DOCUMENT MANAGER

Reference Manual

Version 1.0

AUTOPOWER SYSTEMS



400 Technology Park Lake Mary, FL 32746

www.AutoPower.com

Ph. 407-695-7300 Fax: 407-695-8001

Overview

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Accuterm 7, Version 7.0 or higher

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Chapter 1 INTRODUCTION & OVERVIEW

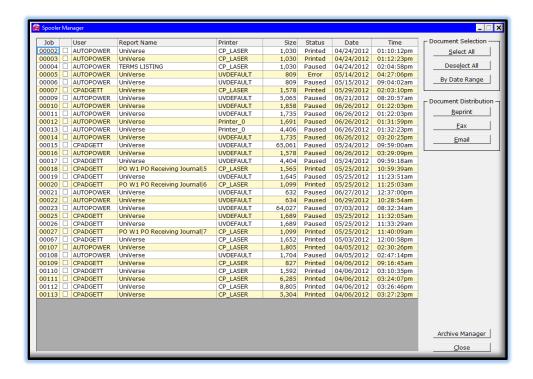
Introduction to Windows Spooler Manager & Report Archive Manager

There are two services within your AutoPower system that manages the reports produced from the menus, during the End of Day, and End of Month processes. The first of these services is the Windows Spooler and the other is the new service Report Archive Manager.

Windows Spooler Manager

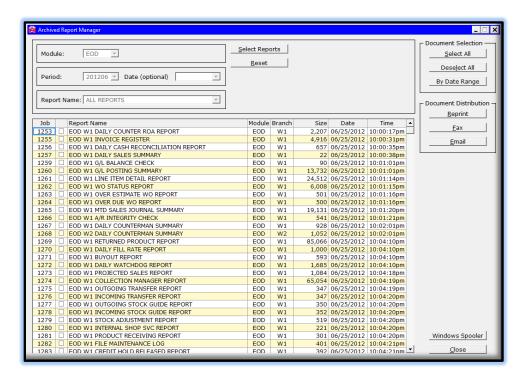
The Windows Spooler is provided by Microsoft and is used to manage the various printers and the reports printed on those printers. To some, the Windows Spooler is not easily understood and often times difficult to find and reprint reports from the spooler. This new software update will help you manage these spooled reports making their access and reprint much easier by virtue of the new Windows Spooler Manager software. The Spooler Manager provides the following:

- Can view the report to screen
- Can reprint the report to any printer
- Can fax the report
- Can email the report



Report Archive Manager

The Report Archive Manager is a new document service provided by this software update.



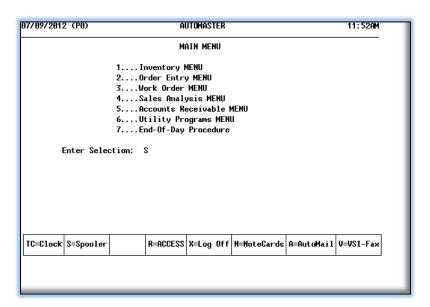
The reports produced by the AutoPower System are now archived and saved in a report archive file indefinitely or for as many days as you specify. Once saved in the Report Archive folder, the Report Archive Manager software provides the following:

- Archive the reports from the Windows Spooler
- Reports are transferred from the Windows Spooler to the Report Archiving system daily
- Organizes these reports into categories or groups for easy recall
- Assigns the year and month to these reports for later recall by period
- Can view the report to screen
- Can reprint the report to any printer
- Can fax the report
- Can email the report
- Automatically purge old reports no longer needed

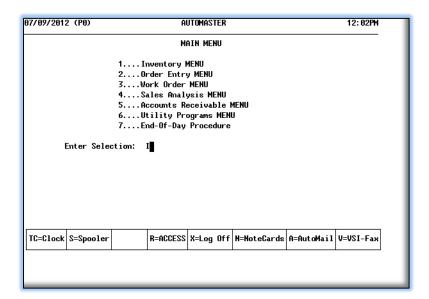
Accessing Either Document Manager

Access the new Windows Spooler Manager or the Report Archive Manager can be performed directly from the AutoPower Menus.

By entering an "S" at any Menu Selection prompt, the new Spooler Manager program will be launched.

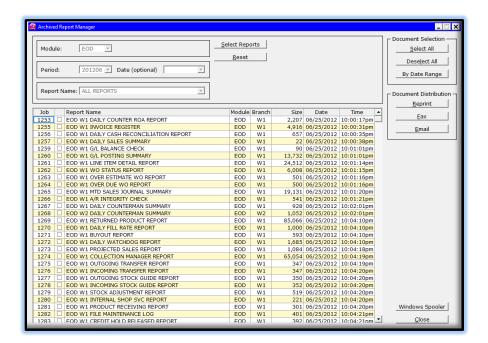


By entering an "I" at any Menu Selection prompt, the new Report Archive Manager program will be launched.

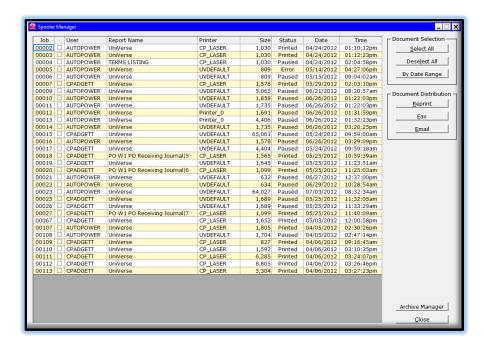


You can access the Report Archive Manager from the Spooler Manager and access the Spooler Manager from the Report Archive Manager with just a click of a button.

Archive Manager



Spooler Manager

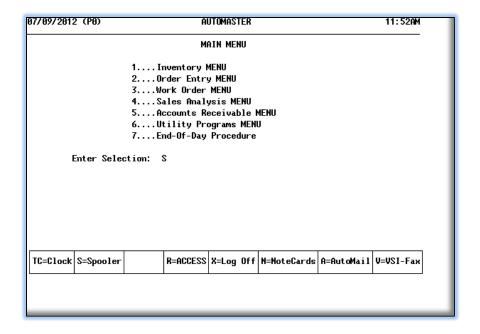


Chapter 2 – WINDOWS SPOOLER MANAGER

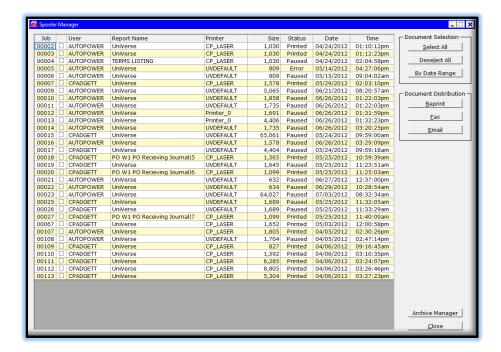
Accessing the Spooler Manager Menu

By entering an "S" at any Menu Selection prompt, the new Spooler Manager program will be launched.

Below is an example of accessing the Spooler Manager from an AutoPower menu.



Below is an example of the Spooler Manager Screen.



Here you will see the reports currently in the Windows Spooler. These reports will include those printed today and prior to today that have not yet been deleted from the Spooler. Remember, today's reports won't be archived until tomorrow.

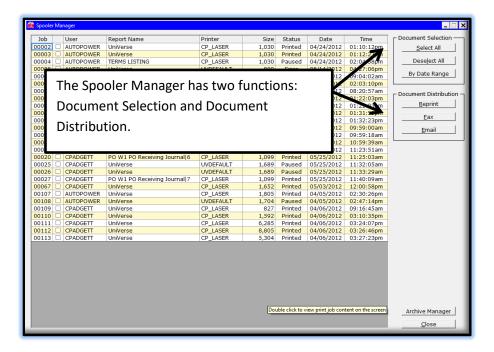
Resorting the Report Detail Area

Once the reports are shown in the report detail area, you can resort the reports in this area by clicking on any of the column headings. The reports will be resorted and shown in either an ascending or descending sequence according to the column heading you clicked on.

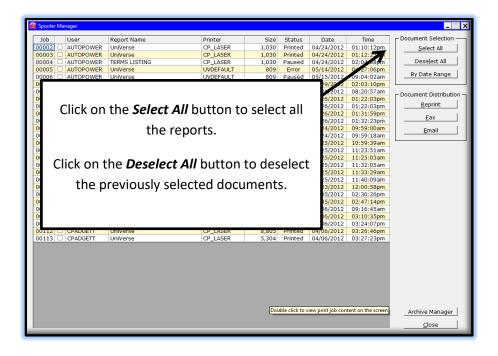
By clicking the same column header again, the report detail will be resorted in the opposite sequence. This re-clicking of the column heading will resort the report detail into either ascending or descending sequence.

There are 8 columns on this screen. They are Job number, the user that created the report, report name, printer where the report originally printed, report size, status of the report, date and time the report was originally produced.

Document Selection and Distribution

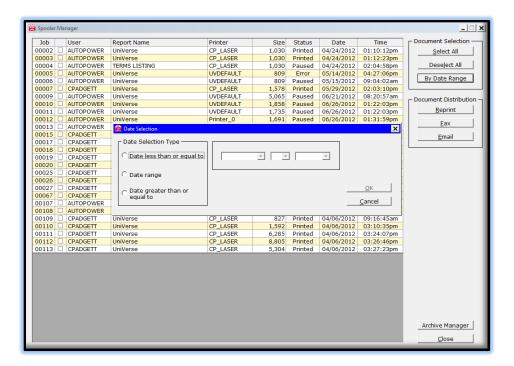


Document Selection



Document Selection by Date Range

With hundreds of reports in the spooler, finding the reports for a specific date or range can be difficult. Using the "By Date Range option", you can narrow the view of the reports to just those printed in a specific time frame.



The documents can be selected using three options:

- Date less than or equal to
- Date range
- Date greater than or equal to

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Document Distribution

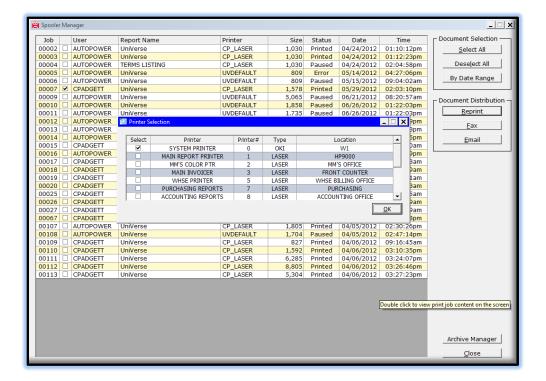
- Reprint
- Fax
- Email

Document Reprint

You can reprint the document by clicking on the box next to the Job Number and then click on the *Reprint* button.

Complete the Printer selection box. Select the printer where the report should print.

Click the **OK** button.

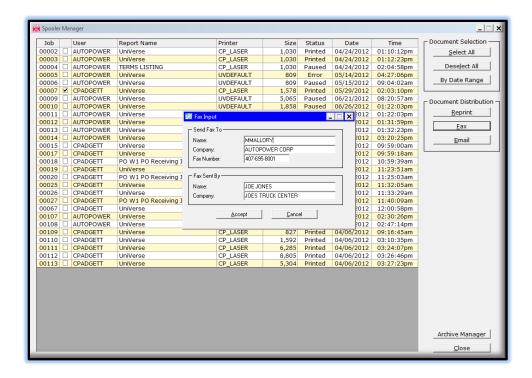


Fax a Document

You can Fax the reports by clicking the box next to the Job Number and then click on the **Fax** button.

Complete the Fax Input box with information about who shall receive the faxed documents.

Click the Accept button.



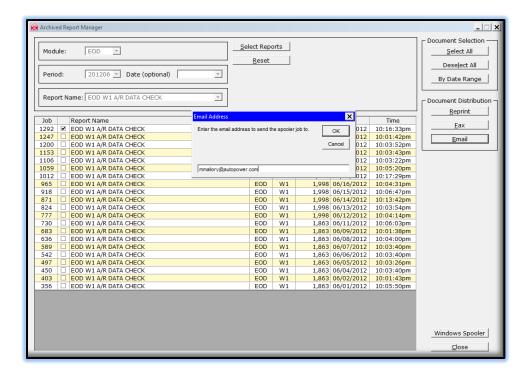
You can also access "**Vsifax** from any AutoPower menu by typing in the letter "**V**" at the menu selection prompt to view the status of the fax that you sent.

Email a Document

You can email the reports by clicking the box next to the Job Number and then click the *Email* button.

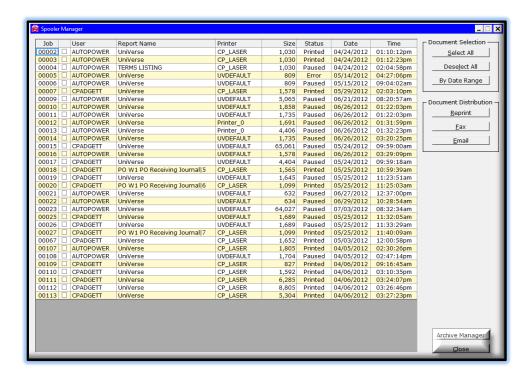
Type in the Email address. This is not connected to Outlook's address book.

Click the **OK** button.



Exit from the Spooler Manager

You can click on the *Archive Manager* button to access the Archived Reports Manager or you can click on the *Close* button to exit the Spooler Manager and return back to the menu.



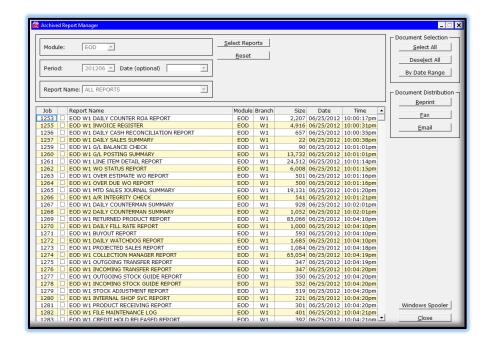
Chapter 3 – REPORT ARCHIVE MANAGER

Accessing the Report Archive Manager

By entering an "I" at any Menu Selection prompt, the new Report Archive Manager program will be launched.

Below is an example of accessing the Report Archive Manager from an AutoPower menu.

	2 (P0)		A	UTOMASTER			12: 02PM
			М	AIN MENU			
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	S=Spooler		<u>-</u>	X=Log Off	N=NoteCards	A=AutoMail	V=VSI-Fax



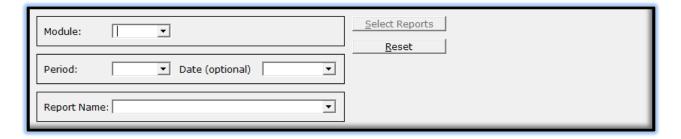
Below is an example of the Report Archive Manager Screen.

Once the spooled reports have been stored in the Report Archive folder, the Report Archive Manager provides easy access to reports produced yesterday, last month, last year, or several years ago.

When the reports have been stored in the Report Archive folder, they remain there until they are deleted based upon the number of retention days you specify. Keeping these reports in the Report Archive folder indefinitely will continue to require more and more disc storage and result in longer data backups. Eventually, purging old reports may become necessary.

With the spooled reports stored in the Report Archive folder, the Report Archive Manager provides access to these reports. The Report Archive Manager screen shown below illustrates a variety of methods for selecting the reports of interest. These reports can be selected using any of these options.

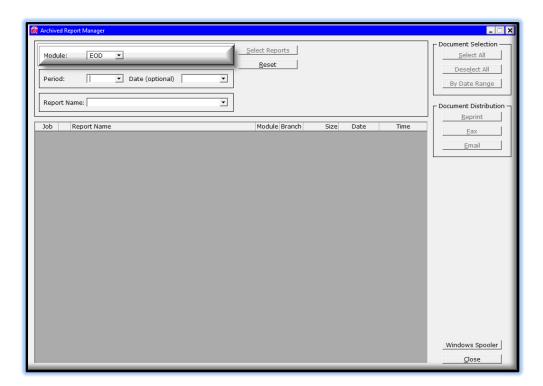
- Select a specific Module (such as EOD, EOM, Inventory, PO, AR, etc.)
- Year, Month, and Period
- Specific Date
- Specific Report



When using the selection options, you can use any of the options or a combination of the options. For example, if you want to select the EOD reports for a specific period, you would select the EOD Module and also indicate which Year and Period you are interested in. After making your selection options, then click the *Select Reports* button. The reports meeting the selection criteria will be shown in the report detail area.

Select Reports by Module

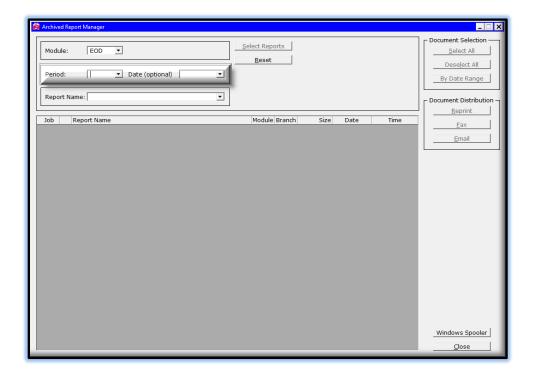
When selecting the archived reports for a specific application Module, you can click the *Module combo* **box** to select the module from the list of modules shown. The modules shown represent those modules associated with the reports currently archived.





Select Reports by Period or Date

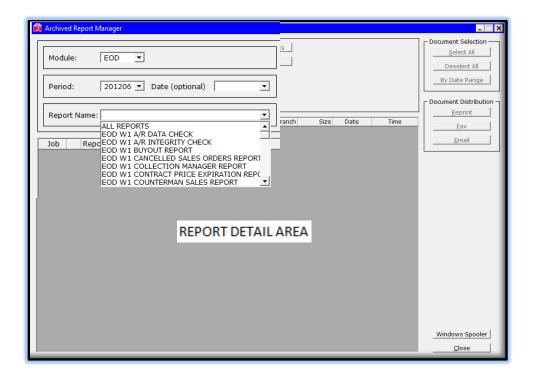
Any report that is archived contains the Date it was created. This report date is used to establish the Year and Period, such as 021204 for Period #4 (April) and the year 2012.



You also could enter or select a specific date. You can use only either the Period or the Date selection options, not both.

Select Reports by Report Name

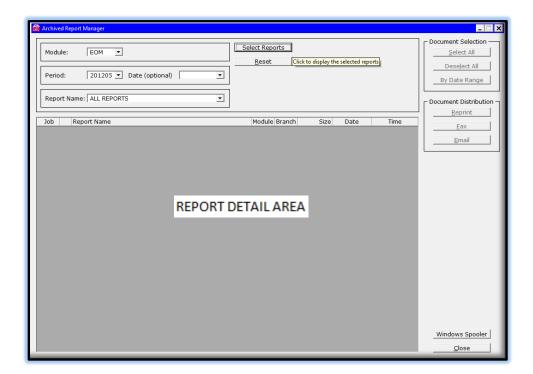
Each report that is archived has a Report Name. All the Report Names are available for selecting a specific report, like the EOD Negative Inventory Report, for example. The *Report Name combo box* will provide a list of all the different report names in the Archive folder.



So, if you wanted just a specific report to be selected for a particular Period or Date, then you would specify the Period and the Report name you want to select. Once the *Select Reports* button has been clicked, then the specified report that was run during the period entered will be shown in the report detail area.

Select Reports Button

After you have specified the report selection criteria, click the **Select Reports** button. Once clicked, the reports in the Report Archive folder will be searched. Any reports selected will be shown in the report detail area.



Resorting the Report Detail Area

Once the reports are shown in the report detail area, you can resort the reports in this area by clicking on any of the column headings. The reports will be resorted and shown in either an ascending or descending sequence using the column heading you clicked on.

By clicking the same column header again, the report detail will be resorted in the opposite sequence. This re-clicking of the column heading will resort the report deal into either ascending or descending sequence.

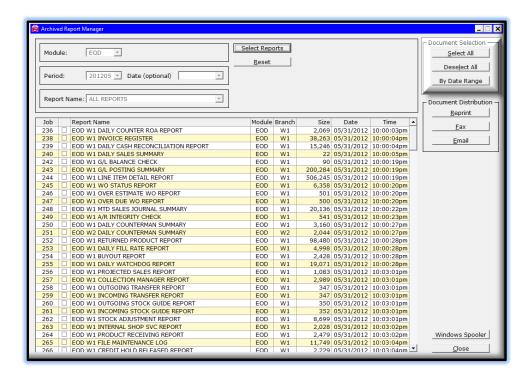
Reset Button

Click the *Reset* button to clear the report selection options you had entered.

Document Selection

Now that the report detail area contains the reports based upon the selection criteria, you can now use any of the three Document options shown on the right side of the screen. These Document Selections options are:

- Select All
- Deselect All
- By Date Range



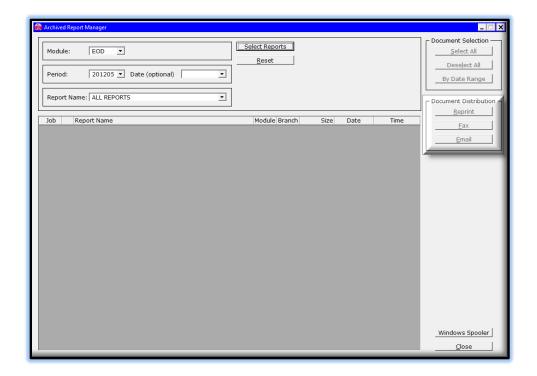
This frame contains the options: **Select All** and **Deselect All**. The **Select All** button will place a check mark in each check box adjacent to each report name. The **Deselect All** button will remove the check mark from each check box.

Using the **Select All** button alleviates having to click each check box individually. Using the **Deselect All** button alleviates having the click and un-check each check box individually.

After one or more reports have been selected by having them checked, then you can use the Document Distribution options.

Document Distribution

- View to Screen
- Reprint
- Fax
- Excel

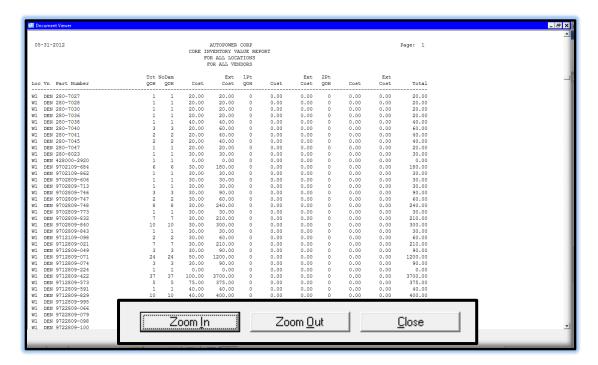


Viewing a Report

There will be times when all you want to do is view a report. To do this, just double-click the report name and the Document Viewer will display the report to your screen.

Enlarge or Reduce the Report View

At the bottom of the view form, there are **Zoom In** and **Zoom Out** buttons. Using the **Zoom In** button will enlarge the report; Zoom **Out** will reduce the report size.

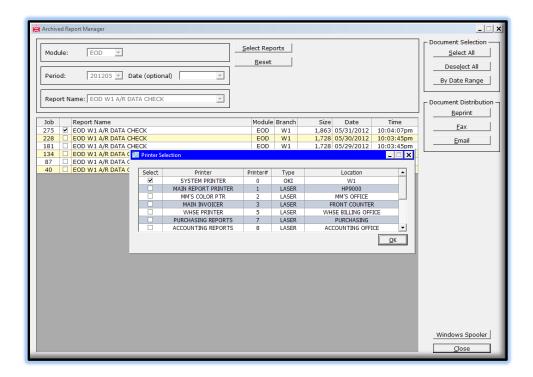


Document Reprint

You can reprint the document by clicking on the box next to the Job Number and then click the *Reprint* button.

Complete the Printer selection box. Select the printer where the report should print.

Click the **OK** button.

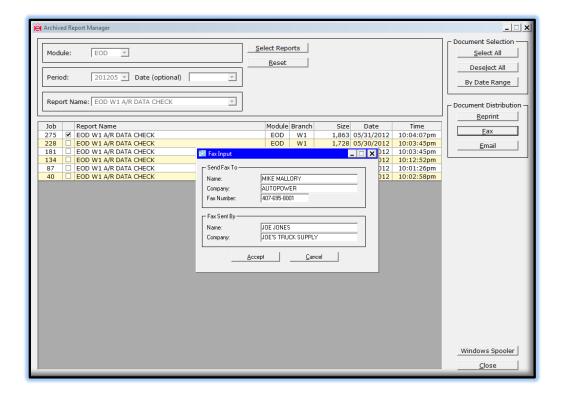


Fax a Document

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Complete the Fax Input box with information about who shall receive the faxed documents.

Click the Accept button.



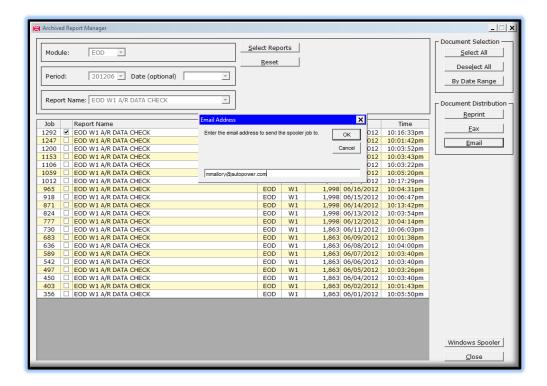
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Email a Document

You can email the reports by clicking the box next to the Job Number and then click the *Email* button.

Type in the Email address. These email address are not retrieved from your Outlook's e-mail address book.

Click the **OK** button.



Exit from the Report Archive Manager

Click on *Close* button when you are finished to return to the menu.

