

WebTop

How to Access Your Karr Tuttle Campbell DM Documents from a Remote Location Over the Web

Logging In



- Open Internet Explorer (It must be Internet Explorer – you cannot use Firefox)
- Go to <http://webtop.karrtuttle.com>
- At the login screen enter the same User Name and Password you use at work
- Leave the Network Name blank
- Click Log On
- You may see a message that says “Please go to the My Options page to install or update your application components.” If so, click OK.
- NOTE – whenever you finish using WebTop please log off using the Log Off link in the top right corner of the screen

Default Screen

- The screen you are at when you first log into WebTop is the Quick Reference screen. Note the Tab marked Quick Reference. If while using WebTop you get lost and want to return to the default Quick Reference screen, click that tab. Note your Recently Edited Documents tab is forward. If you use a Quick Search you may also have to click the Recently Edited Documents tab to return to that screen.

Checking Out a Document to Work On It

To work on a document you will want to check it out to the local computer:

- In the right column of the document list under Actions you will see a document icon for each document. It looks like this:  When you hover over it you get the tip “Check In/Out Selected Document(s).” Click this link.
- Fill in the comments if you like or change the expected return date as appropriate.
- Click the document icon in the top left this time  that says “Check Out and Lock this Document” when you hover on it. This will keep anyone else from editing the document while you have it checked out.
- Look for the words Document Name: followed by the document name in blue. Right click on the blue document name link. Select “Save Target As”

- Save to Desktop. If the location is not set to Desktop you can click the Desktop on icon on the left side of the Save As box.





- File Name: The file name should already be filled in, but remove any unusual characters such as parentheses or question marks and be sure “.doc” appears at the end of the document name.
- Click Save.

Editing the Document

- You can log out of WebTop (see Log Off link in top right of the screen) and close Internet Explorer if you will be working on the document for a while, or keep them open until you are finished if you prefer.
- Display your computer’s desktop.
- Double click the document to open it – it should open in Word.
- Make your edits and save.
- Close the document and close Word.

Check the Document Back In So It is Available in DM

- If you have exited WebTop, reopen Internet Explorer and log in as above. If you did not exit WebTop click the Quick Reference tab to return to the default screen.
- Find the document in your Quick Retrieve or under the Checked Out Tab.
- In the right column of the document list under Actions click the document icon with a hover tip of “Check In/Out Selected Document(s).” It’s the same icon you used for checking out – it now has a checkmark and like this  because the document was checked out.
- The screen gives you the option to replace the checked out version or to create a new version. In most cases you will want to replace the checked out version. Enter any comments.
- Click the Check In and Unlock This Document link in the top left – it looks like this .
- WebTop doesn’t know where you saved the document on your computer so it asks you to point to the file. At the Upload File prompt click the Browse button.

- If the “Look In” is not set to Desktop, click the Desktop icon:




- Click on the file to select it, click “Open.”
- Click the Upload link. The document profile will appear. Your document has been checked in.
- Click the Quick Reference link to return to the default screen. The document should be listed at the top of your Quick Retrieve and you will notice there is no more red checkmark over the document’s icon.
- Go to your computer’s desktop and delete the document from there. This step is especially important when using a remote computer other than your own – for example when you are traveling. In that case you may also want to go to the Recycling Bin and delete it there too.

Copying a Document

To use an existing document as the basis for a new document you will download a copy of the document onto your local computer, make the edits, then upload the new document.

Getting a Copy

- Begin at the Quick Reference screen.
- Find the document in your Quick Retrieve or by searching (Note - you can type a document number into the search box in the top right corner of the screen and it will find your document).
- In the right column of the document list under Actions click the document icon with a hover tip of “More Actions.” It looks like this:  That brings up a shortcut menu with more options. You may have to scroll down some to see them all.
- On the new menu select Get Copy.
- Look for the words Document Name: followed by the document name in blue. Right click on the blue document name link. Select “Save Target As”
- Save to Desktop. If the location is not set to Desktop you can click the Desktop on icon on the left side of the Save As box.



- File Name: The file name should already be filled in, but remove any unusual characters such as parentheses or question marks and be sure “.doc” appears at the end of the document name.
- Click Save.



Editing the Document

- Follow the same procedures for editing a document above.


Uploading the New Document

- If you have exited WebTop, reopen Internet Explorer and log in as above. If you did not exit WebTop click the Quick Reference tab to return to the default screen.
- Find three icons in the top right area of your screen that look like this:



. Click the third one: . It's labeled “Import Document.” Fill in the Document Name, Author, Client, Matter and Document Type. Unlike with DocsOpen you must fill in these fields completely. You cannot type part of it and have it fill in the rest for you. If you need to look up a Document Type or Author feel free to use the browse buttons with each field: 

- For the Application field fill in MS Word if it is a Word document. If it is Excel use MS Excel, if PowerPoint use MS PowerPoint.

- Click the Create Document icon in the top left of the screen: 

- WebTop doesn't know where you saved the document on your computer so it asks you to point to the file. At the Upload File prompt click the Browse button.

- If the “Look In” is not set to Desktop, click the Desktop icon:



- Click on the file to select it, click “Open.
- Click the Upload link. The document profile will appear. You may want to make a note of the new document number. Your document has been uploaded.
- Click the Quick Reference link to return to the default screen. The document should be listed at the top of your Quick Retrieve.
- Go to your computer's desktop and delete the document from there. This step is especially important when using a remote computer other than your own – for example when you are traveling. In that case you may also want to go to the Recycling Bin and delete it there too.

Creating a New Document from Scratch


You can create a new document from scratch on your local computer and upload it using the WebTop.

- Create the document in Word, Excel or PowerPoint.
- Use the procedures above under “Uploading the New Document” to import the document into DM.

Searching

Search Box


- If you know the document number you want you can type it into the Search box at the top of the Quick Reference screen and click the green arrow to find the document:

Search 

Quick Searches

- If you have preexisting Quick Searches (saved searches) you can click the Quick Searches link [Quick Searches](#) below the Search box to use them.

Advanced Search

- To do a regular DM search click the Advanced link under the Search box:
[Advanced](#)
- Fill in your search criteria just as you would in DM or DocsOpen.
- Note the Search in Content checkbox. You can now enter words or phrases in the Search For box and do a full text search from WebTop.
- To perform the search click the magnifier in the top left section of the screen labeled “Perform the Search”: 

More Info on Searching

- You will see tabs along the top of the search screen like this:

Profile Search [Content Search](#) [Custom Search](#) [Search Results](#)

- The Profile Search tab is forward when you first click the Advanced search link. But you can click Content Search and Custom Search to do more sophisticated searches. Give it a try and let us know if you have any questions.
- The Search Results tab will come forward showing your search results when you click the magnifier to perform the search.

- After you click a document link to view it in your search, you can click the Advanced Search link below Content View in the upper left area of your screen.



- If you mistakenly use the Back button you can get back to your search by going to the Profile Search tab and clicking the magnifier to run it again. Your search criteria is saved in the form.

Log Off

- Please remember when you finish using WebTop please log off using the Log Off link in the top right corner of the screen