ProteanPAPER's System User Guide

Introduction

 As you are reading this, you have access to ProteanPAPER's back office menu. From here you can setup your personal parameters to interact with your business. This guide assumes that you have just been given access 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 user 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 your password and user ID has can act on your behalf.

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 your e-mail 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.

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 your personal information.

Moving On and Configuring Your System

Once your access has been secured, you will want to verify the information the system contains about yourself.

1. Get Access 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 this has already been done.)
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 "My Information" function under "Company Settings" on the main menu to enter or verify information about yourself. Pay particular attention to the fields titled, "E-mail" and "E-mail 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.

After these steps are concluded, you are setup within the company. Now you will need to consult the user guides for each of the modules you have been given access to.

The following paragraphs provide more detail about the four 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) Getting Establishing within ProteanPAPER

We are assuming this has already been done and can log into ProteanPAPER's Back Office menu system. However, if you can not, then you must contact your ProteanPAPER web administrator. He/She will give you a user ID and a temporary password. At the same time the administrator will also grant you appropriate access the the functions you need to work with the system.

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 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 any functions within the system. 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.

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 Information

Your contact information is pretty self explanatory for the most part. Click on the "MY INFORMATION" function under "COMPANY SETTINGS" of the ProteanPAPER menu. This page allows you to enter and edit the contact information. The Employee code cannot be changed and is shown for reference only. Your Employee name should already be set from when you created the company. You can change it here if you need to.

The e-mail is used for communications pertaining to the web site itself. 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.

Understanding the List and Field Interfaces

Throughout the ProteanPAPER system, you will be interacting with various lists of data. The same basic list maintenance methodology is 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.

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.

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".

Spend a few minutes interacting with some of the data functions. You will become comfortable with the interface very quickly.