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- Task-Oriented & Progressive Disclosure Procedures
 - Workflow Scenario
 - Reference Guide
 - Three-Tiered Audience Profile Report
 - Ten Blog Topics
-

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Portfolio Contents

This portfolio contains writing samples completed for *Comm 2206 – Writing for the Computer Industry*.

The class focused on the principles of task-oriented and progressive disclosure procedures, granularity, and knowing your audience. The following writing samples illustrate those principles.

Portfolio Table of Contents	
Tab	Writing Samples
1	Task-oriented and Progressive Disclosure Procedures
2	Workflow Scenario
3	Reference Guide
4	Three-Tiered Audience Profile Report
5	Ten Blog Topics

Task-Oriented and Progressive Disclosure Procedures

Table of Contents

Create Bookmarks in Adobe Acrobat Reader.....	3
Create Screenshots Using FastStone Capture	6
Create Mind Maps and Project Charts Using SmartDraw	9
Build Information Queries in Actuate Query.....	15
Schedule Reports with the HSBC Automated File Delivery Tool	20
Customize the Internet Options' Tabs for Internet Explorer	24
Manage the Windows System Properties Dialogue Box	28
Import and View an XML File in the PADGen Program.....	33
Track Patient Information Using the ClinicPro Administrative System	40

Create Bookmarks in Adobe Acrobat Reader

Overview

Set up bookmarks in Adobe Acrobat Reader.

Create Bookmarks in Adobe Acrobat Reader

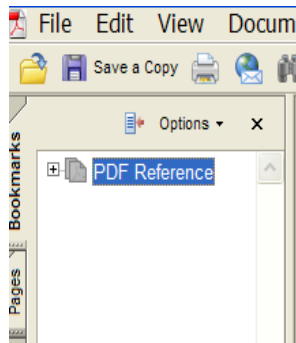
Introduction

Use Adobe Acrobat Reader to create bookmarks in the navigation pane by learning to do the following:


- open bookmarks in navigation pane
- expand topic headings
- collapse topic headings
- navigate topic headings
- zoom In/Out of pages
- close bookmark window
- quick Key Glossary

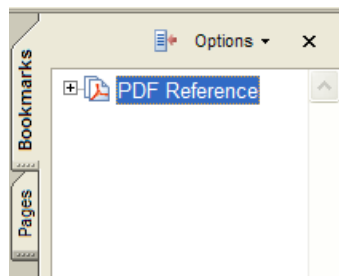
Open Bookmarks Navigation Pane

1. On **Menu Bar**, click **View>Navigation Tabs>Bookmarks**. A navigation pane appears.




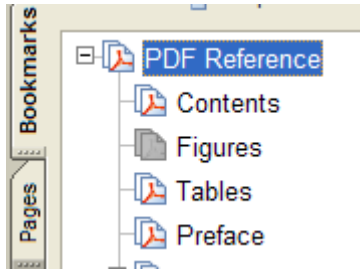
Expand the Topic Headings

1. Click  beside "**PDF Reference**" to expand heading. A list of bookmarks appears.



Collapse the Topic Headings



1. Click  beside “**PDF Reference**” to collapse headings. The list of bookmarks disappears.




Navigate Topic Headings

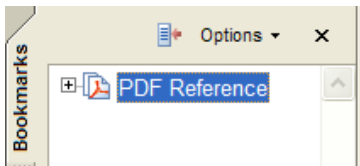
1. Click on any heading to go to the corresponding page in the document.

Zoom In/Out of the Bookmarked Pages

1. Press Ctrl  to zoom into the page.
2. Press Ctrl  to zoom out of the page.

Close Bookmark Navigation Pane

1. Click  to close **Navigation Pane**.



Quick Key Glossary	
Key	Function
Ctrl +	Zoom In
Ctrl -	Zoom Out
Ctrl 0	Sets Page to “Fit Screen” size
Ctrl 1	Zooms In (30%)
Ctrl 2	Zooms In (60%)
Ctrl 3	Reveals Bottom Slide Bar
F4	Hides Bookmark Navigation Panel
F8	Reveals Print Task Bar
F9	Reveals Task Menu Bar

Create Screenshots Using FastStone Capture

Overview

Create screenshots using FastStone Capture.


Create Screenshots Using FastStone Capture

Introduction


Use FastStone Screen Capture to create screenshots in the following ways:

- create a screenshot using capture active window
- create a screenshot using capture window/object
- create a screenshot using capture rectangle region
- create a screenshot using capture freehand region
- create a screenshot using capture scrolling window
- create a screenshot using capture full screen
- crop a selected screenshot
- copy a selected screenshot


Create a Screenshot Using Capture Active Window

1. From task bar, click . Screen reverts to a new window with the screen image selection.
2. Drag + cursor to select detail of image to capture.


Create a Screenshot Using Capture Window/Object

1. From task bar, click . Screen reverts to a new window with a red rectangle border and a hand cursor/icon.
2. Move hand within the red rectangle border and click on precise detail of image to capture.


Create a Screenshot Using Capture Rectangle Region

1. From task bar, click . Screen reverts to a new window with intersecting red lines and + cursor.
2. Drag intersecting red lines and + cursor to precise detail of image to capture.


Create a Screenshot Using Capture Freehand Region

1. From task bar, click . Screen reverts to a new window with a lasso icon.
2. Drag lasso icon and create organic detail of image to capture.

Create a Screenshot Using Capture Scrolling Window

1. From task bar, click . Screen reverts to a new window with a + cursor.
2. Drag + cursor to precise detail of image to capture.

Create a Screenshot Using Capture Full Screen

1. From task bar, click . Screen reverts to a new window with screen image with a red rectangle border and a hand cursor. This scrolls through all the information open on the screen.
2. Move hand within the red rectangle border and click on precise detail of image to capture.

Crop a Selected Screenshot

1. On task bar, click **Crop**. This crops the image to a specific size.

Copy a Cropped Screenshot

1. On task bar, click **Copy**. Go to the document to place image.
2. Right click mouse, and click **Paste** to place selection in the document.

Create Mind Maps and Project Charts Using SmartDraw

Overview

Use SmartDraw to create mind maps and project charts.

Create Mind Maps and Project Charts Using SmartDraw

Introduction

SmartDraw helps you to visualize your ideas.

Use SmartDraw to create mind maps in the following ways:

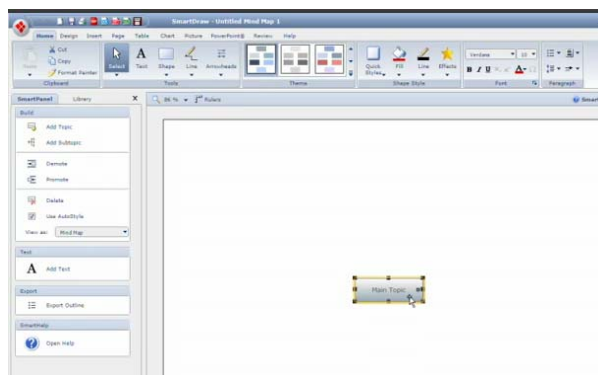
- create a mind map from the home screen
- add a topic to your mind map
- add a subtopic to your mind map
- move a subtopic from one topic to another
- move an entire subtopic tree to a new topic
- demote a topic or subtopic
- promote a topic or subtopic
- break large projects into smaller tasks
- create a project chart from a mind map
- email your mind map to your team

Create a Mind Map from the Home Screen

1. From **Home Screen**, select **Mind Map**.

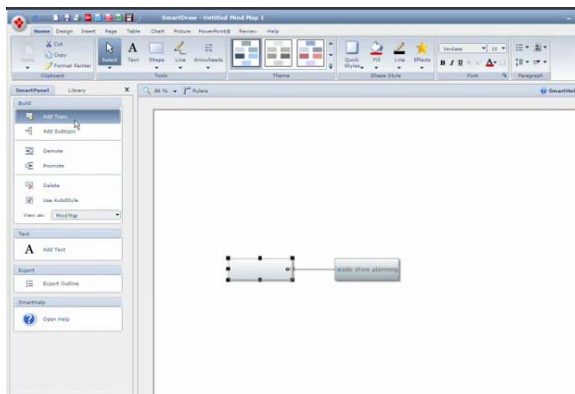


2. Click **Main Topic** box and type subject of your presentation.



Add a Topic to your Mind Map

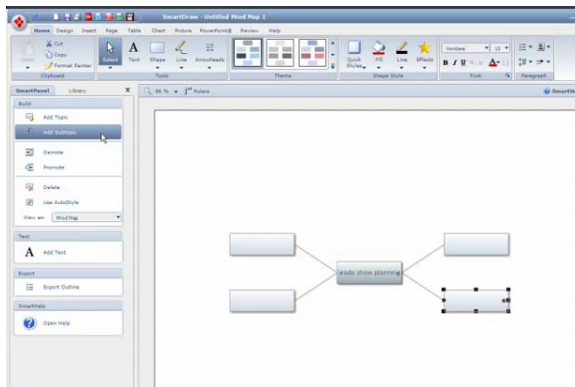
1. From the **Smart Panel**, click **Add Topic**.



2. Click on topic box and type the name of another topic.

Add a Subtopic to your Mind Map

1. From the **Smart Panel**, click **Add Subtopic**.



2. Click on topic box and type the name of the subtopic.

Move a Subtopic from One Topic to Another

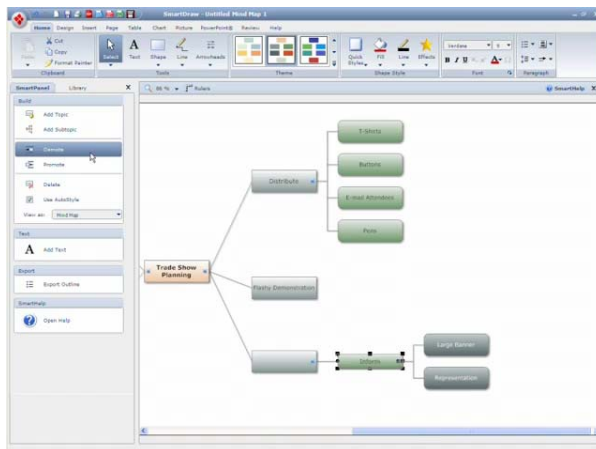
1. Select the subtopic and drag it to another topic. Connector lines are automatically reset and reconnected.

Move an Entire Subtopic Tree to a New Topic

1. Select a topic box and drag it to a new location under a different topic. All subtopics connected to the topic you are moving go along with it. Connector lines are reset and reconnected automatically to the next topic. The moved topic adopts the style of the related topic.

Demote a Topic or Subtopic

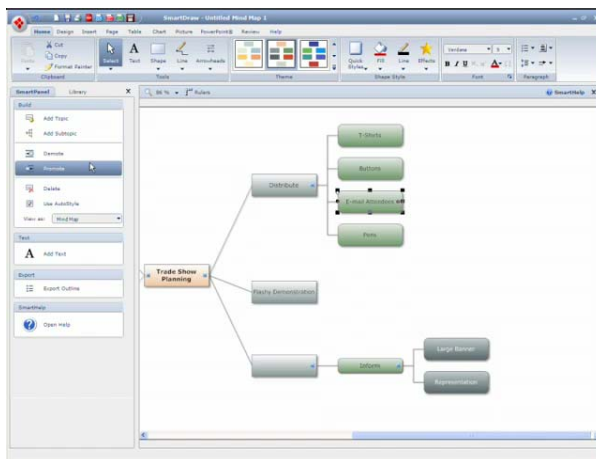
1. Click on topic or subtopic to demote.



2. From **Smart Panel**, click **Demote**. Now the topic or subtopic is on a new level.

Promote a Topic or Subtopic

1. Click on topic or subtopic to promote.



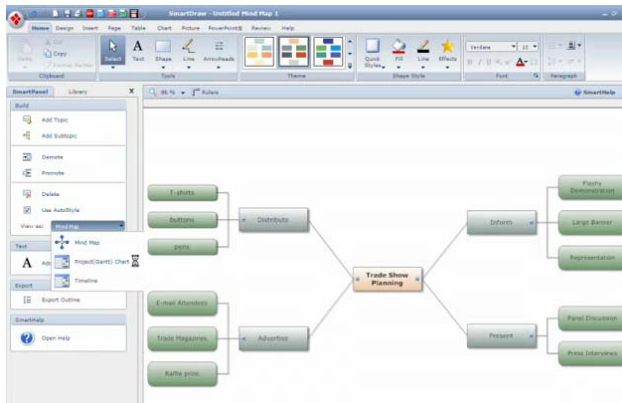
2. From **Smart Panel**, click **Promote**. Now the topic or subtopic is on a new level.

Break Large Projects into Smaller Tasks

1. From Home screen, select **Mind Map**.
2. Click on central object and type the title of your project.
3. From the **Smart Panel**, click **Add Topic** for each component of project.
4. From the **Smart Panel**, click **Add Subtopic** to add a task to each component of the topic. Continue until all tasks of the project are identified.

Create a Project Chart from your Mind Map

1. From the **Smart Panel**, click **View As**, and then select **Project Chart**. This creates a chart showing the tasks to complete.



2. Enter start and end dates.

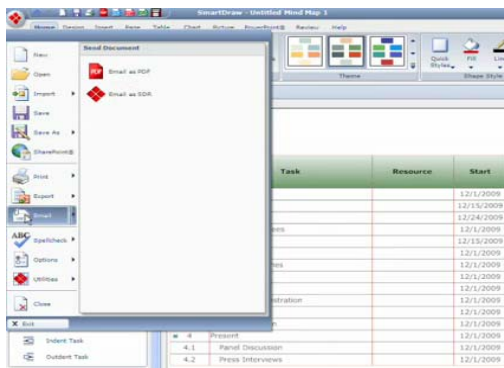
Number	Task	Resource	Start	End	Duration	% Complete	2009
1	Distribute		12/1/2009	12/31/2009	23		
1.1	T-shirts		12/1/2009	12/31/2009	23		
1.2	Buttons		12/1/2009	12/31/2009	23		
1.3	pens		12/1/2009	12/31/2009	23		
2	Advertise		12/1/2009	12/31/2009	23		
2.1	E-mail Attendees		12/1/2009	12/31/2009	23		
2.2	Trade Magazines		12/1/2009	12/31/2009	23		
2.3	Raffle prize		12/1/2009	12/31/2009	23		
3	Inform		12/1/2009	12/31/2009	23		
3.1	Flyer Demonstration		12/1/2009	12/31/2009	23		
3.2	Large Banner		12/1/2009	12/31/2009	23		
3.3	Representation		12/1/2009	12/31/2009	23		
4	Present		12/1/2009	12/31/2009	23		
4.1	Panel Discussion		12/1/2009	12/31/2009	23		
4.2	Press Interviews		12/1/2009	12/31/2009	23		

3. Change the duration time of the tasks or adjust the task bar.

Note: Change tasks if necessary. Any changes made on project chart, change on the mind map.

Email Your Mind Map or Project Chart


1. Click  on Task Bar.

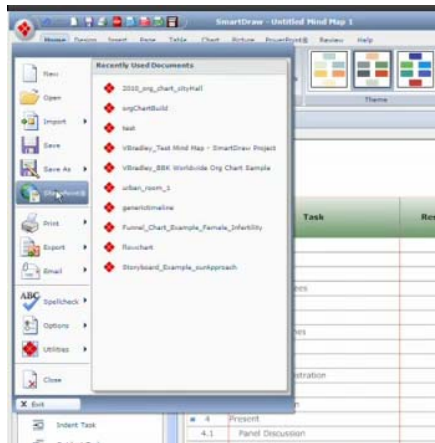


2. Select **Email to:**, and then click on file to send.

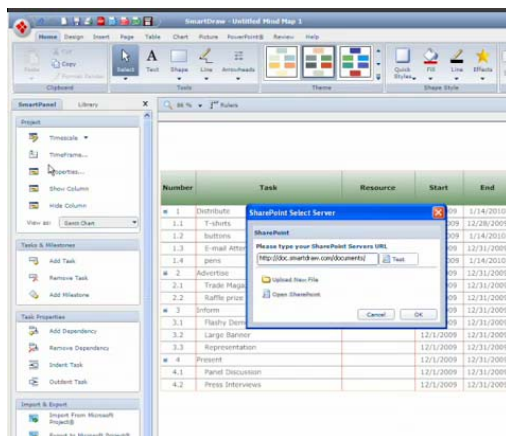
Note: Tabs at bottom of window allow you to move from mind map to project chart view.

Publish to Sharepoint Server

1. Click  on Task Bar, and then click **Sharepoint**.



2. Type **Sharepoint Server URL**, and then click OK.



Build Information Queries in Actuate Query

Overview

Use Actuate Query to create information queries.

Build Information Queries in Actuate Query

Introduction

Actuate Query is a tool that uses **Information Objects** (a category describing a part of your business such as customer, amount, or item) to organize information about your company.

Use Actuate Query to do the following:

- choose information objects
- add fields to query
- sort returned data
- filter results of returned data
- select output format
- create a pie chart

Choose Information Objects

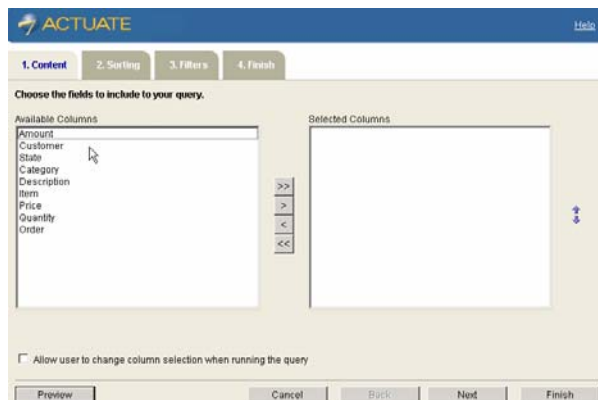
1. From **Main Page**, select object to begin the query.



2. This takes you to the **Content** tab on the **Query Field Selection Page**.

Add Fields to Query

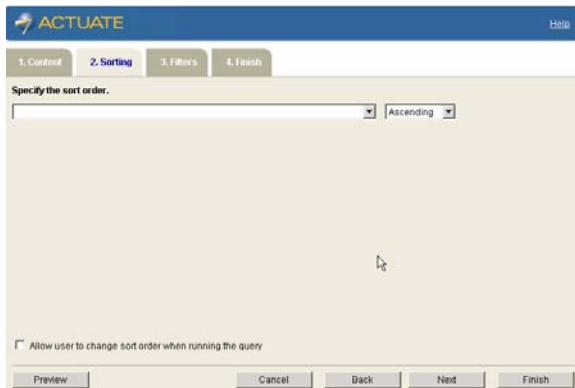
1. In the **Content** tab of the **Query Field Selection Page**, select fields to include in your query.



2. From Available Columns, click on field(s) of choice.
3. Then click >, to move selection(s) to **Selected Columns** box. Use >> to move all column options to **Selected Columns** box.

Sort Returned Data

1. In the **Sorting** tab, click the down arrow at **Specify the Sort Order**, then click down arrow for **Ascending** or **Descending** order. A list of data appears.



Filter Results of Returned Data

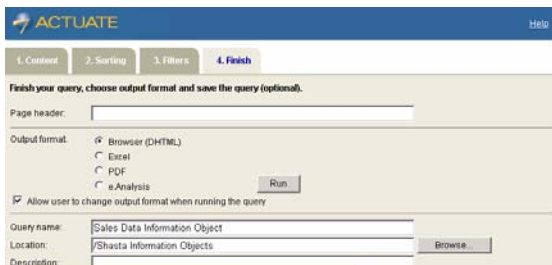
1. In the **Filters** tab, click Predefined Filters (Parameters) drop down menu.



2. Choose **Location** to filter data by. In this screenshot, the user chooses the Location of NH (New Hampshire). Only the data for NH will appear.

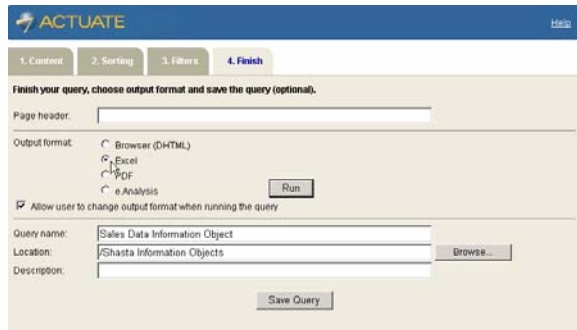
Select Output Format

1. In the **Finish** tab, select the format of your output document by clicking on one of the following options:

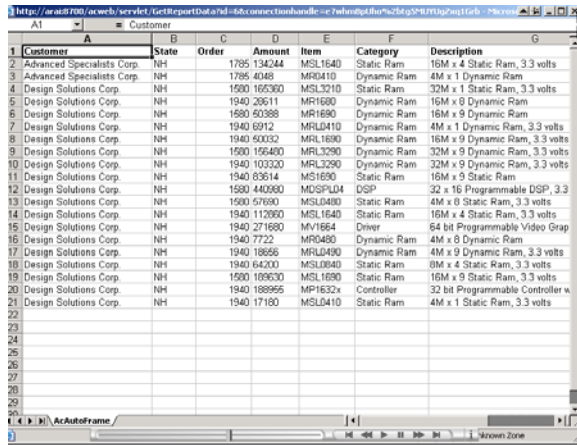


- Browser (DHTML)
- Excel
- PDF
- e-analysis

2. Click **Excel**, and then click **Run**.

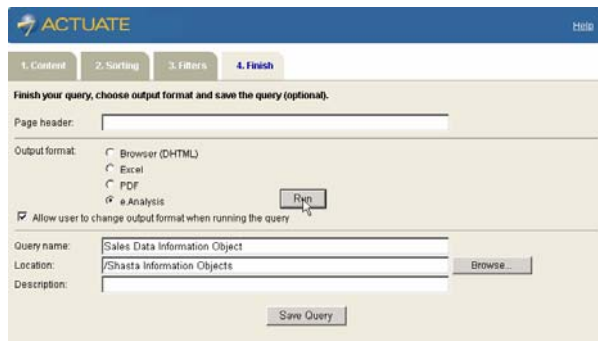


3. The data displays in an **Excel** spreadsheet.

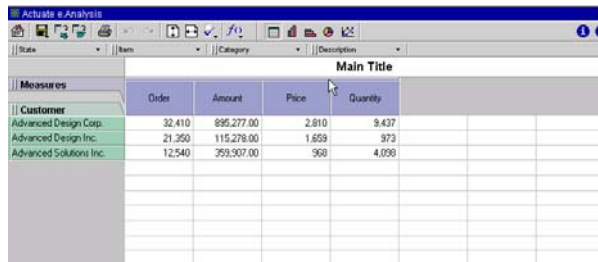



Create Pie Charts and Pivot Table Formats

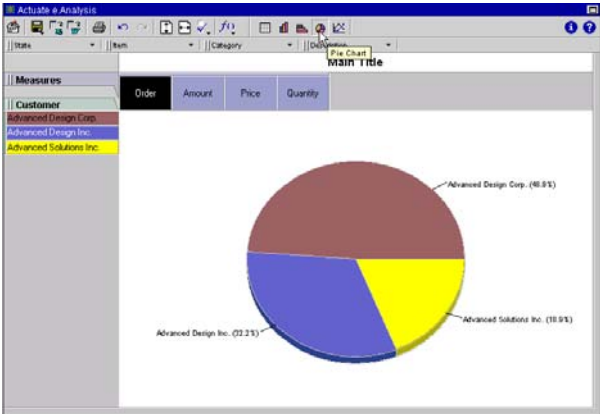
1. In the **Finish** tab, select **e-analysis**, and then click **Run**.



2. The results are in a table format for easy analysis.



3. To create a pie chart from the **e-analysis** spreadsheet, click .



Schedule Reports with the HSBC Automated File Delivery Tool

Overview

Configure the Automated File Delivery Tool for downloading report files to your computer.

Schedule Reports with the HSBC Automated File Delivery Tool

Introduction

The HSBC Automated File Delivery tool allows you to schedule reports when you want them.

Configure the Automated File Delivery tool to do the following:

- set up Automated File Delivery (AFD)
- create a New Schedule
- set up a download directory
- receive reports in bulk or individually
- schedule frequency of reports
- generate a report at a specific time
- generate a recurring report
- select reports to download
- view schedule summary

Set Up Automated File Delivery (AFD)

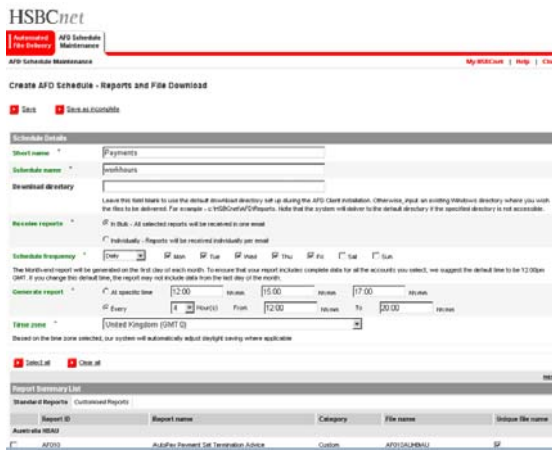
1. Contact the System Administrator.

Create a New Schedule

1. In file menu, click **Create New Schedule – Reports and File Download**.



2. The AFD Schedule Maintenance window appears.



3. In the **Short Name** section, type a short name. This is a schedule identifier for quick filtering purposes.

Schedule Details

Short name *

Schedule name *

4. In the **Schedule Name** section, type a schedule name.

Set up a Download Directory

1. In the **Download Directory** section, type a directory path. Find your file here. Leave space blank to download to the default directory.

Download directory

Receive Reports in Bulk or Individually

1. In the **Receive Reports** section, click either **In Bulk** or **Individually**.

Receive reports * In Bulk - All selected reports will be received in one email
 Individually - Reports will be received individually per email

Schedule Frequency of Reports

1. In the **Schedule Frequency** section, click down arrow, then select from the following options:
 - Daily
 - Weekly
 - Monthly (end of month)

Schedule frequency * Daily Mon Tue Wed Thu Fri Sat Sun

Generate a Report at a Specific Time

1. At **Generate Report**, click At Specific Time.
2. In the **hh/mm** section, enter a specific time to generate a report.

Generate report * At specific time 12:00 hr:mm 15:00 hr:mm 17:00 hr:mm
 Every 4 hour(s) From 2:00 hr:mm To 20:00 hr:mm
Time zone * United Kingdom (GMT 0)
Based on the time zone selected, our system will automatically adjust daylight saving where applicable.

Generate a Recurring Report

1. At **Generate Report**, click **Every** to receive a recurring report.


Generate report * At specific time 12:00 hr:mm 15:00 hr:mm 17:00 hr:mm
 Every 4 hour(s) From 2:00 hr:mm To 20:00 hr:mm
Time zone * United Kingdom (GMT 0)
Based on the time zone selected, our system will automatically adjust daylight saving where applicable.

2. At the **Hours** drop down menu, click down arrow to choose specific number of hours for report to recur.
3. At the **From** and **To** sections, enter hours to establish the recurring time period.
4. At the **Time Zone** drop down menu, click down arrow to choose appropriate time zone.

Select Reports to Download

1. At the **Report Summary List**, select a report.

Report ID	Report name	Category	File name	Uncheck file name
AF011	AutoPay Payment Set Termination Advice	Custom	AF011AUBMBAU	<input type="checkbox"/>
AF011	AutoPay Full-Pay Termination Advice	Custom	AF011AUBMBAU	<input type="checkbox"/>
AF012	AutoPay Non-Payment Advice	Custom	AF012AUBMBAU	<input type="checkbox"/>
AF008A	AutoPay Check Transmission Error Report	Custom	AF008AUBMBAU	<input type="checkbox"/>
AF009A	AutoPay List (on Leave Vehicle Data)	Custom	AF009AUBMBAU	<input type="checkbox"/>
AF0081	AutoPay Payment Set List (AutoPay Capable Report)	Custom	AF0081AUBMBAU	<input type="checkbox"/>
AF0091	AutoPay List (on Vehicle Data)	Custom	AF0091AUBMBAU	<input type="checkbox"/>
AF0101	AutoPay List (on Capable Data)	Custom	AF0101AUBMBAU	<input type="checkbox"/>
AF00811	AutoPay Return/Purchase Report	Custom	AF00811AUBMBAU	<input type="checkbox"/>
BA0R	BA Report	Reconciliation	BA0RAUBMBAU	<input type="checkbox"/>
CV01A	Statement - End of Day (CSV)	Custom	CV01AUBMBAU	<input type="checkbox"/>
CV01B	Statement - End of Day (CSV)	Reconciliation	CV01BUBMBAU	<input type="checkbox"/>
DD00A01	FDIC Auto Investment Statement	Liquidity	DD00A01AUBMBAU	<input type="checkbox"/>
DD00B01	FDIC Interest Statement (with and without Interest Protection)	Liquidity	DD00B01AUBMBAU	<input type="checkbox"/>
DD00S01	FDIC Resourcing Reporting	Liquidity	DD00S01AUBMBAU	<input type="checkbox"/>
DD00R01	FDIC Member Funding Net Advantage Production Position Report	Liquidity	DD00R01AUBMBAU	<input type="checkbox"/>
DD00W01	FDIC Processed (Swaged) Report	Liquidity	DD00W01AUBMBAU	<input type="checkbox"/>
FC01R	Funding Interest Position Report	Liquidity	FC01RAUBMBAU	<input type="checkbox"/>

2. Click  , for AFD schedule to take effect.
3. Once all steps completed, the acknowledgement page appears.

HSBCnet
 Automated File Delivery
 AFD Schedule Maintenance

Acknowledgement - AFD Schedule (Create) - Reports and File Download

Report name: Payments
Schedule name: monthlies
Schedule reference number: M000000012

Schedule Summary

Frequency: Daily - No Tu-Ve Tu-Fr
All time: Every 4 hours(12:00 - 20:00)
Time zone: United Kingdom (GMT+0)
Business reports: No. All selected reports will be included in one email.

Report ID	Report name	Category	File name	Uncheck file name
DD00R01	FDIC Member Funding Net Advantage Production Position Report	Liquidity	DD00R01AUBMBAU	<input type="checkbox"/>
DD00S01	FDIC Member CC Interest Allocation Report	Liquidity	DD00S01AUBMBAU	<input type="checkbox"/>
DD00R02	FDIC Member CC Interest Allocation Summary Report	Liquidity	DD00R02AUBMBAU	<input type="checkbox"/>
DD00R02A	FDIC Member CC Interest Allocation Summary Report (CC-Report)	Liquidity	DD00R02AUBMBAU	<input type="checkbox"/>

Schedule Summary

1. Click the **Schedule Summary**.

Automated File Delivery

[Setup Automated File Delivery Service \(AFD\)](#)

[Create New Schedule - Reports and File Download](#)

[Schedule Summary](#)

Your report summary appears.

HSBCnet
 Automated File Delivery
 Schedule Summary

Schedule Summary

To help us create a new schedule that only runs on the addition of the Schedule. To view existing schedules, click on the Schedule of the Schedule.

Enable new schedule

Report name	Schedule	Type	Frequency	Status	Start schedule	Status	Action
monthlies	monthlies	Schedule Maintenance	Every 4 hours (12:00 - 20:00)	Active	1/1/2008 12:00	Active	Edit

Refresh

Customize the Internet Options' Tabs for Internet Explorer

Overview

Customize the internet options' tabs for Internet Explorer.

Customize the Options' Tabs for Internet Explorer

Introduction

Here is a reference guide of the **Options** tab under the **Tools** section of **Internet Explorer**:

Internet Explorer>Tools>Internet Options		
Tab	Option	Function
General	Homepage	<ul style="list-style-type: none"> ▪ customizes home pages
	Browsing History Search	<ul style="list-style-type: none"> ▪ deletes browsing history
	Search	<ul style="list-style-type: none"> ▪ changes default settings
Security	Select a Zone to View or Change Security Settings	<ul style="list-style-type: none"> ▪ Internet ▪ Local ▪ Trusted Sites ▪ Restricted Sites
	Security Level for Zone	<ul style="list-style-type: none"> ▪ Appropriate for most sites ▪ Prompts before downloading unsafe content ▪ Unsigned Active X controls will not be loaded
Privacy	Settings	<ul style="list-style-type: none"> ▪ Blocks third party cookies
	Pop-Up Blocker	<ul style="list-style-type: none"> ▪ Prevents most pop-up windows
	In-Private	<ul style="list-style-type: none"> ▪ Allows/disallows collection of data for In-Private Browsing
Content	Content Advisor	<ul style="list-style-type: none"> ▪ Ratings to help control internet content
	Certificates	<ul style="list-style-type: none"> ▪ Encrypts connections and identifications
	Auto Complete	<ul style="list-style-type: none"> ▪ Stores previous web page searches and suggests matches
	Feeds and Web Slices	<ul style="list-style-type: none"> ▪ Creates automatic feeds and web slices for pages used frequently
Connections	Setup an Internet Connection	<ul style="list-style-type: none"> ▪ Sets up an internet connection
	Dial-up and Virtual Private Network Settings	<ul style="list-style-type: none"> ▪ Adds dial up connection ▪ Adds VPN connection
	Choose Settings for Proxy Server	<ul style="list-style-type: none"> ▪ Allows for setup of proxy server
	LAN Settings	<ul style="list-style-type: none"> ▪ Sets up local area network connections
Programs	Default Web Browser	<ul style="list-style-type: none"> ▪ Sets Explorer as default browser
	Manage Add ons	<ul style="list-style-type: none"> ▪ Enables or disables browser add-ons
	HTML Editing	<ul style="list-style-type: none"> ▪ Chooses program Explorer to use to edit HTML files
	Internet Programs	<ul style="list-style-type: none"> ▪ Chooses email program
Advanced	Settings	<ul style="list-style-type: none"> ▪ Sets accessibility for windows and tabs
	Browsing	<ul style="list-style-type: none"> ▪ Notifies about script errors

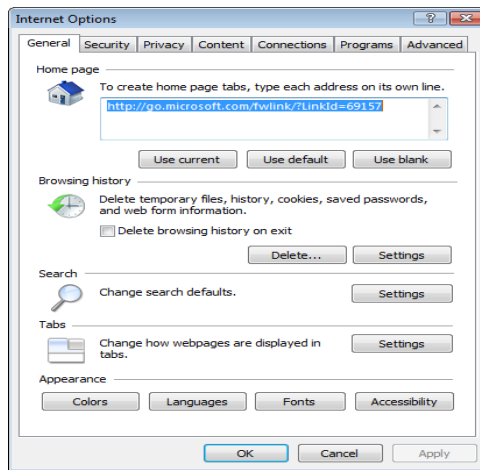
General Tab Task-Oriented Procedures

The Internet Options dialogue window allows you to do the following:

- create Home page tabs
- set or delete browsing history
- change search defaults
- change how web pages are displayed in tabs
- change appearance of web pages

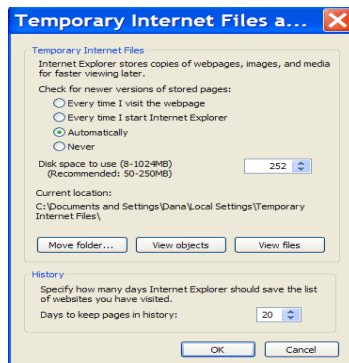
Create Home Page Tabs

1. In the **General** tab, type name of URL address in **Home Page** box.



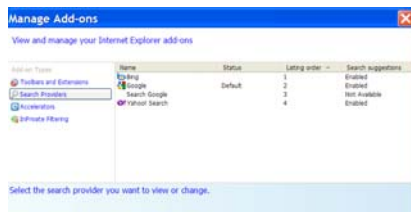
Set or Delete Browsing History

1. Click **Settings**, to select from the following:



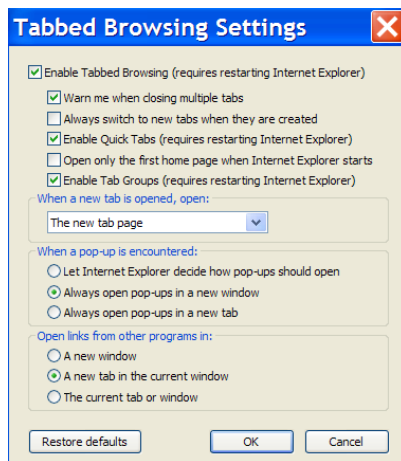
Change Search Defaults

1. Under **Browsing History**, click **Settings** to change default search settings.



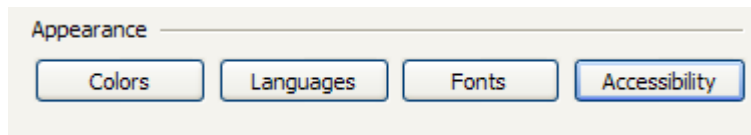
Change How Web Pages Display

1. Under **Tabs**, click **Settings** to change how web page display.



Change Appearance of Web Pages

1. Under **Appearance**, click the following:



- **Colors** - change display colors of page.
- **Languages** - change to preferred language.
- **Fonts** - choose font style.
- **Accessibility** - ignore set formatting styles.

Manage the Windows System Properties Dialogue Box

Overview

Manage the Windows System Properties Dialogue Box.

Manage the Windows System Properties Dialogue Box

Introduction

Here is a reference guide for the Windows Systems Properties dialogue box:

Windows/Systems Properties/Change Settings		
Tab	Option	Function
Computer Name	Computer Description	<ul style="list-style-type: none"> Identifies computer on network
	Network ID	<ul style="list-style-type: none"> Creates identity of computer to join domain or workgroup
	Change	<ul style="list-style-type: none"> renames computer or changes domain or workgroup
Hardware	Device Manager	<ul style="list-style-type: none"> lists hardware installed on computer and allows property changes to devices
	Device Installation Settings	<ul style="list-style-type: none"> allows for Windows to download drivers for software and provides details about drivers
Advanced Settings (Changed by Administrator)	Performance	<ul style="list-style-type: none"> adjusts visual effects, processor scheduling, memory usage and virtual memory
	User Profiles	<ul style="list-style-type: none"> changes settings related to user login
	Startup and Recovery	<ul style="list-style-type: none"> customizes startup features handles system failure and debugging problems
	Environment Variables	<ul style="list-style-type: none"> adjusts desktop environment
System Protection	System Restore	<ul style="list-style-type: none"> restores computer back to previous version after unwanted changes occur
	Protection Settings	<ul style="list-style-type: none"> allows for protection of drives
	Configure	<ul style="list-style-type: none"> system administrator disables
	Create	<ul style="list-style-type: none"> system administrator disables restore point creation
Remote	Remote Assistance	<ul style="list-style-type: none"> allows remote assistance to computer
	Remote Desktop	<ul style="list-style-type: none"> allows select users to gain access to the computer

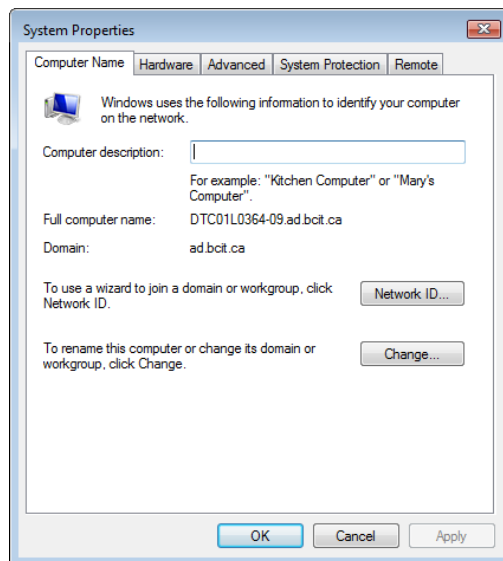
Change Settings Options

In the Windows **System Properties**> **Change Settings** dialogue box you have the following options:

- create a name for your computer
- join a domain or workgroup
- rename your computer or change its domain name

Create a Name for Your Computer

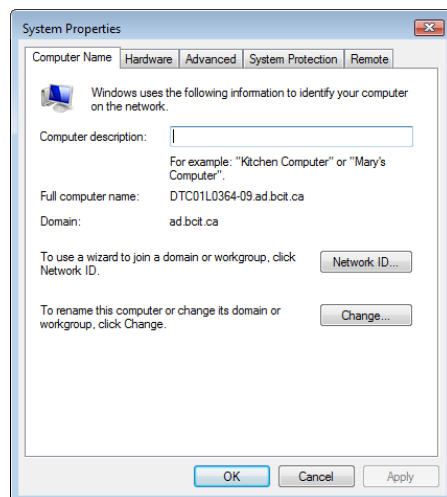
1. In the **Computer Name** tab, type the name of your computer in **Computer Description**.



Tip: follow the example for possible computer names.

Join a Domain or Workgroup

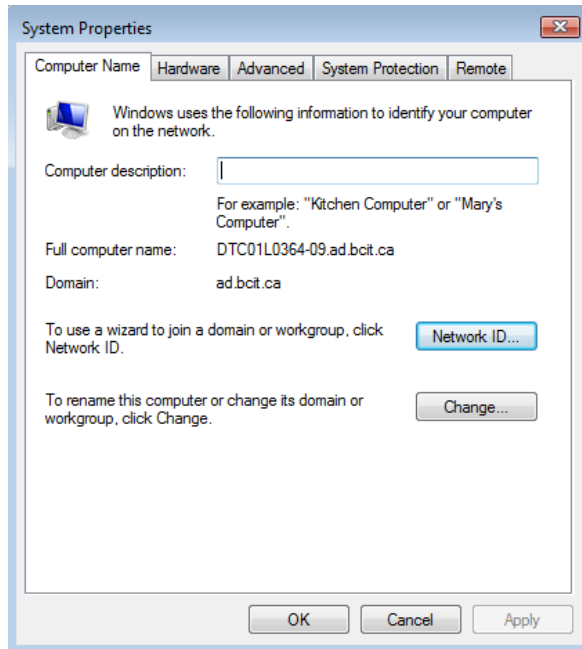
1. To join a domain or workgroup, click **Network ID**.



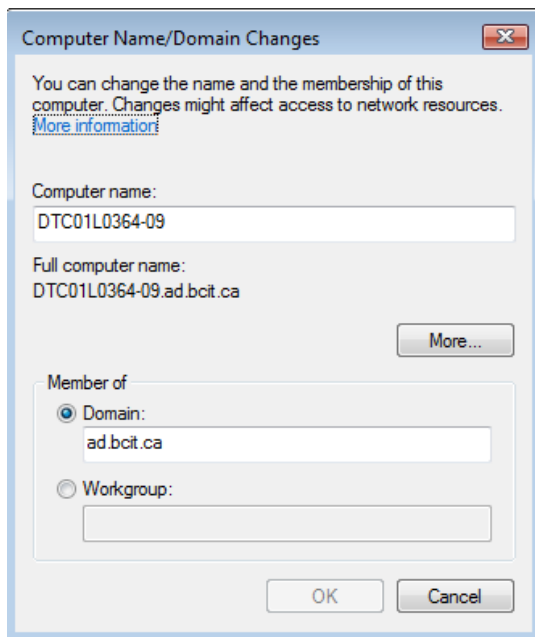
2. In the **Join a Domain or Workgroup** window, select an option that applies to your computer and click **Next**.
3. In the next **Join a Domain or Workgroup** window, select the answer that best applies to your company network domain and click **Next**.
4. In the next **Join a Domain or Workgroup** window, type user name, password and domain name and click **OK**.

Rename Your Computer or Change its Domain Name

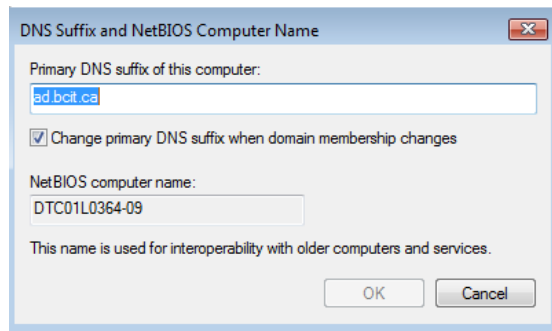
1. To rename your computer or change its domain name, click **Change**.



2. In the **Computer Name/Domain Changes** window, type **Computer name**.



3. Click **More**, to add **Primary DNS suffix of this computer** and **Net BIOS computer name**. Click **OK**.



4. Select member of **Domain** or **Workgroup**, and add applicable name. Click **OK**.

Import and View an XML File in the PADGen Program

Overview

Use the PADGen software program to import and view an XML file.

Import and View an XML file in the PADGen Program

Introduction

Learn how to import and view XML files in the PADGen software program.

Here is a reference guide for the main window of PADGen:

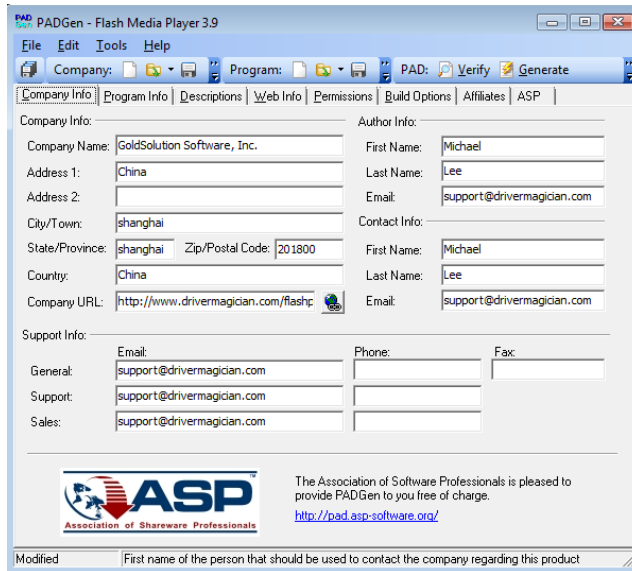
PADGen Main Window	
Tab	Function
Company Info	<ul style="list-style-type: none">describes contact information about the company profiled
Program Info	<ul style="list-style-type: none">describes information about program used (i.e. Flash Media Player)describes languagedescribes operating systems supported by
Descriptions	<ul style="list-style-type: none">describes media program in descriptions ranging from simple to detailed
Web Info	<ul style="list-style-type: none">provides URL informationprovides download information
Permissions	<ul style="list-style-type: none">provides field to enter Distribution Agreement informationprovides field to enter End User License Agreement information
Build Options	<ul style="list-style-type: none">generates PAD and signature PFX filesprovides field for a password
Affiliates	<ul style="list-style-type: none">fields to enter download sites that can sign up to be affiliates of your products
ASP (Association of Software Professionals)	<ul style="list-style-type: none">field to enter membership number

Use PADGen to execute the following:

- import an XML file in PADGen
- view an XML file in PADGen

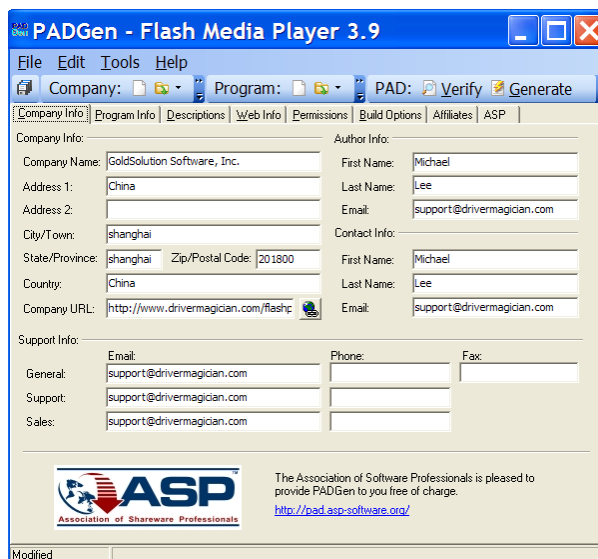
Import an XML file to PADGen

1. In the **Menu Bar**, select **File** and then **Import PAD file**. The tabs populate with the data from the PAD file.

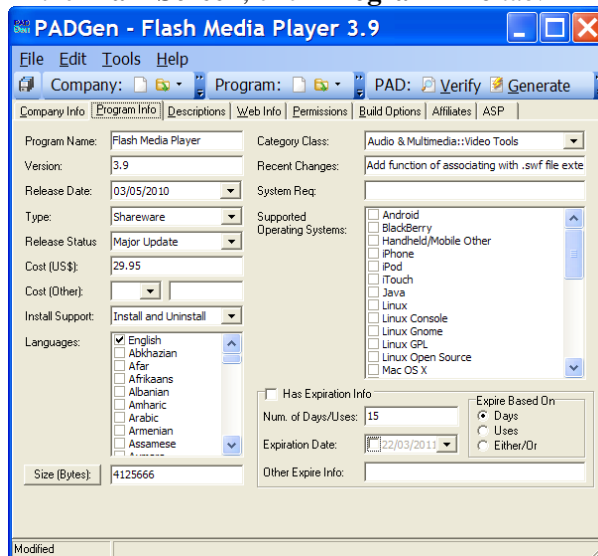


View an XML file in PADGen

1. In the **Main Screen**, click **Company Info** tab. Review, verify or update company contact information.



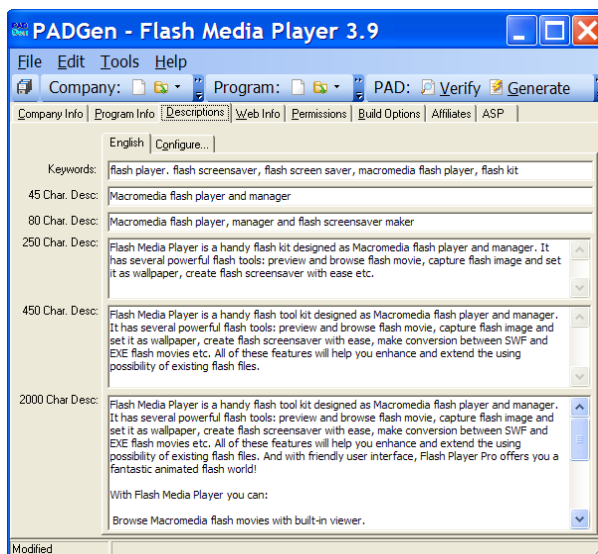
2. In the **Main Screen**, click **Program Info** tab.



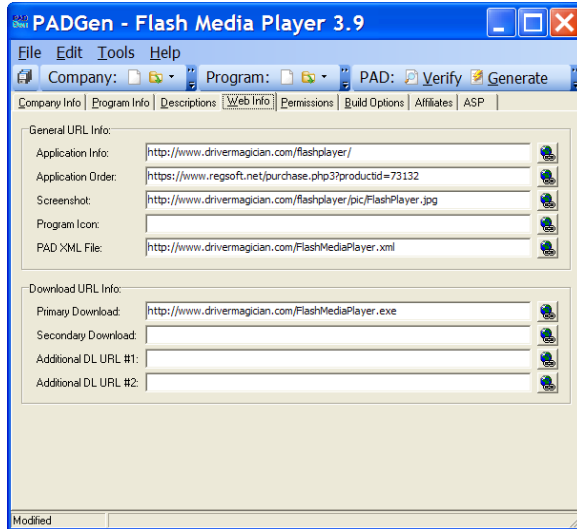
Review and verify the following:

- program that will run the XML file (in this case Flash Media Player)
- version, release date, type and status
- cost
- install and uninstall
- language of choice
- size
- category class
- recent changes
- system requirements
- supported operating systems
- expiration information

3. In the **Main Screen**, click **Descriptions** tab.



4. Review the following descriptions:
 - Keywords
 - 45-2,000 word character description
5. In the **Main Screen**, click **Web Info** tab.



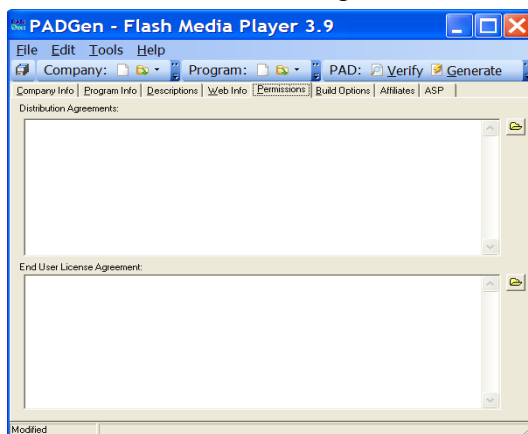
Review or add the following URL information:

- Application information and order
- Screenshot
- Program icon
- PAD XML file

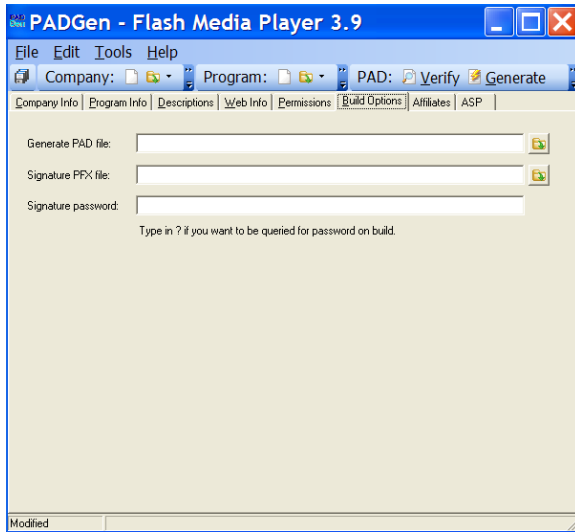
Review or add the following download URL information:

- Primary download
- Secondary download
- Additional DL URL #1
- Additional DL URL #2

6. In the **Main Screen**, click **Permissions** tab. Review or add the following information:
 - Distribution agreements
 - End-user License agreement



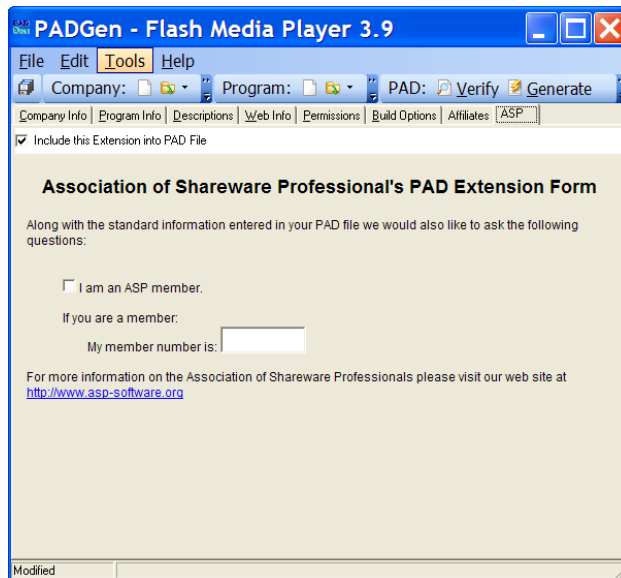
7. In the **Main Screen**, click **Build Options** tab. Review or insert PAD or PFX files to generate.



8. In the Main Screen, click **Affiliates** tab. Enter information to allow download sites to affiliate with your company.



9. In the **Main Screen**, click the **ASP** tab. Click if you are a member, and then add a membership number.



Track Patient Information Using the ClinicPro Administrative System

Overview

Track patient information using the ClinicPro administrative system.

Track Patient Information Using the ClinicPro Administrative System

Introduction

Track patient information by entering basic information in the **List** tab. Here is a reference guide of the **List** tab of the ClinicPro software program:

Summary of ClinicPro List Tab		
Tab	Option	Function
List	Last Name	Records patients' last name
	First Name	Records patients' first name
	MI	Records patients' middle initial
	Patient No.	Records patients' "patient" number
	SSN	Records patients' social security number
	DOB	Records patients' date of birth
	Phone	Records patients' phone number

Review patient information in the **Patient Detail** tab. Here is a reference guide of the **Patient Detail** tab of the ClinicPro software program:

Summary of Patient Detail List Tab		
Tab	Option	Function
Patient Detail	Patient #	Displays patients': <ul style="list-style-type: none"> ▪ last name ▪ first name ▪ middle initial ▪ SS # ▪ Date of birth ▪ Gender ▪ Marital status
	Contact Information	Displays patients': <ul style="list-style-type: none"> ▪ address ▪ Phone, fax, cell ▪ Email
	Primary Dr. and Referring Dr.	Displays patients' <ul style="list-style-type: none"> ▪ Primary doctor ▪ Referring doctor
	Legal Information	Displays patients': <ul style="list-style-type: none"> ▪ Lawyer ▪ Responsible party ▪ Legal representative
	Job Information	Displays patients': <ul style="list-style-type: none"> ▪ Employer ▪ Job title ▪ Status ▪ Work number

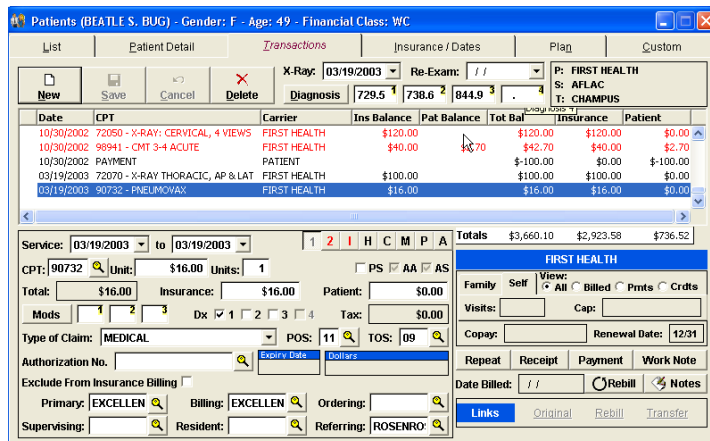
Manage the Transactions Tab in ClinicPro

The Transactions tab is a record of past payment transactions, and the section where you enter new transactions. This section describes how to complete the following:

- search for completed transactions
- check for Alerts
- enter a new transaction
- modify a new transaction
- switch to different screens

Search for Completed Transactions

1. In the main window, use the down arrow to scroll through past transactions.



Note: red lines show overdue accounts and blue lines show billed accounts.


2. In the main window, select a line and click on it. The bottom left section of the screen gives a line item detail of the transaction.

Check for Alerts


1. In the main window, select a line, and click on it. The bottom right section of the screen gives alerts that need attention.

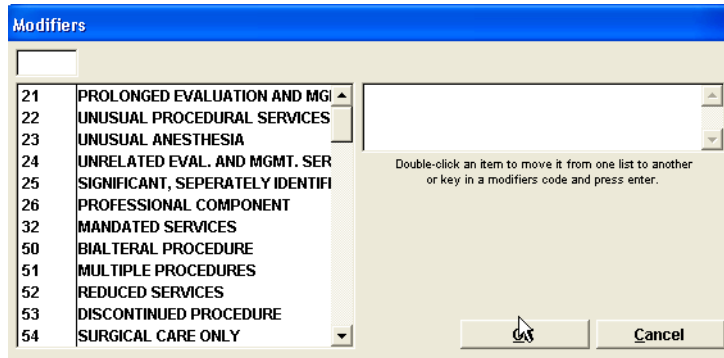
Enter a New Transaction



1. Click . Type in procedure number or choose it from the lookup list. Once you have chosen the procedure, the system automatically displays the fee and corresponding information.

Modify a New Transaction

1. From the **Transaction** screen, click  to modify the transaction.
2. Enter a procedure number or select from the list.



Switch to Different Screens

1. From the **Transaction** screen, click on each menu bar item to switch screens.

Click On	Switch To Information Screen
2	Disability and Hospitalization
I	Insurance
H	HCFA
C	Chiropractic
M	Medical and Pediatric
P	Podiatry
A	Ambulance