
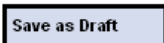









WFS Wesleyan Financial System

Smart Doc Toolbar Quick Reference



The Toolbar appears at the top of all Smart Doc pages and approver pages. If you do not see the toolbar at the top of a Smart Doc, click "HOME" and navigate again to the Smart Doc.

The Icon	The Action	Special Comment
	Saves the full document; generates the document ID on the first Save. <u>Replaces the SAVE button at the bottom of the page.</u> Click on the icon to save.	All required fields on the page must be completed
	Allows a document to be saved in "Draft" mode. O.K. for some required fields to be incomplete. Hover over the SAVE icon, then move down to "Save as Draft" and click. DO NOT click regular SAVE before saving as Draft.	<u>If the document ID has already been generated, DO NOT Save as draft.</u> For one-time use only.
	Allows a document to be saved in "Template" mode. O.K. for some required fields to be incomplete. Hover over the SAVE icon, then move down to "Save as Template" and click. DO NOT click regular SAVE before saving as Template.	<u>If the document ID has already been generated, DO NOT Save as a template.</u> Templates can be used many times.
Tip on Drafts & Templates	Do not use an existing document to create a draft or template. It will have a document ID. It is better to leave at least one required field blank on Drafts and Templates so it cannot be accidentally saved as a complete document.	<u>Comments and attachments ARE saved on drafts, but the icon appearance does not change until the document is completed with a document ID.</u>
	Hover over COPY icon and click "Copy from Draft." Click radio button next to the draft you wish to copy, and then click OK.	A draft can be copied into the document only once. Re-save as draft with a new name if needed.
	Hover over COPY icon and click "Copy from Template." Click radio button next to the template you wish to copy, and then click OK.	A template can be used over and over.
	Collaborate allows comments to be made about the document by both the initiator and approver. The icon changes when there is a comment to view: <u>Do not use Collaborate for messages to AP; use the comment field on the screen.</u>	 <u>You must click the "Submit" button at the bottom of the comment box,</u> and then click OK. The icon changes only after the document "Save" is clicked.
	The Attach icon replaces all attachment sections on the Smart Docs. When you click the Attach icon you can select to attach documents at the Header level (for the entire document) or Line level (for a specific distribution line). The icon changes when there are attachments:	All attachments for historic documents can now be viewed using the Toolbar.
	The Print icon will print the Smart Doc in the same manner as the Print button at the bottom of the page.	