WilliamsLeatag Top Project

Integrated Quality Management System

Caxton – User Manual

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Contents

1   INTRODUCTION

This document contains the user Manual details of caxton portal.

1.1   Purpose

The purpose of this document is to provide complete front end details about caxton portal. This portal used by the users in order to view and down load the pdf documents. The documents can be viewed from Hitachi .

1.2   Objective

The objective of this document is to provide full steps to use the caxton portal by end client.

2   ACCESSIBILITY

Caxton portal requires a valid user to allow the functioning accessibility of it. There are three types of user and they can access the portal functionality according to the role.

2.1   Super User

Full access, has the ability to search and view the documents .It has also the access to create and manage all type of users.

2.2   Client Admin

Has the ability to search and view the documents. It has also the ability to create and manage two type of accounts, these are Client Admin and User account.
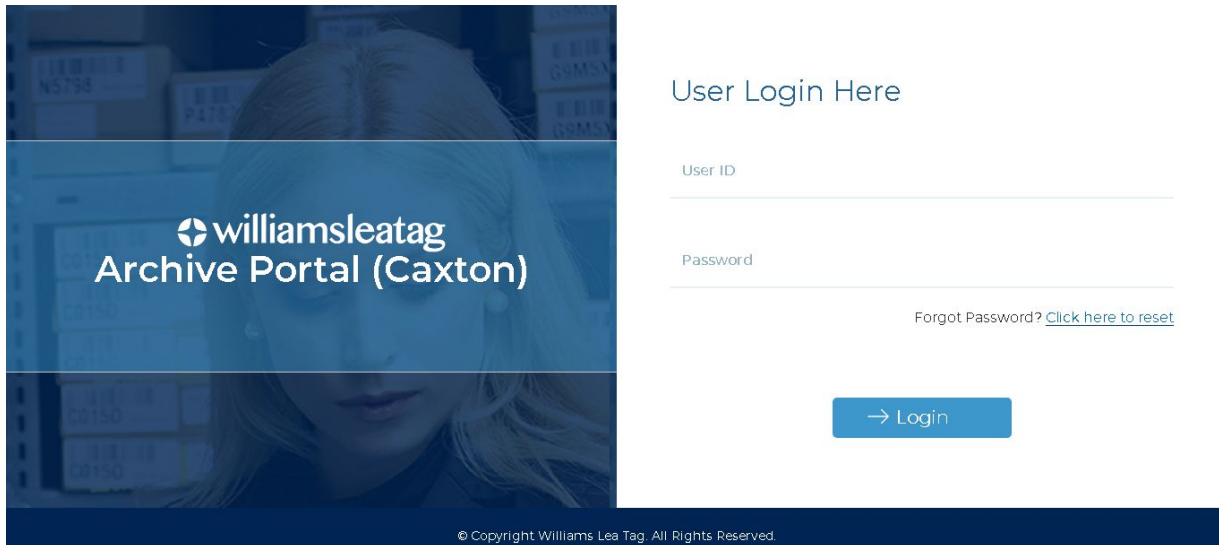
2.3   User

Can only search and the view the documents.

3   LOGGING IN

The process of logging into the caxton website is straightforward and requires only a valid username and password. The login page for the caxton portalis accessed using the following link.
http://gbrtwwvdvwbp01.global.wlt.com/Archive
Show figure 1 for Login Page.

Figure 1 - Login Screen

3.1   Forgot Password

If user doesn't remember the password, he can reset it with a new one by clicking the "**Click here to reset**" link on the user log In page.

Figure 2 – Reset Password Screen

The following screen displayed when user click on the "Click here to reset" link .

Figure 3 – Forget Password Screen

User only need to fill the username and click on "**submit**" button. A new password is generated and send to the users's email id.

4   WORKING FLOW & FUNCTIONALITY

Caxton portal has three main sections. These are **Search, User Maintenance and Change Password** as shown in figure 4**.**
Only User Maintenance menu has its sub sections as shown in figure 5.

Figure 4 – Home Page Screen

Figure 5-Sub Menu Screen

4.1   Search

Documents can be search by using this page, user needs to be select at least one search criteria from the given list.

Figure 13-Search Screen

- Select Product Category From Product Category List.
- Enter Policy Number if any.
- Select Date operand Type and From Date, Select ToDate in case the operand is of type between.
- Select Document Type if any.
- Enter Zip Code if any.

- Select Page Count operand type and Page From ,select Page To in case the operand is of type between if any.
- Select Sorting Criteria from the list

Figure 14-Search Screen With Sort Criteria

- After filling required field, click on "**SEARCH**" button. The result will be shown in a list as shown in given figure.
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Figure 14-Search Result Screen

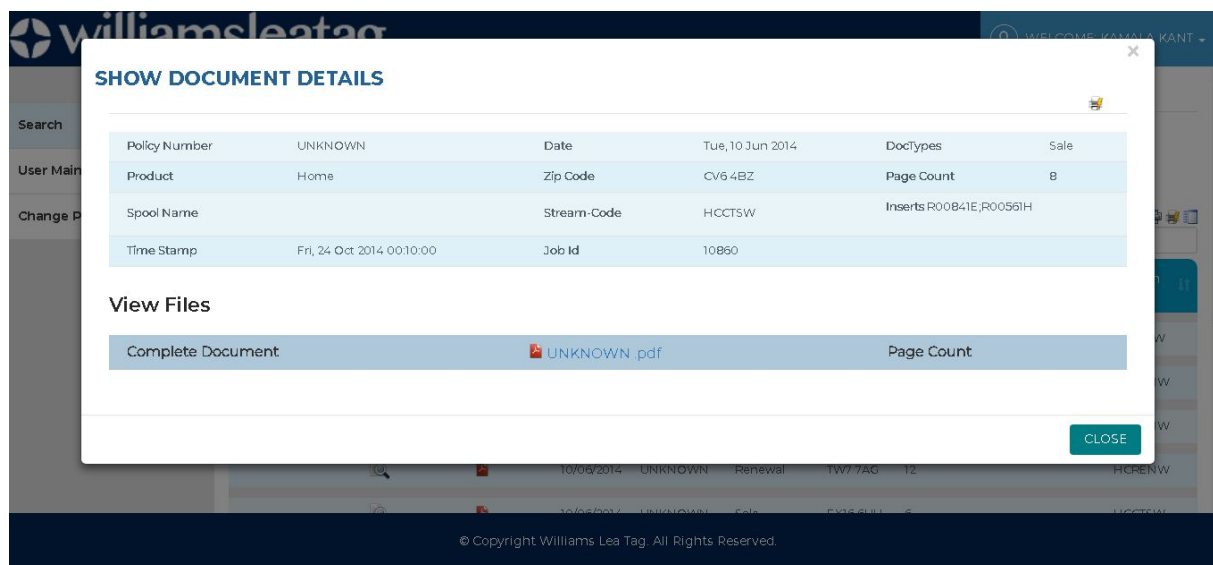➢ The details of the document can be viewed by clicking on "**Show Details**" icon.

Figure 17-Show Document Details Screen

> ➢ The pdf document can be viewed on the browser by clicking on "**Show File**" icon.
> ➢ This page also provides the functionality of printing, exporting, column visibility and grouping of columns with in the list.

- "**CLEAR**" button is used to reset the field value to its original.
- "**REFRESH**" button is used to show the previous result.

4.2   User Maintenance

User Maintenance section has been divided into two sub sections. These are **User Listing** and **Create User.**

4.2.1   User Listing

This page shows the list of users with the following fields shown in below figure.

This page is only accessible to Super User and Client Admin.

- In case the user logged in as Super User role, the list shows all the users in the list
- In case the user logged in as Client Admin, the list shows only the uses with User and Client Admin role.

Figure 11-Userlist Screen for Super User

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Figure 12-Userlist Screen for Client Admin

- Client admin don't have Search page access
- A user account can be activate and deactivate by using "**Set Active**" and "**Set Inactive**" link on the user list.
- A user account can be unlocked by using Unlock Account column on the user list.
- A user account password can be reset and a new temporary password is send to user email by using "**Reset Password**" link.
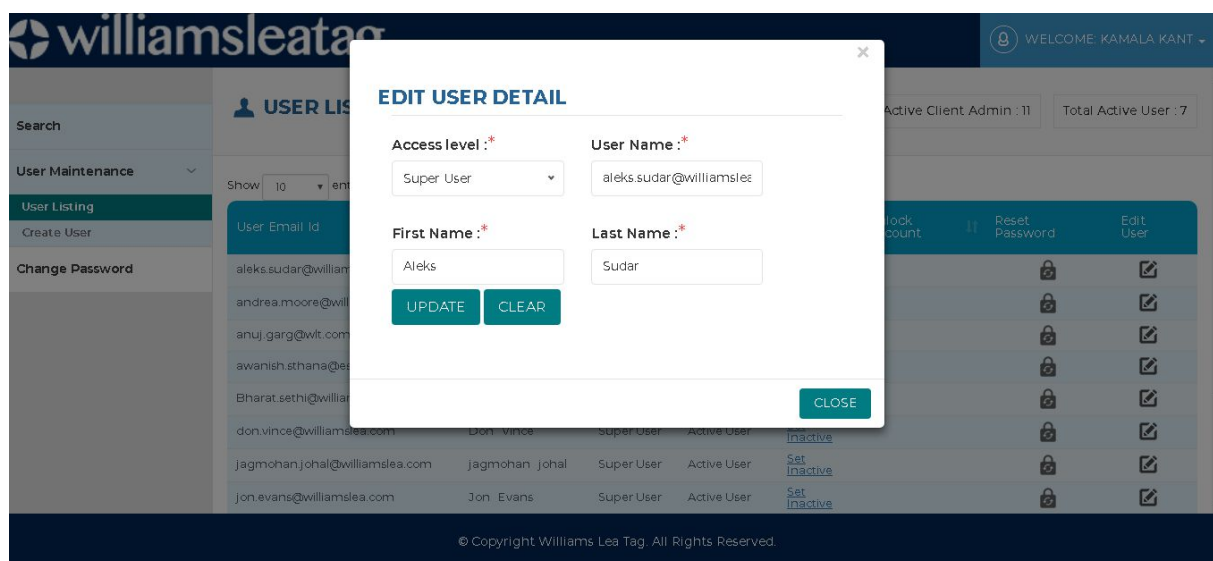- A user details can be updated by using the Edit User link.
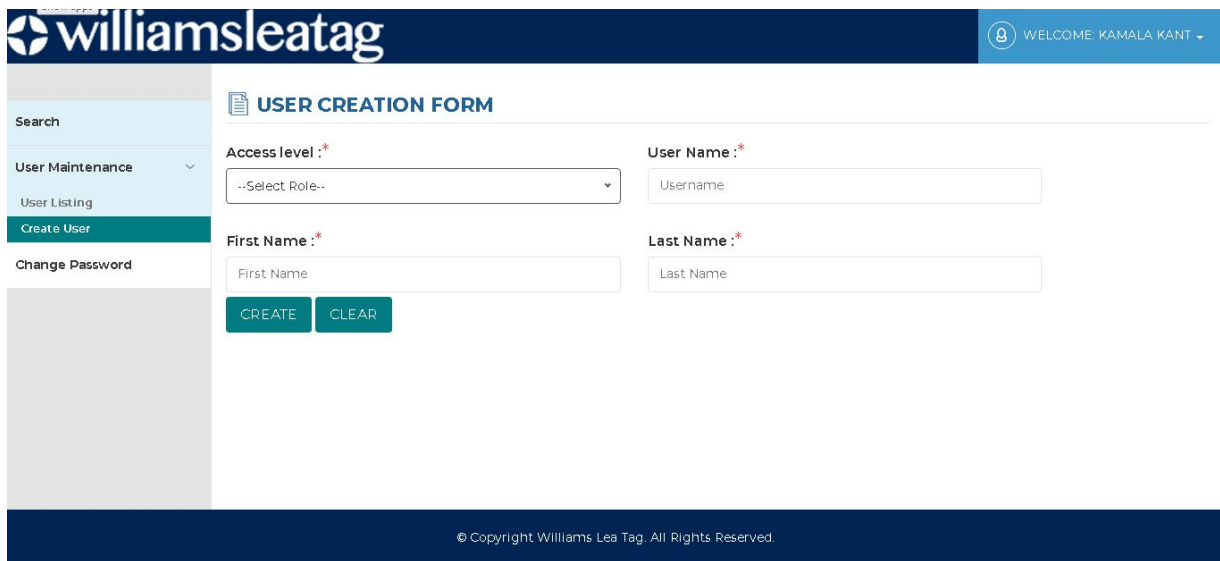

Figure 12-Edit User Screen

After changing the given fields value as shown in above figure click on "**UPDATE**" button, the changes are made to the user in the database.

4.2.2 Create User

A new user account for the Caxton portal is created by using this page.
- Select the access level of the user(For Super user all user roles are shown in the list, User and Client admin roles are shown in case of Client Admin in the list)
- Enter the user name of the user
- Enter the Fist name of the user
- Enter the last name of the user

After filling all required fields click on "**CREATE**" button, if user already exist then it will show User already exists warning message. Otherwise a new account will be created with a temporary password and the temporary password sends to the user's email id.
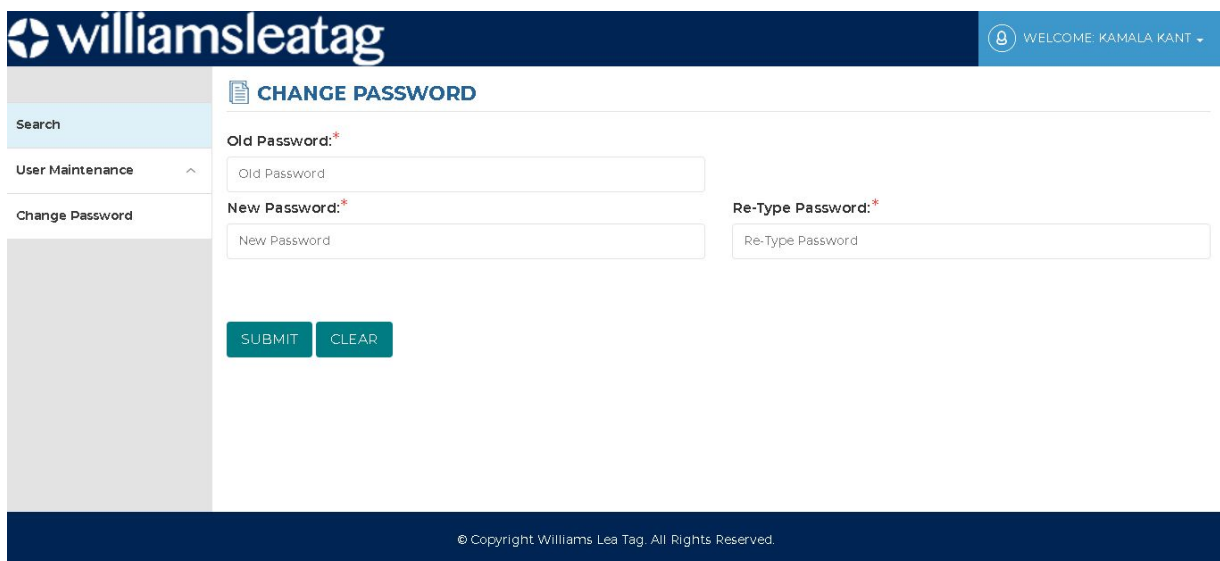
Figure 13-Create User Screen

4.3   Change Password

After Login to the portal user can change its own password by using the Change Password Screen as shown in below figure.

Figure 9-Change Password Screen

- Enter the old password for the user.
- Enter the new and confirm password for the user.
- Click on "**SUBMIT**" button.

If the newly entered password matches the password criteria and old password is validated against the user, then the new password is generated and sends to the user's email id.