

Training Documentation

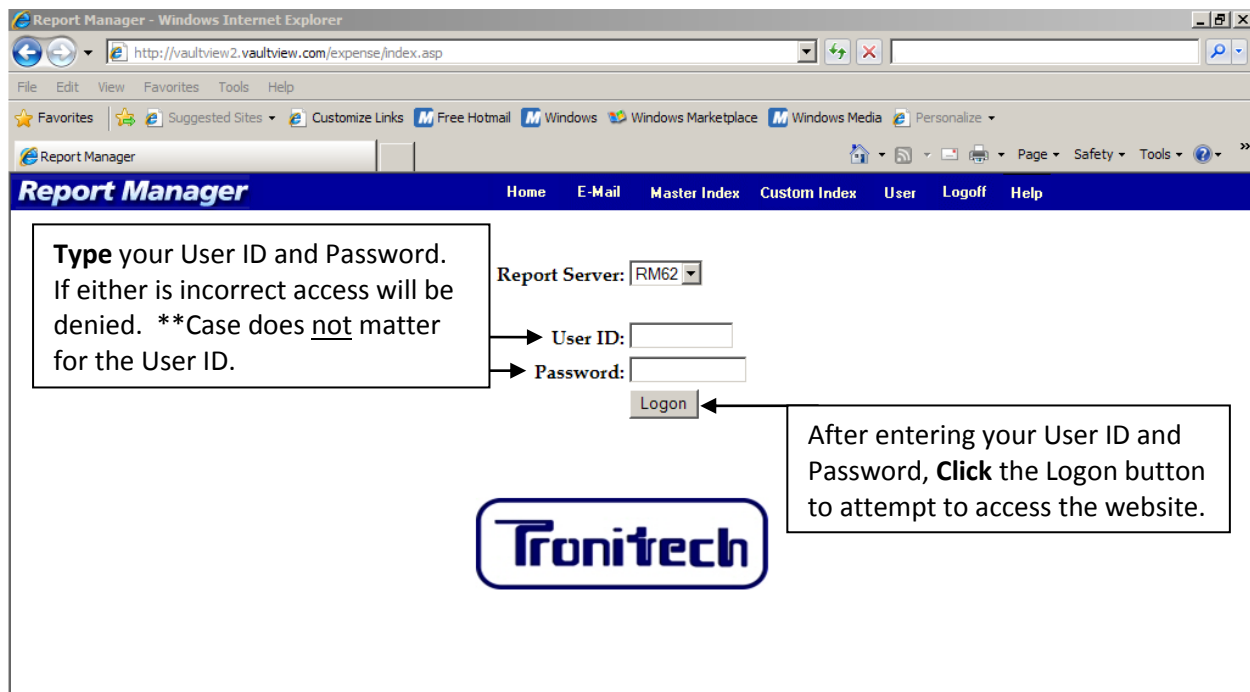
The Report Manager Plus (RM Plus®) training guide for is for end users which need assistance accessing and using their company's RM Plus® website. The examples of functionality in this document are below:

- [The RM Plus® Website](#)
- [Basic User interface](#)
- [Extended Features](#)
- [The Adobe viewer](#)
- [Web Browser Settings](#)
- [User Administration](#)
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RM Plus® Website

To access the RM Plus® website open Internet Explorer and enter the correct URL in the Address Bar. The typical website syntax starts with <http://vaultview2.vaultview.com/> but each customer has a different suffix. The example shown below is using <http://vaultview2.vaultview.com/expense> which will allow the user to search for their Expense Reports. Please contact your sales representative or support@tronitech.com if you need your URL.

Enter Username and Password



Type your User ID and Password.
If either is incorrect access will be denied. **Case does not matter for the User ID.


Report Server: RM62

User ID:

Password:

Logon

After entering your User ID and Password, **Click** the Logon button to attempt to access the website.



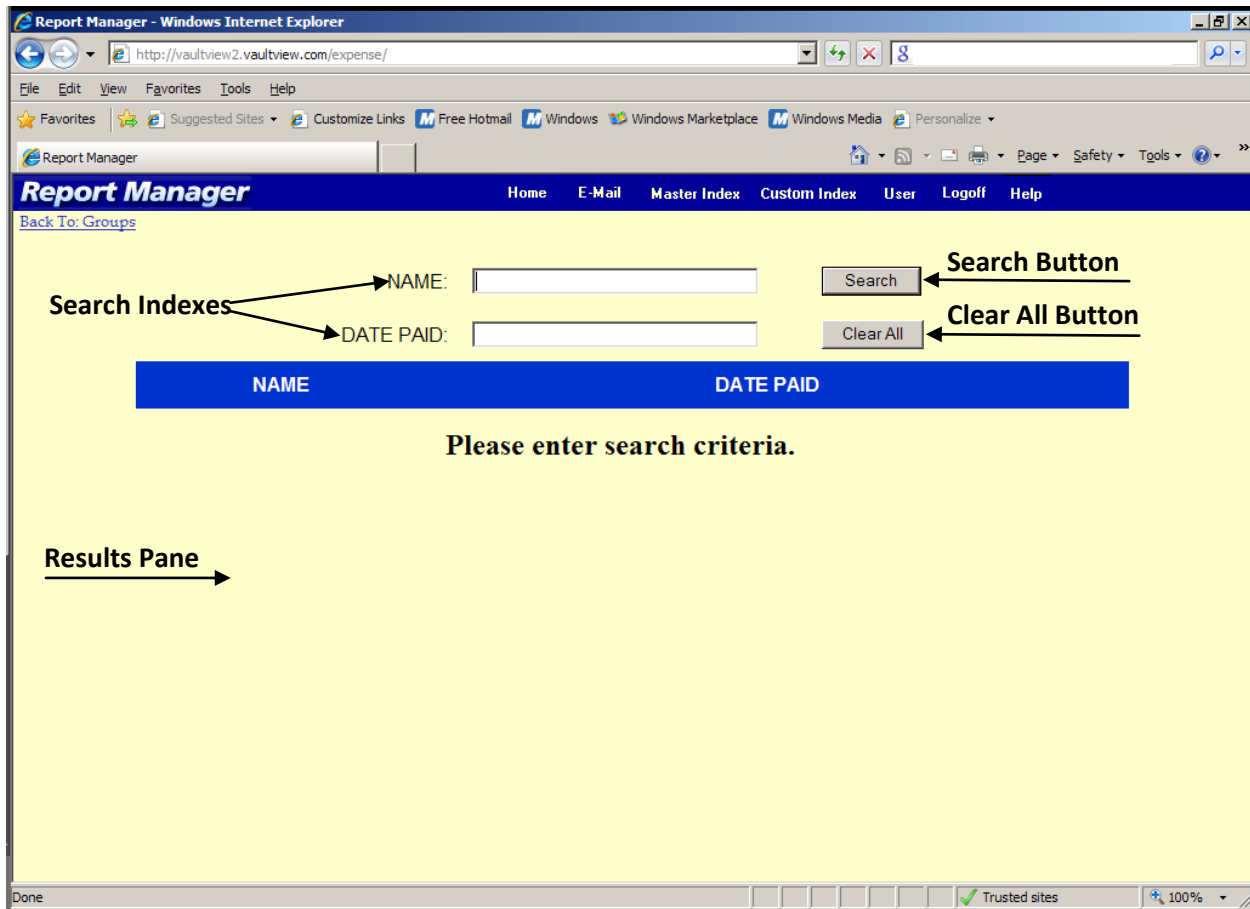
The following Warning Message normally refers to an incorrect User ID or Password:

If you see this message, click OK and re-enter your User ID, Password and click the Logon button again.



RM Plus® Interface

The RM Plus® user interface can have many different tools which differ for each application. A typical user interface is below:



Search Index

Use each search index to hunt for the document(s) you are looking for. Searching with one or more index will help to narrow the result. The wildcard character to help searching for a range of documents is the %.

[Search Button](#)

The "Search" button to request documents which connect to the available index value(s).

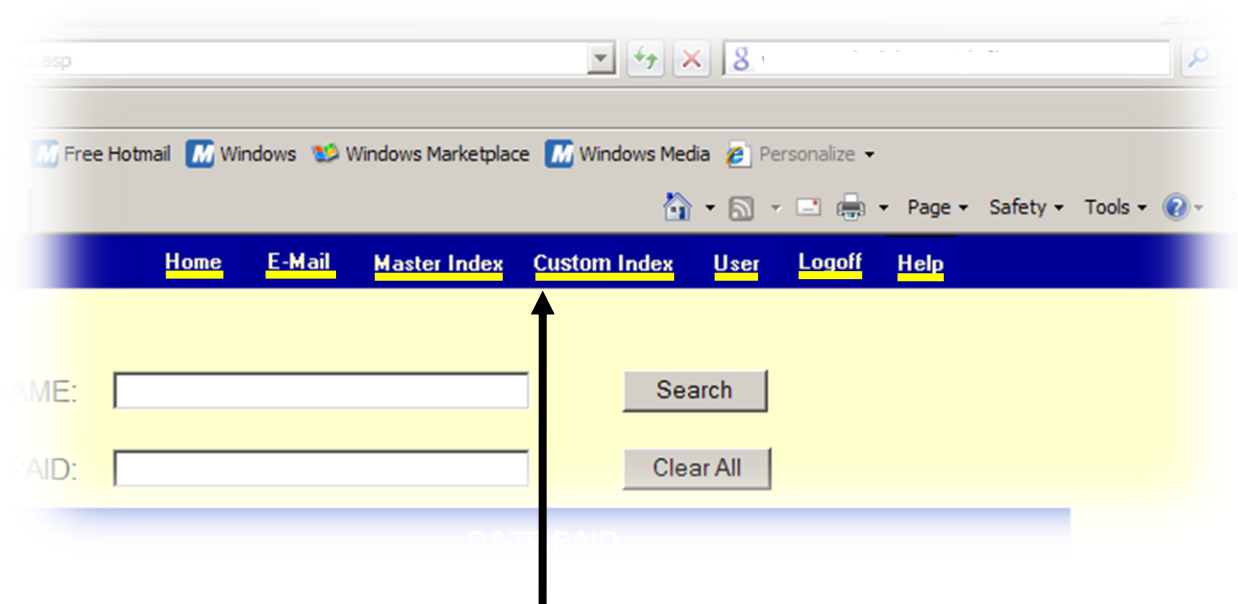
[Clear All Button](#)

The "Clear All" button removes the search criteria and the values in the Results Pane. The "Clear All" button will reset the search screen to its default display.

[Results Pane](#)

The Results Pane displays the outcome of the search. The maximum number of documents in the Results Pane is one hundred and fifty.

Exended Features



There are seven buttons with a yellow line under them in the screen shot above. Each button has an independent function, and the use of each button is determined by the type of documents stored inside Report Manager. Below is an explanation of each button.

[Home](#)

The Home button will show all of the available Report Groups created for the current Report Profile. This feature is only used and supported for COLD documents.

[E-Mail](#)

The E-Mail button will invoke the user's local email program, and start a blank message with the default recipient address of Admin@YourCompany.com. This functionality is only supported with Microsoft Outlook.

Master Index

The Master Index button is used to search through indexes found on COLD documents. This feature is only used and supported for COLD documents.

Custom Index

The Custom Index button will refresh the entire RM Plus® screen which will clear the index textboxes and result pane. The button will also return the user to the Search screen.

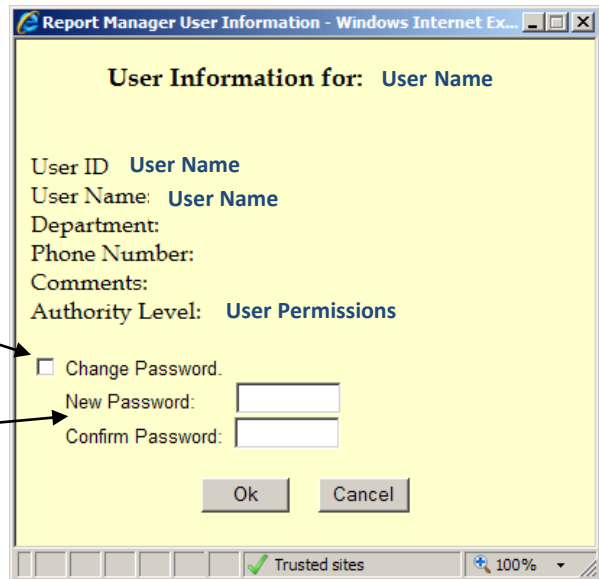
User

The User button allows each RM Plus® user to change their password. After clicking the User button the following screen will appear:

Check the box next to Change Password

Type the new password in each text box.

Click the OK Button to Accept the new password, or the Cancel Button to keep your old password.



Logoff

The Logoff button allows the user to exit their RM Plus® application and sever their connection.

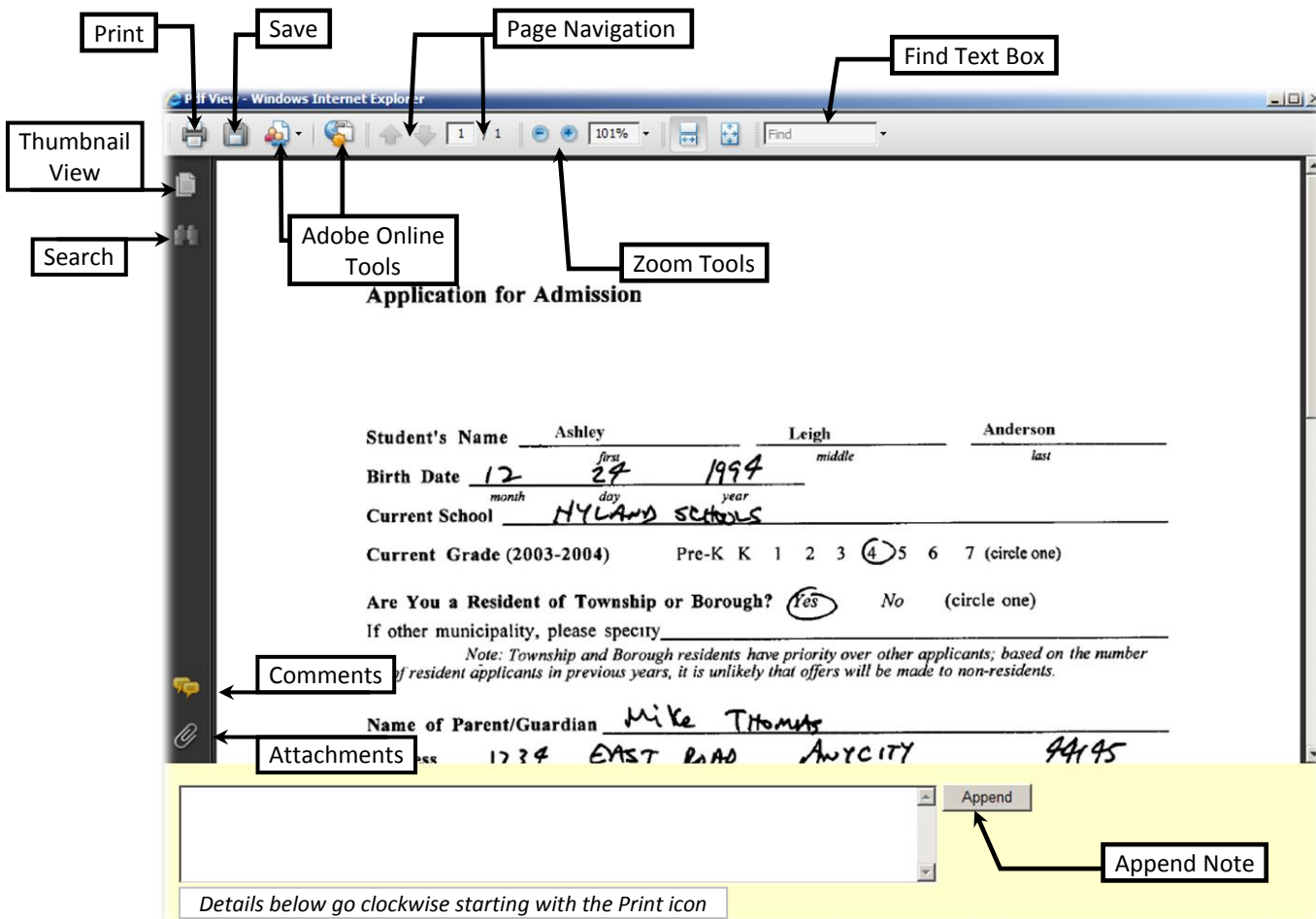
Help

Click the Help button to access the RM Plus® help file. The help file has useful information for COLD and PDF documents.

Adobe PDF Viewer

Figure 1 is an example of the RM Plus® document viewer. RM Plus® uses Adobe Reader to render documents to the client machine, so all of the tools available when viewing other PDF documents are available.

Figure 1



Print

The Print icon is in the upper left corner of the Adobe PDF viewer, and allows the user to print the current document to any printer connected to their PC.

Save

A user is able to save the document locally to their PC or to any network location.

Adobe Online Tools

The Adobe Online Tools do not contain any functionality within RM Plus[®].

Page Navigation

Use the Page Navigation tools to maneuver between pages within the current document.

Zoom Tools

The Zoom Tools will allow the user to focus on a particular spot of a page, or view several pages of a document at once.

Find Text Box

If the document in the viewer has OCR the Find Text Box will allow the user to search for keywords across all of the pages.

Append Note

The Append button will allow a user to attach a note to the current document. The note will include the username, timestamp and the user's message.

Attachments

A user can view all of the PDF's attachments using this button. All attachments have to be added before the documents are put into RM Plus®.

Comments

Any comments the PDF may contain will be visible from this area. The comments have to be added before the documents are put into RM Plus®.

Internet Explorer Settings

Viewing documents within RM Plus® is only supported with Internet Explorer version 6.x and higher. Below are the Internet Explorer settings necessary to view documents.

Open Internet Explorer -> Internet Options -> Security Tab

- Select Trusted Sites -> Click the Sites Button -> Add the RM Plus® URL to the zone
 - Uncheck Require Server verification (https:) for all sites in the zone (if necessary)
- Click the Custom Level button:
 - Ensure all options are set to Enable or Prompt
 - This will only enable these options for the Trusted Sites Zones

Click the Privacy Tab (top of Internet Options)

- Click the Sites Button -> Add the RM Plus® URL to the "Address of website" textbox -> Click Allow -> Click Ok
- Click the Settings Button -> Add RM Plus® URL to the "Address of website to allow" textbox -> Click Add -> Close

Restart Internet Explorer after making any changes.

User Administration

The User Administration utility is available for users which have Department Admin or above permissions. The tool can complete the following tasks:

- Add users to website
- Delete user profiles
- Edit user settings
- Assign users to report groups

The administration tool can be accessed from the User Administration icon located on the toolbar. Figure 2 shows the typical arrangement for the administration toolbar and the User Administration button.

Figure 2: The Report Manager Toolbar with the User Administration Button

The User Administration button opens the administration tool which is displayed in a new screen. Figure 3 shows the Report Manager User Administration utility.

RM User Administration

User ID:

Password:

Confirm Password:

Department: AP

Name:

Phone:

Comment:

Permissions: User
 Department Admin
 System Admin

Ignore Page Level Security: Yes
 No

Password Properties: Change Password at Next Logon
 Password Never Expires

Assign Report Group(s):

Assign	Report Groups
<input type="checkbox"/>	DEMOSTUF
<input type="checkbox"/>	RMADMIN
<input type="checkbox"/>	UNDEFGRP

User Properties: Enabled
 No Time Limit
 Time Limit for User

Start Date:

End Date:

		User ID	User Name
<input type="button" value="Edit"/>	<input type="button" value="Delete"/>	CHANTEST	change test
<input type="button" value="Edit"/>	<input type="button" value="Delete"/>	DEMO	Demo User
<input type="button" value="Edit"/>	<input type="button" value="Delete"/>	DEPTTEST	department test
<input type="button" value="Edit"/>	<input type="button" value="Delete"/>	GROUPTES	group test
<input type="button" value="Edit"/>	<input type="button" value="Delete"/>	LIMITED	User has limited access
<input type="button" value="Edit"/>	<input type="button" value="Delete"/>	LOGUSER	this is for the logs
<input type="button" value="Edit"/>	<input type="button" value="Delete"/>	LPADMIN	LPADMIN
<input type="button" value="Edit"/>	<input type="button" value="Delete"/>	MENUTEST	menu test
<input type="button" value="Edit"/>	<input type="button" value="Delete"/>	NEWUSER1	Random User
<input type="button" value="Edit"/>	<input type="button" value="Delete"/>	PAGELEVE	Testing Page Level
<input type="button" value="Edit"/>	<input type="button" value="Delete"/>	PASSPROP	pass prop test
<input type="button" value="Edit"/>	<input type="button" value="Delete"/>	PASSTEST	PASS TEST
<input type="button" value="Edit"/>	<input type="button" value="Delete"/>	PASTEST2	password test
<input type="button" value="Edit"/>	<input type="button" value="Delete"/>	SYSADMIN	SysAdmin
<input type="button" value="Edit"/>	<input type="button" value="Delete"/>	TESTWORK	testing
<input type="button" value="Edit"/>	<input type="button" value="Delete"/>	THEREFRE	the refresh

Figure 3: Report Manager User Administration

Figure 3 show the main administrative screen which allows a user to add, edit, and delete user profiles. Each of the functions can be completed from this screen if the user logged onto the Report Manager website is a Department Admin or System Admin. The following defines each of the criterions for a user profile:

- User ID
 - Used to access the website.
 - Limited to eight characters.
 - Case of the characters does not matter.
 - Legal characters include A-Z and 1-9.
 - Mandatory field.
- Password
 - Used to access the website.
 - Limited to eight characters.
 - Case of the characters does not matter
 - Legal characters include A-Z and 1-9.

- Mandatory field.
- Confirm Password
 - Must be exact replica of the Password field.
 - Mandatory field.
- Department
 - Mandatory field for all Department Admins.
 - Optional field for User and System Admins.
- Name
 - Optional field.
 - Case of the characters does not matter.
 - Legal characters include A-Z and 1-9.
 - Limited to 50 characters.
- Phone
 - Optional field.
 - Case of the characters does not matter.
 - Limited to 15 characters.
 - All characters are legal.
- Comment
 - Optional field.
 - Case of the characters does not matter.
 - Limited to 55 characters.
 - All characters are legal.
- Permissions
 - User – Allows the user to search and view documents.
 - Department Admin – All of the functionality of the User, plus the User Administration tool.
 - System Admin – All of the functionality of the Department Admin, plus full control of all users.
- Ignore Page Level Security (only applicable to COLD documents)
 - Yes –Searches return the entire result set, regardless of the page level security parameters.
 - No –Page level security parameters filter the search’s result set.
- Password Properties
 - Change Password at Next Logon – A user must change their password at the beginning of their next session.
 - Password Never Expires – A user’s password is valid forever.
- Assign Report Groups
 - Optional field.
 - Checkbox designates assignment.
- User Properties
 - Enable – Check the box to enable the user.
 - No Time Limit – When selected the user does not have a time limit.
 - Time Limit for User – When selected the “Start Date” and “End Date” fields must be completed.
 - Start Date – The user is enabled on this date.
 - End Date – The user is disabled on this date.

The following defines all of the buttons and displays:

- Add User Button – Complete the applicable user profile criterion. Click the button, and the user is added to the User Grid.
- Clear User Form Button – Resets the webpage to its default state.
- Exit Button – Closes the webpage.
- Refresh Usernames Button – Updates the User Grid.

- Edit Button – Initiates the Update Mode for any of the user’s profile criterion.
- Delete Button – Deletes the user profile.
- User Grid Display – Displays all of the users configured to access the site.

It is possible to edit or update a user’s profile in the RM Administration screen. To update a user’s profile, click the Edit button next to their name in the User Grid. Selecting an Edit button next to a user’s User ID transitions the RM Administration screen into Update Mode. Figure 4 shows the RM Administration screen in Update Mode.

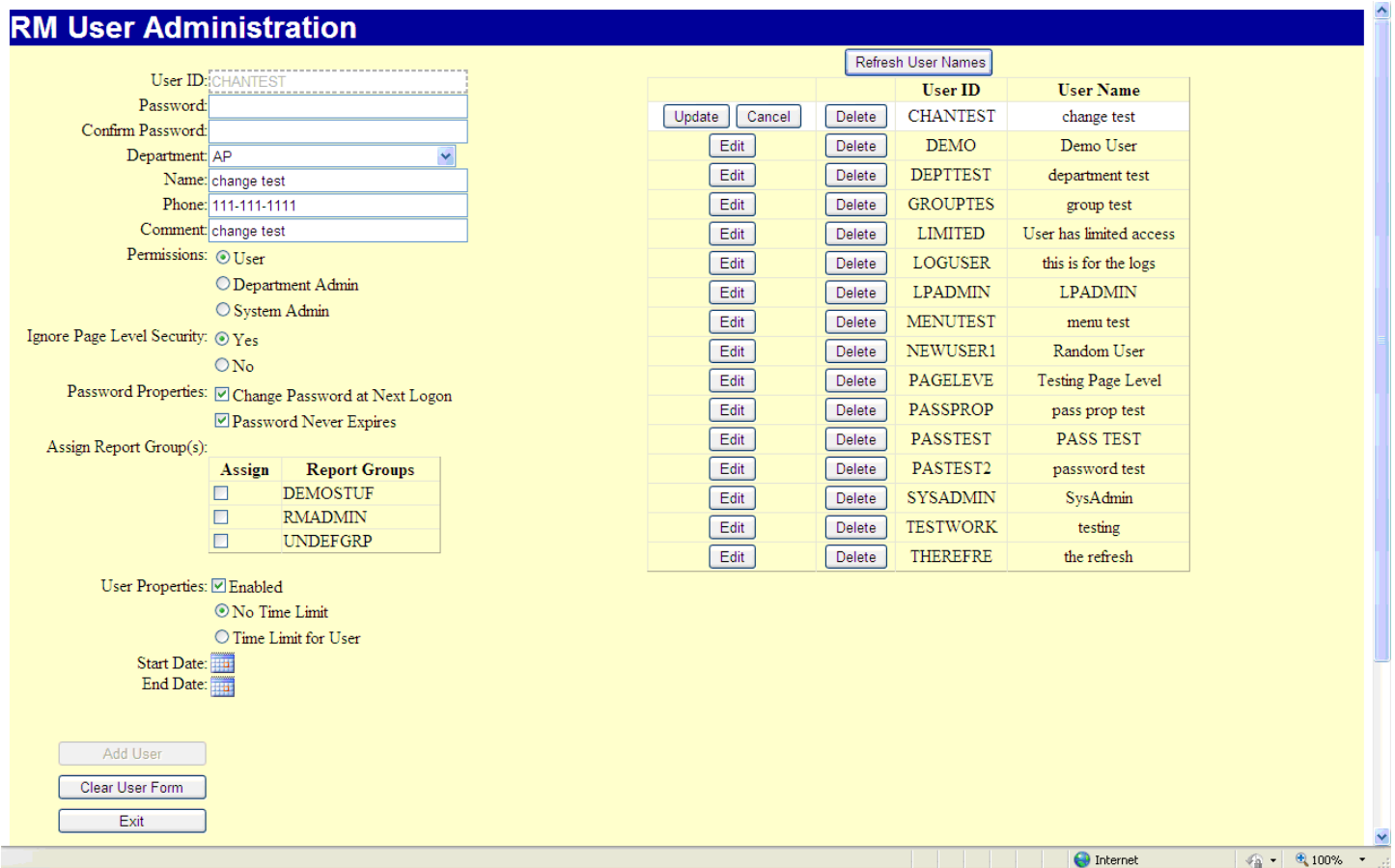


Figure 4: The RM Administration screen in Update Mode.

Figure 4 shows the User ID CHANTEST in update mode. When the RM Administration screen is in Update Mode there are a few rules and locks imposed. Here is a list of guidelines for Update Mode:

1. The User ID cannot be altered.
2. The Password and Confirm Password fields are not displayed.
3. All of the fields are the exact settings configured for the user profile.
4. The Add User button is disabled.
5. The Edit button is converted into an Update and Cancel button.
6. The user profile selected is highlighted.
7. Only one profile can be edited at a time.

Click the Cancel button to exit Update Mode and return to the default RM User Administration screen.



Contact Us

Tronitech Corporate Office
8719 Boehning Lane
Indianapolis, IN 46219

Email: Support@Tronitech.com

Toll-Free: 800.582.7652

Phone: 317.899.3456

Fax: 317.899.4184