

Home Team – Document Management System

System Administration Instructions

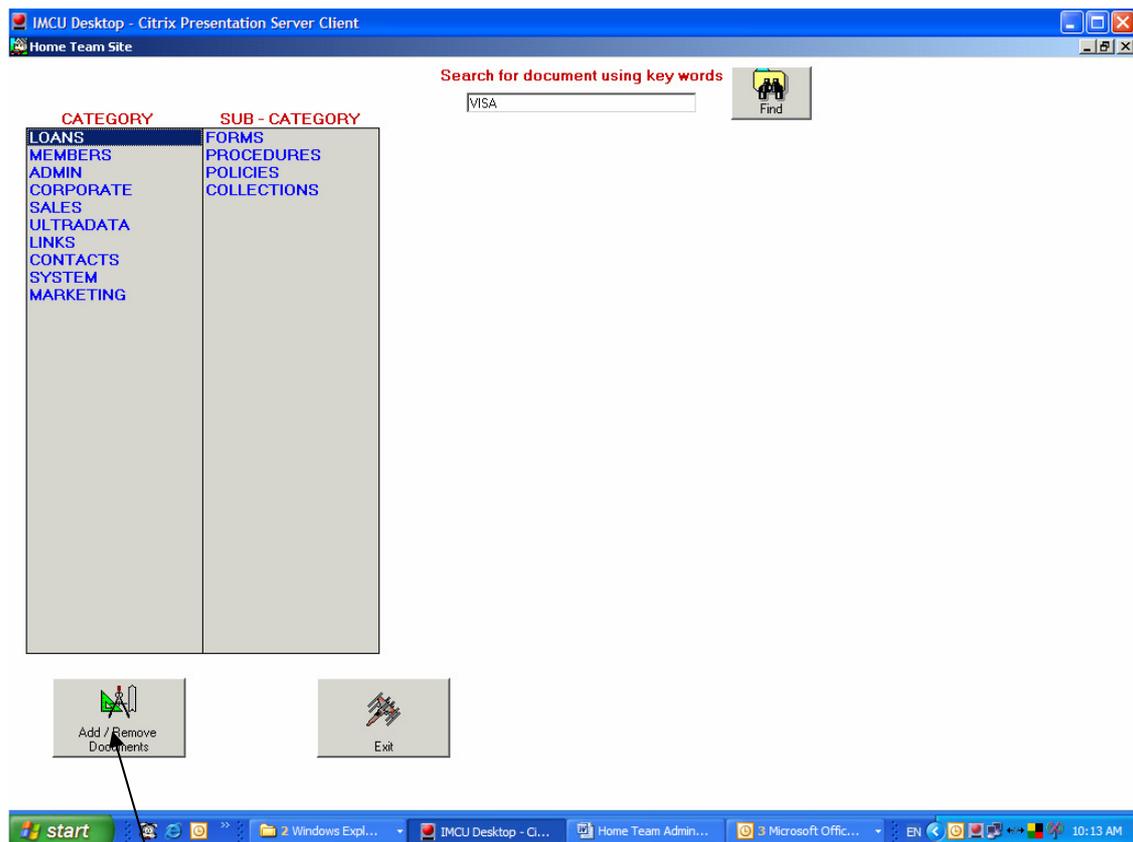
Introduction

This procedure should only be provided to staff who will administer the system, and not to general staff.

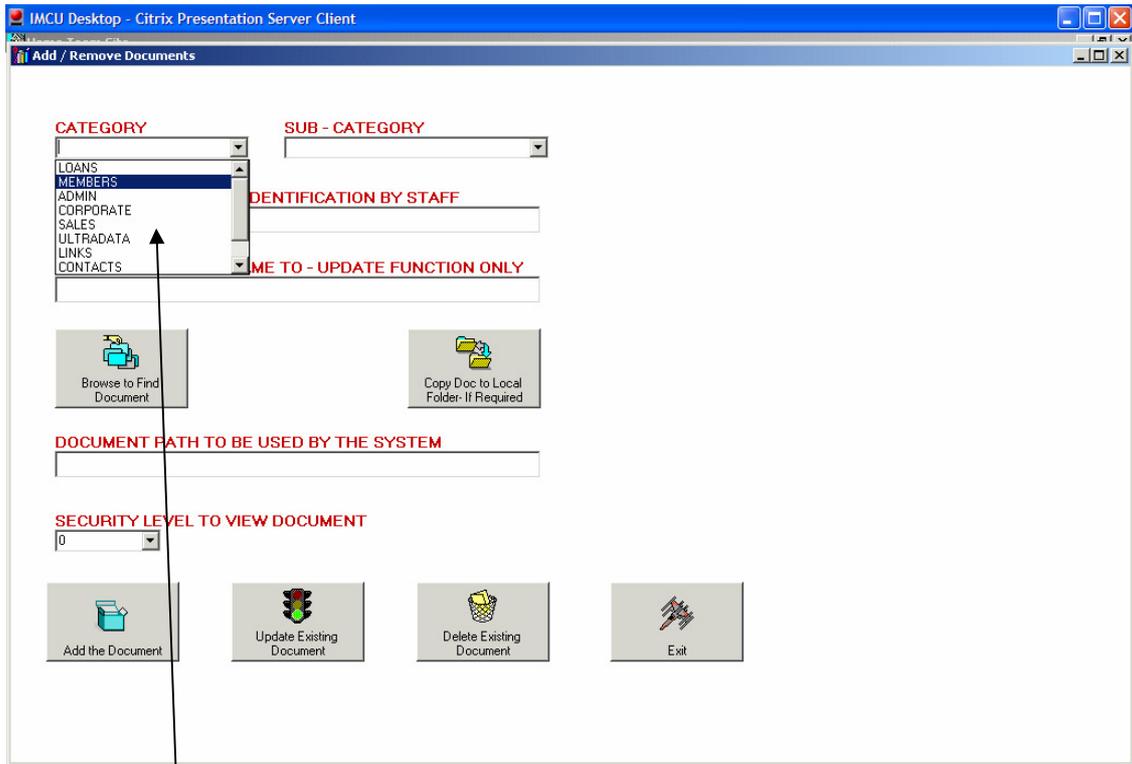
While basic administration is handled via the system, some set-up aspects require that the person undertaking set up tasks has Microsoft Access available on their PC.

Basic Administration

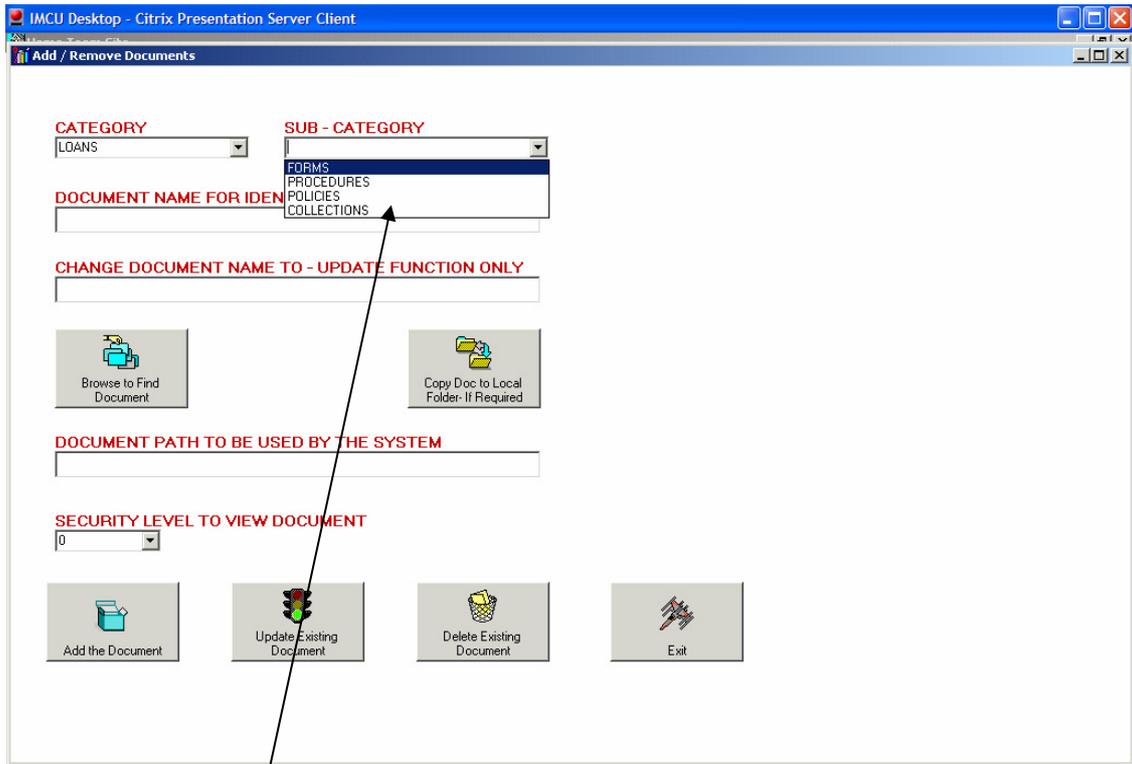
Adding a New Document



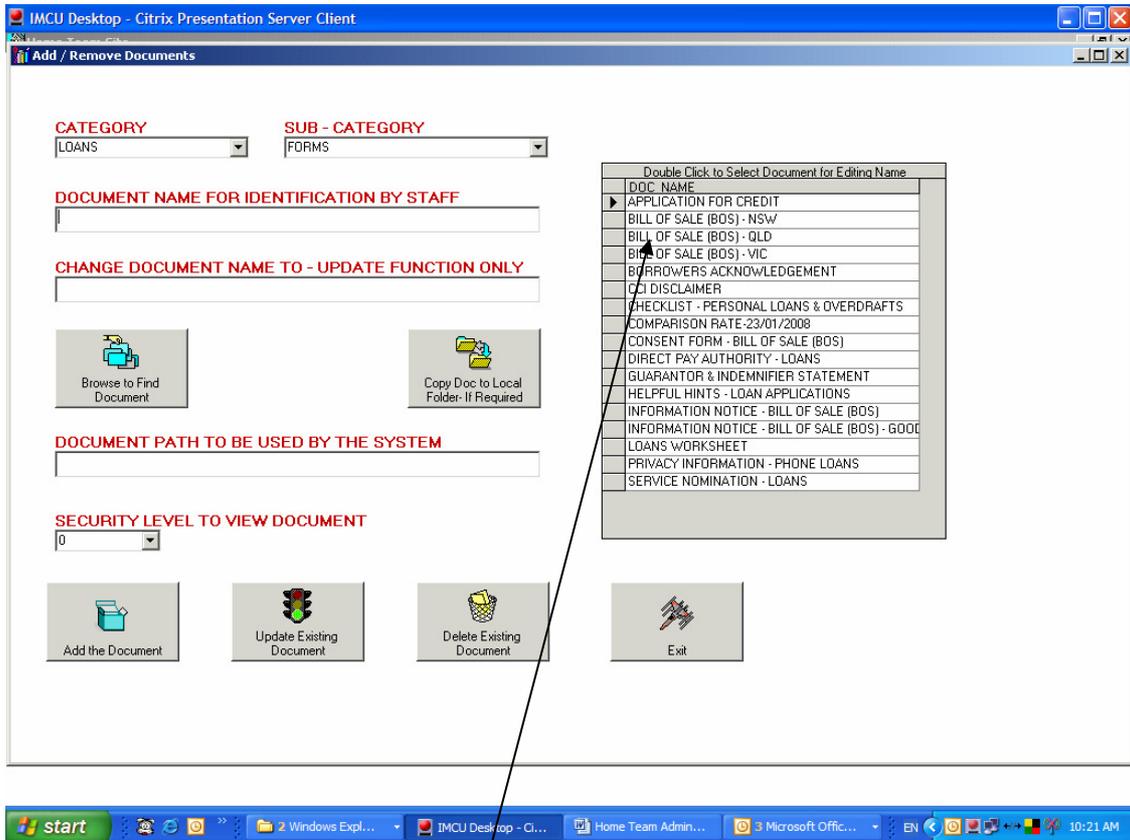
Clicking on **Add / Remove Documents** takes you to the Admin Screen. Only Staff who have an appropriate access level can access this function. This is described later in this procedure.



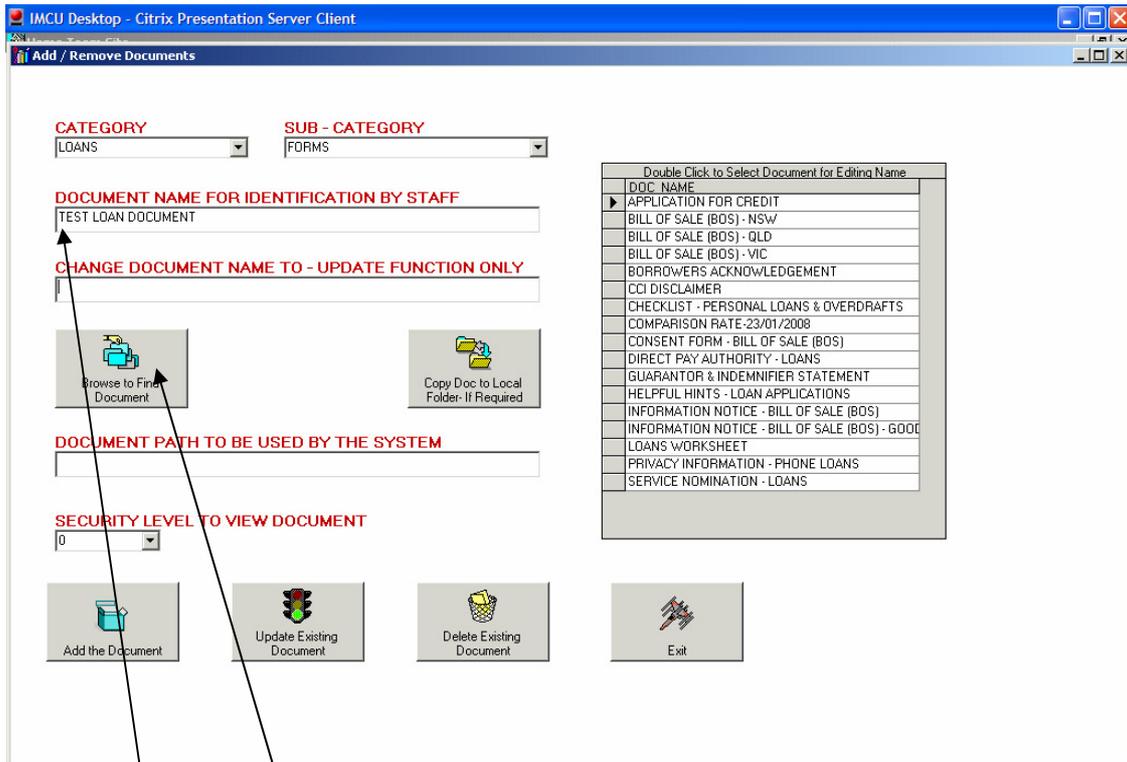
Select a category, or type the name of a new Category to be added to the system



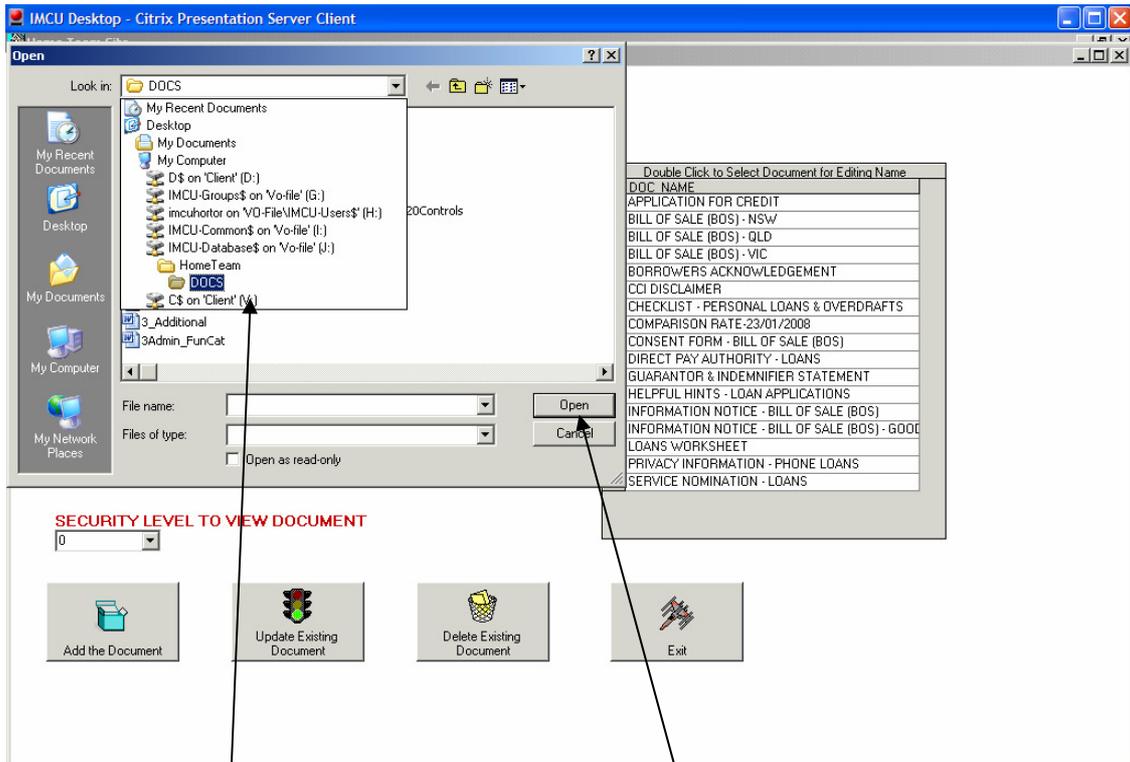
Select a Sub-Category or type a New Sub-Category to be added to the system.



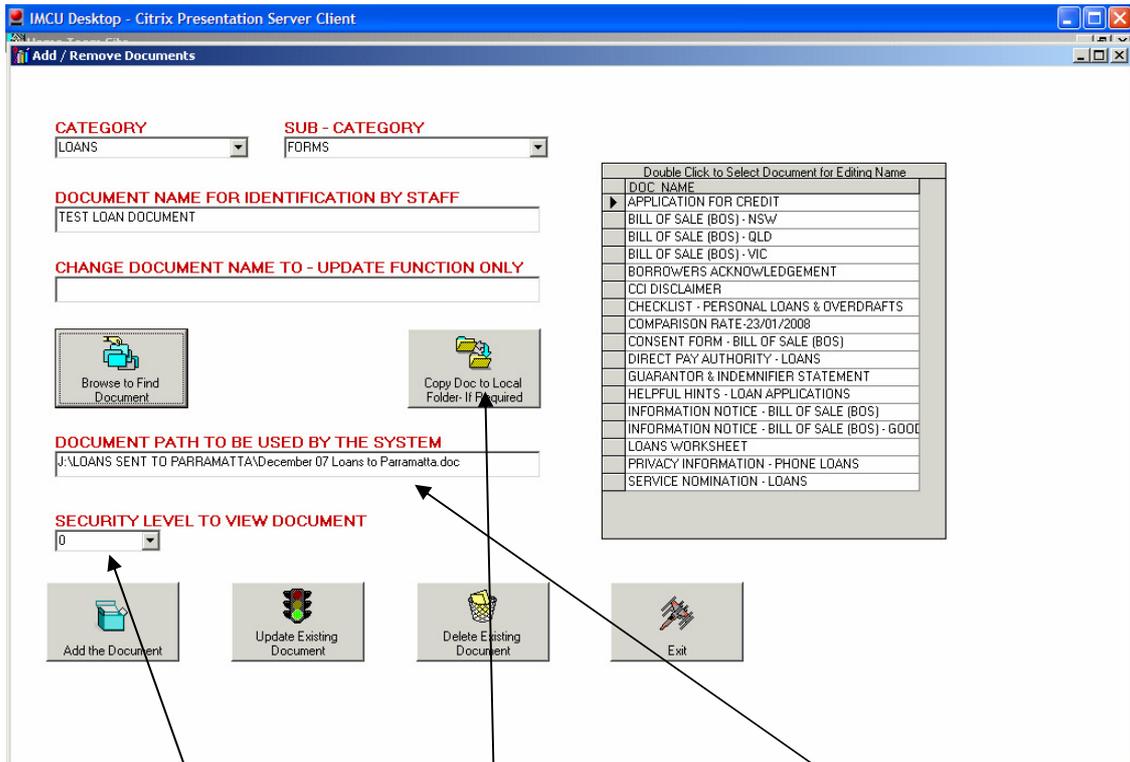
When the cursor leaves the Sub-Category box (ie. by hitting Tab) a list of current documents in the Category and Sub-Category is shown.



Enter the name of the new document that you wish to add to the system, then Click **Browse to Find Document**.



A Windows type dialog box opens.
The initial path is to a folder called Docs, set up when the system is installed.
Clicking on the down arrow will show you the network and mapped drives available.
Navigate your network to find the actual document you require.
Once you have selected the document concerned, Click **Open**.



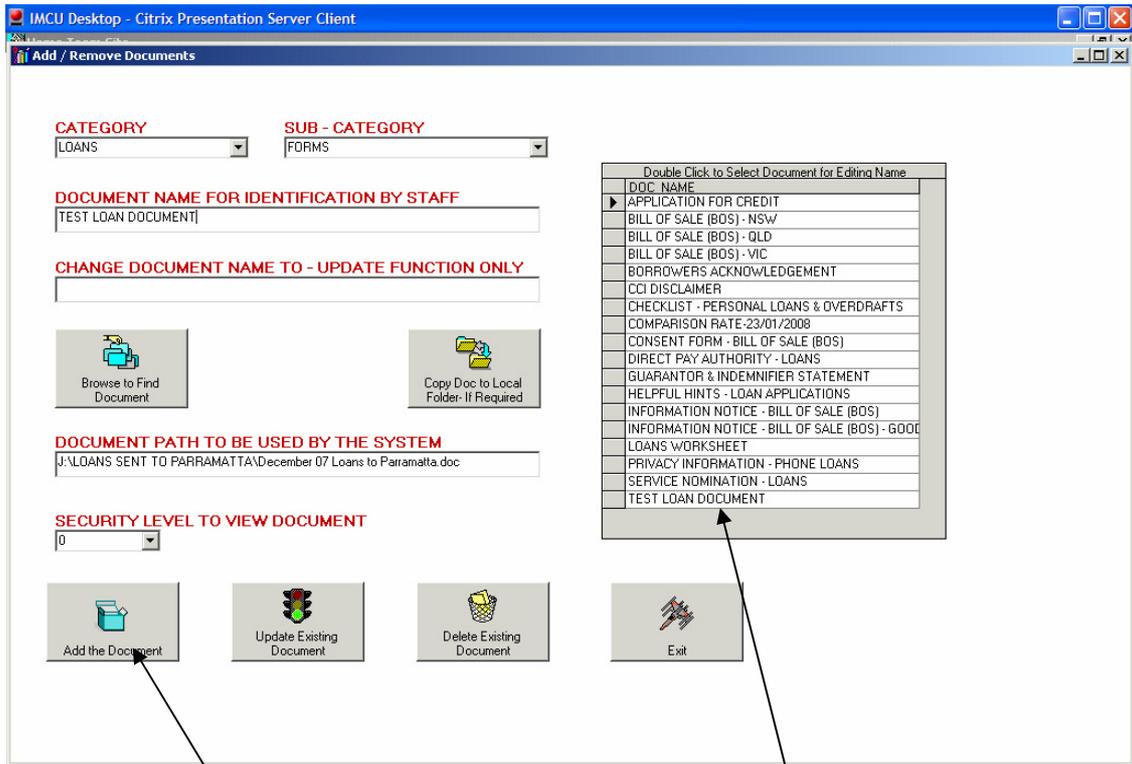
The current path to the document is placed by the system into the document path box.

You can set a Security Level – 1 to 9. A level of 0 means any staff can view the document.

There are two options.

1. Leave the actual document where it is.
In order to do this, any staff member who wishes to open the document must have access to that location.
For example it would **not** be appropriate to reference a document in your own C:\My Documents\ folder, as this location is not readily accessible by other staff. For documents to left in their current location, it should be a common network drive that all staff have access rights to.
2. Copy the document to the system default **Docs** folder.
Clicking **Copy Doc to Local Folder**. Will copy the document, and amend the path reference.

Note: This is only valid for actual documents. If you are setting up a LINK, you just enter the relevant URL (ie. <http://www.rjhorton.com.au>) in to the document path box.



Clicking **Add the Document** adds it to the system. It will be available to staff from that point in time.

Deleting a Document

CATEGORY
LOANS

SUB - CATEGORY
FORMS

DOCUMENT NAME FOR IDENTIFICATION BY STAFF
TEST LOAN DOCUMENT

CHANGE DOCUMENT NAME TO - UPDATE FUNCTION ONLY

DOCUMENT PATH TO BE USED BY THE SYSTEM
J:\LOANS SENT TO PARRAMATTA\December 07 Loans to Parramatta.doc

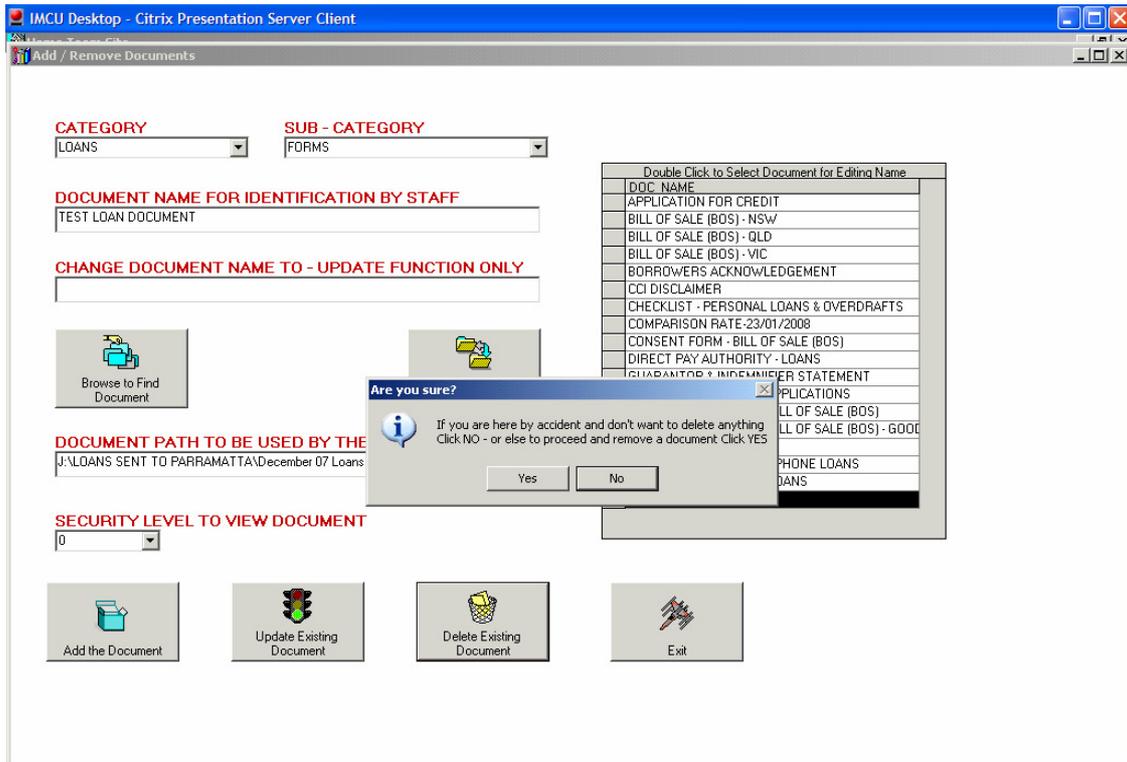
SECURITY LEVEL TO VIEW DOCUMENT
0

Double Click to Select Document for Editing Name

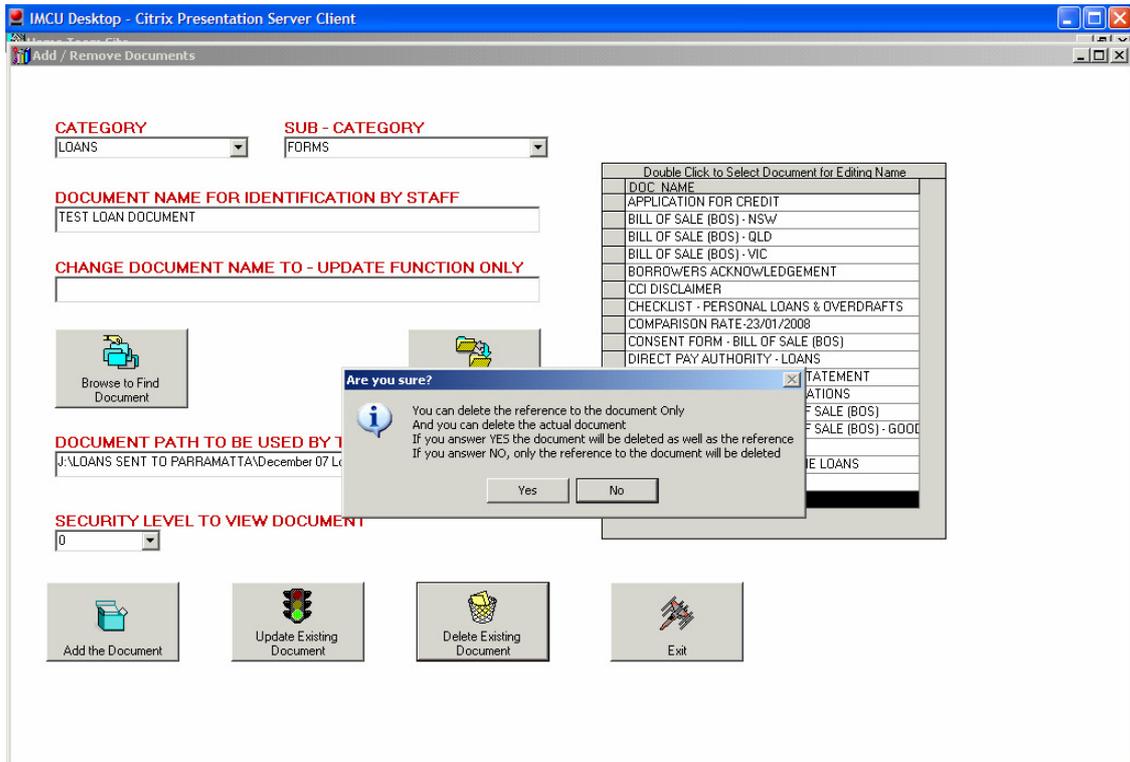
DOC_NAME
APPLICATION FOR CREDIT
BILL OF SALE (BOS) - NSW
BILL OF SALE (BOS) - QLD
BILL OF SALE (BOS) - VIC
BORROWERS ACKNOWLEDGEMENT
CCI DISCLAIMER
CHECKLIST - PERSONAL LOANS & OVERDRAFTS
COMPARISON RATE-23/01/2008
CONSENT FORM - BILL OF SALE (BOS)
DIRECT PAY AUTHORITY - LOANS
GUARANTOR & INDEMNIFIER STATEMENT
HELPFUL HINTS - LOAN APPLICATIONS
INFORMATION NOTICE - BILL OF SALE (BOS)
INFORMATION NOTICE - BILL OF SALE (BOS) - GOOD
LOANS WORKSHEET
PRIVACY INFORMATION - PHONE LOANS
SERVICE NOMINATION - LOANS
TEST LOAN DOCUMENT

Buttons: Add the Document, Update Existing Document, Delete Existing Document, Exit

Double Clicking a Document in the list brings the information for that document onto the screen.



A warning is given in relation to the option to delete. Answer Yes to Proceed of No to escape.

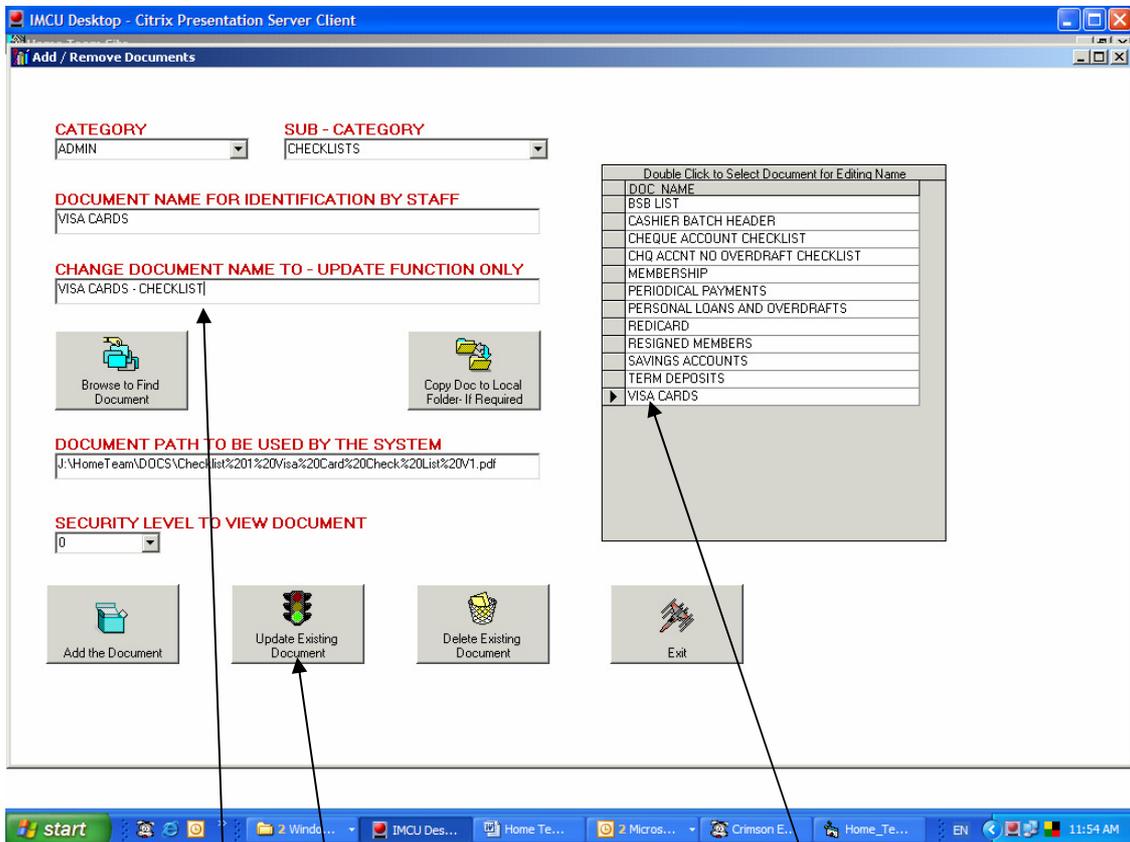


If you proceed to delete a document an option is given to remove the reference in the system and the actual document, or just the reference in the system to the document.

If you choose Yes here, the actual document will be deleted from wherever it is located, as described in the Document Path box.

Changing the Reference Name of a Document

On occasions it might be necessary to alter the name of a document to make it more meaningful for staff.



Choose the Category and Sub-Category, then double click the required document in the list.

Enter the new Name for the Document.

Click **Update Existing Document**.

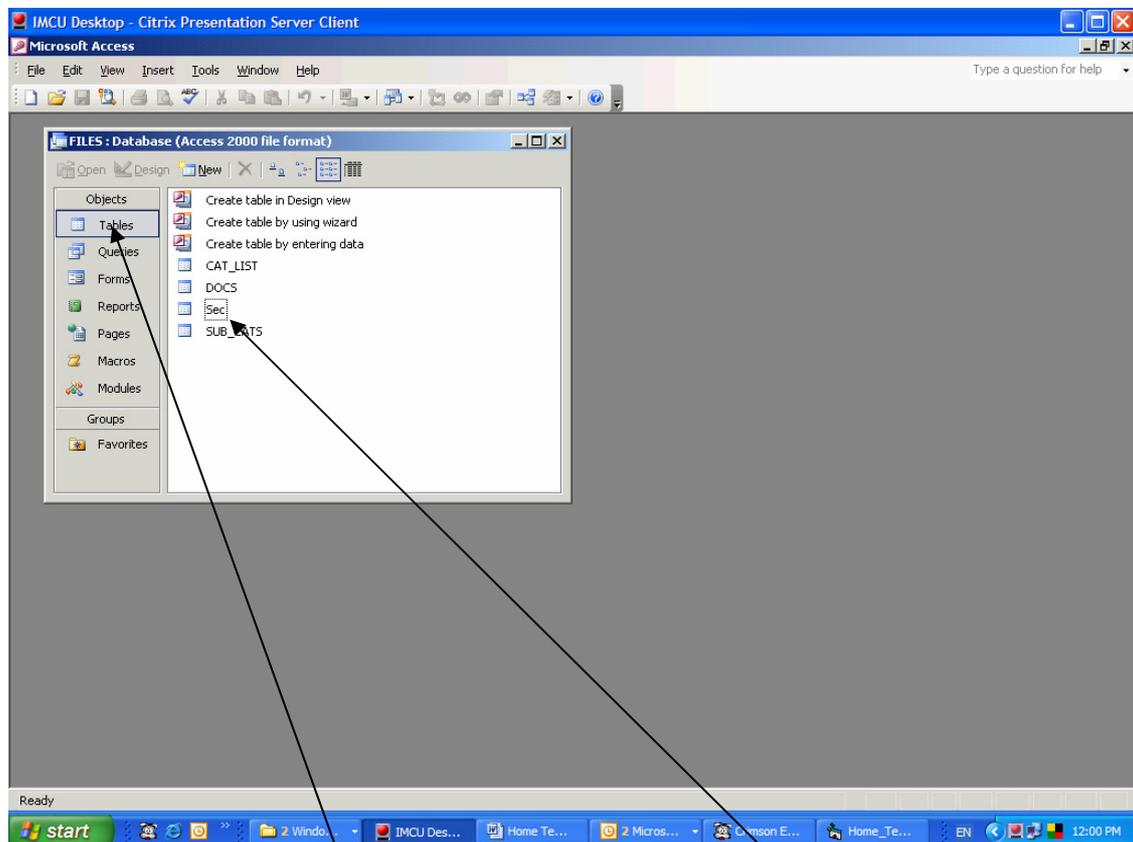
System Set-Up

In the location where the Database is held (referenced in a file called DocLoc in the folder where the Home Team Program resides), open the Files.mdb (Microsoft Access is required for this task).

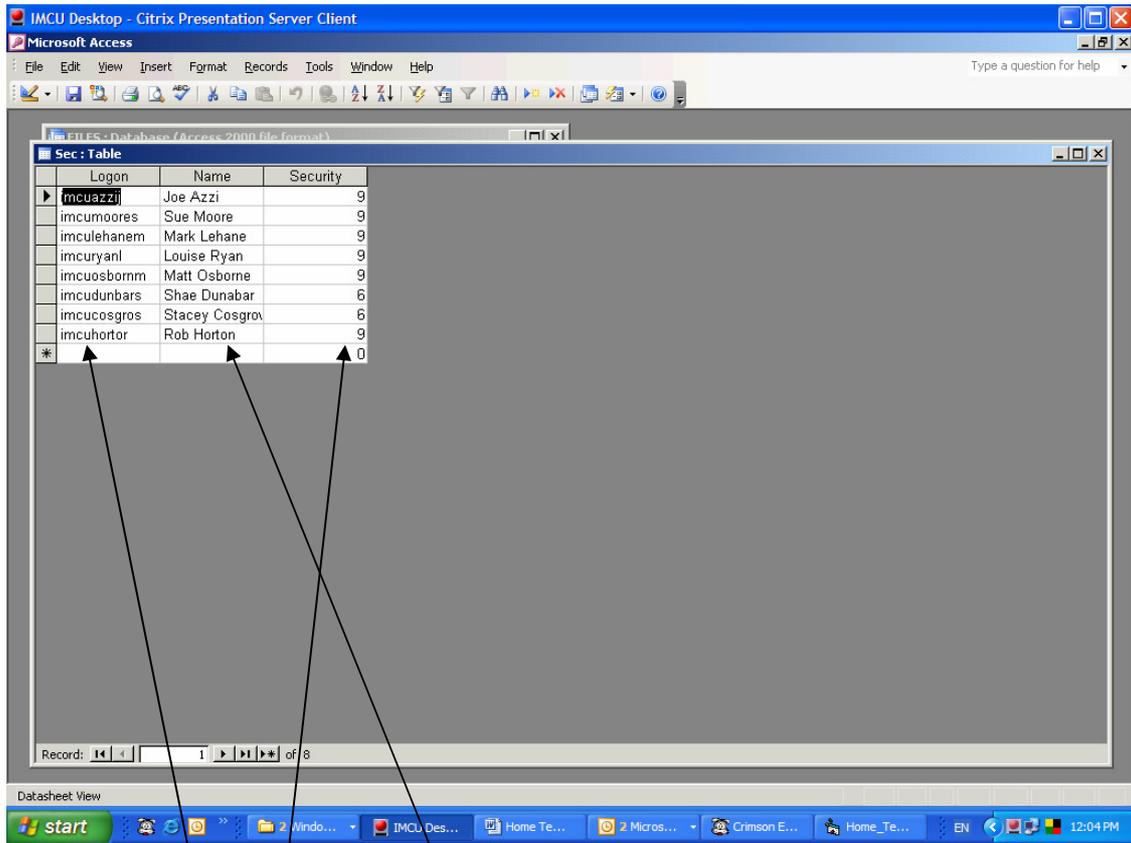
The task here is to set up specific staff with access levels greater than 0.

Normal staff who will have an access level of 0 do not need to be entered into the database.

Staff who have access to Add and Remove documents in the system, need to have an access level greater than 5.



Make sure you are in the Tables section. Double Click on the Sec table to open it.



For each person you wish to give a higher than 0 level of security, enter their pc logon name into the Logon field, their Real Name in the Name field and the required level of security in the Security field. Add as many staff as required.

By way of explanation, the Home Team system “talks” to Windows on the PC to find out who is logged on. It then uses that logon to reference the Sec table and determine which level of access is available.

It is up to the organization concerned to ensure that staff do not leave their PCs available to others in their absence.

End of Procedure.

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