



LaserVault Reports Web Client

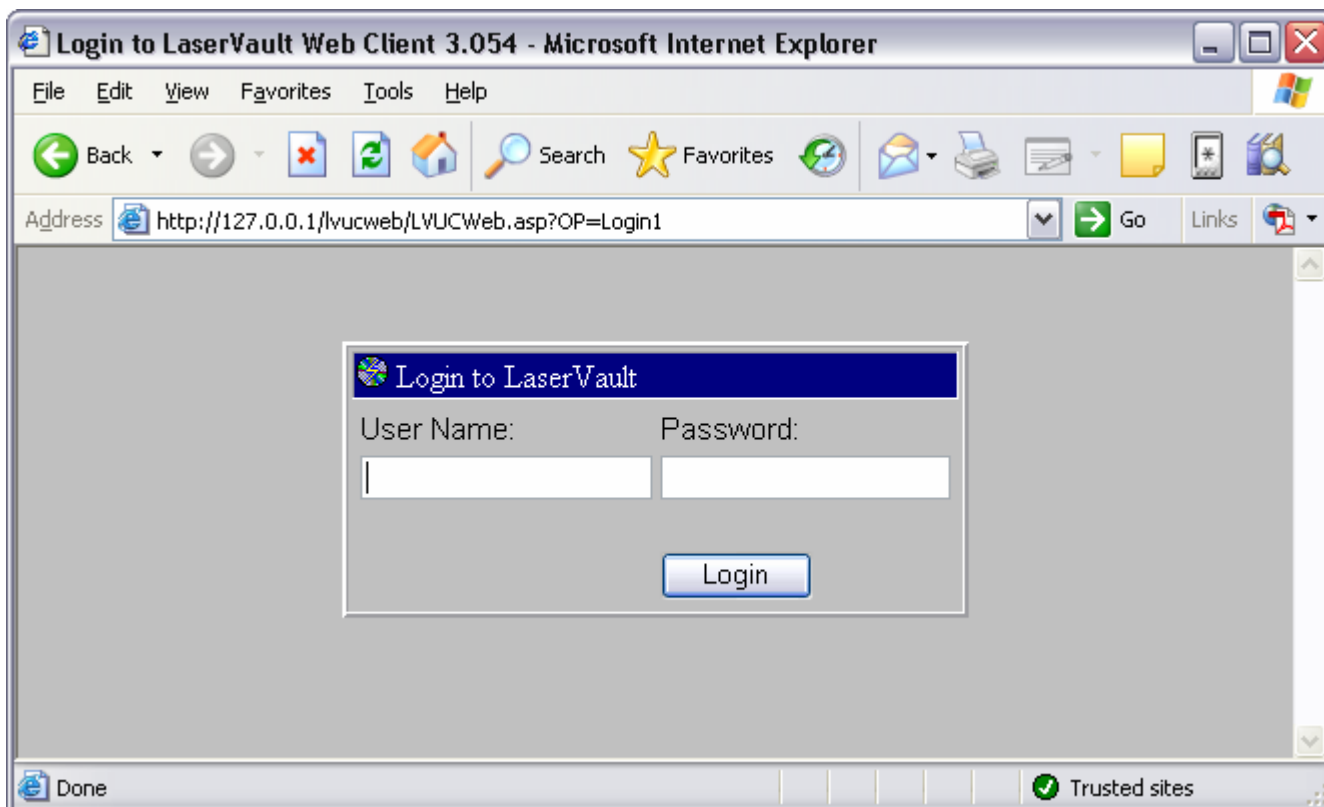
<http://www.laservault.com>

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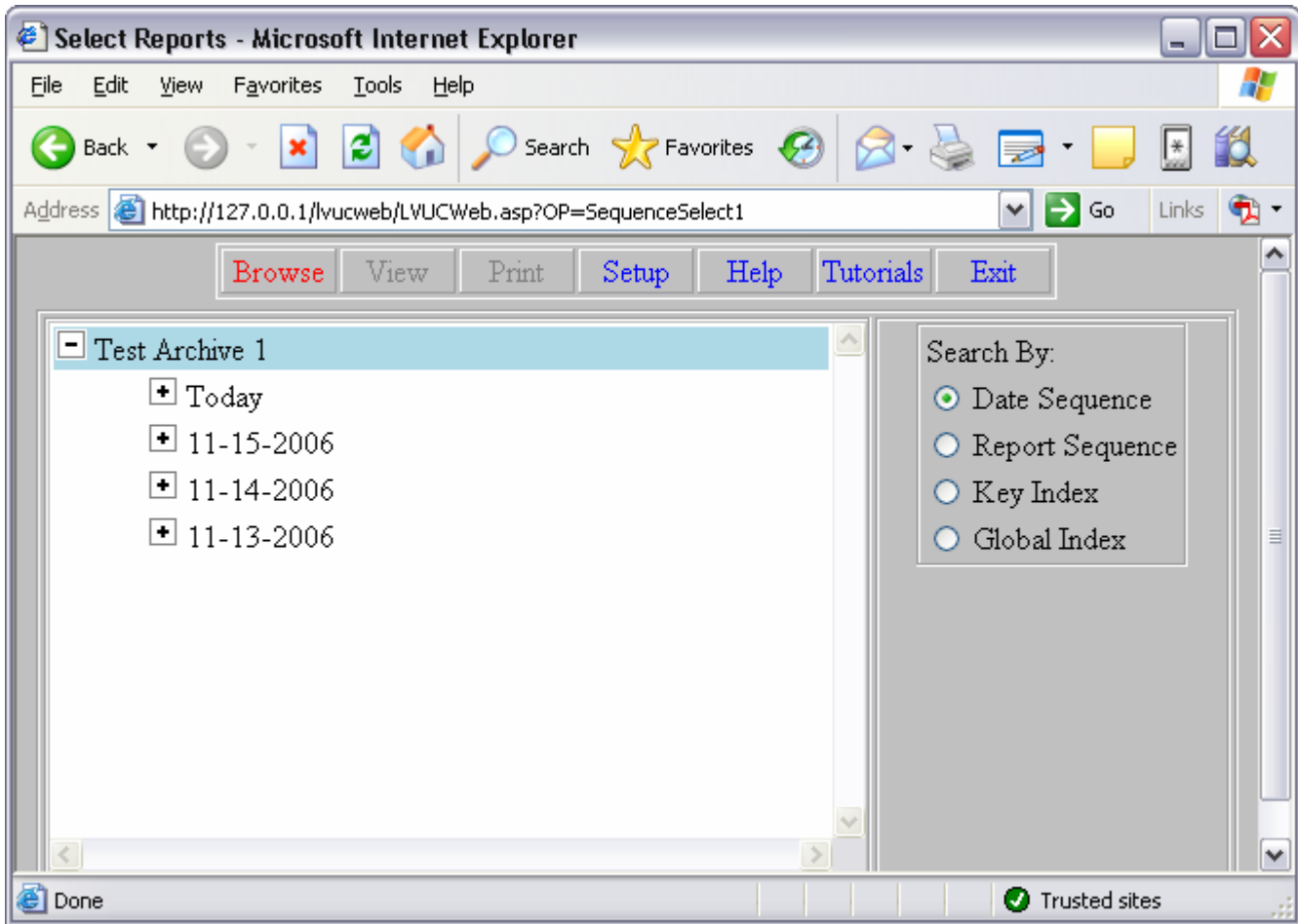
Login

The first screen you will normally see is the login screen. Enter your user name and password that was assigned to you by the LaserVault Administrator. LaserVault might be configured to automatically log you in with you domain account. If that's the case you will not see a login screen, but will be logged in using the account you logged on to the network with.



Selecting an Archive

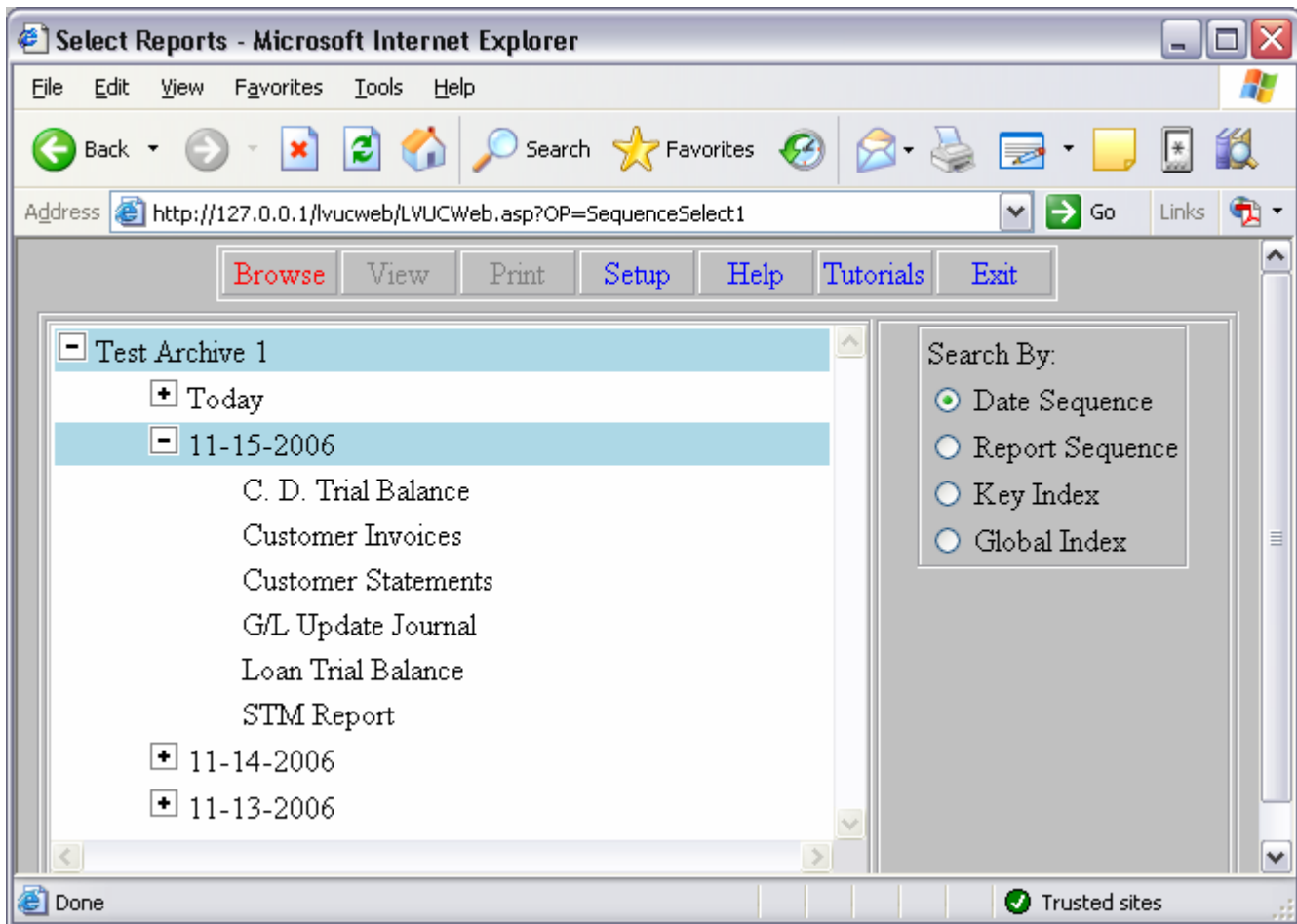
After you login you will see all the archives you have access to. Click on an archive to select it.



Once you have selected an archive you have several different methods for finding reports.

Date Sequence

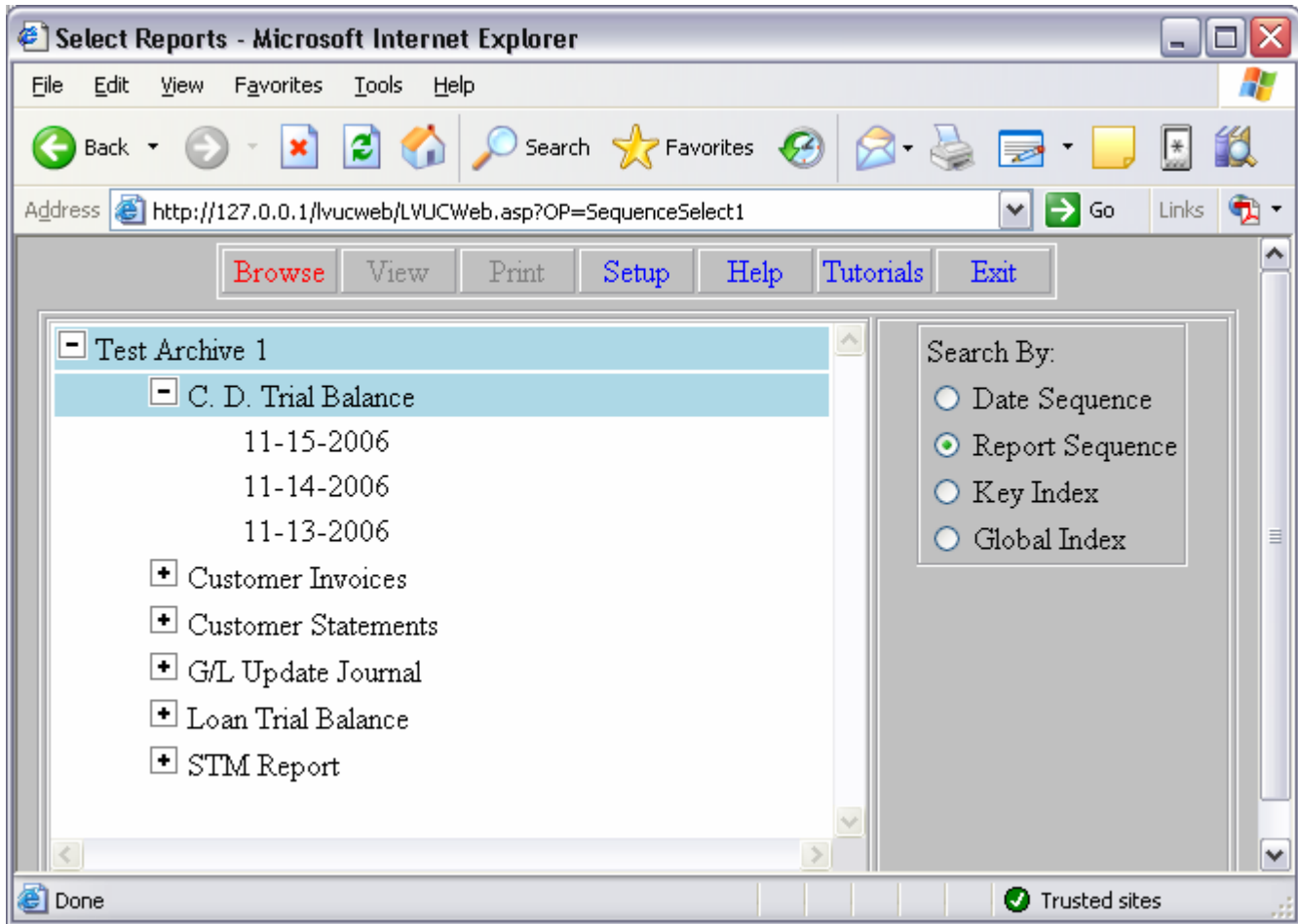
Using date sequence you will see a list of all dates in the archive. When you select a date you will see the reports that were archived to that date.



Select a report to view it.

Report Sequence

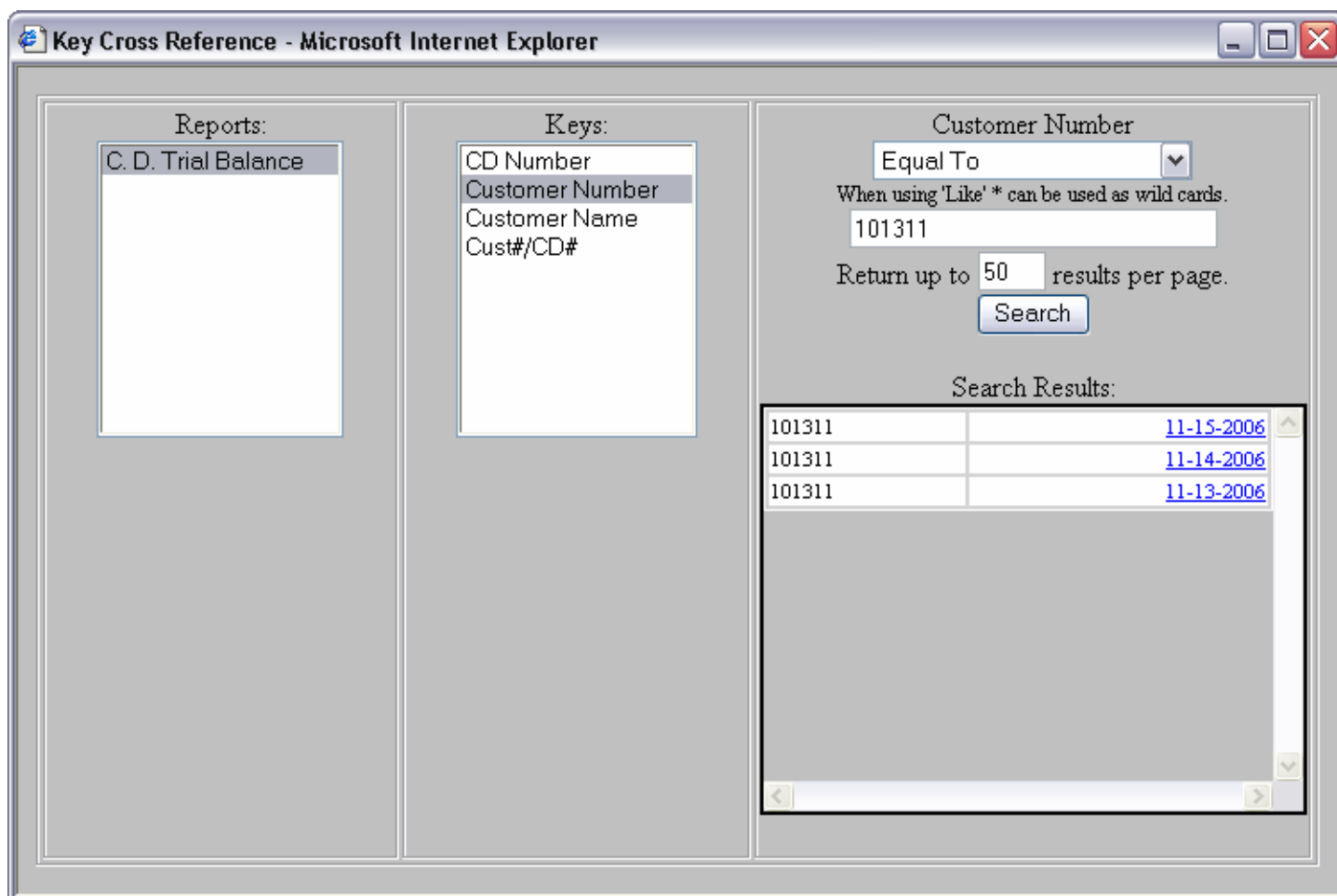
If you choose report sequence, you will see all reports in the archive.



Click on a report to see what dates the report is archived in. Click the date to view the report.

Key Sequence

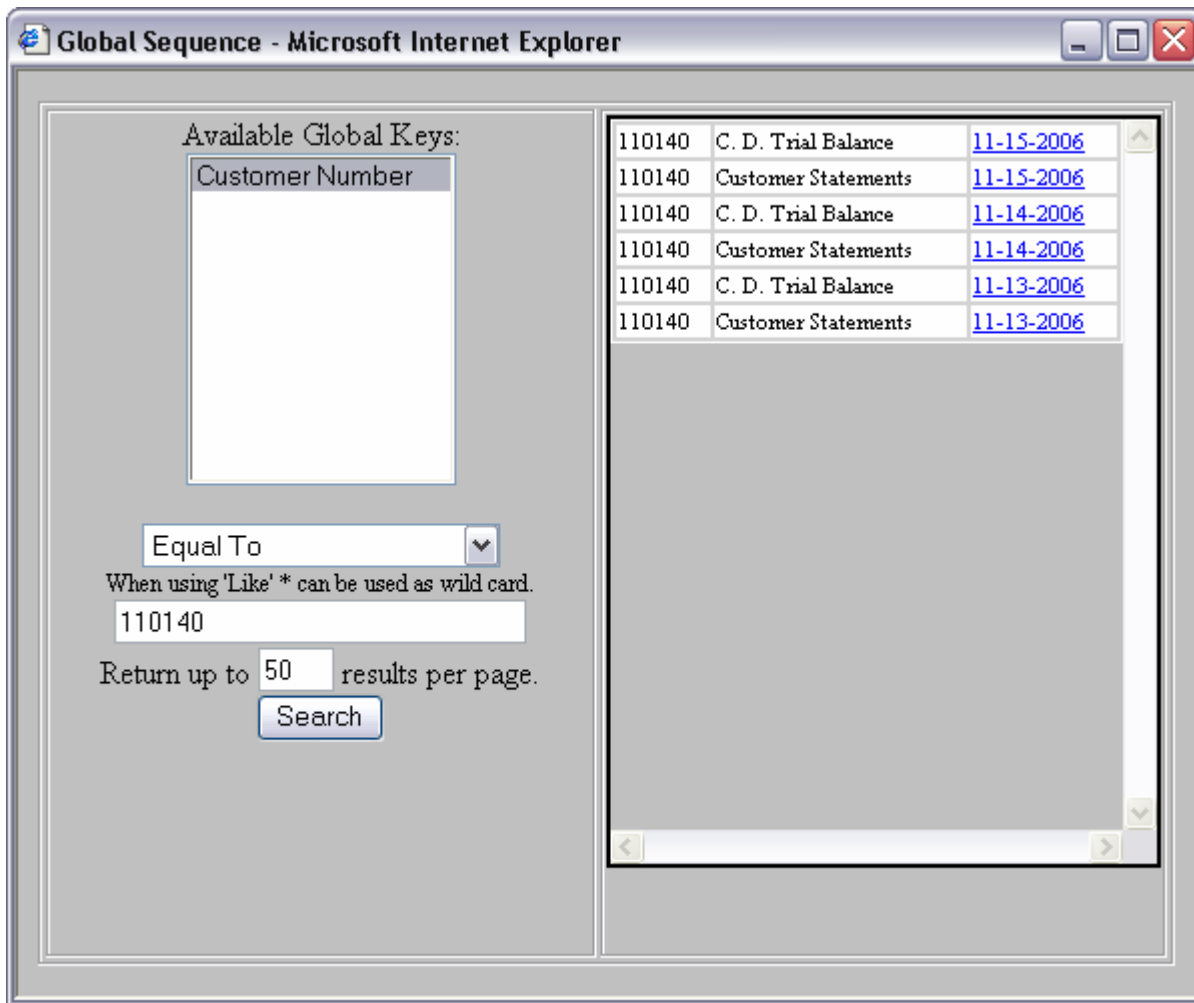
Using key sequence you can search for a key value across multiple dates. The LaserVault administrator must first setup the key sequence before this option is available.



With key sequence, select the report, then select the key or index you want to search, enter the search value and click search. You will see a hit list showing the key value found and the date where the report is. Click the date to view the report.

Global Index Sequence

Global Keys must be setup first by the LaserVault administrator. Click the Global Index sequence to do a global search.



When you do a global index search you select the global key then enter the key value. The result list will display any reports and the dates where that value is found. Click the date to view the report. You can do a partial value search by using the Like option and using asterisk as a wild card. For example selecting Like and 1* would return all customer numbers that start with 1 in the above example.

Full Text Index Sequence

If the LaserVault administrator has configured full text indexes you can search reports using this option. A full text search is similar to a web search engine search where you can search for any word or phrase in a report.

The screenshot shows a web browser window titled "Full Text Index Sequence - Microsoft Internet Explorer". The main content area is divided into two columns. The left column, labeled "Reports:", contains a list of report types with checkboxes: "***** All Reports *****" (checked), "C. D. Trial Balance", "Customer Invoices", and "Customer Statements". The right column, labeled "Search Type:", contains four radio button options: "Match exact phrase.", "Match all words within a page.", "Match any word." (selected), and "Match all words within a report.". Below these columns is a "Search For:" text input field containing the word "ethel". Underneath the search field are two date range selectors: "Start Date: 11-13-2006" and "End Date: 11-15-2006", each with a dropdown arrow. At the bottom center of the form is a "Search" button.

Select all reports, or select a set of reports you want to search in. Enter the word or words you want to search for. Select the type of search to perform and the date range.

A search results page will show any reports that contain the word or phrase you are searching for.

Select	Report	Date	Word	Page
<input type="checkbox"/>	C. D. Trial Balance	11-15-2006	ETHEL	3
<input type="checkbox"/>	Customer Statements	11-15-2006	ETHEL	7
<input type="checkbox"/>	STM Report	11-15-2006	ETHEL	5
<input type="checkbox"/>	C. D. Trial Balance	11-14-2006	ETHEL	3
<input type="checkbox"/>	Customer Statements	11-14-2006	ETHEL	7
<input type="checkbox"/>	STM Report	11-14-2006	ETHEL	5
<input type="checkbox"/>	C. D. Trial Balance	11-13-2006	ETHEL	3
<input type="checkbox"/>	Customer Statements	11-13-2006	ETHEL	7
<input type="checkbox"/>	STM Report	11-13-2006	ETHEL	5

Found 9 report pages that contain the word ETHEL.

Perform another search

Click the report name to view the report.

Viewing a Report

Once you've selected a report to view you will see the first page of the report in the view screen. From this page you can navigate through the report using the page up, page down, top, and bottom buttons.

You can do a key search within this report using the list of keys on the right to select a key and the search buttons.

You can also mark pages for printing or e-mailing and add or view attachments if that option is enabled for you.

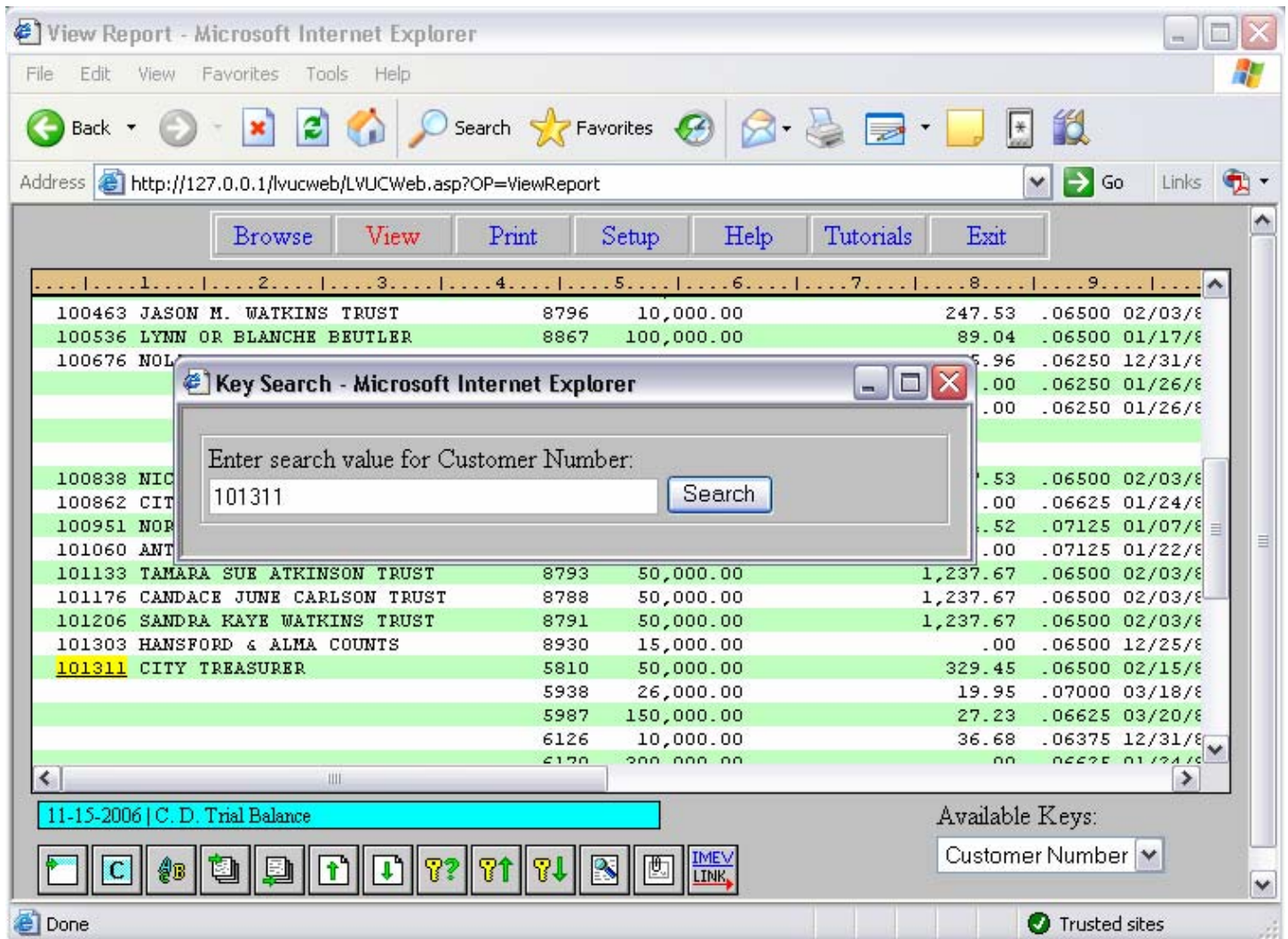
12/22/87 C. D. TRIAL BALANCE

CUST NBR	N A M E	CD NBR	CURRENT BALANCE	ORIGINAL BALANCE	ACCR. INT.	RATE	NEXT DATE
100021	MR OR MRS W A SMITH	8719	79,000.00		2,827.77	.06500	01/04/88
		8742	6,000.00		214.77	.06500	01/04/88
** CUSTOMER TOTAL **			85,000.00				
100056	MR. OR MRS. EDWARD E. PEELER	4893	10,000.00		199.45	.06500	03/01/88
		5255	13,000.00		111.26	.06375	05/03/88
		5254	13,000.00		111.26	.06375	05/03/88
		5300	12,000.00		88.03	.06375	05/10/88
		5950	10,000.00		162.74	.06750	03/25/88
		5952	10,000.00		162.74	.06750	03/25/88
** CUSTOMER TOTAL **			68,000.00				
100064	LARA, LISA & LANA KAMPHAUS	5158	10,000.00		133.08	.07250	04/15/88

11-15-2006 | C. D. Trial Balance

Available Keys: CD Number

When you select a key and press the key search button (icon with the key and ?) you will be prompted for a search value. The search value will be highlighted on the report if found.



You can also do a sequential text search which doesn't use the pre-defined keys. This search can be a lot slower on large reports but allows you to look for any text string within the report.

If there is an attachment on the report page or key value the attachment icon will display yellow rather than white.

Attachments

Attachments can be used to add a note to a page of a report, or associate a note with a key value such as a customer number or invoice number. An attachment can also have a file attached.

To add an attachment, click the attachment button at the bottom of the view screen.

Add an Attachment - Microsoft Internet Explorer

Subject:	Special note
Note Text:	This is a special note for customer 101311
Attach Options:	<input type="radio"/> Attach to page. <input checked="" type="radio"/> Attach to key value.
Key Value:	101311
Permissions:	<input checked="" type="checkbox"/> Allow others to view this attachment. <input checked="" type="checkbox"/> Allow others to edit this attachment. <input checked="" type="checkbox"/> Allow others to delete this attachment.

After an attachment has been added, you can upload a file to associate with the attachment.

Attachments - Microsoft Internet Explorer

Owner	Subject	Note Text	Key Value	File Attachment	Date Added	Date Modified	Options
Erik	Special note	This is a special note for customer 101311	101311	*None Upload	11/15/2006 3:44:38 PM	11/15/2006 3:44:38 PM	Edit Delete

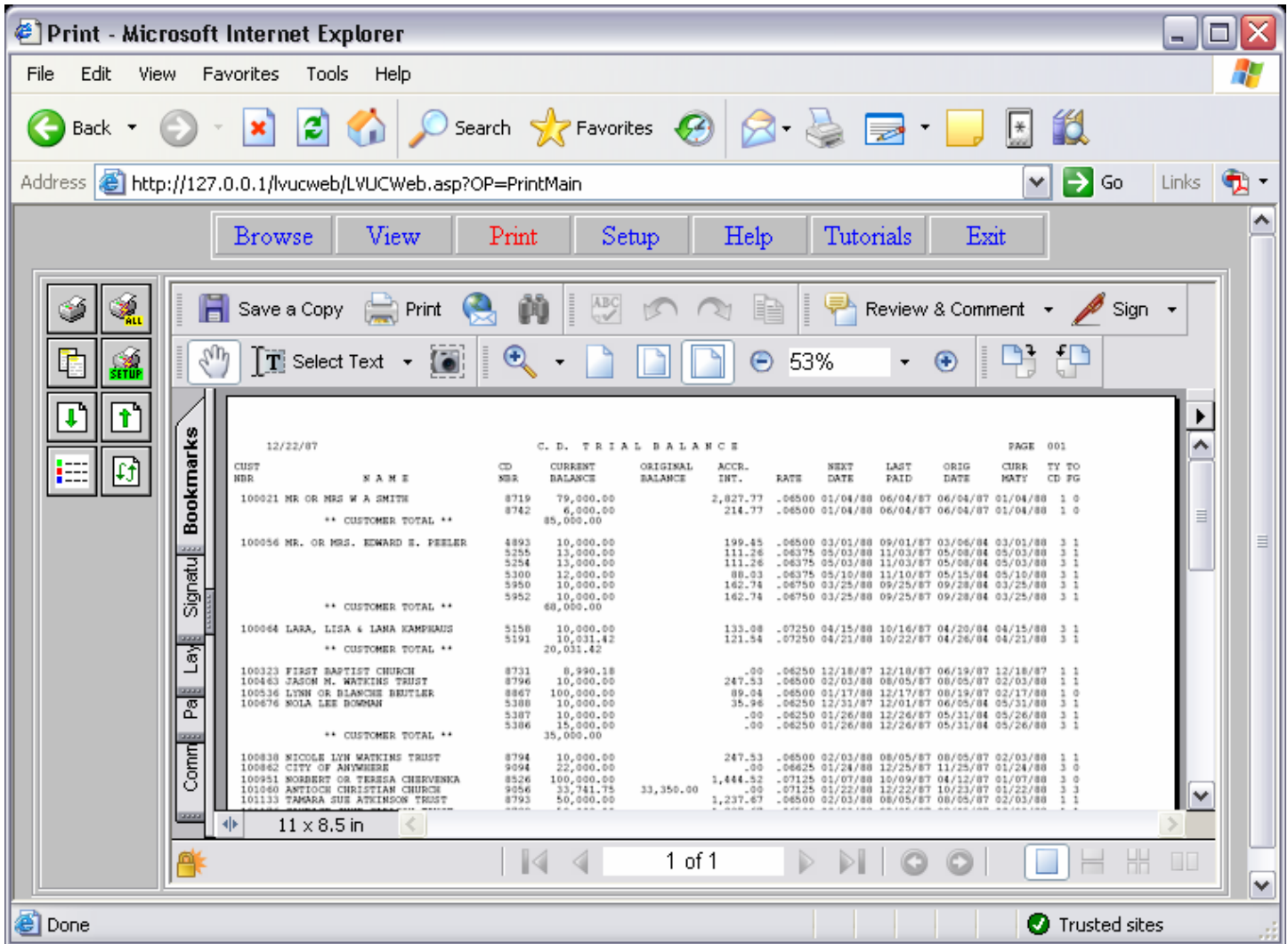
You have the option to attach the note or file to a page of the report, or attach it to a key value. If it's attached to a page you will only see the note on that page of the report.

If it's attached to a key value you will see the attachment on any report within the archive after doing a search on that key value.

Printing and E-Mailing

Click the print tab to print or e-mail a report.

If your LaserVault administrator has setup the PDF Printer, you will see a print preview in acrobat reader. You will need to have reader installed on your machine.

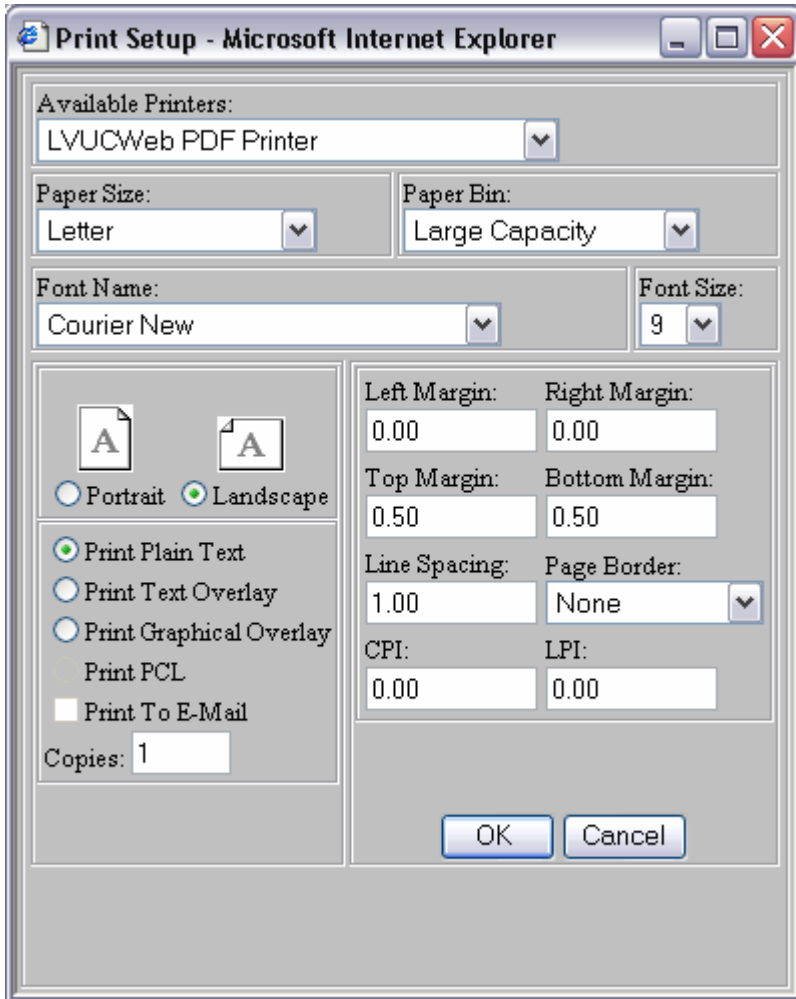


This is a preview of the current page you are viewing. You can use the page up and page down buttons to switch pages. If you just need to print or e-mail the current page, click the acrobat option to print or e-mail the PDF.

If you have marked several pages to print or e-mail, click the print button on the left top. This will open a new window with the multi-page PDF in it. From that window you can use acrobat to print or e-mail the file.

To print the entire report, click the print all button on the left. To do a batch print where you can specify a key value and a date range, click the batch print button. This is handy if you need to print or e-mail invoices for a customer over a given date range.

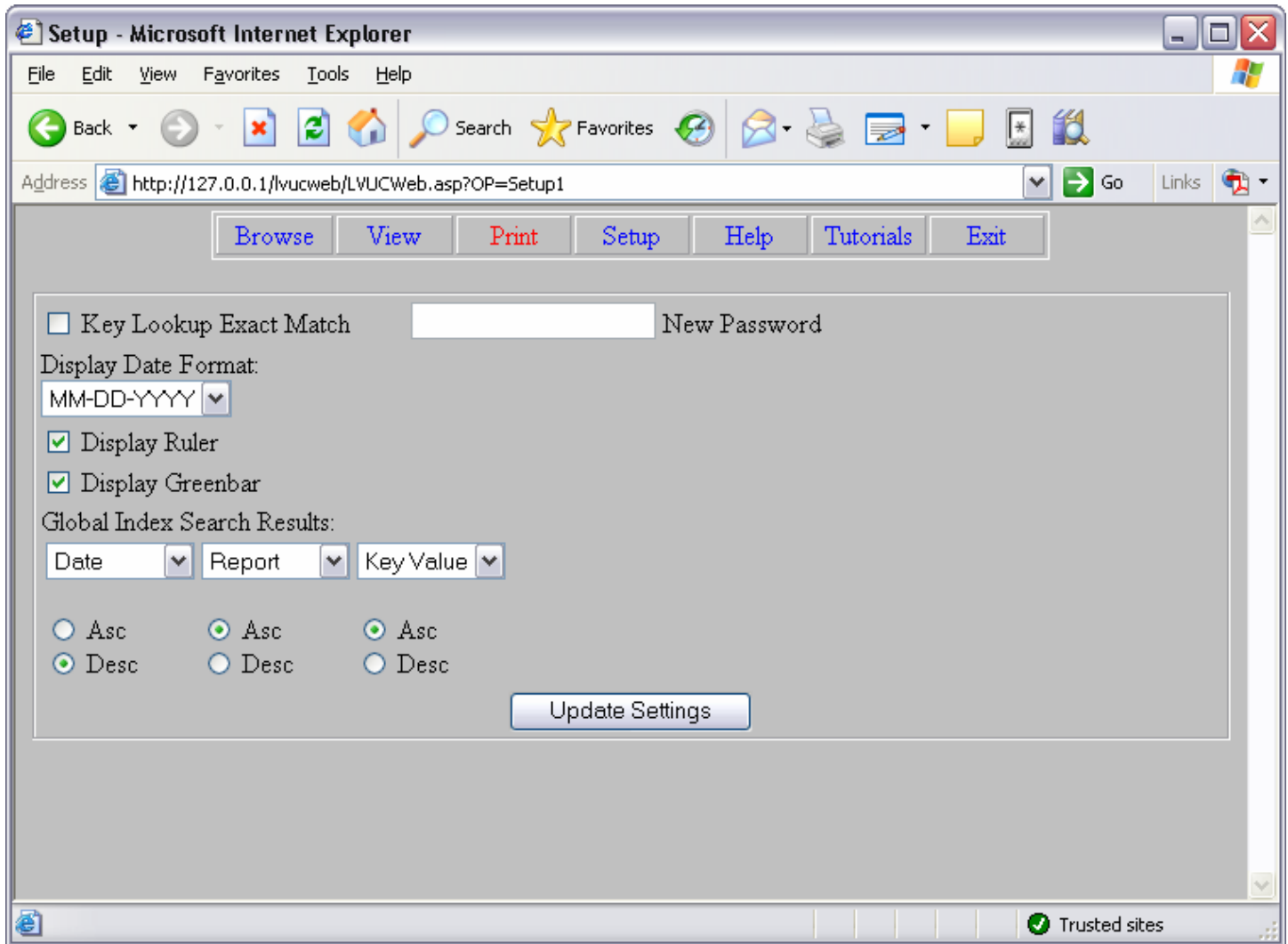
To change print setting, click the print setup button.



From this screen you can set margins, chose the option to display an overlay for a form. If you have other printers defined you can select those printers. The LaserVault administrator can create other printer definitions to print reports back to an AS/400 or to a network printer. In those cases you may not see a print preview.

Setup

On the setup screen you can set various preferences.



By default LaserVault attempts to find the closest match to a search value. If you click the “Key Lookup Exact Match” option it will display a message if the exact value typed in is not found rather than highlighting the nearest match.

You can change the sort order for the global index results, turn on green bar and the ruler option as well as change your password in LaserVault if the administrator has enabled that option.