# **TenDocs Admin Tasks<sup>\*</sup>**

This mini-manual provides an overview of the tasks that only you, the administrator/manager, can perform with the TenDocs document imaging tool:

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\**Important!* There are different "levels" of administrator and/or manager user types. Depending on your agency's unique, individual preferences, some users may have limited access to some of the tasks that can be accomplished in the TenDocs Archive Web Browser, but are not necessarily "administrators" or "managers." This mini-manual is meant to be an overview of all tasks that can be completed in the TenDocs Web Browser, but please note that all users who can access it, might not be able to complete all discussed tasks.

# Accessing TenDocs

Agency administrators have the ability to access the TenDocs imaging tool through a TenDocs archive web browser that is separate from WinTen/WinTen<sup>2</sup>. This link is provided to you at the time of installation.

### To Access TenDocs Archive Web Browser (separate from WinTen/WinTen<sup>2</sup>)

- ✓ In your internet address bar, enter the URL of your TenDocs archive web browser (provided at installation).
- ✓ Press ENTER. The **TenDocs Admin Archive screen** appears.

## The TenDocs Admin Archive Screen

The **TenDocs Admin Archive screen** is an agency's administrator's/manager's tool for managing the Ten-Docs document imaging/archive tool:

TenDocs Powered by Tenmast Software						.ogout 🥑 Help		
Search Documents								
Activity Period: 6-month view	Category:	Asset	•			¢	Search	
Status Type	Archive Time Categor	y Pages	PurchaseDate	DocumentType	AssetID	AssetNumber	AssetType	DocumentUser
ㄷ 🗟 📚 📚 📑 \varTheta	11/08/07 11:11AM Asset	1						CICILY THOMAS
ㅁ 🗟 🐌 📚 🔚 😑	11/06/07 11:31AM Asset	1	02/23/98	Other	8459	*3538	Conversion Exception	TIM@TENMAST
r 🗟 📚 📚 💷 🔍	11/06/07 11:26AM Asset	1	02/23/98	User Manual	8459	*3538	Conversion Exception	TIM@TENMAST
ㅁ 🗟 📚 📚 💷 🔍	11/06/07 11:25AM Asset	1	02/23/98	Sales Receipt	8459	*3538	Conversion Exception	TIM@TENMAST
r 🗟 📚 📚 🖃 🍳	11/06/07 11:24AM Asset	1	02/23/98	Warranty	8459	*3538	Conversion Exception	TIM@TENMAST
ㄷ 🗟 📚 📚 🔚 鱼	10/11/07 03:30PM Asset	1						
Selected Documents: <u>Print Email Fax Delete</u>								

- Use the navigation arrows on the toolbar (for example, the blue arrows in Internet Explorer) to go backwards or forward in the sequence of TenDocs screens in which you have been working.
- Use the Refresh button (for example, this icon from Internet Explorer) to refresh the data on the screen. For example, if you have just scanned a document and want to view its information as soon as possible in the document table.

From this screen, only an administrator/manager can:

- 1. Search archived documents.
- 2. Edit archived document properties.
- 3. Delete documents from the archive.
- 4. View status of archived documents.
- 5. Add/Edit TenDocs users.
- 6. Change your password.

Note: For more information on printing, e-mailing, and/or faxing a document or batch of documents, please see the TenDocs User Manual.

# Working With the Document Archive

### **Searching Archived Documents**

Once on the **TenDocs Admin Archive screen**, you will see *all* your agency's archived documents in a table. To find a specific document(s), use the **search documents** area at the top of the screen.

- 1. Select the **activity period**, (such as current month or year to date), in which the document(s) was archived.
- 2. Select the **category** of the document you are trying to find.

# *Note: The default document categories are: household, employee, fixed asset, vendor, work order, public housing unit, and section 8 property.*

3. Click Search

Click All archived documents that match the specified search criteria will display in the table.

### **Editing Archived Document Properties**

- 1. In the document table, click in the row of the document you want to edit. A **Preview screen** will appear with the first page of the document displayed, as well as a listing of the document page's properties.
- 2. If necessary, change the **document type** of the document page by selecting the appropriate radio button.

Select Page:	Page 1 💌	Total Pages: 1	<< Prev	Next >>	Close	
Document Types C Asset C Em C Other C PHU C Unknown C Ver	ployee O Financial Jnit O Report ndor O WorkOrder	C Household C S8Property				
PurchaseDate 2/23/1998	PurchaseDate     DocumentType       2/23/1998     User Manual					
AssetID 8459	AssetID AssetNumber 8459 *3538					
AssetType DocumentUser Conversion Exception TIM@TENMAST						
Save Cancel						

- 3. Modify the available document property fields, as necessary. The fields displayed will depend on the document's previously tagged document type.
- 4. Click SAVE to apply your changes; or, click CANCEL to cancel the changes and return to the **TenDocs Admin Archive screen**.

### **Deleting Documents from the Archive**

- 1. In the document table, check the checkboxes in the row(s) of the document(s) you wish to delete.
- 2. Click the **Delete** link at the bottom of the screen.

### **Viewing Statuses of Archived Documents**

Each time a document is scanned/archived with TenDocs, an archive "event," such as date and time, is logged and filed with the document. On the **TenDocs Admin Archive screen**, you have the ability view an archived document's archive event details.

Click	EventViewer at the top of the screen. The Events screen appears:					
	Search Ev	ents				
	Search:	Event Description	Status: All	Activity Period:	Year view	
	Search	Clear				
	Status	Event Description	Event Message	E	ivent Time	
		Database Report (Pgs: 2)		11/1/2007 9:57:4	\$7 AM	
	•	PROCESS TXT FILE		11/1/2007 9:57:4	44 AM	
	0	Database Report (Pgs: 2)		11/1/2007 9:55:1	12 AM	

• Status: A green status symbol 🤎 means the scan/archive was successful. A red status

symbol 🧕 means the scan/archive failed.

Note: An e-mail will be sent to the administrator(s)/manager(s) to notify of the failed scan/archive event.

- Event Description: the file type of the scanned/archived document.
- **Event Message:** the error of why a document failed to archive.
- Event Time: the exact date and time the document was scanned/archived.
- Use the **search** function to find the particular archived document event you want to view. You can filter the list of archive events by event description, event message, status, and activity period. After specifying your search criteria, click SEARCH; click CLEAR to clear out the search fields for another search.

### Adding/Editing TenDocs Users

To manage TenDocs users and work with their user profiles, click **Admin Archive screen**. The **Manage Users screen** appears.

I Admin

at the top of the TenDocs

Manag	Manage Users					
۵ 🐍	Add liter					
	Username	Email	Online	Last Login		
Select	admin	admin@nowdocs.com	Г	11/1/2007 7:48:31 AM		
Select	ALOZANO@TENMAST	tendocs@tendocs.com		10/12/2007 4:28:06 PM	Delete	
Select	ALVIN	tendocs@tendocs.com	Г	10/12/2007 4:17:15 PM	Delete	

### To Add/Edit a User

1. Click the **Add User** link.

#### OR

Click the Select link in the row of the user you want to edit. The User Profile screen opens:

Edit User Profile					
Username	ALVIN				
Password	Passwords must have 1 non alpha numeric character and be at least 7 characters long				
Email	tendocs@tendocs.com				
Account	Settings				
Active	Uncheck to deactivate the user.				
Admin	Check to make the user an administrator on the site.				
Locked Out	Uncheck to enable the user to log in again.				
Change u	ser privileges				
Edit	This user can edit a document.				
Delete	This user can delete a document.				
Access Control	This user can VIEW the following document type(s)				
Save	Delete Cancel				

- 2. Add or edit the user profile information, as needed.
- 3. Check or uncheck the appropriate **account settings** checkboxes.
- 4. Check or uncheck the appropriate **user privileges** checkboxes.
- 5. Click SAVE to apply your changes, DELETE to delete a user's information, or CANCEL to cancel your changes and return to the **Manage Users screen**.

### **Changing Your Password**

- 1. Click Change Password at the top of the screen. The Change Your Password screen opens:
- 2. Enter your "old" **password** and then enter your **new password**.
- 3. Re-type your new password to confirm and then click CHANGE PASSWORD to apply your changes. Or, click CANCEL to cancel the change and return the Home page of the TenDocs Admin Archive screen.

# Setting Up User Access to TenDocs in WinTen Modules/ Programs

One of the duties of an agency administrator/manager is setting up the user security for WinTen/WinTen<sup>2</sup> users vs. "direct" users of the TenDocs archive. If you want certain WinTen/WinTen<sup>2</sup> users to have full, "direct" access to the TenDocs archive, but want other WinTen/WinTen<sup>2</sup> users to not have any access at all, you can work with Tenmast to design the user security that is right for your agency.

#### **Access Master Setup Program**

1. On the **Main Menu screen** of the Master Setup program, click SECURITY. The **Maintain User Security** screen appears with the **User tab** selected.

#### Edit User Role

- 2. Select the **Program Tasks tab** and click *to* make the screen available for entry.
- 3. Select the **program** you want to work with; all the tasks that can be accomplished for the selected module are listed at the bottom of the screen.

#### Assign TenDocs Tasks User Can Access

4. Check the checkboxes next to the TenDocs task(s) you want the user to be able to access.

#### Save and Finish

- 5. Once you have selected all the tasks that you want for the user, click  $\blacksquare$ .
- TenDocs Archive Report: Checking this checkbox allows the user to archive a report into the TenDocs archive.
- TenDocs View Archive Report: Checking this checkbox allows the user to only view an archived report in the TenDocs archive.
- View/Scan Archived Report: Checking this checkbox allows the user to view a report in, as well as scan a report into, the TenDocs archive.
- 6. View/Scan History Archived Report: Checking this checkbox allows the user to view/scan a report associated with a tenant in history.

# Setting Up User Access to TenDocs in WinTen<sup>2</sup> Modules/Programs

#### **Access Master Setup Program**

1. On the **Main Menu screen** of the Master Setup program, click ROLES. The **Browse Roles screen** appears with all enabled roles displayed in a table.

### Edit User Role

- 2. Highlight the role you want to work with and click *on the toolbar*. The **Maintain Enabled Roles screen** opens with all enabled WinTen<sup>2</sup> programs displayed in a table.
- 3. Highlight the program you want to work with and click *again.* A **Module Tasks screen** displays. All the tasks that can be accomplished for the selected module are organized by group on the left side of the screen in the **Tasks No Access Allowed** list.

### Assign TenDocs Tasks User Can Access

- 4. Click *and* the screen becomes available to work with.
- 5. Click the plus sign next to the TenDocs group of tasks, and then highlight the specific task you want the user to be able to access.
- 6. Click . The highlighted task now displays on the right side of the screen in the **Tasks Access Allowed** list.

🍓 Maintain	×
File Edit View Help	
📔   🖉 🖬 🤣   🔶 🔶	
Role Occupancy Specialist	
Program Occupancy Rent Calculation	
Tasks - No Access Allowed	Tasks - Access Allowed
Group : TenDocs	Group : LETTERS
TenDocs View Archived Report	Group : REPORTS
View/Scan Household Documents	Group : SETUP
	Group : TENANTS
	Group : TenDocs
	TenDocs Archive Report
	<u> </u>

• If you want to assign all tasks within the TenDocs group, click >>>.

### Save and Finish

7. Once you have selected all the tasks within the group that you want for the user role, click  $\blacksquare$ .