## Create a New Folder
1. Click on New Folder icon
2. Choose Functional Area you want to create folder in
3. Enter new folder name (must be unique)
4. Click SAVE
5. Folder appears with blank identifier fields to be filled in. To save identifiers, click UPDATE

## How to find and open a folder or document
1. Click on the Search button.
2. Use the drop down list to choose the Search Type.
3. Use the drop down list to choose the Functional Area.
4. Select Case Sensitive Yes/No.
5. Click on SEARCH to view all documents/ folders in the FA

–or–

6. Fill in one or more identifiers (Status, View) then click on SEARCH.
7. Click on the document/folder you wish to open.

## Change Your password
1. Go to the Action drop-down menu, upper right of screen
2. Select CHANGE PASSWORD
3. Enter Old Password
4. Enter New Password

## Create a New Memo
1. Find and open a folder
2. Click on Memo icon
3. Choose subject, type of memo, and fill in the body of the memo (all required fields)
4. Click OK and memo will be saved into working memos for that folder

Tip: Memos can be marked Official and then moved to an Official Section if desired

## Chronology Log
1. Find and open a folder
2. Click on icon with footprints
3. Review folder activities
4. If you wish to add an entry to the Chron Log, click ADD ENTRY, type in your comments and click SUBMIT

Electronic Manager

# Quick Reference Card
## Main Toolbar Icons

Home. To view recently viewed opened folders, current alerts, and current workflows.

Go to current folder.

Create a new folder.

Find an existing document or folder.

Import a file into a folder.

Create a new memo in a folder.

Create or manage a workflow.

Access the Chron Log to view or create activity entries for a folder.

Links provide a gateway to outside applications.

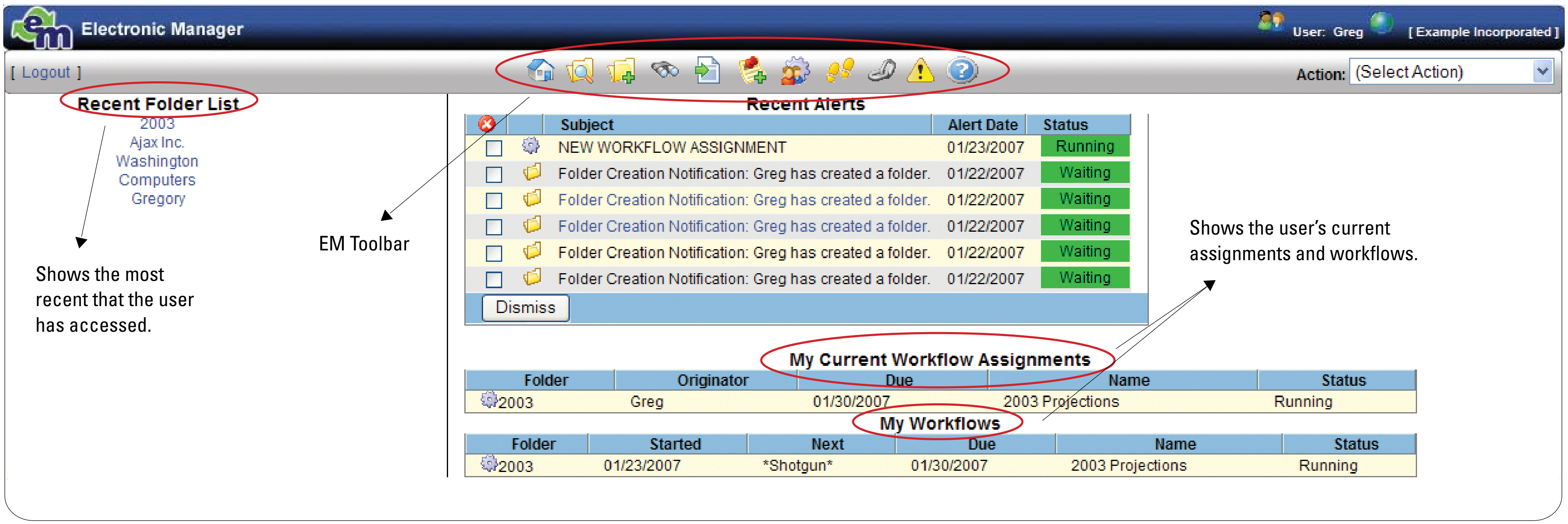
Search for all alert notifications.

Access the context sensitive HELP feature.

Electronic Manager

# Quick REFERENCE GUIDE EM

Van Hoose Associates




## Move A Working Document

1. Find and open a folder
2. Click on Working Files tab and find document
3. MOVE will be an option in the Select Action dropdown menu
4. Can only move into non-official sections

## Move A Document Into an Official Section

1. Find and open a folder
2. Click on Working Files tab and find document
3. Click on down arrow at Select Action button and highlight PROPERTIES
4. On left side of the screen click on the radio button next to OFFICIAL, then click on UPDATE
5. Document will now show a green icon and MOVE will be an option in the Select Action dropdown menu

## Create a New Workflow (WF)

1. Find and open a folder
2. Click on Workflow Icon
3. Click on the NEW button below the gray box
4. Fill in all (blue) required fields: WF name, User Name, Due Date, Delivery method, and Instructions
5. Click on OK and WF will go out to first addressee (sequential) or all addressees (shotgun/broadcast)
6. Emails are sent automatically to originator and addressees

New

## Import a Document

1. Find and open a folder
2. Click on the Import icon
3. Click on BROWSE to retrieve document
4. Double click on the document you wish to import
5. Name or rename the file to what it will be called in EM
6. Click SAVE
7. File will be brought into the WORKING FILES tab in the Working section of the folder

## Edit a Document

1. Find and open a folder
2. Go to the Working files tab and find the document to be edited
3. Click on down arrow at Select Action button and highlight EDIT TestDocument (Select Action)
4. Click OK
5. Make changes to document
6. Click on the close application button at top right to close and save document, (under the Larger X to close Word)
7. Click YES.

Tip: Using the Properties screen to make a document or a memo "Originator Only" will allow only the originator to edit the document

## Stop a Workflow

1. Click on WF icon
2. View WF initiated by you
3. Open WF you wish to stop
4. Click on STOP button in middle of page
5. Add Comments (required field)
6. Click OK

## Reassign a Workflow

1. Click on WF icon
2. View Current assignments
3. Open WF you wish to view
4. In gray box in middle of page, click on Reassign
5. Dropdown box appears. Choose name of user you want to forward the WF to
6. Add Comments (required field)
7. Click REASSIGN WORK

## Complete a Workflow

1. Click on WF icon
2. View Current assignments
3. Complete work requested by the WF
4. Add your comments (required field)
5. Click COMPLETE