

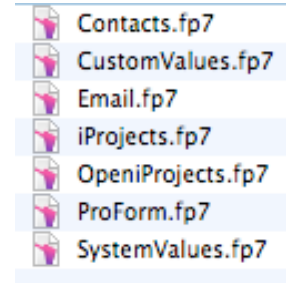
### Login & Navigation

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#### Login:

For initial **iProjects** setup and configuration, see UserGuide 5.1: Initial installation & configuration.

After your system has been configured, to login, first click on the **OpeniProjects** file (not iProjects). Then select your name from the login dropdown, type in your password, and you will open the **iProjects** Home page.



#### Navigation:



Note the set of buttons in the upper left of the screen, shown right. The four white buttons are on every system screen, and are your most basic navigation tool. The “house” icon is “Home” and clicking it always takes you to this screen. The left and right arrows move to the previous screen or the next screen, if you have moved back a screen.

The **iProjects** logo is a “toggle”, available on every layout, except printable forms, that takes you from full computer screen window to a reduced window size, and back again. This is useful when you want to see other files and folders on your desktop.

The [?] mark button takes you to the UserGuide screens and Abbreviations used in **iProjects**.

Throughout **iProjects**, a red triangle (see example at right) is used as the “button” to activate the link to that item.

“Mouseover guides”: Move your mouse over an element of the screen for brief online help (it takes a few seconds to pop up). Mouseover HELP (called “Tooltips” in FileMaker™) are used where additional explanation may be necessary to understand a function.

Stages		
ID	Check	Title
100	<input checked="" type="checkbox"/>	Initiation
200	<input checked="" type="checkbox"/>	Schematic Design
300	<input checked="" type="checkbox"/>	Design Development
400	<input checked="" type="checkbox"/>	Coordination

When you are on a printable form (typically A4 vertical or horizontal) there are several standard navigation tools you need to know:

- ◆ Clicking anywhere in the form header will take you to the previous layout – equivalent to the white “left” arrow on non-form layouts.
- ◆ There is a little “control panel” to the right of the form header that contains a number of functions, as you see on the right.
- ◆ The Email button is a powerful feature of **iProjects** that, when selected, performs the following functions:
  - Saves the document as a .pdf file;
  - Opens a new email addressed to the client contact address
  - Enters the Project Number in the Email Subject Line;
  - Identifies the Contact as the Client;

[Email](#)  
[Preview](#)  
[Print](#)  
[Zoom](#)  
[New](#)  
[Dupe](#)


- Identifies the Project by its name;
- Identifies the the Form ID from which the .pdf file was created; and
- Attaches the .pdf file to the email.

All of the above ID functions can be revised by the User as needed.

- ◆ Preview, Print and Zoom are obvious, although if you use Preview, you need to know that to get out of Preview mode, you need to click the “Continue” button in the Header, as shown at right.
- ◆ The “New” button is available only on List View forms, and is used to add another record to the list.
- ◆ The “Dupe” button means “duplicate”, and is used where this feature is needed in filling out the form.
- ◆ On a number of forms (for example, **PF24**) there are “hotlinks” to other related forms, as shown at right, just below the “Preview/Print/Zoom” navigation tools. Where these are used, the active (visible) form will be in black, as shown at right, and others will be in blue text.



[PF11](#) [PF18](#) [PF23](#)  
[PF24](#) [PF91](#)

The “trashcan”  icon is used throughout **iProjects** to delete records.

On all non-printable layouts, there is a search tool in the upper right corner, as shown at right.



Enter a firm or person name (or part there of) and a select list will appear.

Finally: If you get stuck, CALL US! Ring Elina on 03 9686 3846, 10am-3pm, M-F.