

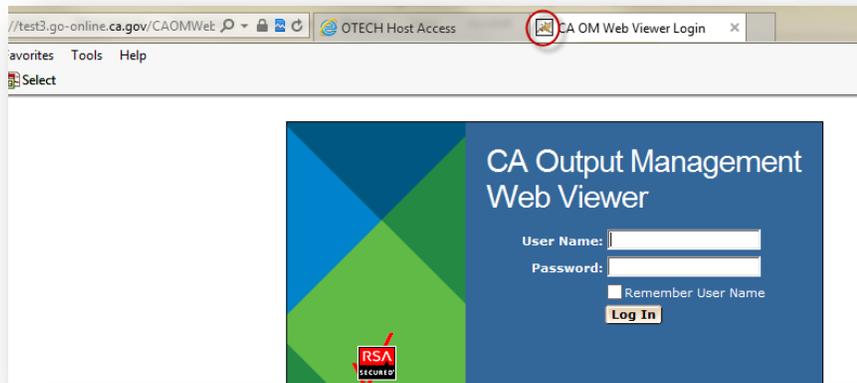


Testing Version 12 Output Management Web Viewer

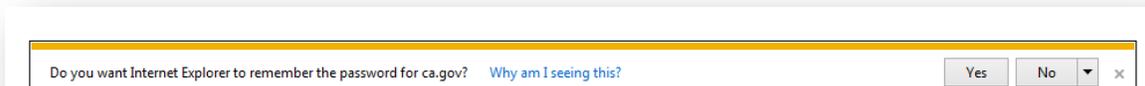
This document is intended for use during Acceptance TESTING of the Version 12 Output Management Web Viewer, ONLY. It is VERY IMPORTANT that you **do not use these websites for Production Work**. To sign on to the TEST Gold Camp Web Viewer, enter the website address <https://test3.go-online.ca.gov> in to your web browser. To sign on to the TEST Vacaville Web Viewer, enter the website address <https://test2.go-online.ca.gov> in to your web browser.

What's Different?

- The new Login Page, actually IS a login page, where you enter your own unique RACF ID and password. The database ID's you used to enter here (ex: GCONLINE, or HWONLINE, etc.) are obsolete.



- Please note the little 'Tomcat' circled in red on the screenshot above. When he is spinning, it means that the system is working on your request, so **don't press enter again**, as that can lead to your screen locking up.
- If you should get the little question bar below asking to remember your password, please respond 'NO'. This is always a recommended response for Security concerns, but also we have found it problematic.



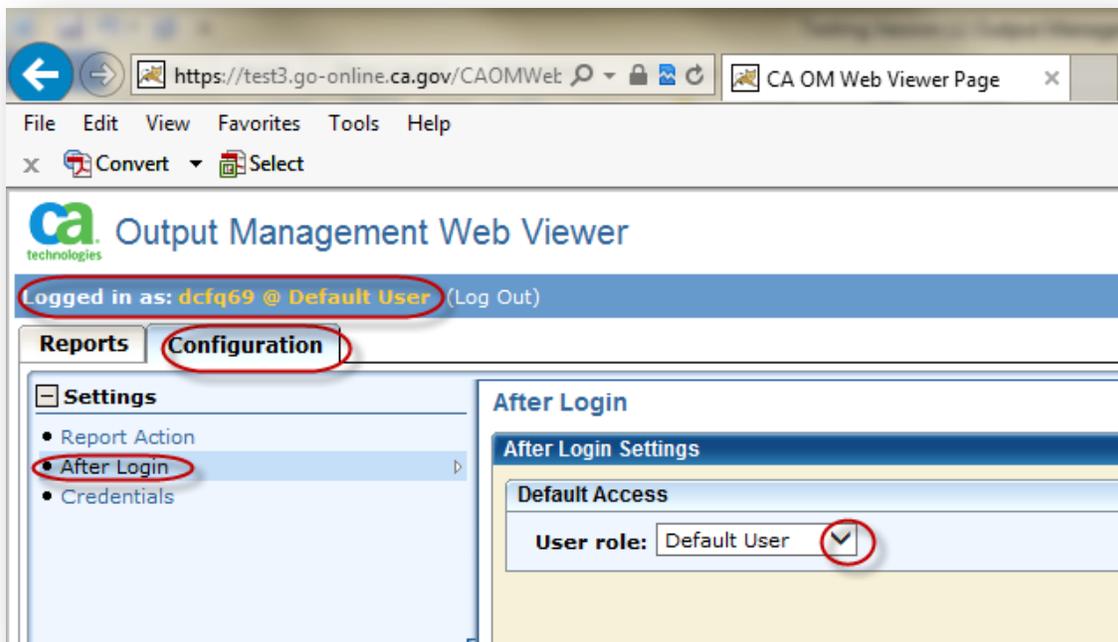
- The first screen you see, will look much different from what you are used to seeing. If you look at the red circled area below, you will see your ID, and the role defined for you. Even 'Basic User' profiles should see at least the **'ReadMe'**, which will have all of the pertinent information you need when you first log on.

User DCFQ69 now has both the Default User roles and Advanced User roles selected, as shown below.

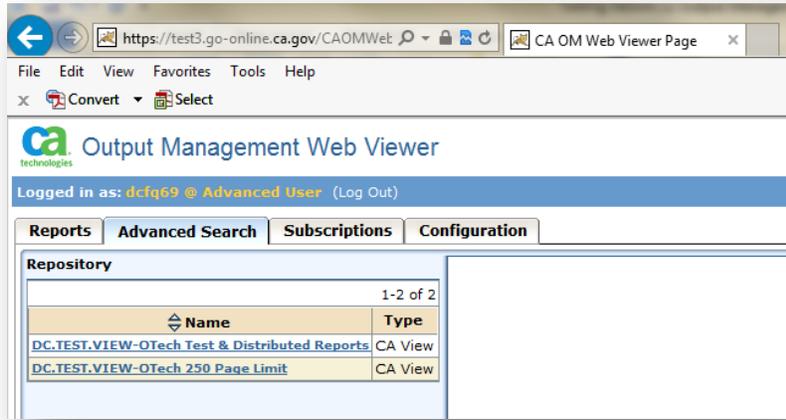


Changing Roles

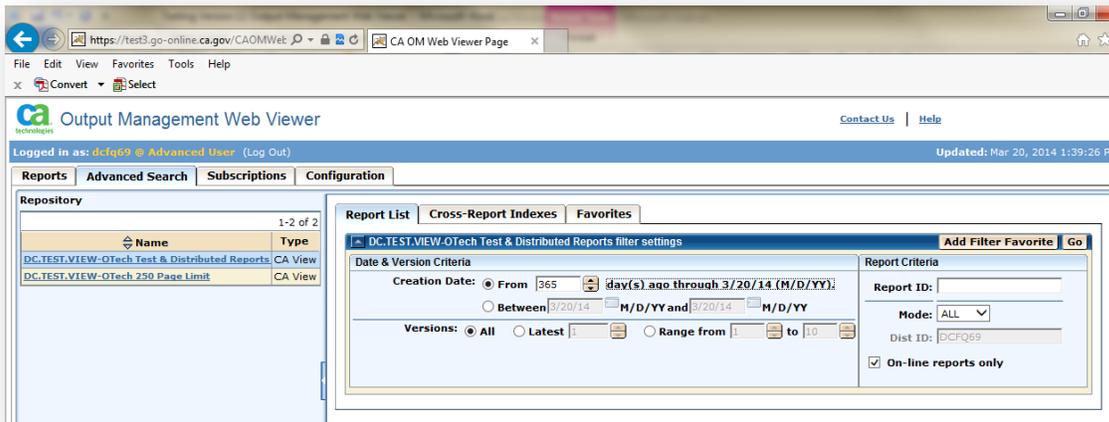
To change your role, click on the Configuration Tab, and select 'After Login'. Click on the down arrow beside User Role, to select the preferred role of those you are authorized for. This will be the role that you will have as soon as you log in, or 'After Login'. You can change roles as needed. Notice also that this screen shows you what ID and Role you are logged in as, for those who have multiple roles/ID's.



After selecting the new Advanced User role to change to, click on 'update' in the upper right again, and it will take you back to reports. While you still won't see any subscriptions, you will notice more tabs, besides the Reports and Configuration tabs. You should also have the Advanced Search and Subscriptions tabs. Clicking on the 'Advanced Search' Tab, will bring up a listing of the Repository's that you have access to.

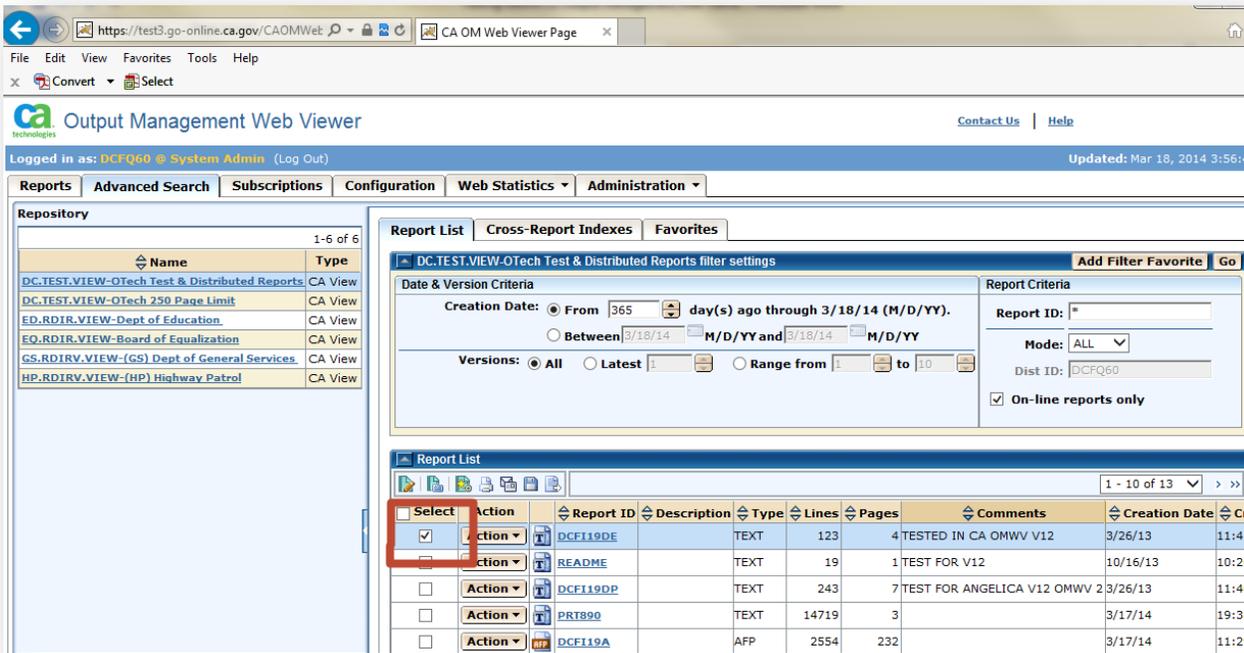


Clicking on one of the repository's will bring up the search box, very similar to the one you are familiar with from Version 11.5.



Viewing your Reports

You now have the Report List tab, the Cross-Report Indexes tab, and the Favorites tab above the search Date & Version Criteria box. These work similarly to what you know from Version 11.5.



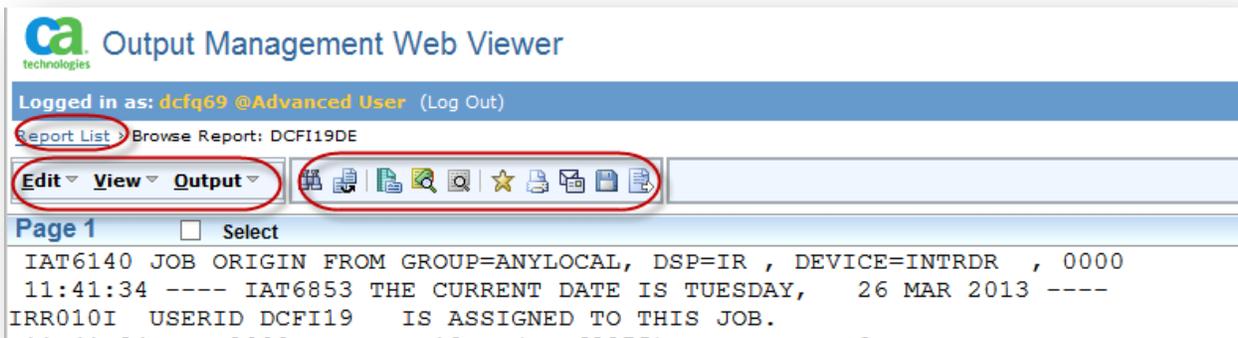
Select the report you want to view, select your 'Action' from the drop down (actions are the same, Browse, Browse in New Window, Information, Add Favorite, Print, Email, Save and Export). As before, you may not have all of these options available to you, as some agencies have prohibited certain functions. We want to point out that as an **enhancement** on Version 12, you can now select pages 1-3, or any combination of pages for the Print, Email and Export functions.

When you put a check mark in the Select box (In red square) and select 'browse', your report will look the same, but the function tabs are a little different. If you'll notice, once you click on the browse, it goes directly to your report, **no more clicking on 'GO'**. You can also click on the Report ID directly, and it will take you to your report.

Please also note the 'T'  beside the 'Action' drop down. The T is for text, but some distributed documents may have an 'AFP'  symbol, or a 'PDF'  symbol, depending on the type of report you are viewing, and if your agency allows these functions. Also, the symbol for 'Offline' reports has changed. It is now , and no longer the lightning bolt that we are used to. **Remember, you only need to click on 'browse' to recall your offline report, if your agency allows it.**

Report Functions and Icons

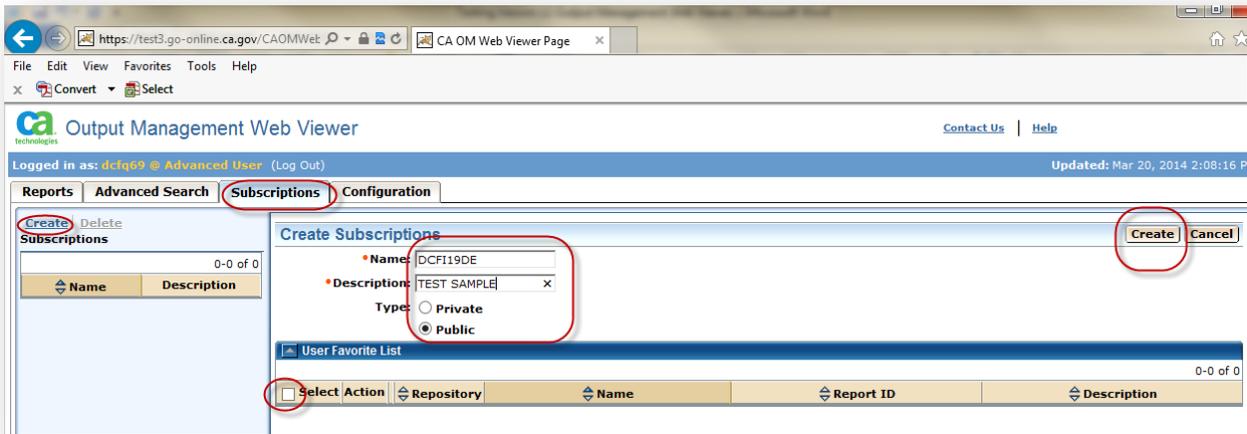
- 'Edit' Option to find or go to a particular page
- 'View' option for Report Information for Annotations and Annotations list
- 'Output' option to Add Favorite or Bookmark, Print, Email, Save and Export.
- The Icons are basically the same options, the Binoculars are to Find, and the page to page icon is to jump to a specific page. The little report icon is to list Report Information, the magnifying glass with the green area is to show the annotations, and the magnifying glass without the green area, is to show the annotations list. The Star is the usual Favorites/bookmark icon, the Printer is to print, the Letter is to Email, the Disk to Save, and the report with the arrow pointing to the right, is the Export icon.
- Click on the Report List, to go back to the listing of all reports.



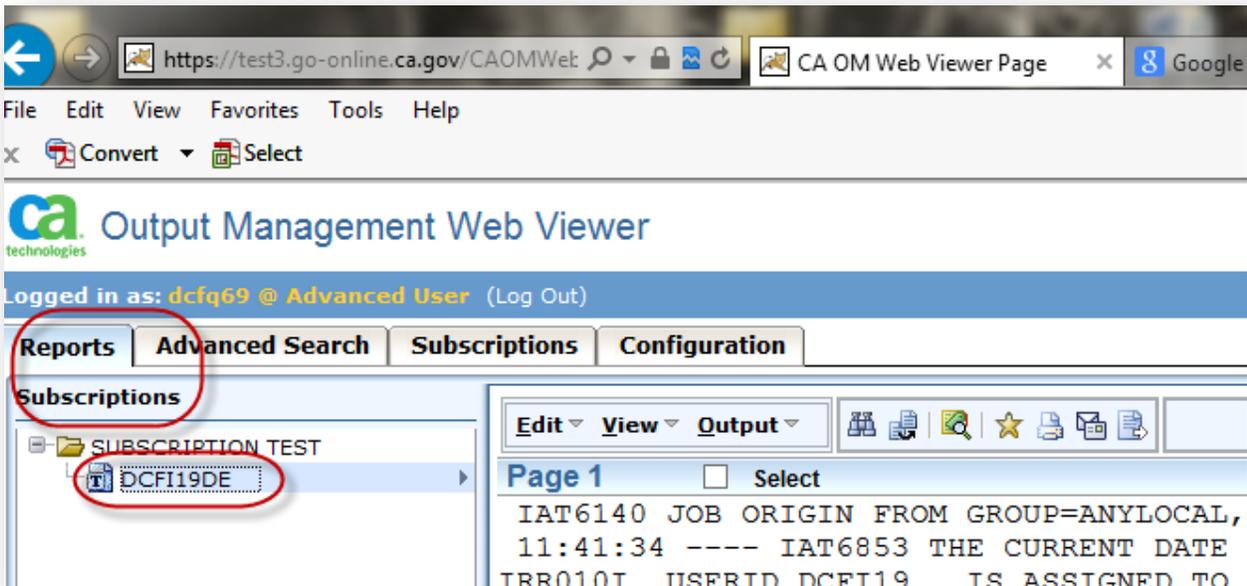
Subscriptions

If there is a specific report that you look at every day, An Advanced User or above, can create a subscription to it, so you don't have to go through the whole search criteria to see it. **The Subscription option is new to Version 12**, and it enables a report or group of reports to be bundled, so they will be the first thing you see when you log in.

- To create a subscription to a report, first add the report that you want as a subscription, to your Favorites. Then go to the Subscriptions tab and click on Create. You can then list the Report ID or a description of a group of reports that you want to see, a general description of the group, and whether you want it to be public or private. Select the report or reports that you want included, then click on create in the upper right corner.



When you log in, you will see that subscription as the first thing under reports, each time you log in. All you need to do is click on the Report ID, and it will bring up a view of that report.



Note: The 'Reports' tab shows only the subscriptions you have been authorized to view. Your Group Administrator may elect to set up subscriptions for you (as we have set up the 'ReadMe' subscription). Only Advanced Users and above can create subscriptions.

New Items/Panels in Version 12 – Primarily for Group Admins:

ROLES: The four different roles that can be assigned to users are:

- **Basic User** ID's assigned to this role can **VIEW ONLY** subscribed reports and Annotations.
- **Advanced User** This is the **MOST COMMON** User Role. These Users will be able to perform Advance Search functions, Edit Report Comments, View Report Information, Create, View and Remove Internal Favorites, View Subscribed Reports and Annotations.
- **Group Administrator** This is your department's Go-Online Administrator or RACF Co-ordinator. They now have more control over Web Viewer settings, and can customize for their users. Group Admins may control what functions their Users can perform and what they can see. Group Admins must add new Users to the appropriate Role.
- **System Administrator** This is us, your Go-Online System Administrators, Irene, Angelica and Darlene. We set the system requirements and limitations, to protect the integrity of the system

In addition to the 4 User Roles above, your Agency Group Administrators can create additional groups of Users, into a Role that allows Users in that specific group the ability to perform certain functions or see particular reports. For example, if your agency doesn't allow the email function turned on for everyone, but perhaps the HR or Accounting groups need to have that ability, a Group Administrator can create an HR group or Accounting group with that ability. This allows you to add or delete a User ID to that group, as people transfer in and out of those specific areas. You can also create groups that can perform specific functions, like 'Tape Recall'.

SUBSCRIPTION AND FAVORITES CONCEPTS:

- Subscription is a set of favorite reports subscribed for certain user roles
- Subscription types are either public or private
- Favorite reports – latest report type only for subscription
- New Favorite types – Index Name, (Cross-Report) Index Value
- Associated User Role for subscriptions assigned at role level
- Advanced User – Traditional IT users can perform report search, mark reports as favorites, and gather favorites as subscription
- Subscription folder tree are subfolders for filter type favorites
- Index Value Selection for Index Name type favorites

Subscription Panel:

Logged in as: DCFQ6D @ System Admin (Log Out) Updated: Apr 2, 2014 4:06:14 P

Reports | Advanced Search | Subscriptions | Configuration | Web Statistics | Administration

Create | Delete
Subscriptions

1-1 of 1

Name	Description
Favorite Test	Favorite Test

Update Subscriptions Favorite Test Update

Name: Favorite Test
Description: Favorite Test
Type: Private Public

User Favorite List

1-1 of 1

Select	Action	Repository	Name	Report ID	Description
<input checked="" type="checkbox"/>	Action	DC.TEST.VIEW-OTech Test & Distributed Reports	DCFI19DE	DCFI19DE	Favorite Test

Output Management Web Viewer

Logged in as: yumb01 @ OS-Payroll (Log Out) Updated: Jan 10, 2012 6:34:51 PM

Reports | Advanced Search | Subscriptions | Configuration | Administration

Subscriptions

- AFP-REPORT
 - RPT_DATA_1 with REGION, BRANCH
 - RPT_DATA_1 with REGION, BRANCH: MID-WEST, 009
 - Report EXP/OM_A on Joe
 - Report HA2 on Joe
 - Cross Index (BB_LIST: 2) Filter on Joe
 - BB-SERIES-REPORT-002-GENERAL-RPT with BB_LIST: 2
- My Favorite Reports
 - PHONE_BILL
 - CREDIT_BILL
 - RPT_DATA_1 with REGION, BRANCH
 - Report Filter on Sheue
 - REPORT_FOR_JOB_MOUAR001D 4/13/05
 - REPORT_NUMBER_1 4/13/05
 - RPT_DATA_1 10/5/05
 - RPT_DATA_2 10/5/05
 - RPT_DATA_3 10/5/05

Select REGION, BRANCH Value(s):

REGION	MID-WEST
BRANCH	038

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CUSTOMER NUMBER	OFF	ORG DATE	INTEREST RATE	LOAN BALANCE	EFF	TOTAL AMT.
CUSTOMER NAME	LDG	MAT DATE	ORG AMOUNT	LOAN CODE	DTE	ADVANCED
EXCEPTION REPORT - NUMBER 31						
ACTIVITY BY OFFICER						
0193828 - 9001	AD6	05-21-02	4.75000	29,975.60		.00
BAILEY J P DBA	20	02-21-03	50,000.00	OA	10-16-02	
0193828 - 9001	AD6	05-21-02	4.75000	29,975.60		.00
BAILEY J P DBA	20	02-21-03	50,000.00	OA	10-16-02	
0193828 - 9001	AD6	05-21-02	4.75000	34,975.60		.00
BAILEY J P DBA	20	02-21-03	50,000.00	OA	10-16-02	
0193828 - 9001	AD6	05-21-02	4.75000	34,975.60		.00
BAILEY J P DBA	20	02-21-03	50,000.00	OA	10-16-02	
0196630 - 9001	AD6	01-10-89	5.81000	1,990,620.68		.00
BAIRD, OB-CLOVR	23	07-10-08	3,572,757.59	OA	10-15-02	

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Subscriptions:

Subscriptions Can Consist of Favorites (Latest Type) Across Repositories

- Report
- Report Index
- Report Index-value report section
- Cross-Report Index-value report section
- Filter:
 - Frequently-used report filters
 - Cross-Report index-value filters
- Type:
 - Public: can be assigned to a role by System Admin or Group Admin
 - Private: can be assigned to one or more roles by the creator as Group Admin
- Who can create:
 - Advanced user
 - Group Admin/System Admin
- Favorite Action in Subscription List:
 - Same as Favorite list
 - Role Restriction applies
- Update type from public to private by the creator:
 - No impact on the ones already assigned to roles as public ones
 - No longer to be seen as available subscriptions for role assignment.
- Update Selected Favorites by the creator:
 - No need to reassign the subscription to roles
 - Subscribed report list dynamically updated under the Report Tab.

Favorites

Favorites – Shortcut/bookmark to reports, indexes, filters from report search results. Types of Favorites are:

- **Report Favorites:**
 - **Static:** refer to a specific instance of the report, not for subscription.
 - **Latest:** the latest version of the report and apply for subscription . As Default when Favorites created
- **Filter Favorites:**
 - **Report List Search**
 - **Cross-Report Search:** not available for subscription
 - **Cross-Report Index Value Search**
- **Report Index Favorites:**
 - **Index Name:** from Logical View
 - **Report Index Value:** from Logical View
 - **Cross-Report Index Value:** Cross-Report Index Value Search result
- **Favorite List:**
 - **A group of favorites at Repository level**
 - **Allow you to remove favorites from toolbar and drop-down action menus**
 - **Display columns from Admin Repository Properties settings or User configuration**
- **Favorite Properties:**
 - **Name, Description, Type, Attributes, and Last Modification**
 - **Allows you to change Report Favorite Type:** latest or static, with report creation date and time
- **Favorite Actions:**
 - **Report/Index favorites:** Favorite Properties, Remove Favorite, PLUS all report actions allowed at role level
 - **Filter Favorites:** Favorite Properties, Remove Favorite, and Apply Favorite Filter (Re-run report search)

CA OUTPUT MANAGEMENT WEB VIEWER FUNCTIONALITY – Report Actions

Report View Level with individual page selection: Toolbar and dropdown menu options:

- **Browser Bookmark**
- **Find**
- **Go To Page**
- **Print**
- **Email**
- **Save**
- **Export**

Role restriction applies to all levels

Internet Explorer settings affect ActiveX control and browser plug-in for print and email.