


Prerequisites:

1. Registered as a Citadon CW User
2. Access to one or more Workspaces
3. Installation of Citadon CW Windows client software or use of Microsoft Internet Explorer.

Accessing Workspaces (Projects)

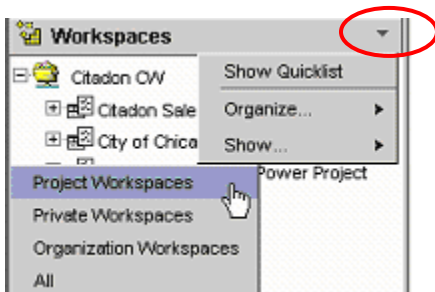
Launch the Citadon client software using either the Windows Client or the Web Access client (browser):

USING WEB ACCESS

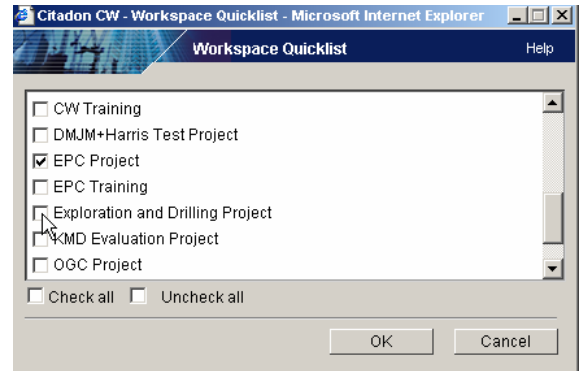
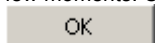
1. Using the Web Access client, go to <http://citadoncw.citadon.com/Tce/index.htm>
2. When you login the first time you will be prompted with a license agreement. Please read through the agreement and click  to continue.
3. At the Citadon CW Login screen, enter your UserID, Password, and Organization ID provided to you by your Organization Administrator. Click the **Login** button and wait a few moments while the Web Access Desktop loads. By default, you will see your Inbox first.



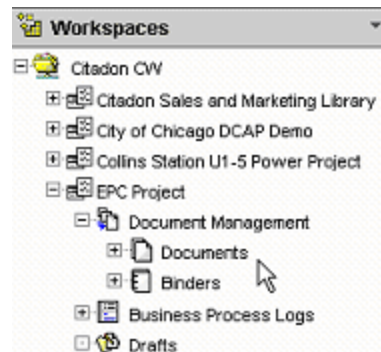
4. By default, your workspaces are listed for you under **Workspaces**. To create a Quicklist of workspaces, click on the pull-down arrow on the **Workspaces** tab. This will expand a sub-menu. Click **Organize** and then click **Project Workspaces** from the dropdown next to it.




A new dialog box will display all your Active Workspaces. Depending on how many Workspaces you are on, this may take a few moments. Check off the Workspaces you want listed and click



5. To navigate within your Workspace, you need to first expand the Workspace you want to work on (click +). To access the Documents area of your Workspace, expand the Document Management link. You will then see Documents and Binders. Continue to expand the list until you reach your designated folder, and then click on the folder to access it.



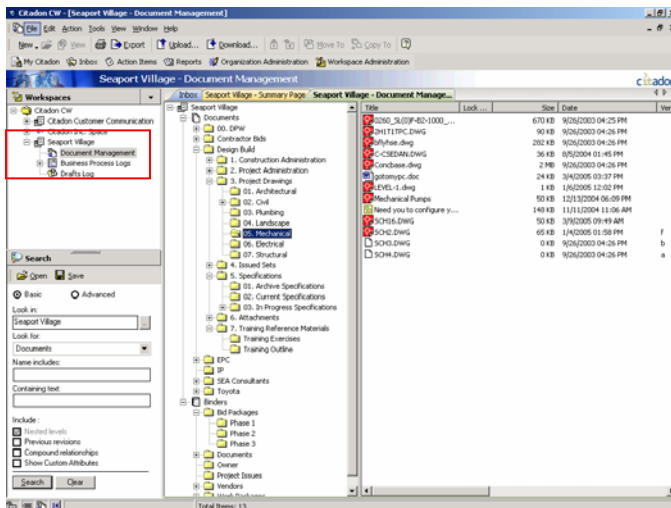
Using Citadon CW Windows Client

1. To start Citadon CW, double-click on the Citadon CW shortcut installed on your computer's Desktop or you may access it from "Start > Programs > Citadon CW".
2. When you login the first time you will be prompted with a license agreement. Please read through the agreement and click  to continue.
3. If this is your first time logging into Citadon CW, you will see the login box shown below:



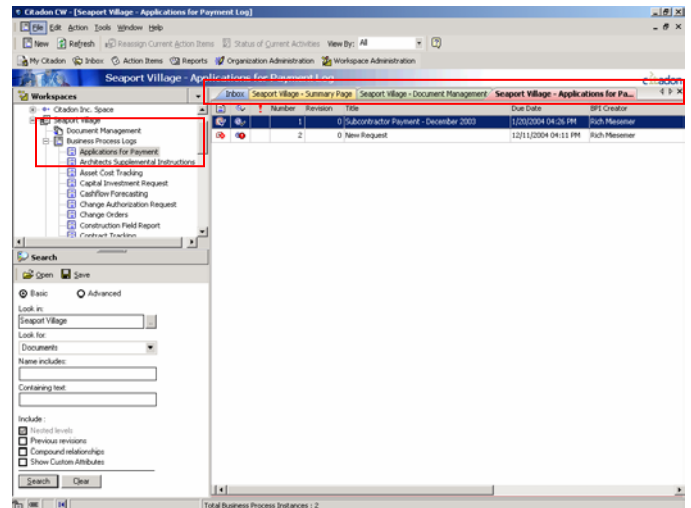
At the Citadon CW Login screen, enter your UserID, Password, and Organization ID provided to you by your Organization Administrator.

- Click the **Login** button and wait a few moments while the Citadon CW Desktop loads. By default, you will see your Inbox first. On the left side of the window is a list of your Workspaces (you can create a Quicklist by following the steps outlined earlier in the reference guide).
- To navigate within your Workspace, you need to first expand the Workspace you want to work on (click +). To access the Documents area of your Workspace, double-click on Document Management to see the Documents and Binders stored in this workspace. Continue to expand the list until you reach your designated folder, and then click on the folder to access it.



To navigate Business Process Logs, click on the + next to Business Process Logs to expand the list of processes. Double-click on the name of the business process log you wish to access.

You can also navigate to various windows you previously opened by click on the appropriate tab in the main window.



To best familiarize yourself with Citadon CW, click **Help** in the menu bar at the top. The Help system provides in-depth information on how to use Citadon CW and also information on the different functions and features of the application.

Citadon Customer Support

Citadon CW

Hours: 6am - 6pm PST

<mailto:support@citadon.com>