - Log Into the ProteanPaper System

The email you received after the creation of your company contains a few necessary pieces of information to get started. This information will allow you to log into the ProteanPaper system. First, find your Company Code, Super User ID, and Super User Password (Figure 1). The password has been randomly generated and needs to be entered exactly as shown. We suggest you copy this information by highlighting the password, right clicking the password, and selecting copy. You may also use the keyboard shortcut ctrl+c.
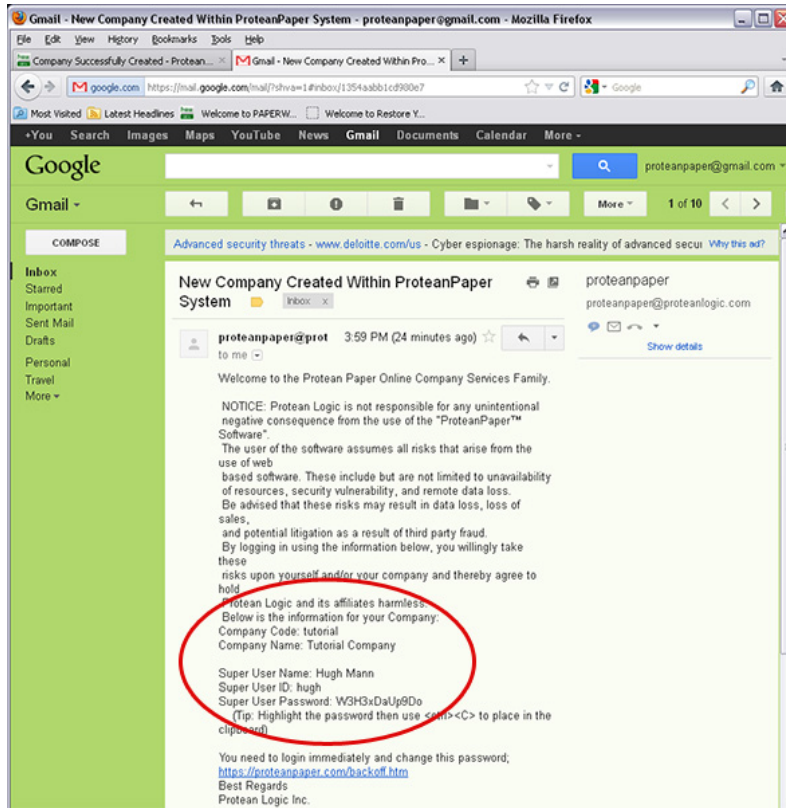
Figure 1 - Company Information

Click on the link at the bottom of the email to be taken to the login screen or enter the address in your browser https://www.proteanpaper.com/backoff.htm. Enter the required information into the appropriate fields. If you chose to copy the password from the email, simply right click in the Password field and select paste or place the cursor in the password field and use ctrl+V. Once the required information is entered, click the Login button.

Step 2 - Complete the Outstanding Employee Checklist Items

After the login is complete you will enter what is known in the ProteanPaper system as the BACK OFFICE. All services that you have subscribed to will be available as modules in the BACK OFFICE. Since this is the first time you have entered the BACK OFFICE in your newly created company, the only module available to you at this point is Company Administration and User's Information. Depending on which services you subscribe to (Section 5) different modules will become available as appropriate.

Change Password
During the initial setup of your company, checklists will appear to help guide you through the process (Figure 2). The first order of business is to complete the items on the New Employee Checklist starting with changing your password. The computer generated password you were given when you created the company will likely be difficult to remember and cumbersome to use. Choose a new password by clicking on the Change Password link in the New Employee Checklist.
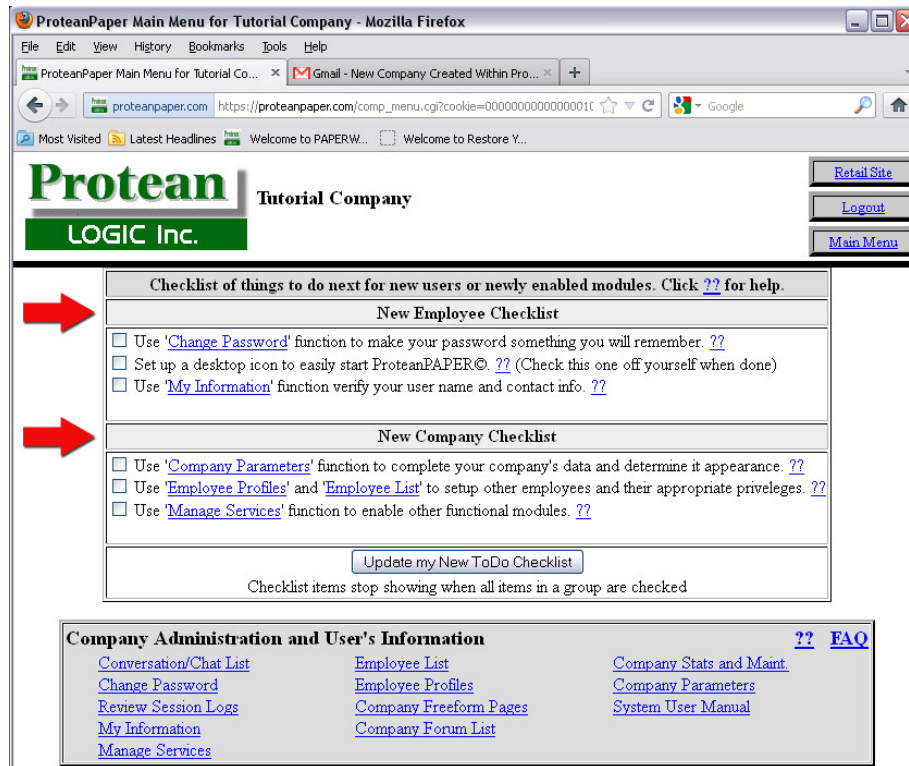
Figure 2 - New Company Checklists

Your current password, from your company creation email, should already be entered. If not, enter it in the Current Password field. Enter your new password of choice into the New Password field and once more in the New Password Again field. The two passwords must match precisely; this insures you have entered the password of your choice even if you make a typographical error. Click the SAVE button to complete the process and return to the BACK OFFICE main menu. You will notice the box has now been checked indicating you have completed the procedure successfully and may move on to the next item.

Desktop Shortcut Icon

Creating a shortcut icon is the next step in the New Employee Checklist. A shortcut will allow you to access the ProteanPaper system from a location on your local computer which is convenient and easy to find. This step is optional, complete only if you want to make a shortcut outside of your browser.

A shortcut icon can also be created on your desktop, or any other directory you choose, on a local machine. Most browsers allow you to simply drag the favicon (Figure 3) directly from the address bar to any open area outside your browser window.
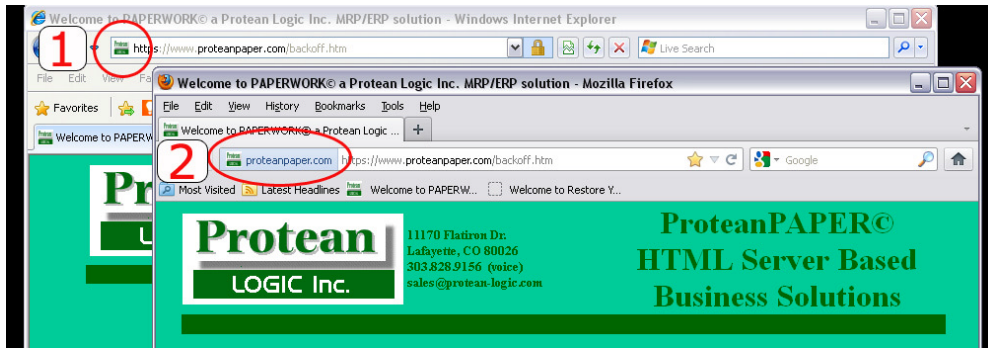
Figure 3 - Favicons in 1. Internet Explorer & 2. Firefox

Creating an icon in this fashion will supply all the necessary information automatically without user intervention (Figure 4).

Alternatively, one may create a shortcut from scratch. Start by right clicking any open area where you wish to create the short cut (Figure 5). Select New then the Shortcut option. A dialogue box will open to help you create the icon at this point (Figure 6). Enter the address: https://www.proteanpaper.com/backoff.htm into the location field. This address will take you to the login screen for access to the BACK OFFICE. Click Next to continue. Give the shortcut a name of your choosing such as "ProteanPaper". Click on the Finish button to complete the shortcut creation.

Now that the icon has been created, you may also change the appearance of the icon if desired. Right click on your shortcut and select Properties from the drop down menu. Click on the Web Document tab in the dialogue box and click the Change Icon button. Select a new icon from the available options or click Browse to select a different image stored on your local machine. Click OK when done to apply the changes (Figure 7).
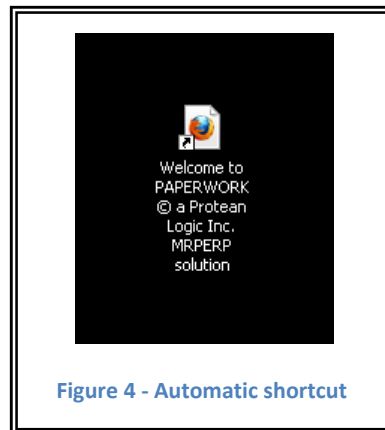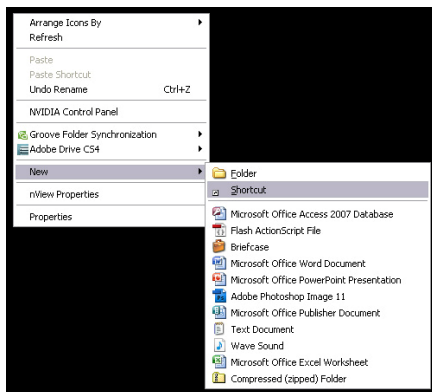

Figure 4 - Automatic shortcut

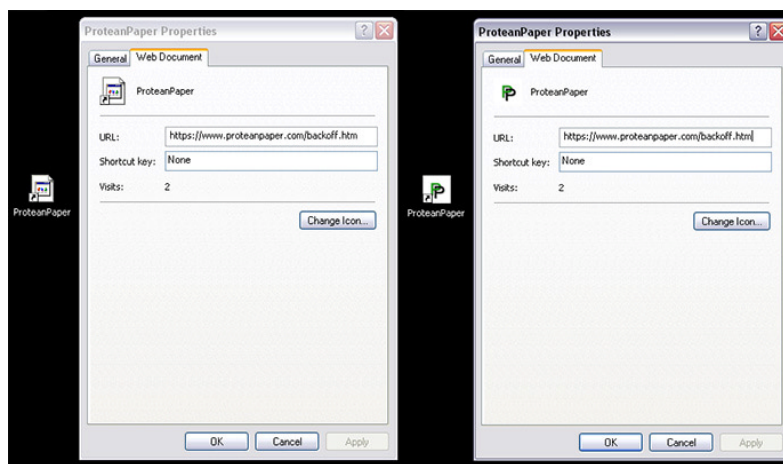Figure 5 - Creating a new shortcut

Figure 6 - Shortcut dialogue

Figure 7 - Before and after icon selection

In addition to the shortcut icon, most users also create a bookmark within their browser. Creating a bookmark should be a simple process which we are assuming you can already accomplish using your favorite browser. Due to variances in the many available browsers which may be used, the process will be left to the user to determine the exact method. The page you should bookmark is: https://www.proteanpaper.com/backoff.htm

Once these tasks have been completed click the checkbox in the New Employee Checklist.

Verify Your User Name and Contact Info
The last task on the New Employee Checklist is to verify your information. Click on the 'My Information' link in the New Employee Checklist to get started. Enter changes as needed in the Employee Name and Email fields. You may also choose an Email Semaphore at this time. This value will appear in the subject line of all emails to the company contact. You can use this in conjunction with your email client to filter and mark these emails. This allows you to identify emails from ProteanPaper as separate from all spam or other emails.

When you have finished editing these fields, click on the UPDATE button to save your changes. You may also click on the SAVE THEN MENU button which will return you to the BACK OFFICE

main menu once the changes have been saved. The New Employee Checklist will update with a check mark at this time indicating the task has been completed.

Update the To Do Checklist
Now that these three tasks are completed you may remove them from the BACK OFFICE. You may need to re-check the desktop icon setup item in your checklist at this time. Once all three items are marked as complete, click the Update My New ToDo Checklist. Note that all three tasks must be marked to clear the list at this time.
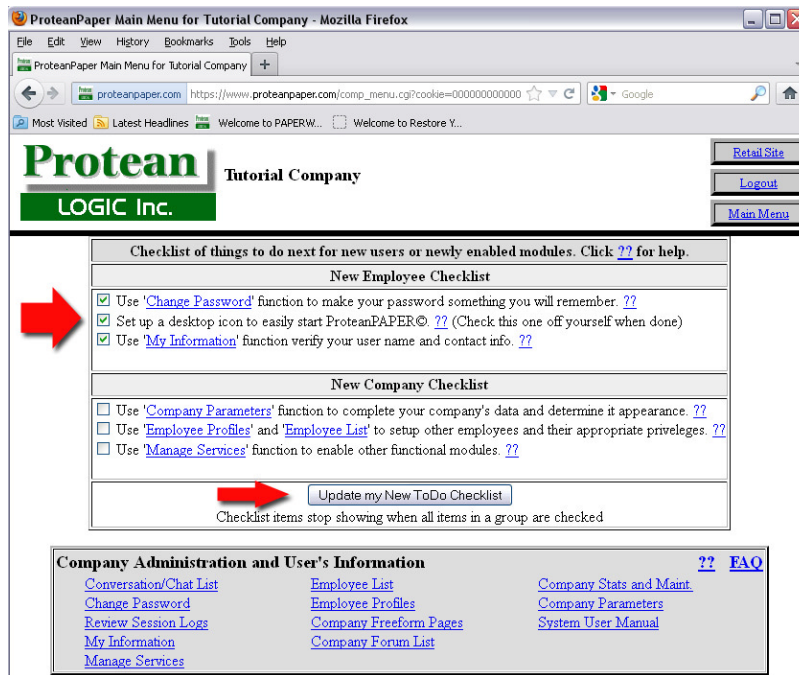
Figure 8 - Clearing the Checklist

Step 3 - Complete the Outstanding New Company Checklist Items

The next step in completing the setup of your company is to finish the tasks in the New Company Checklist. Here you will set the information about your physical company, add new employees as required, and determine which package of modules to purchase based on your company's needs.

Set Company Parameters
Begin by clicking on the Company Parameters link in the New Company Checklist. The following screen(Figure 9) will allow you to enter vital information about your company.
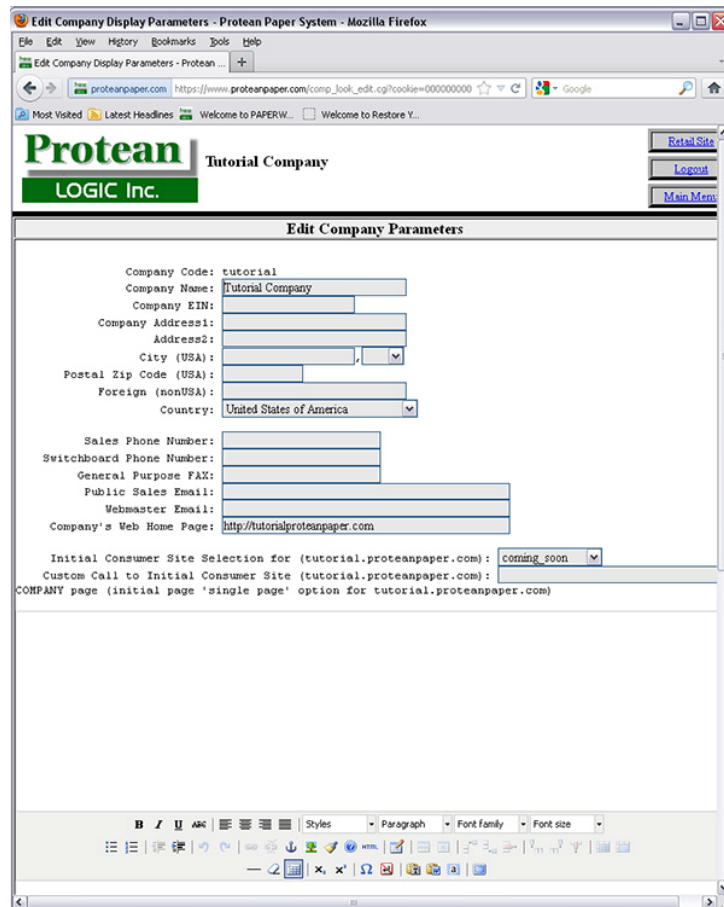
Figure 9 - Company Parameters Screen

Company Code – This code was created when you signed up for service and can not be changed.

Company Name – The full name of your company. The information entered in this field will be used on all company documents (invoices, packing slips, etc.) as well as on all BACK OFFICE pages.

Company EIN – EIN or Employer Identification Number is the number assigned to you by the federal government for tax, payroll, and other purposes. Sole proprietors in the US often use social security numbers only.

 Company Address – The physical location of your company. Multiple lines have been provided. 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 province and postal code are entered in the field called "foreign". Which standard is used depends upon which country has been selected.

Phone Numbers – Enter your telephone information here.

Email Address – General email addresses may be entered here.

Company Web Home Page – This field will be populated with your current ProteanPaper assigned web address. If your pages are already being hosted elsewhere you may enter the address here.

Initial Consumer Site Selection for (default web site) - Several options are available to present your site at this time (Figure 10). Available options are "coming_soon", "down_for_maint(enance)", "store_search", "single_page", and "custom_call". Option descriptions are as follows:

Coming Soon – Displays a message indicating your site is under construction.
Down for Maintenance – Displays a message indicating your site is down for maintenance.
Store Search – Will display your site in the normal fashion presuming you have the Shopping
     Cart module enabled.
Single Page – Displays the page you created using the rich text editor found in the COMPANY
     PARAMETERS.
Custom Call – Will set your page to display based on the address you provide in the "Custom Call
     to Initial Consumer Site" field.
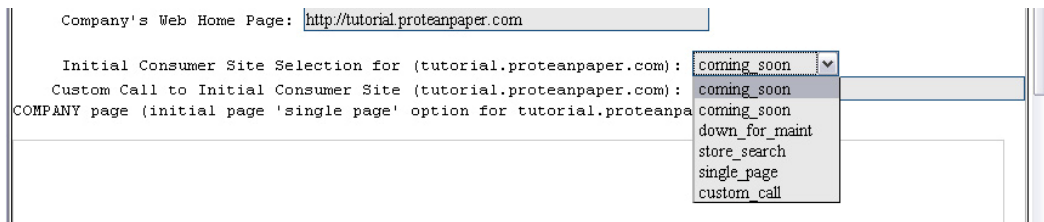
Figure 10 - Site display options

Initially your site may have very little content to display to your customers. You may wish to use the coming soon option until you are ready to present your site. These options may be changed at any point by selecting a new choice from the drop down menu.

Shipping Weight Unit – Shipping weights will be standardized across your company based upon the choice made here. Weights can be set as Kg (kilograms), lbs (pounds), and oz (ounces). Pick the method that works best for you and avoid changing once inventory is added. For example: An item entered as 1.0 lbs will retain a value of 1.0 rather than automatically change to 16 oz. if this value is changed to oz. at a later time. In our example the new weight would be 1.0 oz and you would need to change the weight manually for each item in your inventory.

Private Contact Email – Enter an address used for communicating with the ProteanPaper staff.

Contact Email Semaphore - This value will appear in the subject line of all emails to the company contact. You can use this in conjunction with your email client to filter and mark these emails. This allows you to identify emails from ProteanPaper as separate from all spam or other emails.

User Password Expiration – The value in this field represents the number, in days, you may set to require a new password be generated.

Foreground and Background Colors - These options allow the user to change the appearance of all back office pages. Foreground and background color can be selected in hexadecimal format and entered into the appropriate field. In addition one can choose a color by simply clicking on the small color pallet and selecting the desired color. Once selected, these changes take effect after updating the page using the **UPDATE** button at the bottom of the page.

Background Image - A background image may be selected to replace a solid color background. These images can be uploaded directly from your computer in .jpeg, .bmp, .gif, .tiff, .png, and others. Background images will repeat to match your display size. We would suggest avoiding an animated background, such as an animated .gif, due to the fact that it becomes very distracting on the screen.

In order to upload an image, select Upload from the drop down menu, click the Browse button for local image path, select the image file on your local machine, and finish by clicking open in the windows dialogue box. This will display the path to the file on your local machine in the local image path field. Save your changes by clicking the UPDATE button the bottom of the screen. Your background image will now be set to shown by default. Selecting hide from the Use Background Image drop down menu will retain the image while hiding it from view on your pages. In order to show your image again on back office pages, simply select show in the drop down menu. To remove the image from memory as well as pages, select delete. A different image may be selected at any time by repeating the upload process mentioned above.

*It may be necessary to refresh the page in your browser in order for the image to properly display on your local machine.

Header Logo Image - The header image is displayed in the upper left corner of all back office pages (Figure 11). Header images can be selected using the same methods described in the background image section above. Header images are best displayed in 225(w) x 100(h).

Saving Your Data – If you have not saved your changes already, do so now. This may be done in two ways. First you can click the UPDATE button at the bottom of the page to save your changes while remaining on the Company Parameters page. The second method is to click the SAVE THEN MENU button which will save your changes and take you to the BACK OFFICE main menu. Once your information has been edited and saved return to the BACK OFFICE main menu. A check mark will appear in the New Company checklist indicating you have completed the Company Parameters task.

Grant Employees Access to ProteanPaper

Now you need to let any additional employee's have access to your system. Start by creating a few employee profiles if desired. Employee Profiles will determine levels of access granted to

employees. The default profile is SUPERUSER. Should you wish to grant total access to all functions in the back office to any employee able to log in, then you need go no further with profiles and may skip to EMPLOYEE LIST below. Should you desire to limit access to various functions to an employee now is the time to create a new profile. Start by clicking the EMPLOYEE PROFILES link in the New Company Checklist in the BACK OFFICE.

Employee Profiles - The only profile available at this point is the default SUPERUSER profile. Create a new profile by clicking on the Add-Blank link. Modify the profile name and description as needed, check the appropriate boxes to grant access, and update to save your changes (Figure 4).

Figure 12 - Creating Employee Profiles

Until specific modules are chosen, such as Shopping Cart or General Ledger, the options available will be limited to only necessary company functions. Once new modules are purchased, new access options will appear related to the functions of the new module. During your initial setup it may be wise to grant access only to employees which will help configure your ProteanPaper system.

Once the Employee Profile has been created save your changes by clicking the UPDATE button. If you wish to create more profiles at this time you may click the SAVE THEN LIST button to return to the Employee Profile list. Repeat the process as necessary until all the initial profiles needed have been created. Return to the BACK OFFICE main menu when finished.

Employee List - Now that the proper profile has been created, return to the BACK OFFICE and click EMPLOYEE LIST link in the New Company Checklist. 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 (you). Add a new employee by clicking on Add-Blank . This will create a new record in which you will need to enter all information and login permission to the new employee (Figure 13). Not all employees entered need be granted access to the ProteanPaper menu.

Figure 13 - New Employee Menu

Fill in the required employee code (of your choosing), name, email address, and email semaphore. Should the employee perform a job which requires access to the BACK OFFICE, check the Login Permission box. Now is the time to use the profile you created above to grant specific permissions. Using the drop down menu at the Access Profile field, select the desired profile for this employee. Further information, such as supervisory duties, budgeting authority, and communications access can be granted below. Update, using the button at the bottom of the screen, to save changes. Repeat as needed until you have entered all new employees then return to the BACK OFFICE main menu. The New Company Checklist will be updated with a check for Employee Profiles and Employee List indicating you have completed the task.

Manage Services

The final step on your New Company Checklist is to choose the services you wish to evaluate. Begin by clicking the Manage Services link in the New Company checklist. A new screen will appear which will allow you to change your service options (Figure 14).

Subscriptions to the ProteanPaper system have two parts, Package and Service Level. Packages offer access to modules in the system such as the Shopping Cart, General Ledger, A/R , A/P, and others. Depending on your needs it should become evident which Package will work best for you.

Currently your package will be "Just Getting Started". Access in this package is limited strictly to essential company configuration functions only. A new package must be selected which will grant access to other modules in the ProteanPaper system for evaluation. Take a few minutes exploring the options in the drop down menu. When you have decided on a package that works best for you; click the Check to Modify Services box, select the package, and move on to the Service Level options.

The second part of your subscription is to select a Service Level option. Service Levels will determine how much database storage space you are allowed on the server and the amount of screens which are printed (page draws) in a quarter.

Consider how much storage space you may need. If you are building a site or using modules which require many images, such as the Shopping Cart module, your storage space needs will be greater than using just the Checkbook module. Data, in the form of text, takes up relatively little space by comparison.

Page draws measure the amount of screens which have been printed (displayed) either internally or externally by the ProteanPaper system. A term you may have encountered before with another service or with webhosting is bandwidth. Essentially the same idea applies here, the more traffic within or to a site increases the amount of resources consumed by said site. Determining the actual number of page draws you may require may be difficult initially however you can adjust this level based on usage once you have a better idea how many page draws are actually being created.

The default Service Level is set to Just Starting. A very limited amount of storage (5MB) and page draws (300) will be allowed with this setting but will provide more than enough resources to complete the tasks in this guide. Service Level can be changed by selecting the desired option from the drop down menu.

Finally, enter the number of quarters you wish to subscribe to at this time in the Add Quarters of Service field. Minimum amount of quarters which can be entered is one. Maximum amount of quarters in the evaluation period have been limited to four. Once the Package and Service Level have been selected, click the Accept Changes button. You will now be taken to the checkout screen to complete your order.

Cancelling your subscription to the ProteanPaper system can be done at any time. Check the Modify Services box, Check the box marked Cancel your ProteanPaper Subscription, and click the Accept Changes button.   This will cancel all active Packages and Service Levels subscribed to. If you are still in your evaluation period you will be issued a full refund. Subscriptions outside the evaluation period will not renew at the end of the quarter and no refund will be applied.

Update the New Company Checklist

After you have completed the above new company tasks all three items should now be check marked in your New Company Checklist. If they are not, complete the tasks or simply check the box manually if needed. Finish by clicking the Update my New ToDo List. Depending on the subscription new checklists will appear associated with the modules purchased. Further guides will detail these specific modules.

Step 4 – Accessing Help Functions

Further support details may be found by visiting the FAQs (accessed by clicking the FAQ link in the BACK OFFICE) or by utilizing the online users manual (click the ?? link for content specific search). Questions may also be directed by email to help@proteanpaper.net. We trust you will enjoy using this program and welcome any suggestions or comments you may have.