Hermes Tracking System

User Guide

Version 1.0

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About Hermes TS

Hermes Tracking System is an application designed to handle the internal documentation of a business. It was specifically design for a cooperative. Hermes TS helps delivering documents in a safe and confidential manner, excellent for a business trying to keep their documentation as safe as possible. It works hand to hand with the main system of the company making it light, flexible, and easy to adapt to the business.

System Requirements

In order to run Hermes TS you need to be sure that your computer meets the minimum requirements. This requirements include the following:

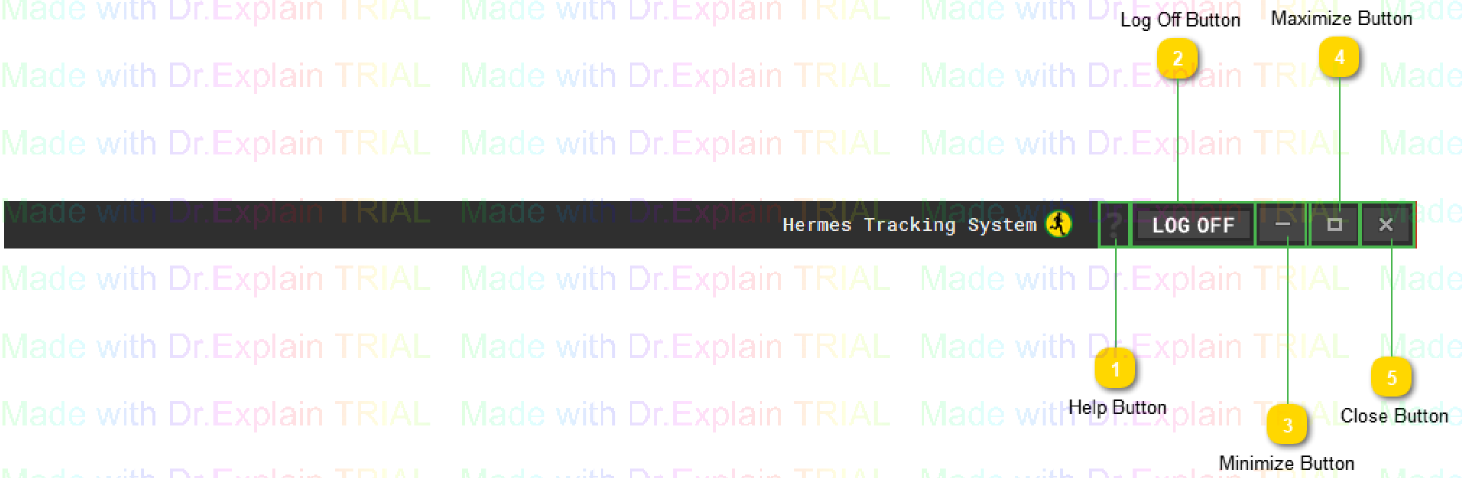
- Windows 7/8/8.1/10
- 4GB of memory RAM
- 100 MB of free disk space
- A resolution of 1024 x 768 or higher
- Having an installation of JRE (Java Runtime Environment) 1.7 or higher

Opening Hermes

After the application is installed, you'll find a folder in the start menu named as **Hermes** and under that folder you'll find a shortcut to the application. You can run the application by just double clicking on the icon.

After you double click on the application a splash screen similar to the following will appear, just need to wait till the system starts.

Hermes Title Bar



1 Help Button

Opens the Hermes manual.

2 Log Off Button

Closes your session and sends you back to the login screen

3 Minimize Button

Minimizes the window

4 Maximize Button

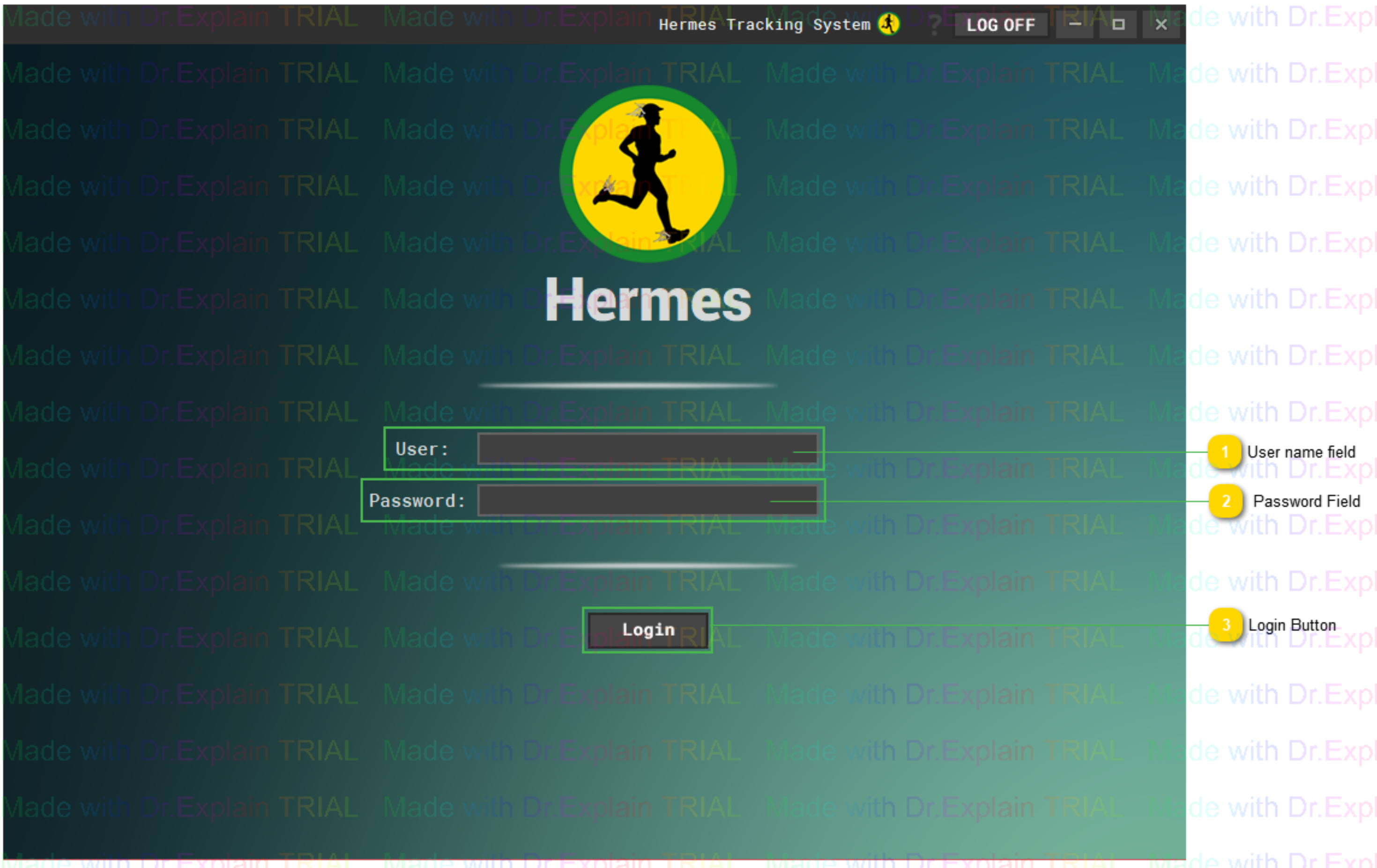
Maximizes the window when it's restore and restores it when it's maximize.

5 Close Button

Asks you to confirm that you want to close the system, if you press (OK) it closes the system but if you press (Cancel) it just closes the popup.

Logging in to Hermes

After the splash screen closes you'll see a window similar to the following. Asking for your valid user name and password. You'll be provided by your system administrator with your credentials.



1 User name field

Field to provide your valid user name

2 Password Field

Field to provide your valid password

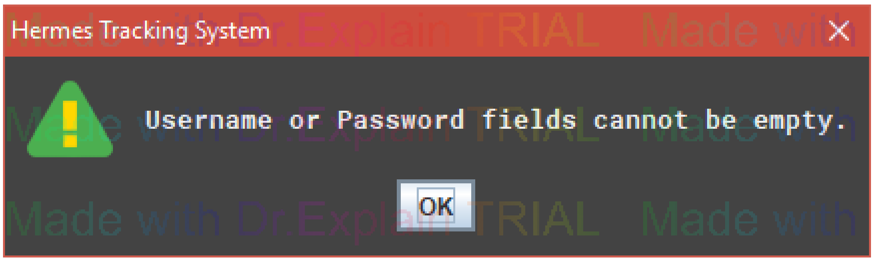
3 Login Button

Button to validate the user name and password that you submitted and to log in to the system if everything is correct.

Common Errors and Messages

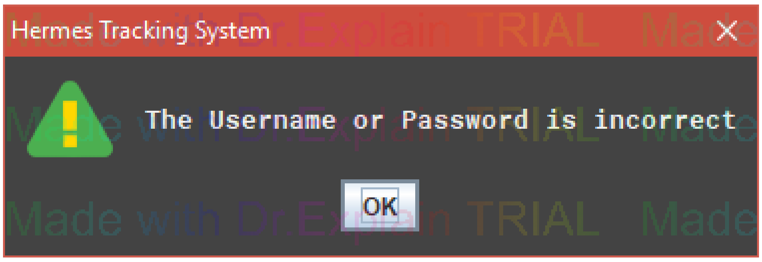
The following are the most common messages and errors that you might encounter while trying to log in to the system. You'll see here an illustrated representation, their meaning and what actions you need to take.

Message/Error:



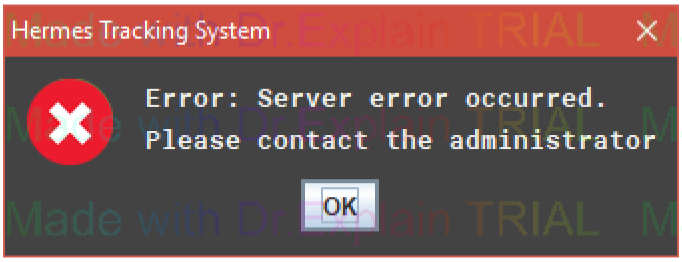
Meaning: The user name or password is empty.
Actions: You need to provide both to be able to log in to the system.

Message/Error:



Meaning: The user name or the password is wrong.
Actions: You'll need to provide new credentials. If you still having issues after several attends please contact the administrator to reset your information and give you further assistance.

Message/Error:



Meaning: The server is down or Connectivity Problems.
Actions: Check your network connection. We recommend you contacting your system administrator.

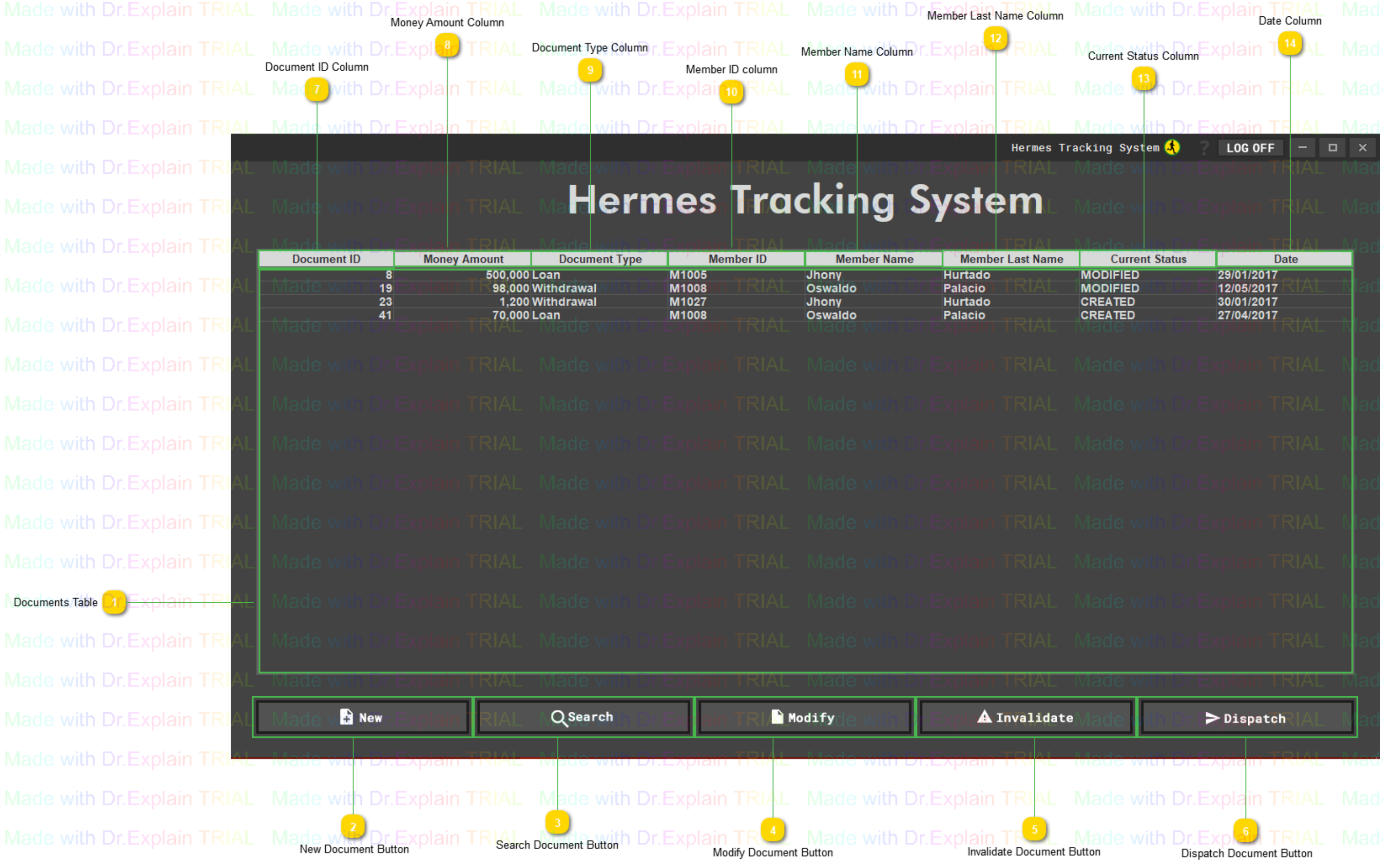
Oficial de Crédito

This section covers all the features available for the **"Oficial de Crédito"** this includes creating and saving a document, searching for documents, modifying a document already created, invalidating a document, and dispatching a document when the process it's already done.

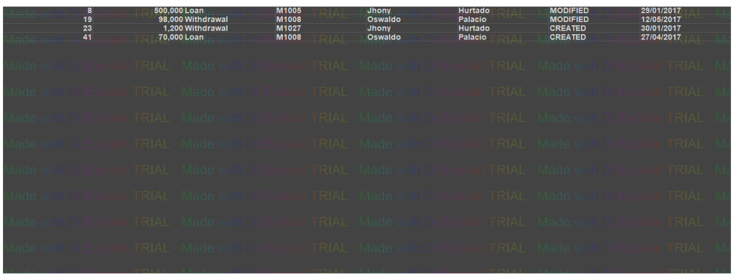
IMPORTANT: As the **"Oficial de Crédito"** is the user who is in contact in the beginning with members he is the only one allow to create and save documents.

Main Screen

The following is the screen that the "Oficial de Crédito" will encounter after a successful login. You will find the description of each one of the components bellow.



1 Documents Table



This table shows all the available documents that are in created or modified status, if you double click on one of the documents you'll see all the information of the document.

2 New Document Button

Shows the screen to start creating a new document.

3 Search Document Button

Shows the screen to Search for documents.

4 Modify Document Button

Shows the screen to modify documents.

5 Invalidate Document Button

Shows a popup to confirm that you want to invalidate a document if it's confirmed the document is invalidated.

6 Dispatch Document Button

Shows a popup to confirm that you want to dispatch a document if it's confirmed the document is dispatched.

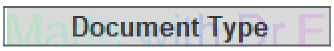
7 Document ID Column

Column where you will find the ID of the documents that you have available.

8 Money Amount Column

Column where you will find the money amount of the documents that you have available.

9 Document Type Column



Column where you will find the type of the documents that you have available.

10 Member ID column

Column where you will find the ID of the member who is owner of the documents that you have available.

11 Member Name Column

Column where you will find the name of the member who is owner of the documents that you have available.

12 Member Last Name Column

Column where you will find the last name of the member who is owner of the documents that you have available.

13 Current Status Column

Column where you will find the last status of the documents that you have available. It'll show **created** as soon as you add a new document or **modified** when the information of the document is change.

14 Date Column

Column where you will find the date of the last status of the documents that you have available.

Creating a Document

To create a document, you must be a "Oficial de Crédito" this option is just available for this type of user. Hermes TS doesn't need a lot of information to work with your documents as it works hand to hand with the main system, It lets all the heavy information to it.

Hermes TS allows you to create a document with some easy steps:

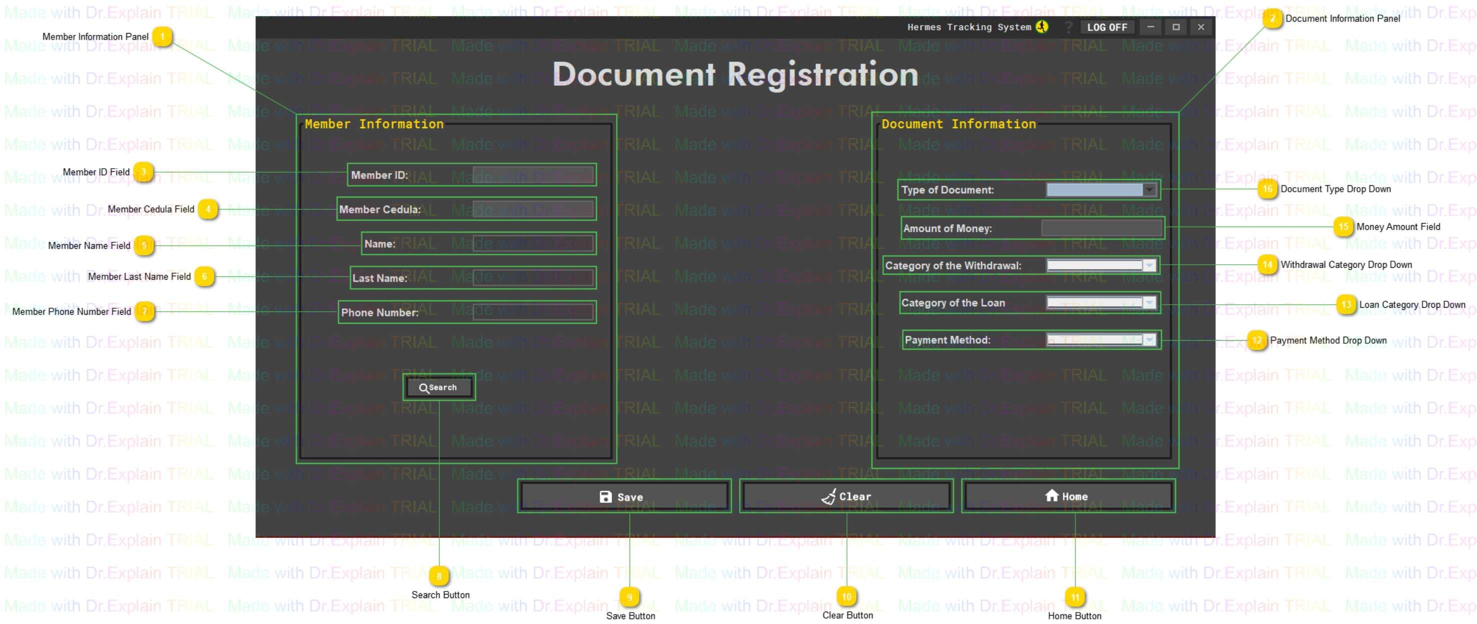
1. You will need to log in to Hermes with your "Oficial de Crédito" credentials.
2. While in the Main Screen, you'll need to click in **NEW**.
3. After you press NEW, you will be redirected to the Document registration screen.
4. You will need to provide the member ID or the member cedula in the **MEMBER ID FIELD** or **MEMBER CEDULA FIELD** respectively.
5. After providing the member ID or the member cedula, press **SEARCH**.
6. After pressing **SEARCH,** all the others field will fill out by themselves if the member is register in the system.
7. fill the type of document type and the available option for that type of document will be available to fill out.
8. After providing all the information, you will need to press the button **SAVE**.

Important: When filling out a new document you will need to fill out all the fields as they are all required.

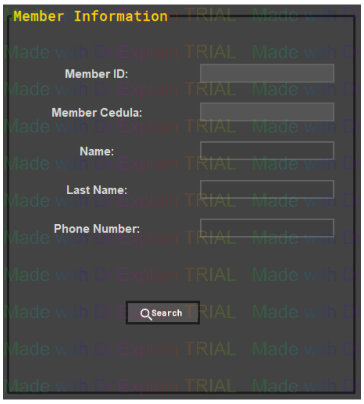
Note: *As soon as you save a new document or update an existing one you will see the changes immediately in your main screen.*

to learn about the components of registration screen go to Knowing the registration screen.

Knowing the registration screen

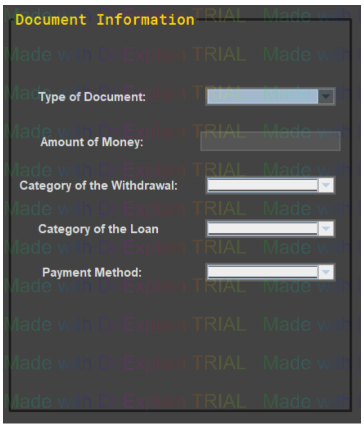


1 Member Information Panel



Area where all the information of the member will be.

2 Document Information Panel



Area where all the information of the document will be.

3 Member ID Field

Field where the member's ID must be inserted.

4 Member Cedula Field

Field where the member's cedula must be inserted.

5 Member Name Field

Field where the member's name will be showed.

6 Member Last Name Field

Field where the member's last name will be shown.

7 Member Phone Number Field

Field where the phone number of the member will be shown.

8 Search Button

Searches and shows all the information of the member.

9 Save Button

Creates and saves the information provided.

10 Clear Button

Clears all the fields

11 Home Button

Sends you back to main screen if the information wasn't save all the information provided will be erased.

12 Payment Method Drop Down

If the type of document selected was a loan this field will be available and you will be able to select the method that the loan will be paid.

13 Loan Category Drop Down

If the type of document selected was a loan this field will be available and you will be able to select the category of the loan.

14 Withdrawal Category Drop Down

If the type of document selected was a withdrawal this field will be available and you will be able to select the category of the withdrawal.

15 Money Amount Field

Field where you need to introduce the amount of the loan or withdrawal if just accepts whole numbers and decimal numbers.

16 Document Type Drop Down

Drop down to select the type of the document.

Searching for Document

While dealing with a lot of document you might find useful to search them individually. Hermes TS allows you to search for them in another screen. In order to do so you'll need to do the following:

1. You need to press search on your main screen.
2. After pressing search, the system will show the search document screen.
3. There you will see different fields, you will need to fill in one of them.
4. Then you will need to press search.

Hermes tracking system allows you to search your available documents using different methods:

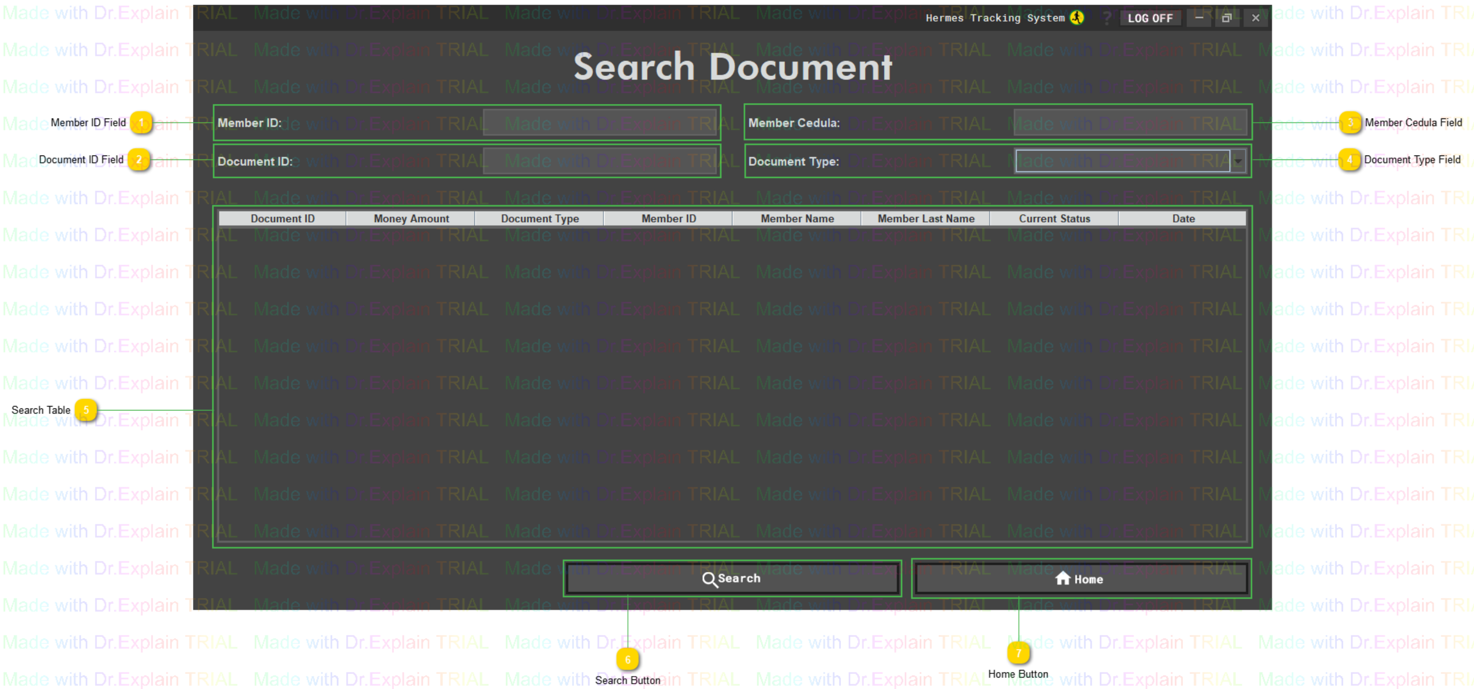
- Using the ID of the document that will show the document which that ID belongs.
- Using the document's type that will show all documents which meet that criteria.
- Using the member ID that will give you all the documents that member has available.
- Using the member cedula that will give you all the documents that member has available.

All document found will be shown in the search table available on that screen.

NOTE: *If you double click on one of the documents you'll see all the information of the document.*

to learn about the components of the search screen go to Knowing the search screen.

Knowing the search screen



1 Member ID Field

Area to enter the ID of the member if you want to search by it, it will search for all document available of this member.

2 Document ID Field

Area to enter the ID of the document if you want to search by it, it will search for the document with that ID

3 Member Cedula Field

Area to enter the cedula of the member if you want to search by it, it will search for all document available of this member.

4 Document Type Field

Area to enter the type of the document if you want to search by it, it will search for all document available with this type.

5 Search Table

Table which shows the documents found.

6 Search Button

Searches for the documents after you enter the information.

7 Home Button

Sends you back to main screen.

Modifying a Document

Hermes TS allows to modify some of the information of the documents already inserted, this might be useful if there was some mistake with the information enter to the system or if the hard paper document was needed to modify.

If the document that you will be modifying is in **CREATED** state it will change to **MODIFIED** state to show that the information was modified. If it's in modified state the document will stay in modified state but will be register as if it was modified again.

The steps to modify a document are the following:

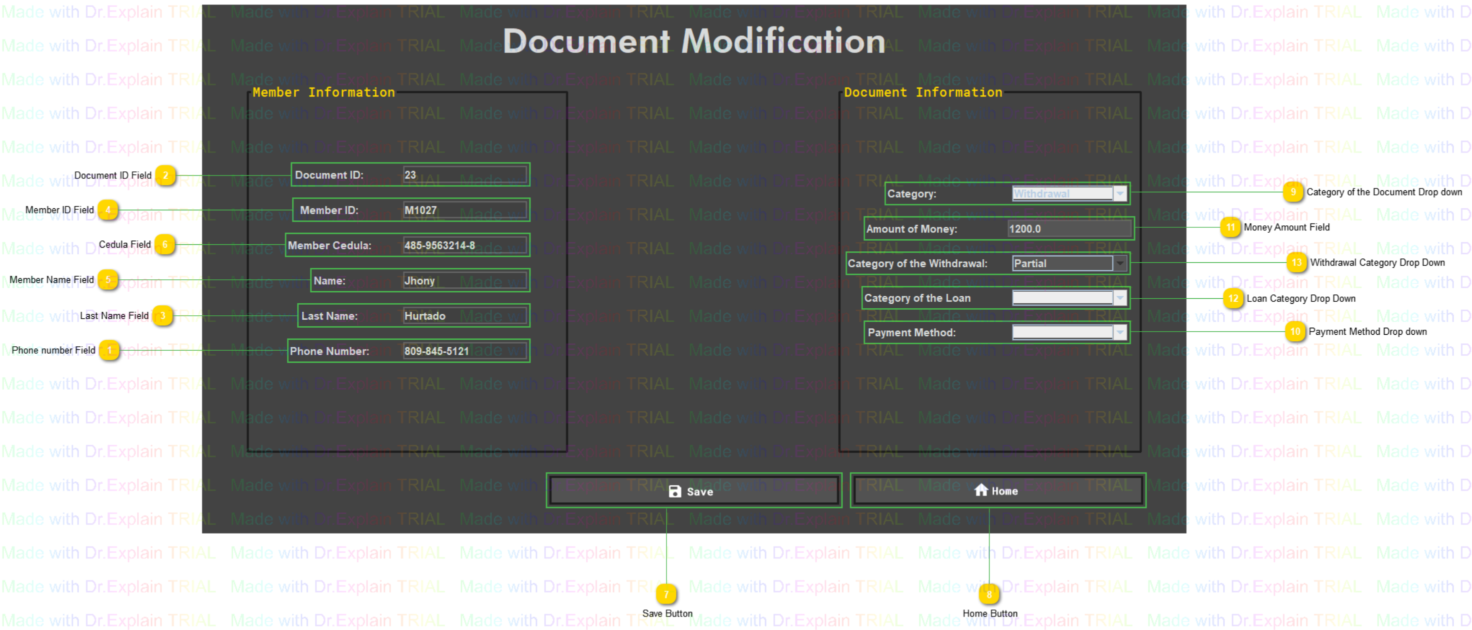
1. Select the document you want to modify on the table that is in the main screen by single clicking it.
2. Press the modify button.
3. After pressing modify you will be redirected to the modify screen.
4. Change the information that you would like to modify.
5. Press **Save** to save all the changes made. A popup will notify if the document was changed correctly.

NOTE: *this option is just available for the "Oficial de Crédito", as is just the only one capable to modify documents.*

IMPORTANT: If you don't modify any of the fields and press save the system will still count it as a modification, this is due to the fact that Hermes doesn't work with all the information of the document but if you need to modify the hard paper document you can still show that there was a modification.

to learn about the components of the Modify Screen go to Knowing the Modify Screen.

Knowing the Modify Screen



1 Phone number Field

Shows the phone number of the member

2 Document ID Field

Shows the ID of the document

3 Last Name Field

Shows the last name of the member

4 Member ID Field

Shows the ID of the member

5 Member Name Field

Shows the name of the member

6 Cedula Field

Shows the cedula of the member

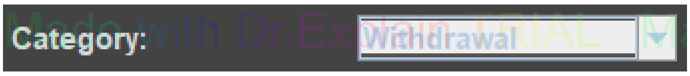
7 Save Button

Modifies the information provided.

8 Home Button

Sends you back to main screen if the information wasn't save all the information provided will be erased.

9 Category of the Document Drop down



Shows the type of Document and can't be change

10 Payment Method Drop down

Shows the loan payment method, it can be change if the document is a loan.

11 Money Amount Field

Shows the money amount of the document, it can be change.

12 Loan Category Drop Down

Shows the loan category, it can be change if the document is a loan.

13 Withdrawal Category Drop Down

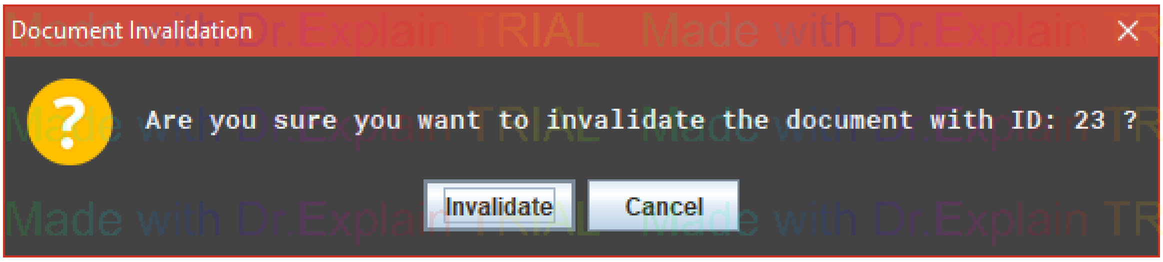
Shows the withdrawal category, it can be change if the document is a withdrawal.

Invalidating a Document

The "Oficial de Crédito" has the option to invalidate a document this will be useful if the was a mistake that can't be modified after creating a document, also if there was a problem with the member and the document needs to be invalidated, or any other issue that demands the document to be canceled.

The document can be invalidated either if it's in **CREATED** state or **MODIFIED** state. The steps to invalidate a document are:

1. Go to the main screen.
2. Select the document that you would like to invalidate in the table by single clicking it.
3. Press the invalidate button.
4. After that, the system will show a popup asking to confirm that you want to invalidate the document with the ID shown. It will be similar to the following:

   1. 

5. Press invalidate if you are sure that you want to invalidate the document.

IMPORTANT: As soon as the document it's invalidated it will disappear from the main screen and you won't be able to get any information about that document. So be careful with this option.

Dispatching a Document

After you are done with the document and the process has been completed the next step is to dispatch it so if can continue with the next stop for this matter you will need to change the state of the document to DISPATCHED in order to do so you need to follow the next steps:

1. Go to the main screen.
2. Select the document that you would like to invalidate in the table by single clicking it.
3. Press the dispatch button.
4. After that, the system will show a popup asking to confirm that you want to dispatch the document with the ID shown. It will be similar to the following:

5. Press invalidate if you are sure that you want to invalidate the document.

IMPORTANT: As soon as the document it's dispatched it will disappear from the main screen and you won't be able to get any information about that document. It will pass to the next user.

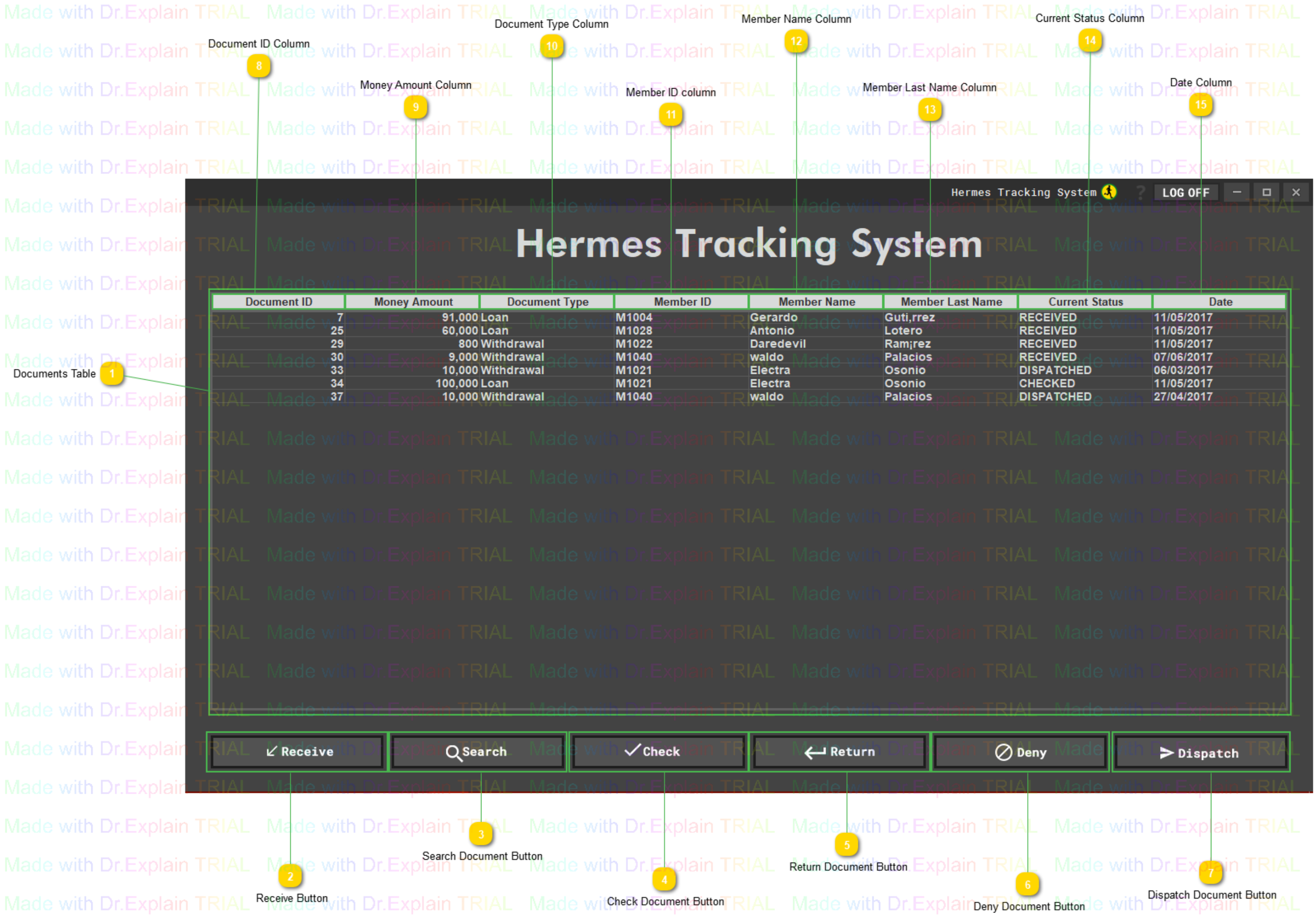
NOTE: *The document can be dispatch either if it's in **CREATED** state or **MODIFIED** state.*

Encargado de Crédito

This section covers all the features available for the **"Encargado de Crédito"** this includes receiving a document, searching for documents, checking, returning, denying and dispatching a document.

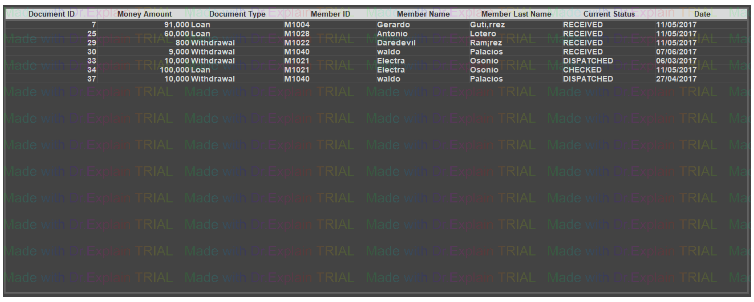
The **"Encargado de Crédito"** is the one in charge to verify the documents after was created by the **"Oficial de Crédito"** so the actions available for him help them to do the job in a quick and easy way.

Main Screen



Document ID	Money Amount	Document Type	Member ID	Member Name	Member Last Name	Current Status	Date
7	91,000	Loan	M1004	Gerardo	Guti,rrez	RECEIVED	11/05/2017
25	60,000	Loan	M1028	Antonio	Lotero	RECEIVED	11/05/2017
29	800	Withdrawal	M1022	Daredevil	Ram¡rez	RECEIVED	11/05/2017
30	9,000	Withdrawal	M1040	waldo	Palacios	RECEIVED	07/06/2017
33	10,000	Withdrawal	M1021	Electra	Osonio	DISPATCHED	06/03/2017
34	100,000	Loan	M1021	Electra	Osonio	CHECKED	11/05/2017
37	10,000	Withdrawal	M1040	waldo	Palacios	DISPATCHED	27/04/2017

1 Documents Table



This table shows all the available documents that were dispatched by the "Oficial de Crédito" and the ones you marked as received or checked. if you double click on one of the documents you'll see all the information of the document.

2 Receive Button

Shows a popup to confirm that you want to receive a document if it's confirmed the document is received.

3 Search Document Button

Shows the screen to Search for documents.

4 Check Document Button

Shows a popup to confirm that you want to mark as check a document if it's confirmed the document is mark as checked.

5 Return Document Button

Shows a popup to confirm that you want to return the document selected to the "Oficial de Crédito" to be modified. If it's confirmed the document is marked as returned and it's returned.

6 Deny Document Button

Shows a popup to confirm that you want to deny a document. if it's confirmed the document is denied.

7 Dispatch Document Button

Shows a popup to confirm that you want to dispatch a document if it's confirmed the document is dispatched.

8 Document ID Column

Column where you will find the ID of the documents that you have available.

9 Money Amount Column

Column where you will find the money amount of the documents that you have available.

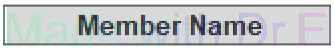
10 Document Type Column

Column where you will find the type of the documents that you have available.

11 Member ID column

Column where you will find the ID of the member who is owner of the documents that you have available.

12 Member Name Column



Column where you will find the name of the member who is owner of the documents that you have available.

13 Member Last Name Column

Column where you will find the last name of the member who is owner of the documents that you have available.

14 Current Status Column

Column where you will find the last status of the documents that you have available. It'll show DISPATCHED as soon as the "Oficial de Crédito" dispatch the document, RECEIVED or CHECKED.

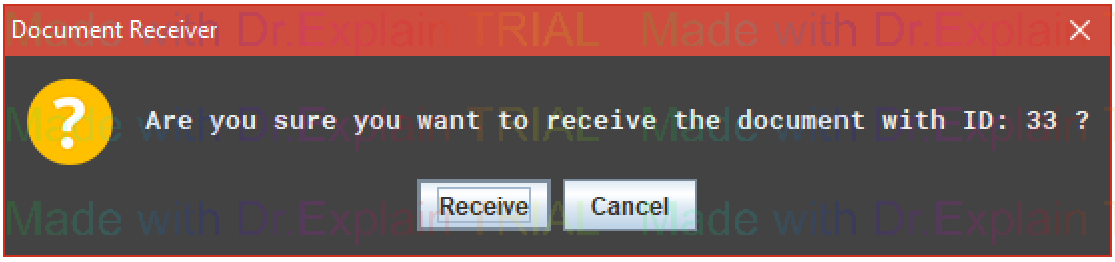
15 Date Column

Column where you will find the date of the last status of the documents that you have available.

Receiving a Document

If you are an "Encargado de Crédito", "Gerente General", or a "Gerente Financiero" you would need to receive a document, this is necessary to show that the document was handed to you and that you are the current bearer of the document. In order to do so you just need to follow the following steps:

1. Go to your main screen.
2. Select the document you want to mark as receive.
3. Press the receive button
4. It will show a confirmation popup asking to confirm the action as the following you just need to press "Receive".



If the action was successfully completed the document will change the current status to "RECEIVED".

NOTE: *To receive a document, it must be marked as dispatched for previous document bearer.*

Searching for Document

While dealing with a lot of document you might find useful to search them individually. Hermes TS allows you to search for them in another screen. In order to do so you'll need to do the following:

1. You need to press search on your main screen.
2. After pressing search, the system will show the search document screen.
3. There you will see different fields, you will need to fill in one of them.
4. Then you will need to press search.

Hermes tracking system allows you to search your available documents using different methods:

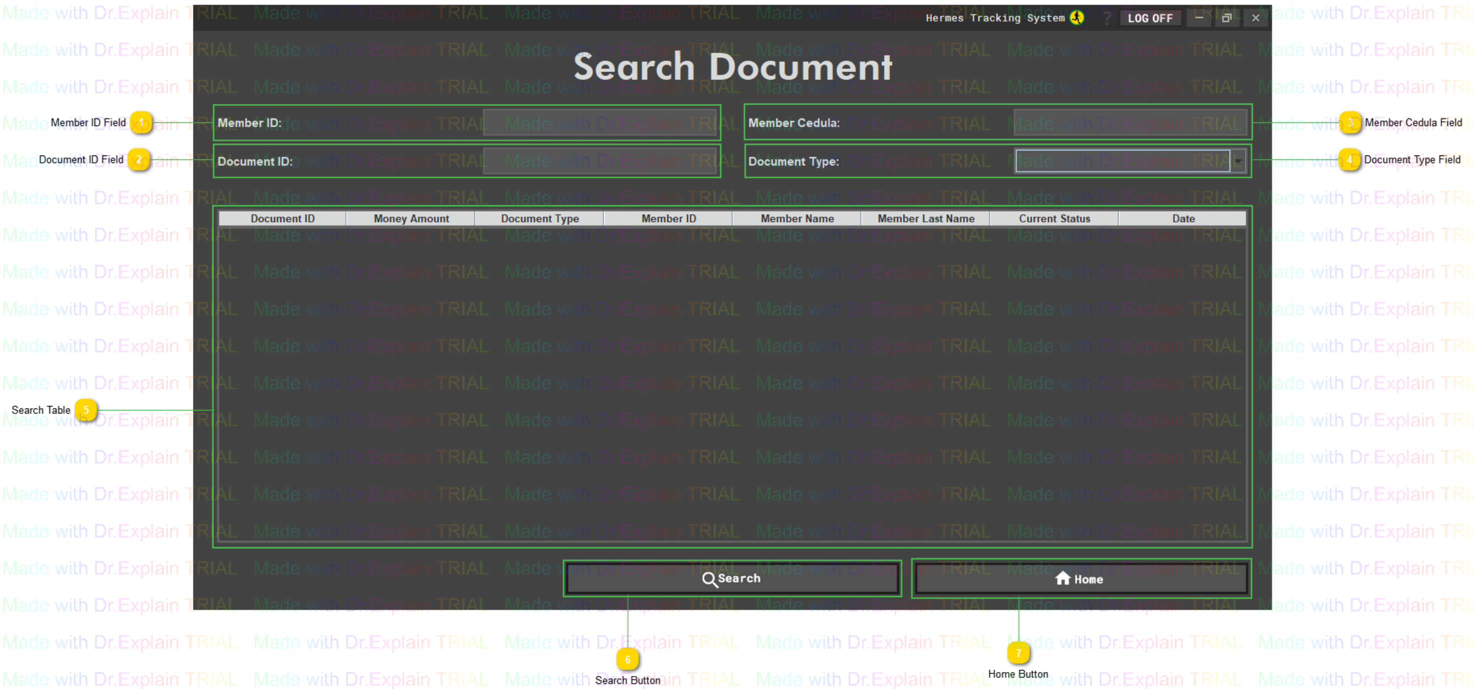
- Using the ID of the document that will show the document which that ID belongs.
- Using the document's type that will show all documents which meet that criteria.
- Using the member ID that will give you all the documents that member has available.
- Using the member cedula that will give you all the documents that member has available.

All document found will be shown in the search table available on that screen.

NOTE: *If you double click on one of the documents you'll see all the information of the document.*

to learn about the components of the search screen go to Knowing the search screen.

Knowing the search screen



Member ID Field

Area to enter the ID of the member if you want to search by it, it will search for all document available of this member.

Document ID Field

Area to enter the ID of the document if you want to search by it, it will search for the document with that ID

Member Cedula Field

Area to enter the cedula of the member if you want to search by it, it will search for all document available of this member.

Document Type Field

Area to enter the type of the document if you want to search by it, it will search for all document available with this type.

5 Search Table

Table which shows the documents found.

6 Search Button

Searches for the documents after you enter the information.

7 Home Button

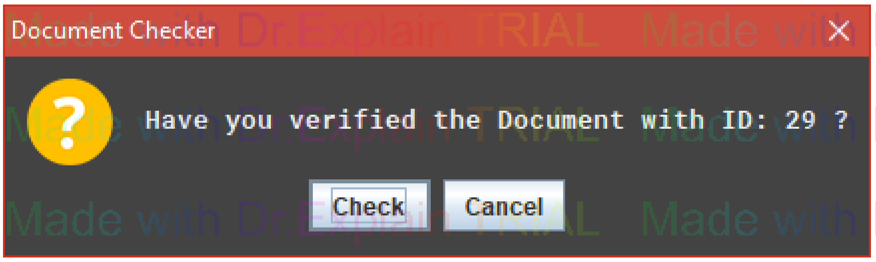
Sends you back to main screen.

Checking a Document

The "Encargado de Crédito" has the option to check a document. It will be used after the hard paper document is checked and verified that everything is correct and the document meets the necessary requirement.

The steps to check a document are:

1. Go to the main screen.
2. Select the document that you would like to mark as checked in the table by single clicking it.
3. Press the check document button.
4. After that, the system will show a popup asking to confirm that you want to check the document with the ID shown. It will be similar to the following:



5. Press check if you are sure that you want to mark as check the document.

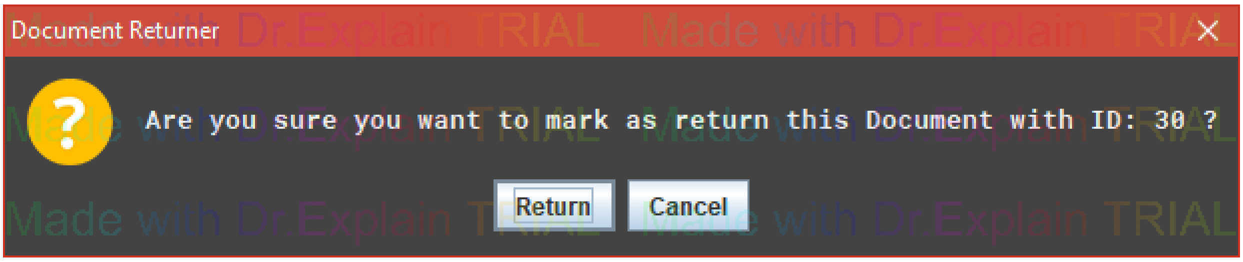
NOTE: *The document can be checked just if the current status is RECEIVED.*

Returning a Document

The "Encargado de Crédito" has the option to return a document. It will be useful when the document has some mistake that needs to be modified by the "Oficial de Crédito".

The steps to return a document are:

1. Go to the main screen.
2. Select the document that you would like to return in the table by single clicking it.
3. Press the return document button.
4. After that, the system will show a popup asking to confirm that you want to return the document with the ID shown. It will be similar to the following:



5. Press return if you are sure that you want to return the document.

IMPORTANT: As soon as the document it's returned it will disappear from the main screen and it will go the "Oficial de Crédito" session.

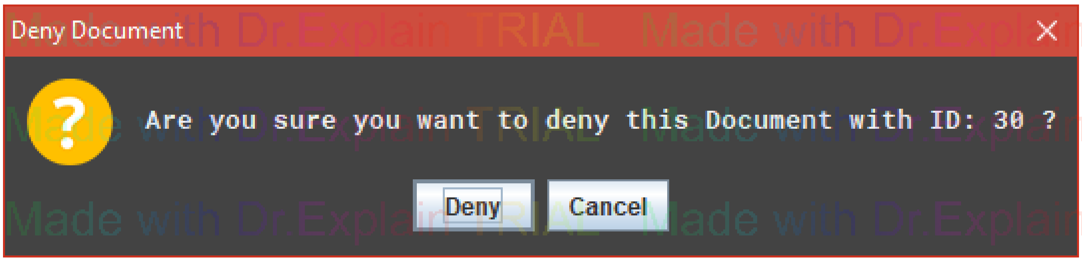
NOTE: *The document can be checked just if the current status is RECEIVED.*

Denying a Document

The "Encargado de Crédito" has the option to deny a document this will be useful if there was a mistake that can't be modified, that the member does not apply for the request or any other issue that demands the document to be denied.

The document can be denied either if it's in **RECEIVED** state or **CHECKED** state. The steps to deny a document are:

1. Go to the main screen.
2. Select the document that you would like to deny in the table by single clicking it.
3. Press the deny button.
4. After that, the system will show a popup asking to confirm that you want to deny the document with the ID shown. It will be similar to the following:



5. Press deny if you are sure that you want to deny the document.

IMPORTANT: As soon as the document it's deny it will disappear from the main screen and you won't be able to get any information about that document. So be careful with this option.

Dispatching a Document

After you are done with the document and the process has been completed the next step is to dispatch it so if can continue with the next stop for this matter you will need to change the state of the document to DISPATCHED in order to do so you need to follow the next steps:

1. Go to the main screen.
2. Select the document that you would like to invalidate in the table by single clicking it.
3. Press the dispatch button.
4. After that, the system will show a popup asking to confirm that you want to dispatch the document with the ID shown. It will be similar to the following:

5. Press invalidate if you are sure that you want to invalidate the document.

IMPORTANT: As soon as the document it's dispatched it will disappear from the main screen and you won't be able to get any information about that document. It will pass to the next user.

NOTE: *The document can be dispatch just if it's in **CHECKED** state.*

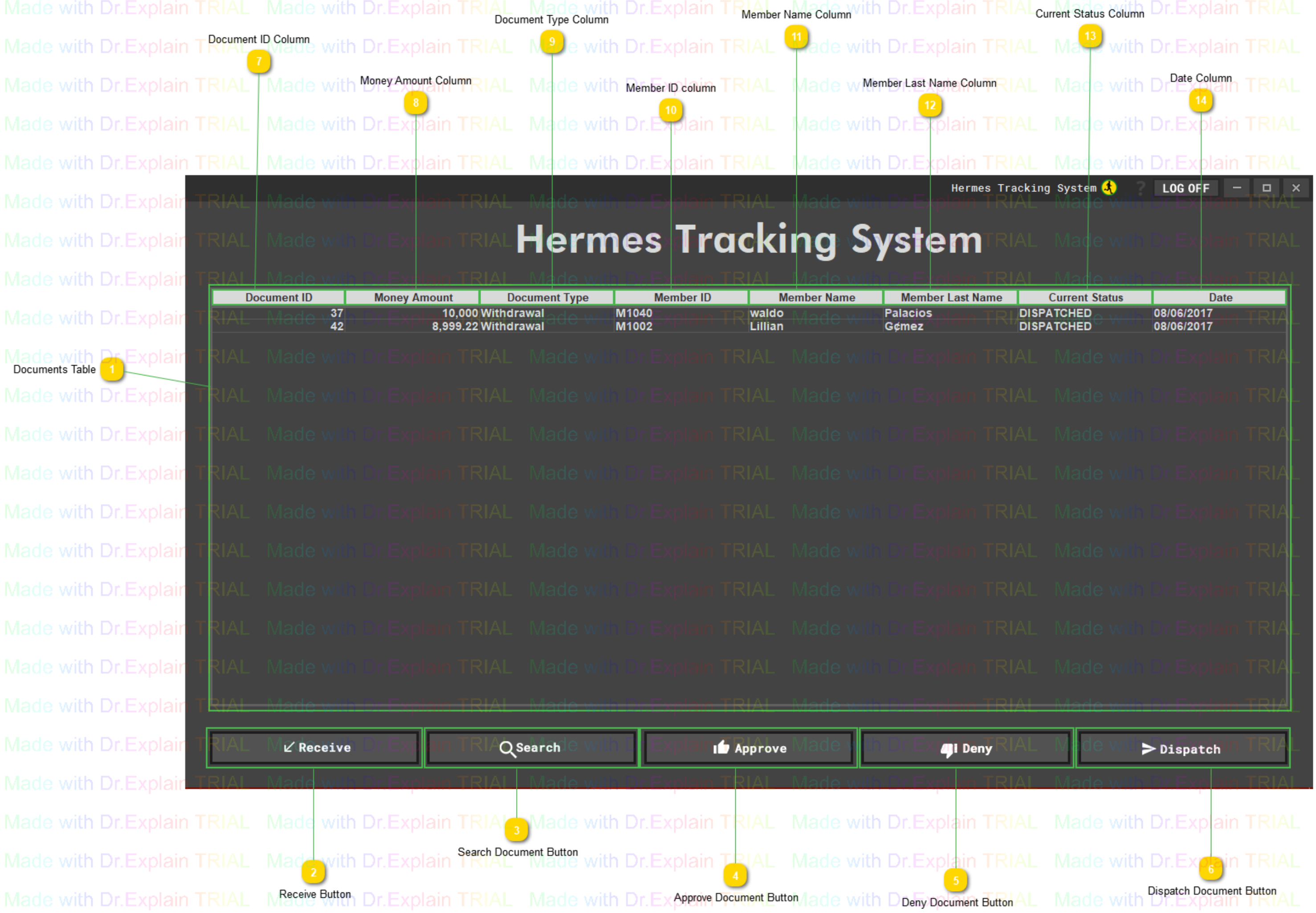
Gerente General/Gerente Financiero

This section covers all the features available for the **"Gerente General"** and the **"Gerente Financiero"** this includes receiving a document, searching for documents, approving, denying and dispatching a document.

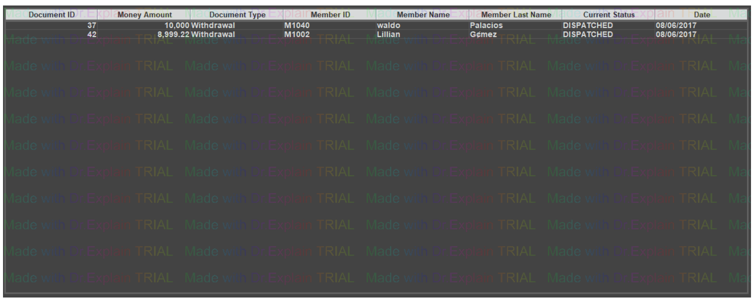
Why do we mix them?

We mix these 2 types of users because both of them have the same features available. But they manage different types of documents, the **"Gerente General"** is in charge of working with withdrawals and the **"Gerente Financiero"** with loans, they both need to decide if they are going to approve or deny their documents, and the system will provide an easy and quick way to do so.

Main Screen



1 Documents Table



This table shows all the available documents that were dispatched by the "Encargado de Crédito" and the ones you marked as received or approved. if you double click on one of the documents you'll see all the information of the document.

2 Receive Button

Shows a popup to confirm that you want to receive a document if it's confirmed the document is received.

3 Search Document Button

Shows the screen to Search for documents.

4 Approve Document Button

Shows a popup to confirm that you want to approve a document if it's confirmed the document is approved.

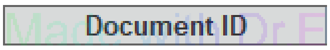
5 Deny Document Button

Shows a popup to confirm that you want to deny a document. if it's confirmed the document is denied.

6 Dispatch Document Button

Shows a popup to confirm that you want to dispatch a document if it's confirmed the document is dispatched.

7 Document ID Column



Column where you will find the ID of the documents that you have available.

8 Money Amount Column

Column where you will find the money amount of the documents that you have available.

9 Document Type Column

Column where you will find the type of the documents that you have available.

10 Member ID column

Column where you will find the ID of the member who is owner of the documents that you have available.

11 Member Name Column

Member Name

Column where you will find the name of the member who is owner of the documents that you have available.

12 Member Last Name Column

Member Last Name

Column where you will find the last name of the member who is owner of the documents that you have available.

13 Current Status Column

Current Status

Column where you will find the last status of the documents that you have available. It'll show DISPATCHED as soon as the "Encargado de Crédito" dispatch the document, RECEIVED or APPROVED.

14 Date Column

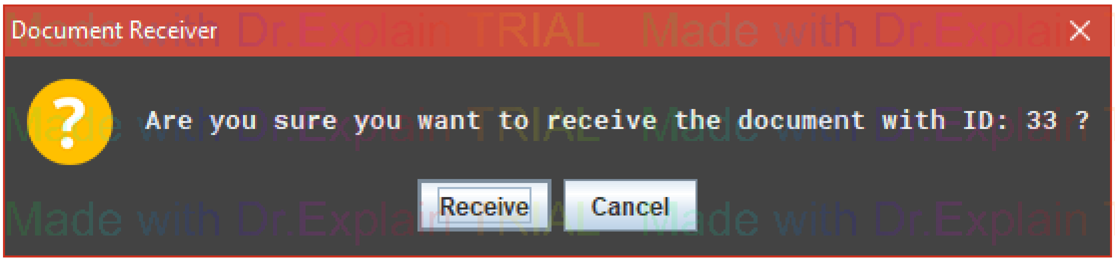
Date

Column where you will find the date of the last status of the documents that you have available.

Receiving a Document

If you are an "Encargado de Crédito", "Gerente General", or a "Gerente Financiero" you would need to receive a document, this is necessary to show that the document was handed to you and that you are the current bearer of the document. In order to do so you just need to follow the following steps:

1. Go to your main screen.
2. Select the document you want to mark as receive.
3. Press the receive button
4. It will show a confirmation popup asking to confirm the action as the following you just need to press "Receive".



If the action was successfully completed the document will change the current status to "RECEIVED".

NOTE: *To receive a document, it must be marked as dispatched for previous document bearer.*

Searching for Document

While dealing with a lot of document you might find useful to search them individually. Hermes TS allows you to search for them in another screen. In order to do so you'll need to do the following:

1. You need to press search on your main screen.
2. After pressing search, the system will show the search document screen.
3. There you will see different fields, you will need to fill in one of them.
4. Then you will need to press search.

Hermes tracking system allows you to search your available documents using different methods:

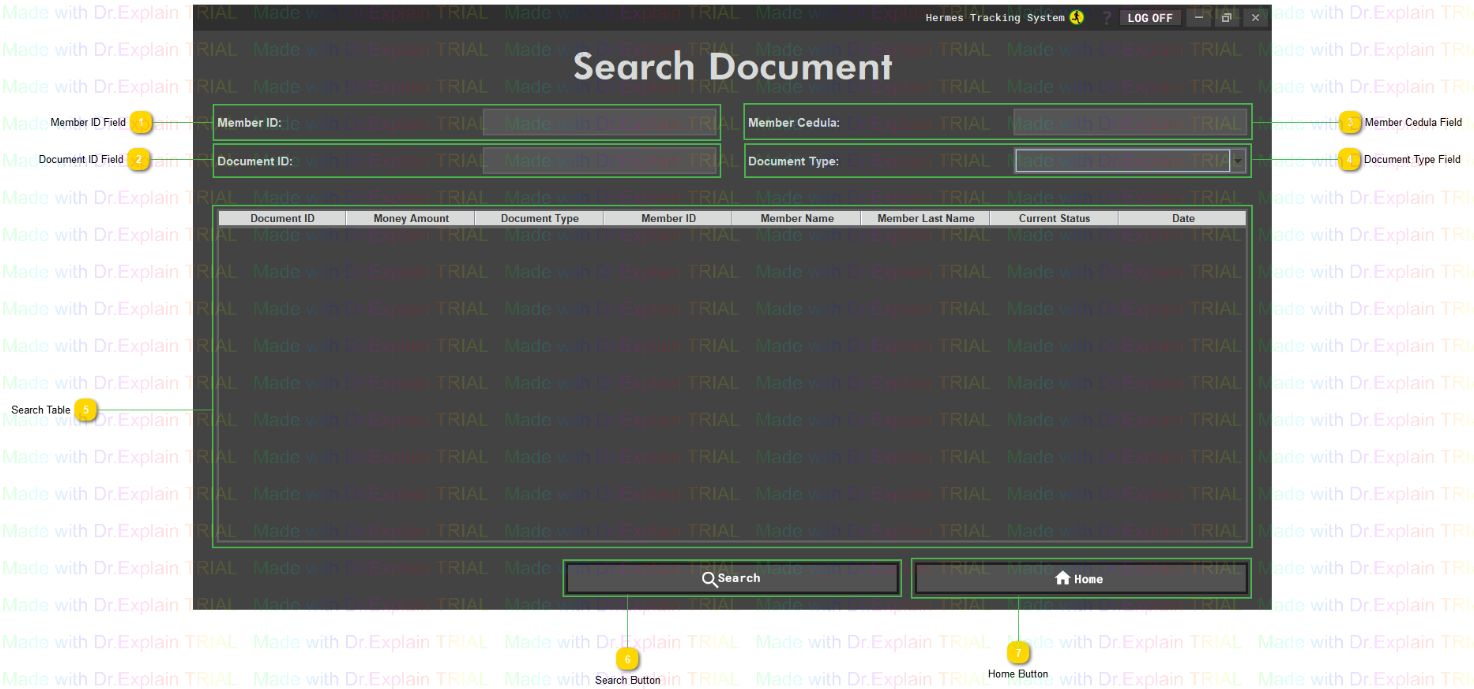
- Using the ID of the document that will show the document which that ID belongs.
- Using the document's type that will show all documents which meet that criteria.
- Using the member ID that will give you all the documents that member has available.
- Using the member cedula that will give you all the documents that member has available.

All document found will be shown in the search table available on that screen.

NOTE: *If you double click on one of the documents you'll see all the information of the document.*

to learn about the components of the search screen go to Knowing the search screen.

Knowing the search screen



1 Member ID Field

Area to enter the ID of the member if you want to search by it, it will search for all document available of this member.

2 Document ID Field

Area to enter the ID of the document if you want to search by it, it will search for the document with that ID

3 Member Cedula Field

Area to enter the cedula of the member if you want to search by it, it will search for all document available of this member.

4 Document Type Field

Area to enter the type of the document if you want to search by it, it will search for all document available with this type.

5 Search Table

Table which shows the documents found.

6 Search Button

Searches for the documents after you enter the information.

7 Home Button

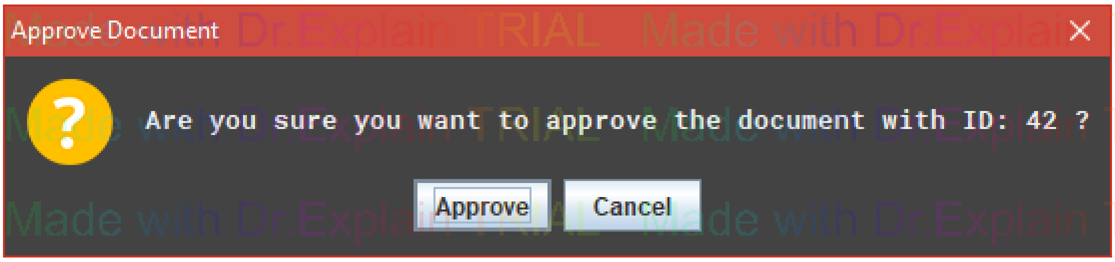
Sends you back to main screen.

Approving a Document

The **"Gerente General"** and the **"Gerente Financiero"** have the option to approve a document. It will be used after the hard paper document is verified that everything is correct and the document meets the necessary requirement.

The steps to approve a document are:

1. Go to the main screen.
2. Select the document that you would like to approve in the table by single clicking it.
3. Press the approve document button.
4. After that, the system will show a popup asking to confirm that you want to approve the document with the ID shown. It will be similar to the following:



5. Press approve if you are sure that you want to mark as approved the document.

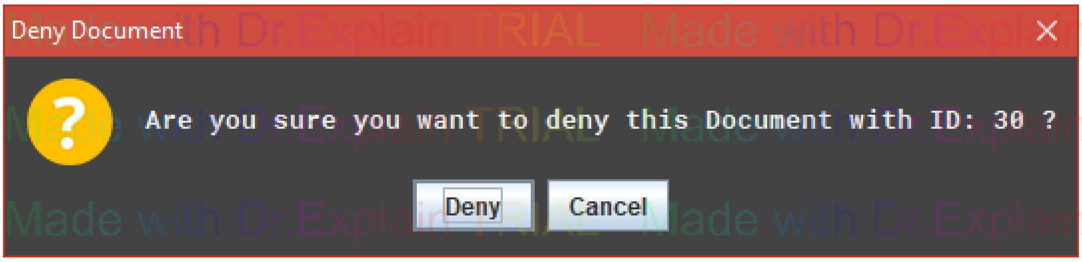
NOTE: *The document can be approve just if the current status is RECEIVED.*

Denying a Document

The **"Gerente General"** and the **"Gerente Financiero"** have the option to deny a document this will be use if the member does not apply for the request or any other issue that demands the document to be denied.

The document can be denied either if it's in **RECEIVED** state or **APPROVED** state. The steps to deny a document are:

1. Go to the main screen.
2. Select the document that you would like to deny in the table by single clicking it.
3. Press the deny button.
4. After that, the system will show a popup asking to confirm that you want to deny the document with the ID shown. It will be similar to the following:



5. Press deny if you are sure that you want to deny the document.

IMPORTANT: As soon as the document it's deny it will disappear from the main screen and you won't be able to get any information about that document. So be careful with this option.

Dispatching a Document

After you are done with the document and the process has been completed the next step is to dispatch it so if can continue with the next stop for this matter you will need to change the state of the document to DISPATCHED in order to do so you need to follow the next steps:

1. Go to the main screen.
2. Select the document that you would like to invalidate in the table by single clicking it.
3. Press the dispatch button.
4. After that, the system will show a popup asking to confirm that you want to dispatch the document with the ID shown. It will be similar to the following:

5. Press invalidate if you are sure that you want to invalidate the document.

IMPORTANT: As soon as the document it's dispatched it will disappear from the main screen and you won't be able to get any information about that document. It will pass to the next user.

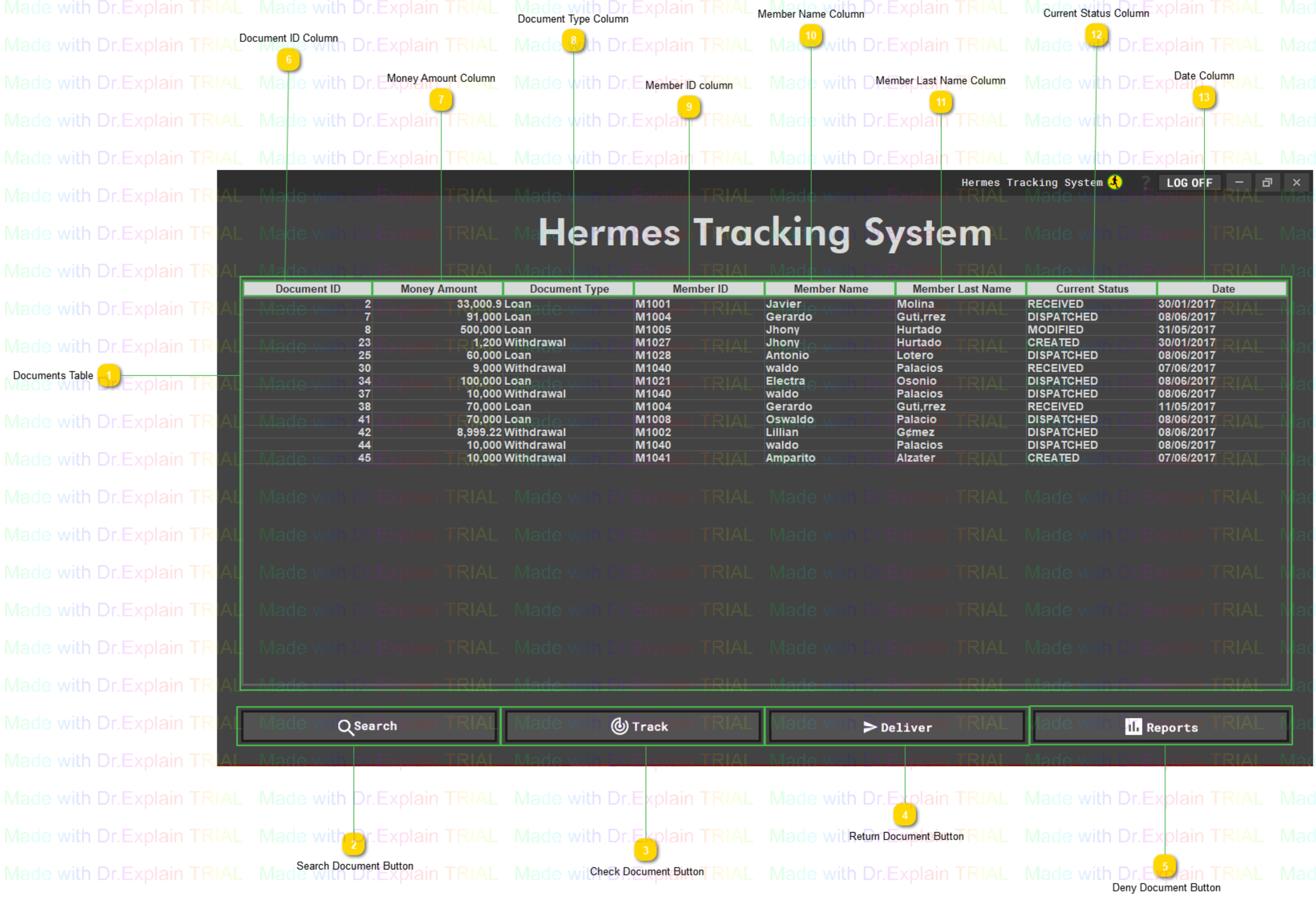
NOTE: *The document can be dispatch just if it's in **APPROVE** state.*

Mensajero Interno

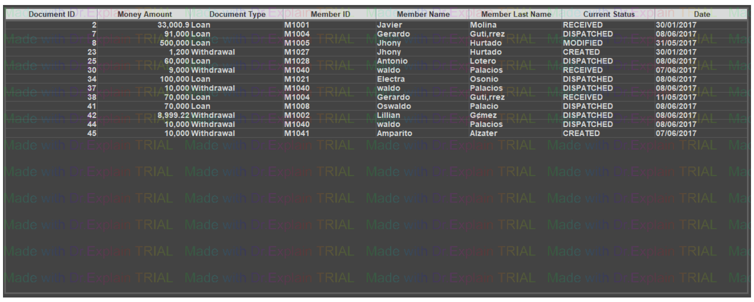
This section covers all the features available for the **"Mensajero Interno"** this includes searching for documents, tracking, delivering and creating reports.

The **"Mensajero Interno"** is the one in charge of moving the documents around the company and delivering the hard paper document to the member after it finishes the process, the actions available for him help them to do the job in a quick and easy way.

Main Screen



1 Documents Table



This table shows all the documents so you can track them. if you double click on one of the documents you'll see all the information of the document.

2 Search Document Button

Shows the screen to Search for documents.

3 Check Document Button

Shows the screen with the tracking information of the document selected.

4 Return Document Button

Shows a popup to confirm that you want to mark as delivered the document selected. If it's confirmed the document is marked as delivered.

5 Deny Document Button

Shows the screen to create reports.

6 Document ID Column

Column where you will find the ID of the documents that you have available.

7 Money Amount Column

Column where you will find the money amount of the documents that you have available.

8 Document Type Column

Column where you will find the type of the documents that you have available.

9 Member ID column

Column where you will find the ID of the member who is owner of the documents that you have available.

10 Member Name Column

Column where you will find the name of the member who is owner of the documents that you have available.

11 Member Last Name Column

Column where you will find the last name of the member who is owner of the documents that you have available.

12 Current Status Column

Column where you will find the last status of the documents.

13 Date Column

Column where you will find the date of the last status of the documents.

Searching for Document

While dealing with a lot of document you might find useful to search them individually. Hermes TS allows you to search for them in another screen. In order to do so you'll need to do the following:

1. You need to press search on your main screen.
2. After pressing search, the system will show the search document screen.
3. There you will see different fields, you will need to fill in one of them.
4. Then you will need to press search.

Hermes tracking system allows you to search your available documents using different methods:

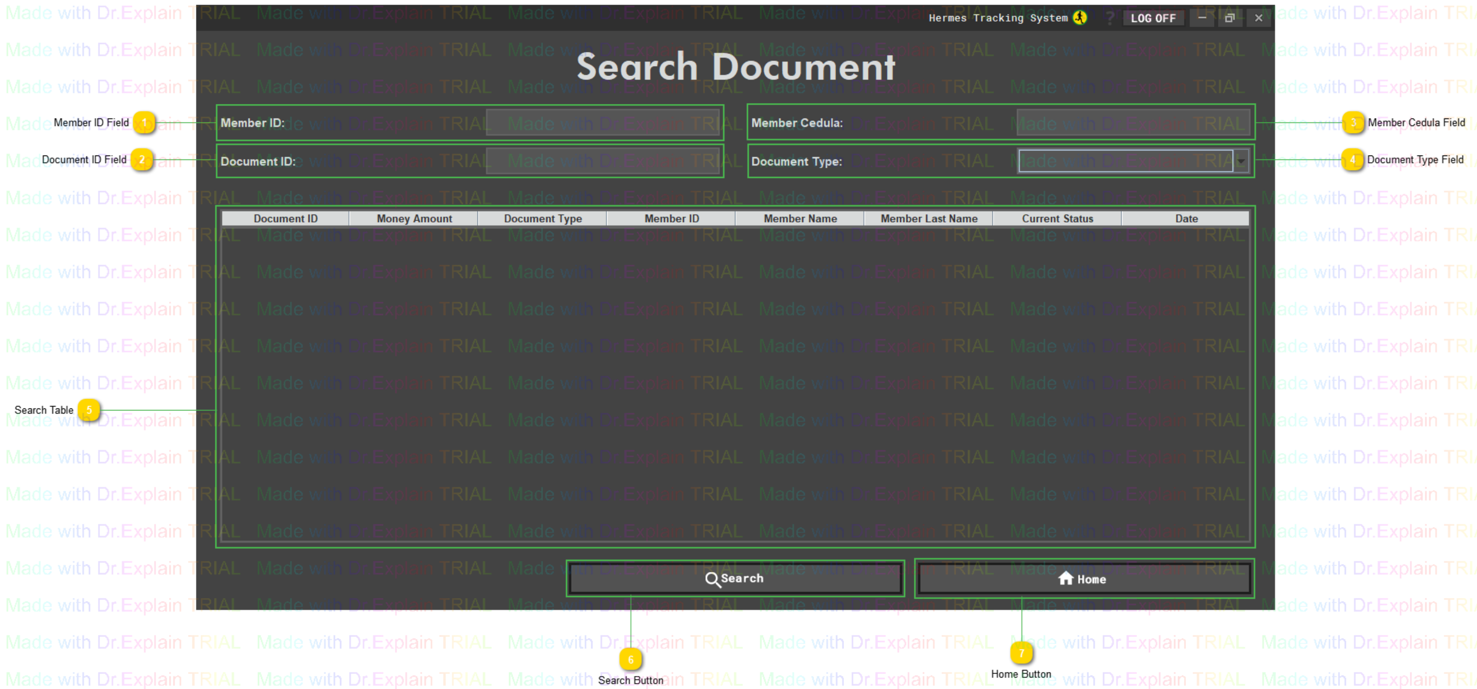
- Using the ID of the document that will show the document which that ID belongs.
- Using the document's type that will show all documents which meet that criteria.
- Using the member ID that will give you all the documents that member has available.
- Using the member cedula that will give you all the documents that member has available.

All document found will be shown in the search table available on that screen.

NOTE: *If you double click on one of the documents you'll see all the information of the document.*

to learn about the components of the search screen go to Knowing the search screen.

Knowing the search screen



1 Member ID Field

Area to enter the ID of the member if you want to search by it, it will search for all document available of this member.

2 Document ID Field

Area to enter the ID of the document if you want to search by it, it will search for the document with that ID

3 Member Cedula Field

Area to enter the cedula of the member if you want to search by it, it will search for all document available of this member.

4 Document Type Field

Area to enter the type of the document if you want to search by it, it will search for all document available with this type.

5 Search Table

Table which shows the documents found.

6 Search Button

Searches for the documents after you enter the information.

7 Home Button

Sends you back to main screen.

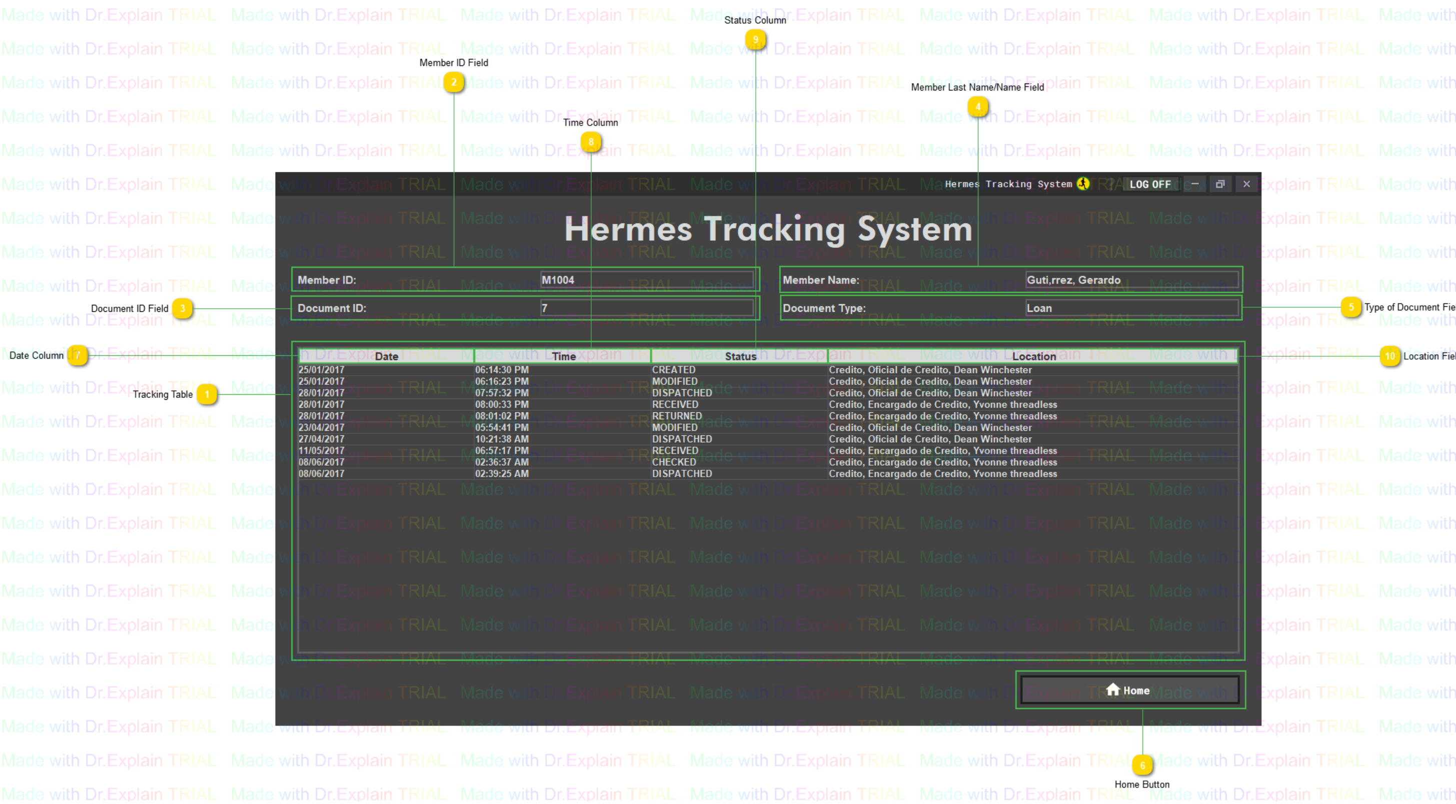
Tracking a Document

The **"Mensajero Interno"** has the option to track documents. It's used to follow the documents throughout their life cycle so you are aware of their location and the current state. In order to do so you just need to follow the following steps:

1. Go to your main screen.
2. Select the document you want to track.
3. Press the tracking button
4. After pressing the tracking button, the system will show the tracking document screen, where you will find all the information about the location of the document and all the process the document has gone through.

to learn about the components of the tracking screen go to knowing the tracking screen.

Knowing the tracking Screen



1 Tracking Table

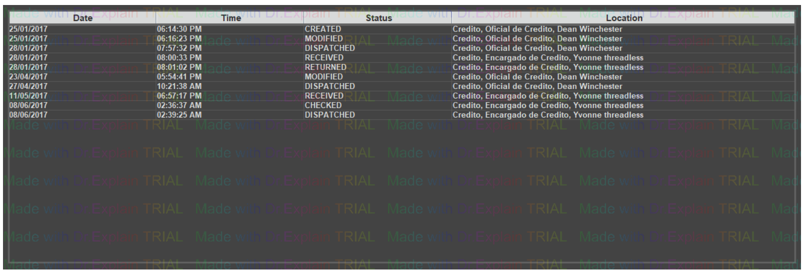


Table that shows the tracking information of the document being tracked.

2 Member ID Field

Shows the ID of the member.

3 Document ID Field

Shows the ID of the document.

4 Member Last Name/Name Field

Shows the Last Name and Name of the member, respectively.

5 Type of Document Field

Shows the type of document.

6 Home Button

Sends you back to main screen.

7 Date Column

Shows the date of every change that the document has had.

8 Time Column

Shows the times of every change that the document has had.

9 Status Column

Shows the status changes of the document throughout the stages of its life cycle.

10 Location Field

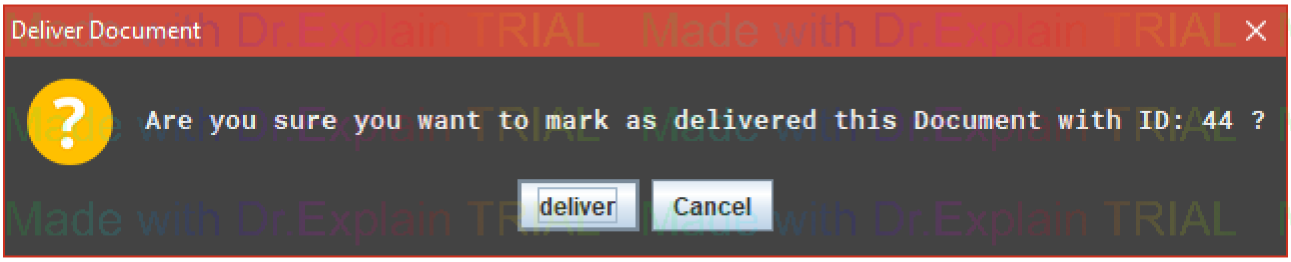
Shows the location of the document as "Department, Charge, employee". It shows the employee who change the status of the document.

Delivering a Document

The **"Mensajero Interno"** has the option to deliver a document. It will be used after the hard paper document has completed all the process and everything is ready to give the output to the member and owner of the request.

The steps to mark as delivered a document are:

1. Go to the main screen.
2. Select the document that you would like to mark as delivered in the table by single clicking it.
3. Press the deliver document button.
4. After that, the system will show a popup asking to confirm that you want to deliver the document with the ID shown. It will be similar to the following:



5. Press deliver if you are sure that you want to mark as check the document.

NOTE: *The document can be deliver if it completed its life cycle or if it was denied.*

Creating Reports

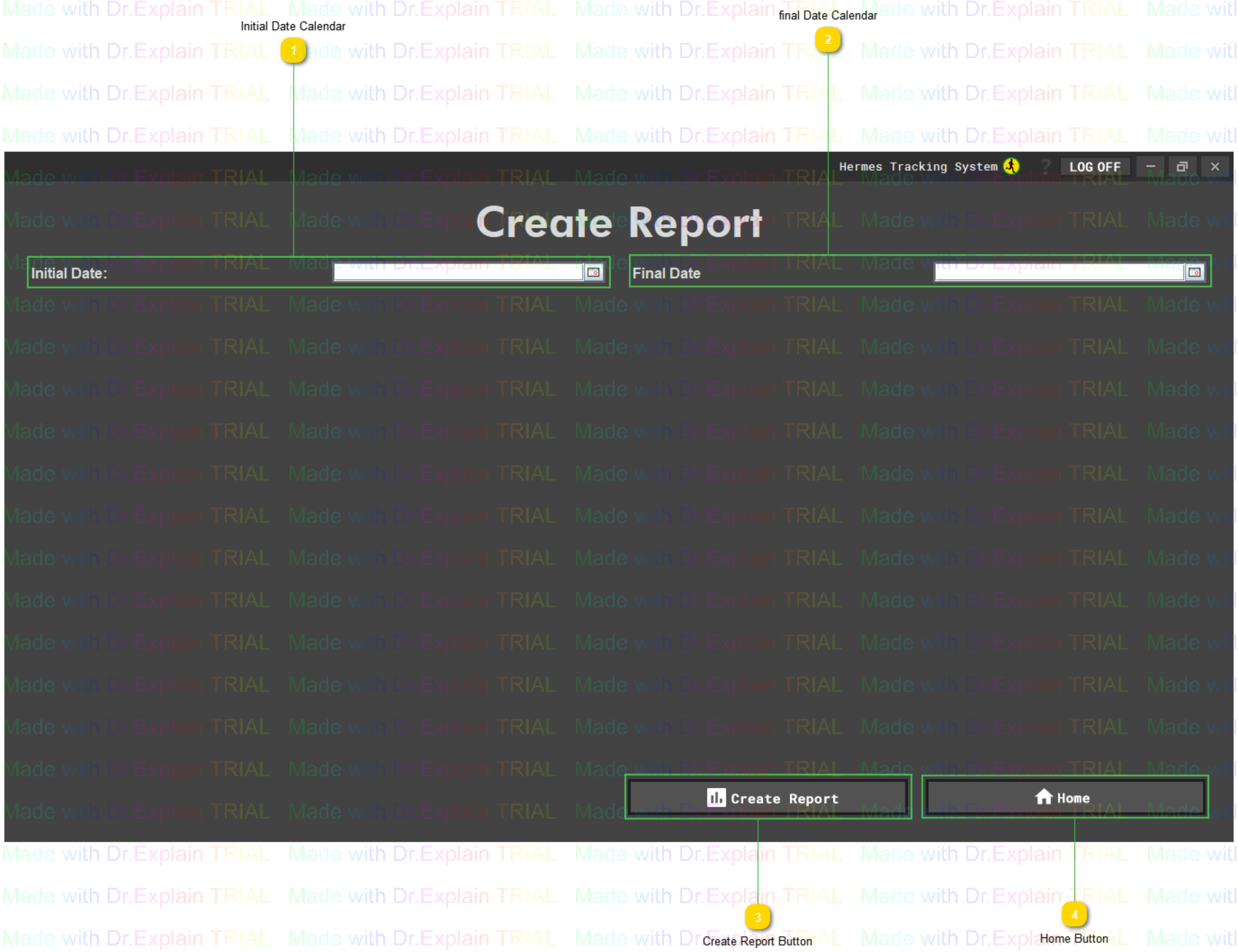
At some point, you might be asked or you'd like to know how fast the whole process it's done, for this matter you can create reports about the time that takes to deliver a document. in order to do so you've got the option of creating reports pretty easily, right there in Hermes TS. for doing that you need to follow the following steps:

- Go to the main screen.
- Press the reports button.
- After that, the system will show the report screen.
- while in the report screen, select the dates between which you would like to get the report.
- wait a couple of seconds and you will get the report between those dates.

NOTE: *The document can be dispatch just if it's in **CHECKED** state.*

to learn about the components of the report screen go to Knowing the report screen.
to learn about the format of the reports go to Knowing my report.

Knowing the report screen



1 Initial Date Calendar

When the little calendar is pressed shows a calendar to pick the initial date for the report.

2 final Date Calendar

When the little calendar is pressed shows a calendar to pick the final date for the report.

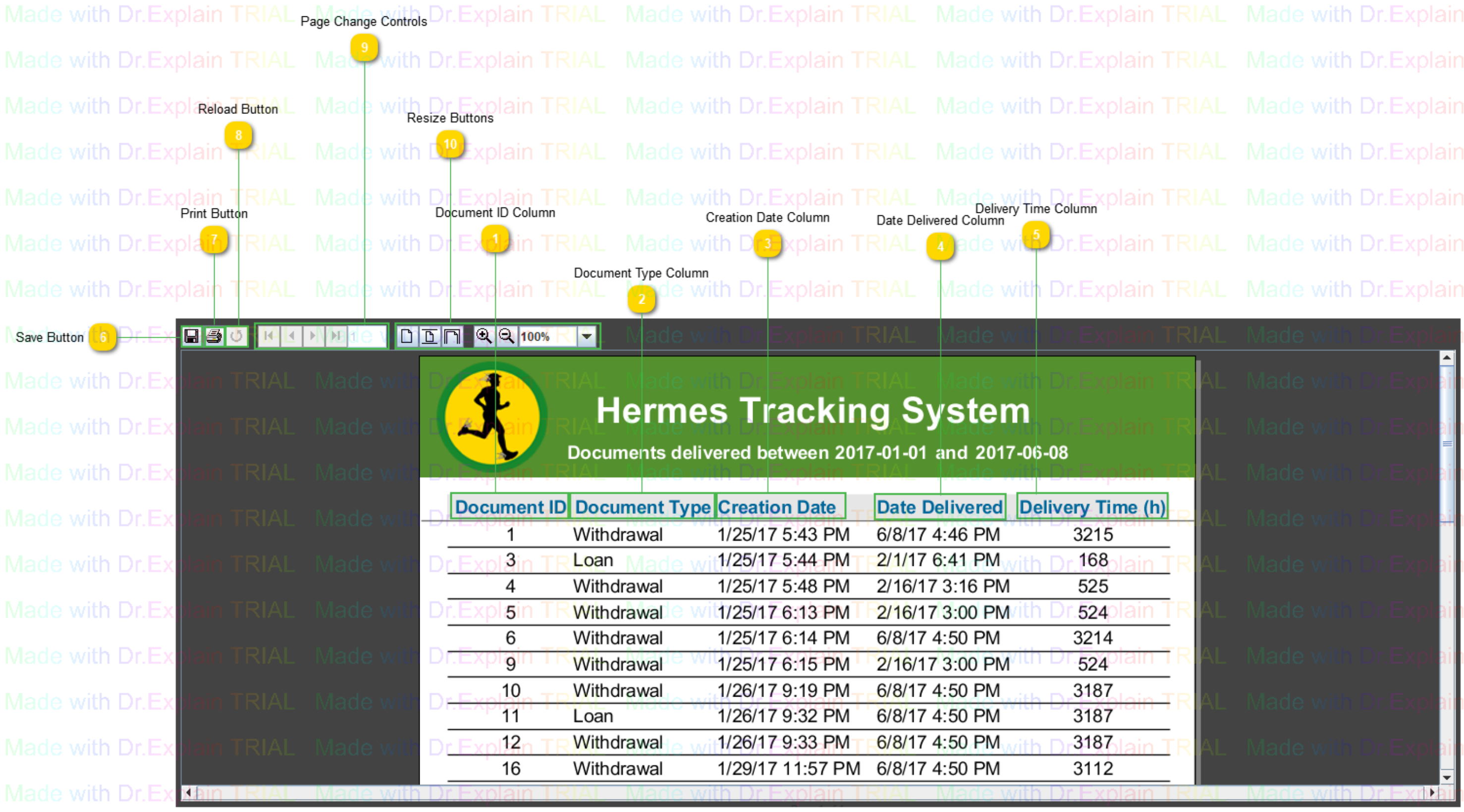
3 Create Report Button

Creates the report with the dates picked.

4 Home Button

Sends you back to main screen if the information wasn't save all the information will be erased.

Knowing my report



1 Document ID Column

Column where you will find the ID of the documents of the report.

2 Document Type Column

Column where you will find the type of the documents of the report.

3 Creation Date Column

Column where you will find the creation dates of the documents of the report.

4 Date Delivered Column

Column where you will find the delivery dates of the documents of the report.

5 Delivery Time Column

Column when you will find the time that took for the document to be delivered since it was created.

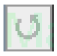
6 Save Button

Saves the report in your computer

7 Print Button

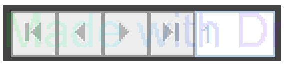
Prints the report.

8 Reload Button



Reloads the report

9 Page Change Controls



buttons to change the current page of the report.

10 Resize Buttons

Controls to resize the report.