Getting Started …

Welcome to Joven Technology's Quasar software. This overview applies to V 1.67.

As you might guess from the title, this document is intended to be read by lab administrator(s) and other lab users who are getting started with the Quasar system. This manual will explain how lab users can perform the most common tasks in the Quasar system. In general, you will want to perform the following tasks in this order.

Before starting these tasks, your system will have been pre-configured by the Quasar technical staff. Elements of configuration, further described in the ***Initial Customer Configuration*** document, include:

1. Project configuration
2. Help configuration
3. Notification configuration
4. Web-site "look and feel"
5. General lab information

The first two steps below must be performed by an individual who has a "Lab Administrator" (Lab Admin) account on the Quasar system. The remaining tasks can be performed by other lab users, who will have a regular Lab User account.

1. Setting up lab locations
2. Setting up lab users

The following steps can be performed by either a Lab Admin or a Lab User:

3. Setting up client companies
4. Setting up client users
5. Creating projects
6. Review/add project details
7. Posting reports to projects
8. Viewing and editing reports
9. Creating additional notifications

This next step is not an essential step, but demonstrates a useful feature:

10. Filtering projects and creating a printout

This appendix covers a special situation:

A. Uploading reports that are NOT in a standard file format

1. Setting up Lab Locations

After the initial configuration of Quasar is complete (which includes the use of your company's logos, etc.), one of the first step in setting up your system is to create Lab Locations. You do this before creating Lab Users, because Quasar requires that all Lab Users be assigned to a Lab Location.

As part of the initial setup, the Joven technology setup team will generally have already created at least one Lab Location. You should review the information for the Lab Location(s) to be sure that it is complete and accurate.

How To:

These steps assume you are logged in as a Lab Admin and at the Main menu.

Click on **Locations** in the Main menu. This brings up a list of the locations currently set up in the system.

To review an existing location, click on the link for the Lab Location. As with other screens, required fields are marked with a **bold** legend. On this screen, the only required field is the name of the Lab Location.

To create a new location, click on the **New** button to create a new location, and enter the basic information about the location.

Tips:

Before creating users, you may want to create a Principal Address for the each location created for the lab. By doing so, when you assign a new user to a location, they will be automatically assigned the Principal Address(es) for that location by default. You can always change this for each user, but it is usually easiest to have the individual users pick up the Principal Address(es) by default.

2. Setting up Lab Users

This step assumes you are logged in as a Lab Admin and at the Main menu.

How To:

Click on **Lab Users** in the menu. This brings up a list of the lab users currently set up in the system. Click on the **New** button to create a new user, and enter the basic information about the lab user. First Name, Last Name, LoginID and Password are required fields (shown in Bold). *Note: the Email field is required in Quasar V167.*

After saving this information, the **Addresses** button and **Lab Locations** buttons will appear at the bottom of the screen.

By default, the user will be created as a Lab User. To make the individual a Lab Admin, you must click on the **Lab Location** button and then Delete them from the Lab Location(s). You can then assign the individual to a Lab Location; on that screen, you will be able to assign them as a Lab Admin or as a Lab User.

Note: at least one Lab Location must be assigned to this lab user before projects can be assigned to the user (this rule applies to both Lab Users and Lab Admins). If you only have one Lab Location in the system, it will automatically be assigned to each lab user.

Gotchas

a. Lab Users will not be able to log in if a location has not been assigned to them.
b. The Email field is not required in Quasar V165, but it must be filled in for lab users to receive automatic notification of reports being posted, projects changing status, etc.
c. All LoginIDs must be unique; no two users can have the same LoginID. The system will alert you if you attempt to create a duplicate, and will require that you choose another LoginID.

Tips:

a. For enhanced security, you should check the “Change Pwd” box; this will force the user to change their password the next time that they login. This will force them to change it from the pre-assigned password which you have established.
b. If you wish to temporarily (or permanently) lock out a user, simply uncheck the “Active” box. This will deactivate their account.
c. Now that you have set up the Lab Locations, and created Lab Users, you can perform the remaining tasks using a regular Lab user account. For security purposes, you might want to create a Lab User account for yourself that you use for regular tasks, and only login using your Lab Admin account when you need to make changes to Lab Locations or Lab Users.

3. <u>Setting up client companies</u>

This step assumes you are logged in as a Lab Admin or Lab User and are at the Main menu.

How To:

Click on **Clients** in the menu. The Client List will appear. Please note that here, and in other discussions of "clients", we are speaking of a *client company*. Individual persons at a client (company) are referred to as *client users*.

Choose the **New** button and enter the basic information about the client. Company Name is the only required field (as always, shown in Bold).

After saving this information, the buttons for **Users** , **Addresses** , and **Lab Locations** will appear at the bottom of the screen. Lab Locations must be assigned to this client company before projects can be created for the client and assigned to that Lab Location.

Gotchas:

Client Users will not be able to log into the system if a Lab Location has not been assigned to the client company. If your system has a single Lab Location, Quasar will automatically assign this Lab Location to clients.

Tips:

Before creating client users, you may want to create a Principal Address for the each client company. If you do so, then when you create a new client user, they will be automatically assigned the Principal Address(es) for that client by default. You can always change this for each client user, but it is usually easiest to have the individual users pick up the Principal Address(es) by default.

4. Setting up client users

This step assumes you are logged in as a Lab User or a Lab Admin and there is an existing client company record (see previous step).

How To:

Select **Clients** in the menu. A client list will appear (on the Client List screen).

Click on an existing client company record you wish to add users to; this will bring you to the “Add / Edit Clients” screen. Click on the **Users** button to view a current list. Select the **New** button and add basic information about the client user to add one. Required fields include First Name, Last Name, LoginID, Password, and User Profile. *Note: the Email field is required in Quasar V167.*

The LoginID and password will be used for login to the system. Assigning a user profile of Client Admin will allow that user to create other client users for the client, and modify the information (address, phone, etc.) stored about the client.

Gotchas:

a. The e-mail field is not required in Quasar V165 and earlier, but it must be filled in for client users to receive automatic notification of reports being posted, projects changing status, etc.

b. All LoginIDs must be unique; no two users can have the same LoginID. The system will alert you if you attempt to create a duplicate, and will require that you choose another LoginID.

Tips:

a. If you are creating a number of users for the same client, you can click the **Copy** button from within an existing client user record so you will not have to re-enter the same information repeatedly.

b. For enhanced security, you should check the “Change Pwd” box; this will force the user to change their password the next time that they login. This will force them to change it from the pre-assigned password which you have established.

c. If you wish to temporarily (or permanently) lock out a user, simply uncheck the “Active” box. This will deactivate their account.

5. <u>Creating projects</u>

This steps assumes you are logged on as a Lab User or a Lab Admin and there is an existing record for the client company, and at least one client user. (See previous two steps.)

How To:

Select **Projects** in the menu. The Project List screen will appear.

Choose the **New** button from the top of the "Projects List" screen. This will bring up the "Add/Edit Project" screen. Enter the basic information about the project. By default, the system will create notification settings so that client user(s) and lab user(s) selected will receive automatic e-mails to notify when the status of the project changes, when reports are posted, etc.

Once the general project information has been saved, email notifications will automatically be sent. Also, a number of buttons will appear at the bottom of the screen, allowing access to related information.

- **Notifications** will allow you to add client users and third party contacts to receive messages and report links from Lab users.

1. **Reports** and **Documents** allow you to post files to the project.
2. **Messages** allow you to send e-mails related to the project.
3. **Comments** allow you to attach notes to the project for other lab users to view.
4. **History** allows you to see previous versions of the project and logs the history of project changes.

Gotchas:

After a project is saved, the Project # and Client company cannot be changed (this is a security measure).

Tips:

Use the **Copy** button from within an existing project record to create a new project which is similar to an existing project.

6. <u>Review/add Project Details</u>

This step assumes you are logged on as a Lab Admin or a Lab User and project records have already been created.

How to:

Choose **Projects** in the Main menu. The Project List screen will appear.

Select a project by clicking on the <u>Lab Project #</u> from the "Project List" screen to view project details (takes you to the View Project Screen). Project details can be edited by clicking the "Edit Project" button in the right hand corner.

To create a printout, click the **Printable View** button. A new screen will appear will is better suited for printing. Use the **Print** button to print the page. A printer must be configured for your computer in order for this to work properly.

Gotchas:

Tips:

A quick way to view or add project details is to choose **QuickScreen** from the Main menu. From there, click on a <u>Lab Project #</u> and go straight to an *editable* view of the project details.

7. Posting Reports to Projects

This step assumes you are logged on as a Lab Admin or a Lab User and project records have already been created.

How To:

Choose "Projects" in the Main menu. The Project List will appear.

From within an existing project (on the Add / Edit Projects screen), click on the **Reports** button and then click on the **New** button at the top of the Reports List.

Clicking on the **Add Report** button at the top of the screen allows you to browse to the report you would like to upload into the system, and convert it to a PDF if desired.

Gotchas:

a. If you want to upload a report without converting it, you will need to de-select the **Convert to PDF** option before browsing to select the file. De-selecting the option clears the file selection.

b. Large files may take a long time to load. Once you click the Upload button, the system will show a "Loading…" symbol to indicate that the system is continuing to work to upload and convert a large file.

Tips:

A quick way to upload reports is using **QuickScreen**. Simply click <u>Add</u> in the Action column.

8. Viewing and editing reports

This step assumes you are logged on as a Lab Admin or a Lab User and project records have already been created.

How to:

Choose **Reports** in the Main menu. The will bring up the “Reports List – All” screen. Clicking on the column headings will sort by that column.

This screen provides a list of current reports along with the ability to search for existing reports or edit existing reports.

To view reports, click on the report number.

To supercede a report (upload new version), click on Edit under the Details column; this will bring up the Add/Edit Reports screen. From this screen, click on the **Add Report** button to upload the new version of the report.

Gotchas:

Large files may take a long time to load. Once you click the **Upload** button, the system will show a “Loading…” symbol to indicate that the system is continuing to work to upload and convert a large file. If the system times out, contact your administrator, who will see that the timeout setting is adjusted.

Tips:

A quick way to add a new report is to the Project Details screen, and from the Edit function on QuickScreen.

9. Creating additional notifications

This step assumes you are logged on as a Lab Admin or a Lab User, project records have been created, and applicable client company and/or third party (external) contacts have been created to select from.

How To:

Choose **Projects** in the Main menu. The Project List screen will appear.

Select a Lab Project # from within an existing project (on the Add / Edit Projects screen). Click on the **Notifications** button. If new notifications for lab users or external contacts are needed, click on the **Add** button to choose an existing contact or to create a new one. Highlight a user, then select the notification(s) that apply to this user, and the method(s) of notification.

Tips:

If you wish to notify someone who does not have a Quasar account, you can enter their name and email address directly (this is often referred to as a "one-off"). If this individual will be notified on a regular basis, you might want to create a Quasar account for them (and keep it inactivated if you don't want them to actually login).

10. Filtering Projects and Creating a Printout

This step assumes you are logged on as a Lab Admin or a Lab User and project records have already been created.

How to:

Select **Projects** from the Main menu. The Project List screen will appear.

To use the search tool to more easily locate a specific group of projects (for example, all projects for one client, or for one Lab User), click on the **Search** button. Under the "Filter By" section, you can filter your projects list by specifying the criteria for your search. Under the "Order By" section, you can control the sorting of the display. When finished, click on **Ok** to return to the Project List screen.

This Search function is available for many of the viewing screens within Quasar.

To create a printout, click the **Printable View** button. A new screen will appear will is better suited for printing. Use the **Print** button to print the page. A printer must be configured for your computer in order for this to work properly.

Gotchas:

a. The search and ordering criteria are "sticky". This means that after creating a desired view, the same criteria will apply until you change the criteria or reset them to the defaults. For example, in order to see the full project list, you should click on the **Search** button and then the **Reset Search** button.

Appendix A. Uploading Reports that are NOT in a standard file format

Quasar recognizes and handles files in a great variety of file formats. In certain situations, however, a lab might be using a non-standard file format and will thus need to take the special measures described below in order to produce a file suitable for use with Quasar.

The procedure described below should not be required except in exceptional situations.

The process below explains how to print a copy of document from your application, and use the Windows "Print to File" feature to save the output to a file in a format that can then be recognized by Quasar.

This process should work for any Windows-based application. First, a printer must be configured (on the workstation that runs the application) to generate PostScript files and write them to disk. Once this is set up, you can print from the application using that printer, and save a file that Quasar will be able to upload and convert to PDF.

Configuring the Printer (one time setup)

The steps described below may vary slightly based on your particular sub-version of the Windows software (sometimes a Service Pack will change these steps slightly.)

- **Windows 2000 Professional:**
  1. In the Start menu, choose Settings: Printers
  2. Double-click on "Add Printer", then click on "Next"
  3. Choose "Local printer", make sure the "Automatically detect and install my Plug and Play printer" checkbox is NOT selected, then click "Next" to continue.
  4. Select "File:" as the port, then click "Next"
  5. When a list of printer manufacturers and models appears, click on "Apple" and "Apple LaserWriter 12/640 PS", then click "Next"
  6. Select "No" when asked if you want to use this printer as your default printer, then click "Next"
  7. Click "Next" again, then select "No", then "Next", then "Finish"

- **Windows 95**
  1. In the Start menu, choose Settings: Printers
  2. Double-click on "Add Printer", then click on "Next"
  3. Choose "Local printer", then click "Next" to continue.
  4. When a list of printer manufacturers and models appears, click on "Apple" and "Apple LaserWriter Pro 810", then click "Next"
  5. Select "File:" as the port, then click "Next"
  6. Type in "PostScript File" as the printer name, then select "No" for the default, then click "Next"
  7. Select "No" when asked if you want to print a test page, then click "Finish"

- **Windows 98**
  1. In the Start menu, choose Settings: Printers
  2. Double-click on “Add Printer”, then click on “Next”
  3. Choose “Local printer”, then click “Next” to continue.
  4. When a list of printer manufacturers and models appears, click on “Apple” and “Apple LaserWriter 12/640 PS”, then click “Next”
  5. Select “File:” as the port, then click “Next”
  6. Type in “PostScript File” as the printer name, then select “No” for the default
  7. Select “No” when asked if you want to print a test page, then click “Finish”

Printing to File

1. Open the document/application with the data you want to upload to Quasar, and bring up the Print dialog.
2. Click on the drop-down list where the printer name is listed, choose the printer just configured for printing to file (i.e. “PostScript File”), then click “OK”
3. A “Print to File” dialog will appear. Depending on the application you are printing from, you will be prompted for the name of the file you want to create, or the name and location of the file you wish to save. When saving the file, make sure the file name ends in “.prn”. Some applications may automatically add that extension to the end of the file name.
4. This file can now be uploaded into Quasar as a report. Make sure you have **Convert to PDF** checked when you upload it.