

Arbutus WebConnect

USER GUIDE





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About this Guide

This guide is provided to licensed users of Arbutus WebConnect to provide quick instructions on connecting and using it.

For more information about our products and services, visit our web site at:
www.ArbutusSoftware.com

Need Help?

Contacting Us

If you have suggestions for improvements or if you can not find a solution to a problem, you can contact technical support for assistance. Please include:

- Your Arbutus Analyzer serial number.
- A description of what you were doing when the problem occurred.
- The error message, if any encountered.

Support Center

Global Help Desk

- Phone: +1-604-437-7873 or +1-877-333-6336 ext. 333
- Fax: +1-604-437-7872
- E-mail: support@ArbutusSoftware.com

Or write to us at:

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CHAPTER 1 ARBUTUS WEBCONNECT

Connecting to Arbutus WebConnect

Please contact your WebConnect administrator to obtain the web address for your Arbutus WebConnect server login.

This will normally be in the form:

`www.yourdomain.com,`

or in the form:

`www.yourdomain.com:xxxx`

(where xxxx is the port number on the server).

When you enter this web address you will automatically be redirected to the WebConnect server Login page.

Once you are on the Login page you will be asked to login to WebConnect. You do this using your standard Active Directory user ID and password. If your login information is not correct you will be presented with an error message. You will not be able to proceed to a WebConnect session without a correct login.

Using Arbutus WebConnect

Once logged in you will be presented with the WebConnect session panel. This panel is broken into two main sections:

- On the left side is a tree view showing all of the folders, tables and scripts you have access to. Above this is a Search box, and below this is a Run button. (more detail on this below).
- On the right side is a larger area, which will display a portion of the selected table contents, or provide information to you about the selected script.

To expand or collapse a folder, just single click on the triangle to the left of the folder.

To select a script or table just single click on it.

Scripts

Scripts can prompt users for input in two ways (input variables or a single simple dialog command). Once entered, the script is run and results are generated (either an email is sent with results or a table is created that can be viewed in WebConnect).



Using Input Variables

When you select a script, the right side of the WebConnect session panel will show the input parameters for this script, together with the script's note. This note will typically give you instructions about the purpose of the script and information regarding entry of any required input parameters.

Some of these input parameters may be disabled. If this is the case then it is an input to the script that you are allowed to see, but not change. If an input value seems incorrect to you then you should contact your WebConnect administrator. If you have run this script before, then the input parameters will display the values from the last time you ran the script.

If you want to run the script, then complete the editable input parameters and press the Run button. You will immediately see a notice that the selected script has been submitted.

All input parameters will be stored as named variables that are used/referenced within the procedure.

Note: Results will appear when the procedure completes - timing will vary based on the size of the data being processed, the complexity of the analytics being performed, and may also be affected by internal delays with your network and/or your e-mail server.

Using a Dialog Command

WebConnect is designed to be run optimally (as a best practice) using the variable inputs described above.

In addition to the on-screen input parameters, WebConnect also supports use of a single simplified user dialog in a script that prompts users for basic input. Currently, WebConnect, treats scripts like scheduled jobs in Analyzer where the single user dialog occurs as the first command in a script surrounded with Schedule Start and Schedule End commands - see the Analyzer Help for more details. Any inputs to a Dialog command will not be remembered from the last time you ran the script.

Note: Accept and Pause commands are not supported in WebConnect scripts. Only a single simplified Dialog command can be used.

Failure To Provide Necessary Inputs

If users fail to supply the requested input, or fail to input the data correctly (for instance, enter a date value using the wrong date format), the administrator will most likely have set up the script to validate all requested inputs and will send the user an e-mail indicating the script could not be run as the required inputs were invalid (i.e. missing or faulty).

Generating Results

Scripts will generally produce results in one of two ways:



- Emailed results will be automatically sent at the completion of the script, most typically as an attached file (like Excel). In this case, your email address is usually one of the script's required and remembered parameters.

Note: If you don't see the sent e-mail in your e-mail software after a reasonable amount of time (this may vary depending on the run time of the chosen script), check your Junk e-mail folder. You may need to configure your e-mail to accept the sent e-mail from WebConnect via your e-mail server.

- Output tables will usually be created in your Private folder. Once you submit the script, give the script sufficient time to complete and then refresh your browser. Once the script has completed you can review the results by expanding your Private folder and selecting the appropriate table.

Tables

When you select a table, the right side of the WebConnect session panel will show some or all of the table. As tables are often very large, it is not always possible to view very large tables on a single page.

- If the table is small, then the entire contents will be shown.
- If the table is large, then you can use the vertical scroll bar to look at the first portion of the file (typically 100-1000 records).
- If you scroll all the way to the bottom of the vertical scroll bar, then the next portion of the table will automatically be loaded. You will see the record numbers change.
- If you are not at the top of the table and you move the vertical scroll bar to the top, then data from earlier in the table will automatically be loaded.

Exporting a Table

Above the table grid, WebConnect offers a button you can click to "Export to Excel". This option assumes you have Excel installed on your local machine and will export all of the data in the table to an Excel spreadsheet.

This option is meant for exporting a manageable number of records. If the table to be exported is very large, exporting to Excel may take a long time as WebConnect has to load the entire set of records prior to performing the export to Excel. In addition, depending on the limitations of the Web browser being used, when exporting large files to Excel, the Web browser may not allow all of the records can be exported. Always check the resulting exported table to ensure all intended records were exported.

For large files, as an alternative, we recommend you modify the script that creates the table to use the Export command to export the data to Excel and then use the Notify command to send the exported spreadsheet as an attachment to those who need it.



Folders

The folders shown in the display area are those folders that the network administrator has indicated your Active Directory account is authorized to use. If you don't see a folder you need, then please contact your network administrator.

Searching Folders for Scripts and Tables

Sometimes there are more available folders, scripts and/or tables than will conveniently fit on the screen.

Rather than having to navigate through a number of folders to locate the item you require, you can use the Search box to quickly select your item. Just start typing any portion of the name, and as you type the tree will shrink to show only those items that match.

For example, if you wanted to run the script "Even_Dollar_Invoices", then typing "dol" in the search box may be sufficient for it to be located and displayed on the page.

