
CATS - COLLIERS ASSIGNMENT TRACKING SYSTEM

Where to Start

Overview

This manual is designed to help a new CATS user get set up and ready to use the system.

What is included in this manual?

- 1.0 Security Access
- 2.0 Accessing your Workspace
- 3.0 Opening the CATS Home Page
- 4.0 Launching the Project Manager, Workflow Manager and Contact Manager
- 5.0 Using CATS for a new Client
- 6.0 Making Local Replicas

If you have any questions or require further clarification please contact:

Corporate Services Help Line @ 604.661.0824

Or

Email: cs.technical.support@colliers.com

Getting Started

1.0 Security Access to the CATS Suite of databases

Before trying to open CATS on your desktop, please ensure you have requested security access to CATS from CS Technical Support (email cs.technical.support@colliers.com or phone 604.661.0824).

CS Technical Support will help determine what security level you need depending on your role in CS. Full users of CATS will be given CS Level 3 access. You will be provided with a login name and a password. Please note that this is only required for the web version of CATS, not the Notes version. When you login to Assignment Tracking from www.collierscs.com you will be prompted for a login name and password (see CS Web Manual in the Software & Training Knowledge Base for more information).

If you have not been set up properly by CS Technical Support, you will be denied access to the CATS databases.

Getting Started

2.0 Accessing your Workspace

Follow these steps to ensure you have access to the right databases on your machine and are ready to start working in CATS.

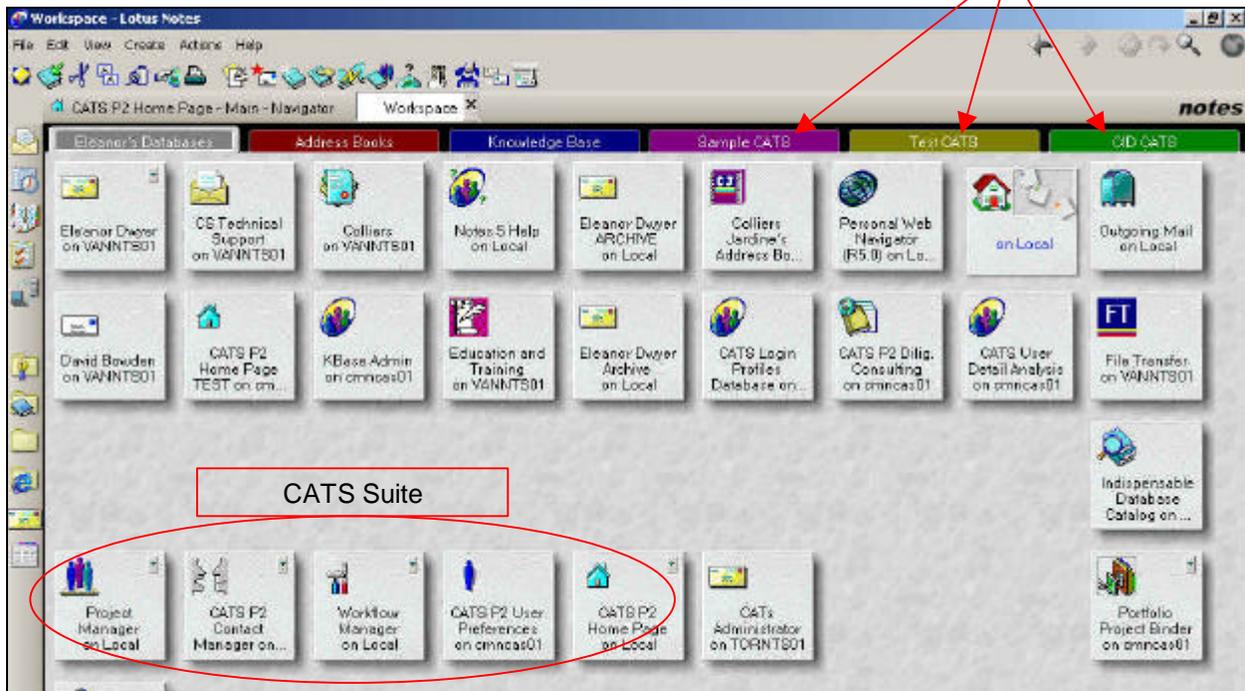
You will need to open a series of Notes databases from your 'Workspace'.

1. Open your Lotus Notes
2. Select the 'Databases' icon in the left margin of Notes and find the database called 'Workspace'.
3. Drag the icon for 'Workspace' over to the left margin.



Getting Started

4. Click on the 'Workspace' icon to see a screen with lots of icons and tabs across the top.



5. The number of icons displayed in any particular tab depends on the number of databases you have previously accessed. Note that you may not see this many icons.
6. The CATS databases are displayed at the bottom left of this screen.
7. When you have finished opening the databases, your screen will show the same icons.

3.0 Opening the CATS Home Page

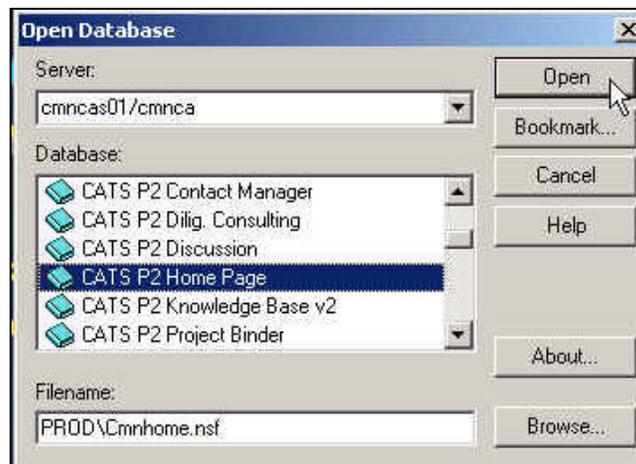
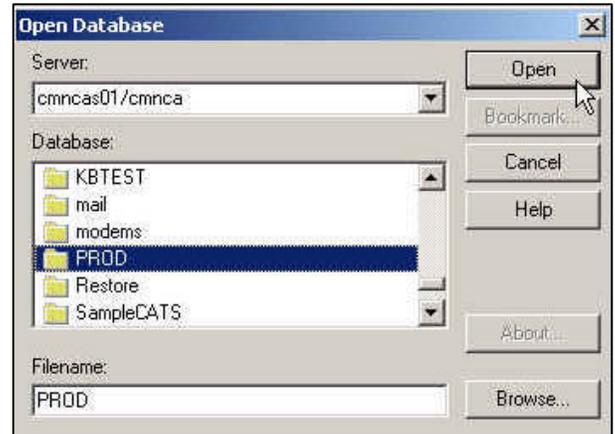
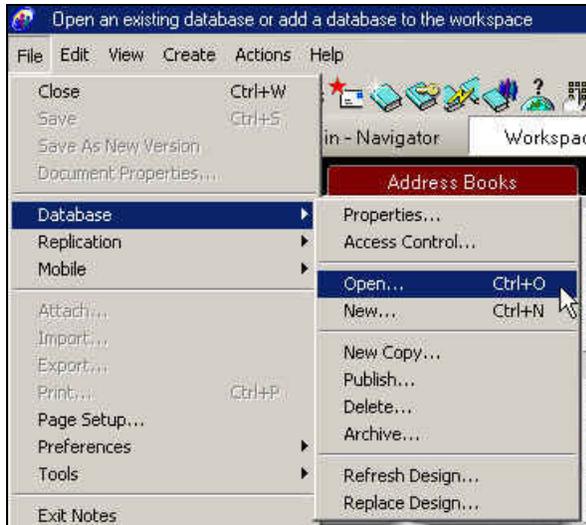
The CATS Home Page provides convenient links to all CS databases and tools.



Getting Started

To launch this database, do the following:

1. Make sure you are in your Notes Workspace
2. Select File, Database, Open from the top menu bar
3. Depending on where you are located, select the appropriate server from the list of servers. If you are a CMN user in North America, choose the cmncas01/cmncas server from the list. You may have to type it into the field directly. (Note: if this does not work, try typing 206.47.125.14 instead).
4. Scroll down to the yellow folder called PROD, select Open
5. Find the CATS P2 Home Page from the list of databases, select Open



The Home Page should open as shown here.

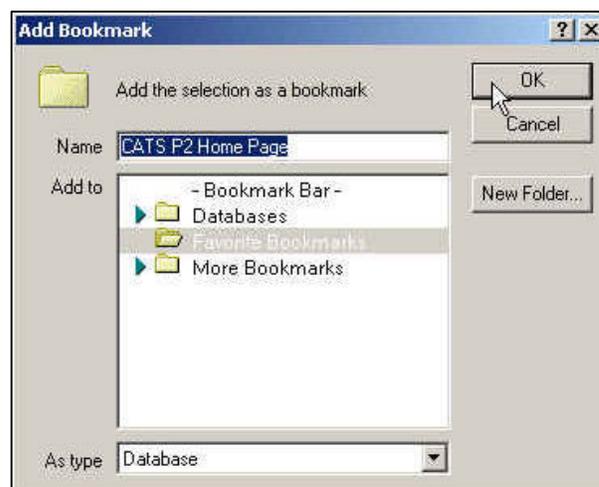
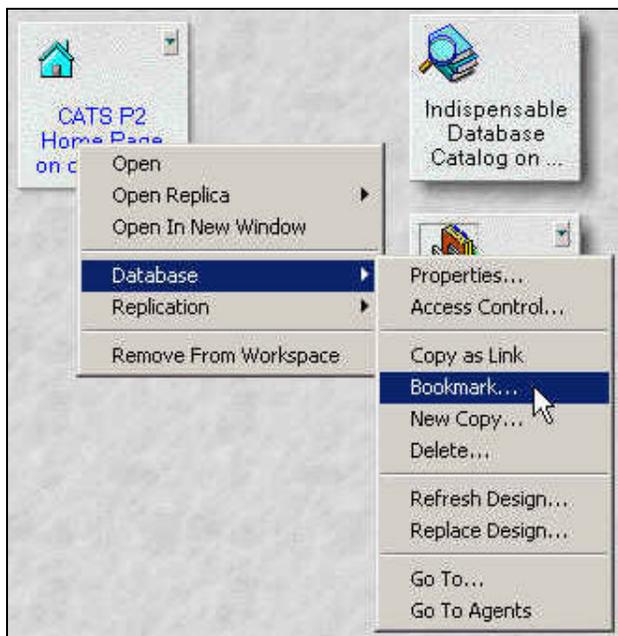


Getting Started

It is helpful to have the CATS Home Page to appear as your Lotus Notes Welcome Page. When you log into Notes, this page will automatically be displayed giving you quick and easy access to all of CS's databases.

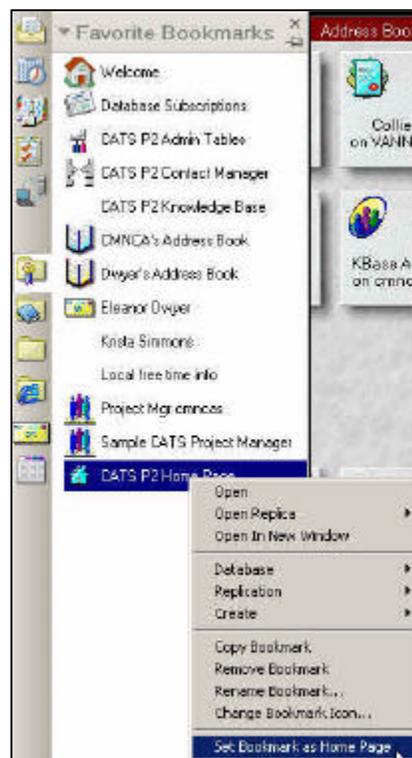
To set this up, do the following:

1. Find the CATS P2 Home Page icon in your workspace. Single click on the icon to select the database but not open it. It should be highlighted in blue.
2. Right click, select Database, select Bookmarks...
3. Ensure that Favorite Bookmarks is highlighted before selecting OK.
4. Click the Favorite Bookmarks icon in the left margin.



5. Hover your mouse over the CATS P2 Home Page icon and right click, select 'Set Bookmark as Home Page'

The CATS Home Page should now automatically appear the next time you open Lotus Notes. It is especially helpful for launching new databases.



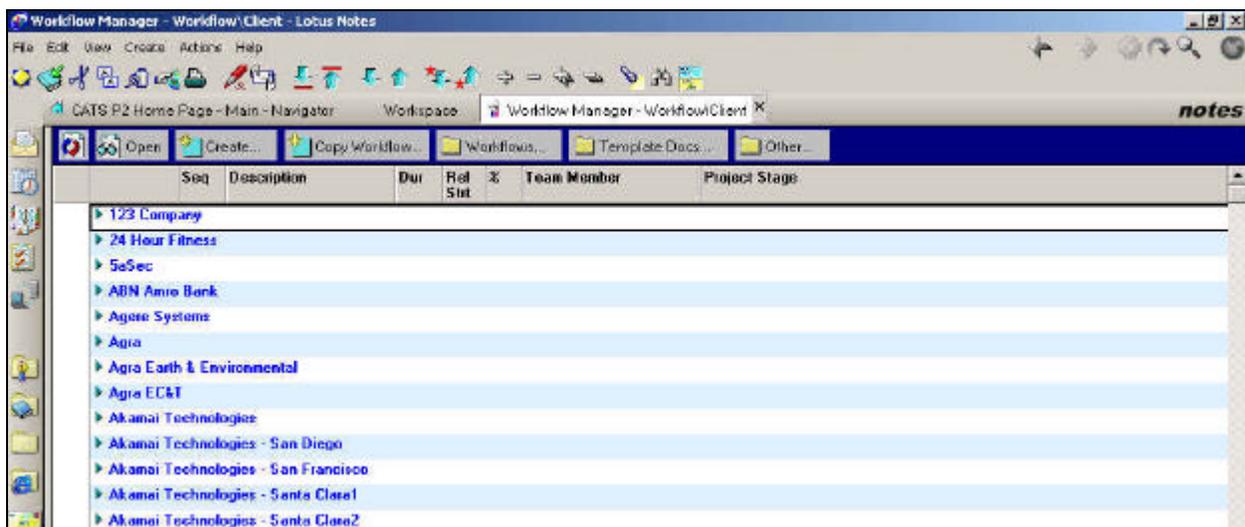
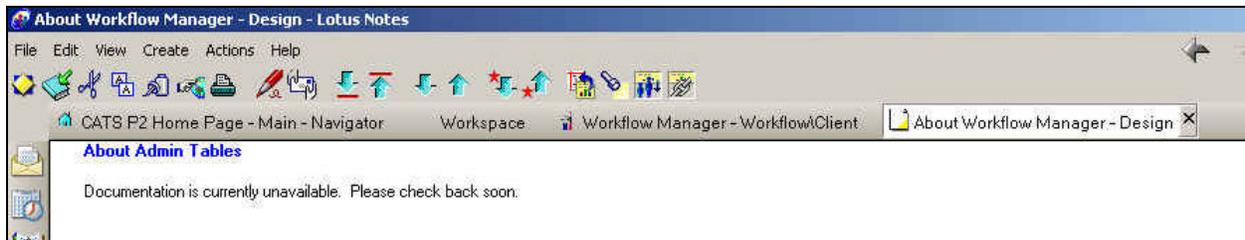
Getting Started

4.0 Launching the Project Manager, Workflow Manager and Contact Manager

From the CATS Home Page, you can access each of the above databases. Note that the Project Manager is called 'Assignment Tracking' on the Home Page.

First, open the Workflow Manager. Remember that this may take some time as your machine is loading a database from the cmncas01/cmncas server which is currently located in Toronto.

1. Select the Workflow Manager link from the CATS Home Page
2. The database will launch showing an 'About' screen. Escape from this to view the Workflow Manager.



3. You may get an error message while trying to open the Workflow Manager that may reference a RID error OR look like the image below.



Getting Started

4. To correct the problem:
 - a. Go to your Workspace
 - b. Find the Workflow Manager icon
 - c. Click once to select the database but do not open
 - d. Select Actions, Setup, Auto-set ENV_FN_CATSADMIN from the top menu bar



5. After launching the Workflow Manager, and correcting any problems you may encounter, open the Project Manger (Assignment Tracking) and the Contact Manager. Note that if you haven't been assigned to a specific client with existing projects, the Project Manager will open for you with no information.
6. You can access all of CS's databases from the Home Page. Spend some time familiarizing yourself with the various 'Knowledge Bases' and their contents. You will find them to be useful tools. Remember that you can add anything to the Knowledge Bases for the benefit of other CS staff. Note that the designated Administrator of the Knowledge Base will be notified if you do add something to the Knowledge Base.
7. Please contact CS Technical Support if you have any problems launching the databases.

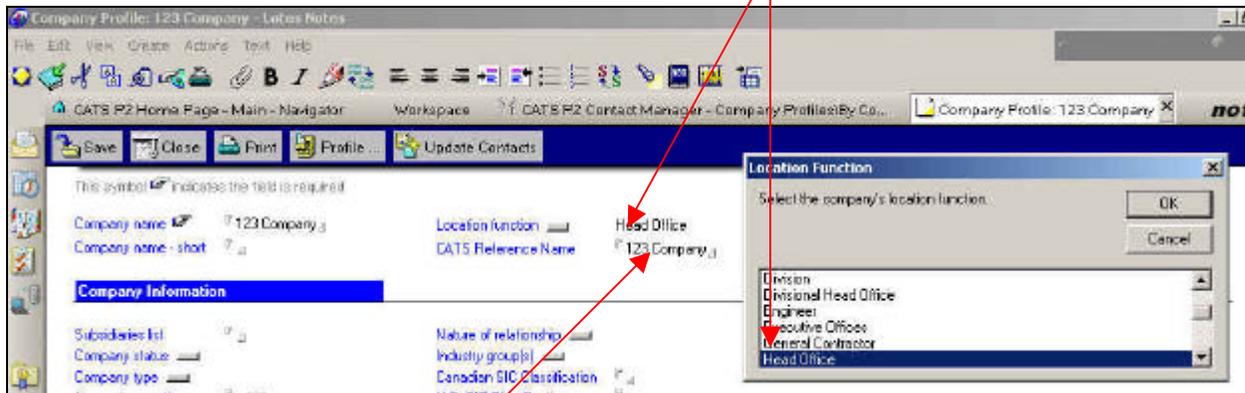
Getting Started

5.0 Using CATS for a new Client

There are two critical items that need to be completed before a user can create projects in CATS for a new client. A company profile is needed in the Contact Manager and a workflow is required in the Workflow Manager.

Contact Manager

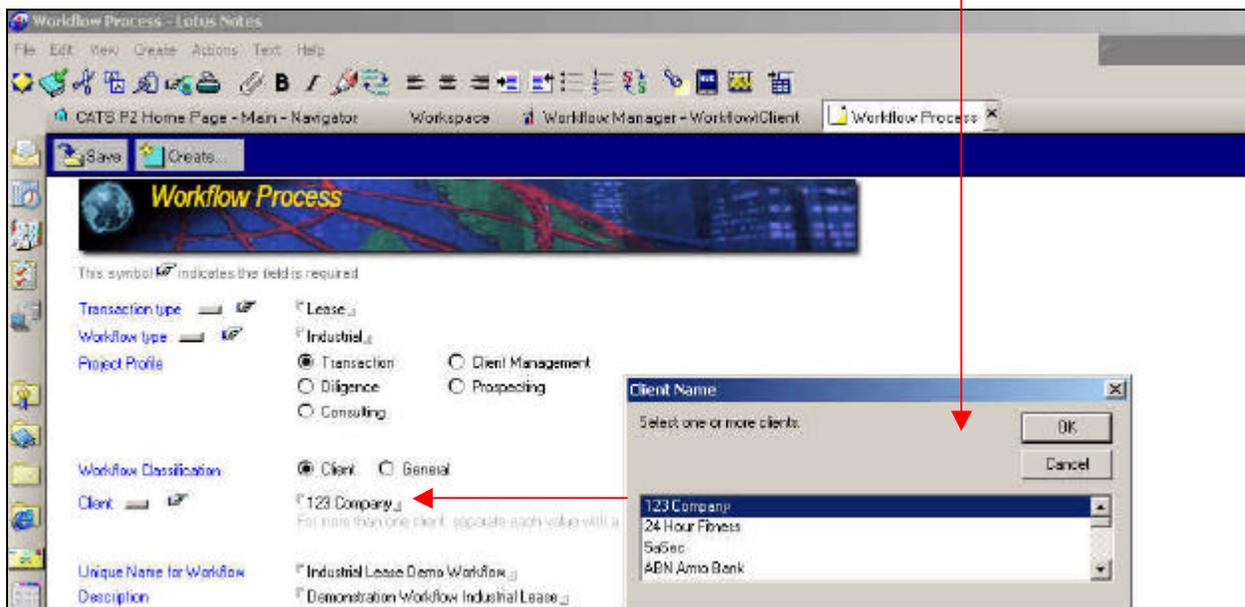
1. Ensure that the company profile for your new client in the Contact Manager, has 'Head Office' selected from the drop down box in the Location Function field.



2. Ensure you type a CATS Reference name in the CATS Reference Name field.

Workflow Manager

When creating a workflow, ensure that it references the **IDENTICAL** CATS Reference Name in the Contact Manager's Company Profile. If it is not available from the drop down box, simply type it into the Client field. Note that the company name has to be **IDENTICAL** to the way it shows in the Contact Manager.



Getting Started

The Project Manger will now link information together based on the CATS Reference Name when you create a project.

6.0 Making Local Replicas - Contact Manager & Workflow Manager

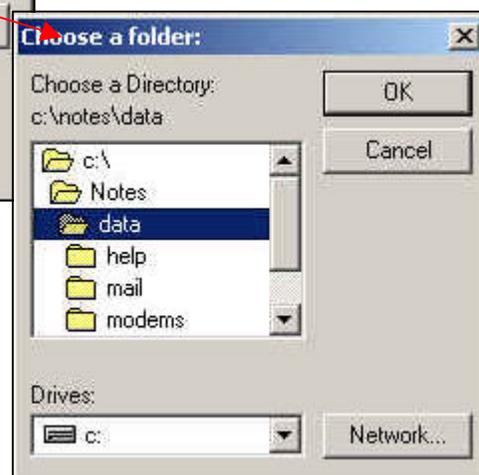
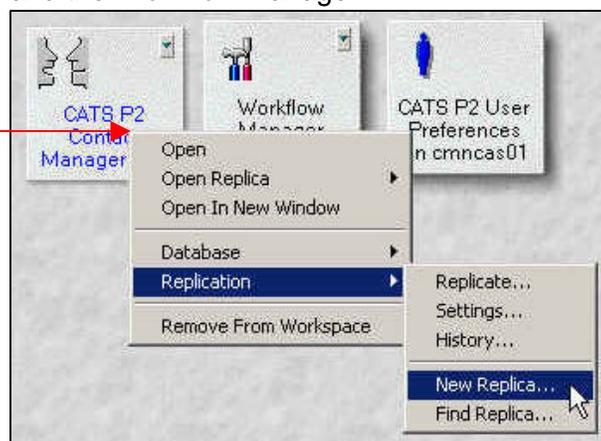
The CATS system will work much faster if you are using a 'local' copy of the databases. A replica of the database is stored on your hard drive and changes to the server copy and your 'local' copy are 'replicated' back and forth.

Note that if you are comfortable and fully functional in the web version of CATS and depending on your use, you may not need to make replica copies of the CATS databases.

However, a full user will still need to access the Notes version of CATS to do certain functions. (ie adding team members to projects, editing security groups in the project profile).

We will start by creating replicas of the Contact Manager and the Workflow Manager.

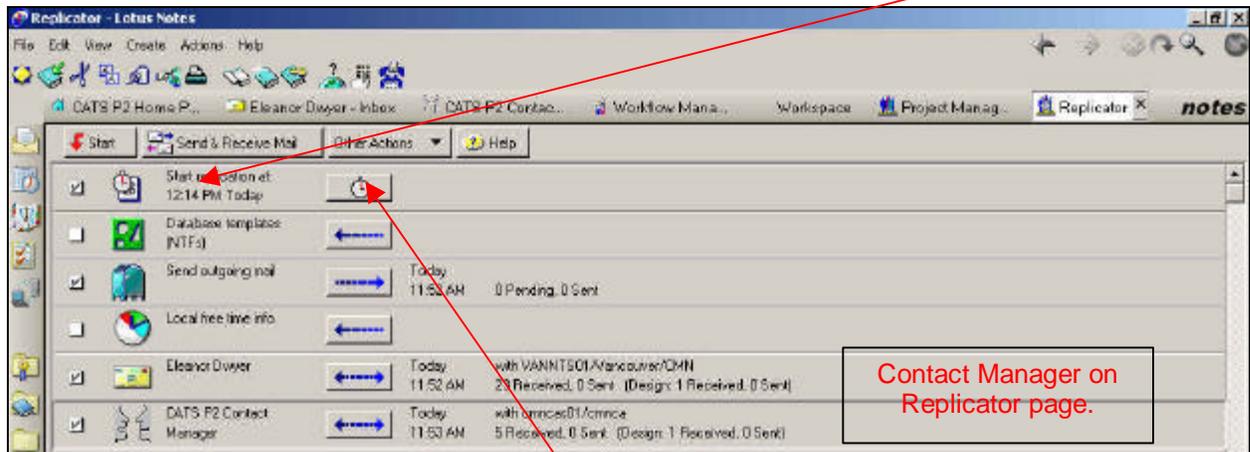
1. Go to your workspace and find the Contact Manager icon.
2. Select (do not open) and right click
3. Select Replication, New Replica
4. Complete the 'New Replica' window as shown below. Be sure to select the right folder to save the replica copy of the Contact Manager. It should be in the Data folder for your Lotus Notes, in this case the path is **c:\Notes\data**.
5. Click OK
6. The replication will run in the background and will not interrupt the normal functioning of your computer.



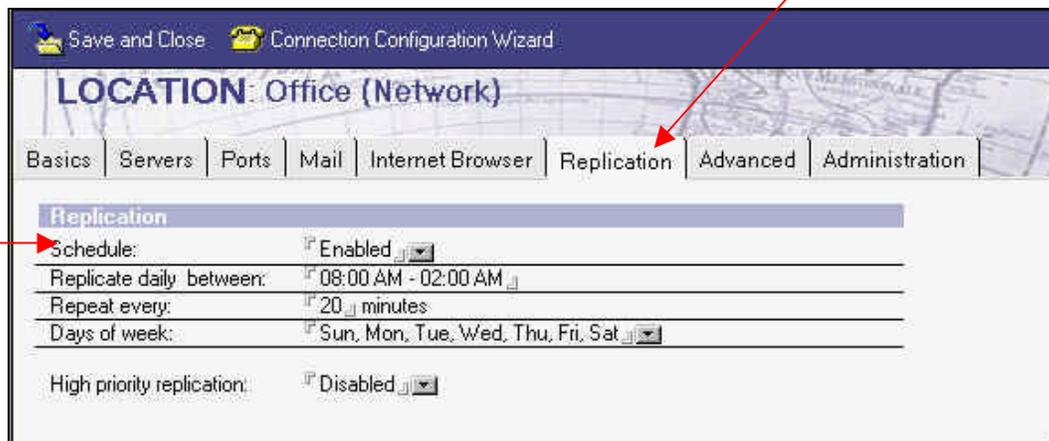
Getting Started

To see the replication, go to your Replicator Page.

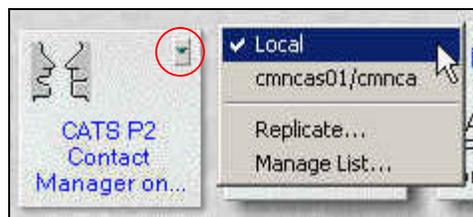
The Contact Manager should now be listed on this page and will push and pull changes to and from the main Contact Manager. Be sure that the replication schedule is enabled.



If your replication is disabled, select the 'stop-watch' icon, go to the Replication tab, and select the Enabled schedule.



Lotus Notes should automatically create a replica copy of the Contact Manager. After this is complete, you should see an arrow in the Contact Manager icon in your workspace. The arrow will let you choose between your local and server versions of the databases. Note that using the local version will be faster.



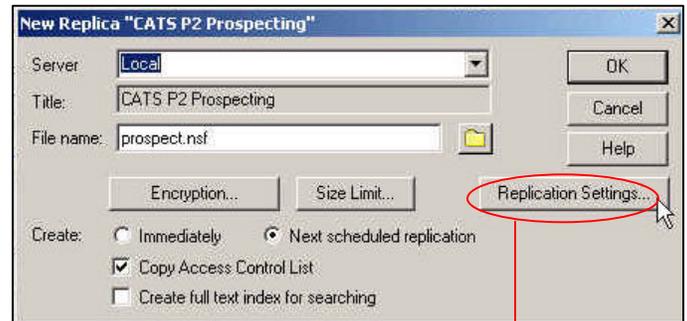
Follow the above steps with the Workflow Manager to create a local copy of the Workflow Manager.

Getting Started

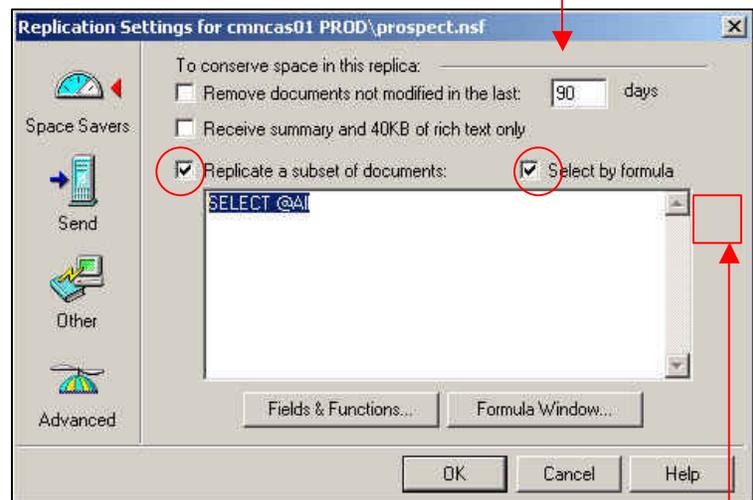
6.0 Making Local Replicas - Project Manager

Local copies of the Project Manager are created using the same steps as the Contact Manager and the Workflow Manager with a few differences.

1. In the New Replica window, select the Replication Settings button.



2. Check the boxes for the selections:
?? Replicate a subset of documents,
and
?? Select by formula
3. Insert the replication formula provided in the Internal Policies Knowledge Base under Systems Security into the formula field – remember to customize it with your client names. The company names in the replication formula should be the same as the CATS Reference Name. If you have questions, please ask CS Technical Support.
4. If a check box appears in the right margin, click it before selecting OK.
5. The Project Manager should now create a replica copy with only the clients listed in the replication formula.



Please contact CS Technical Support if you have problems setting up a replication for the Project Manger.