

Oracle® Documanage

# Documanage Workstation Guide

version 6.6

Part number: E14904-01

March 2009

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## Publication history

First issue for Version 6.4: July 2004

Revision 1 for Version 6.4 Service Release 1: December 2004

Revision 2 for Version 6.4 Service Release 2: May 2005

Revision 2A for Version 6.4 Service Release 3: May 2006

Revision 3 for Version 6.4 Service Release 4: October 2005

Revision 4 for Version 6.4 Service Release 5: June 2006

Revision 5 for Version 6.5: December 2006




Revision 6 for Version 6.5: September 2007

Revision 7 for Version 6.6: March 2009



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# Documanage documentation roadmap



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## Programming

 API help	 Programmer's Guide
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## Workstation

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# Preface

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## Introduction

Document management means different things to different people. For some, it is simply the ability to scan and view paper documents on the desktop. For others, it may mean being able to track a huge number of word-processing files circulating within a department. Still others are concerned with task efficiency; that is, providing information to office workers whenever they want it. The challenge of document management is to find a solution that addresses individual management needs such as these in an effective and complete manner.

Documanager is the most advanced and complete document-management solution that you will ever need. Documanager's strength lies in its open architecture which allows for document capture, storage, access, and processing.

## Using this manual

Documanager is divided into two integrated modules: the Client module, which is fully described in this *Documanager Workstation Guide*, and the Administrator module, which is run by the Documanager Administrator (refer to the *Documanager Administrator's Guide* for more information.) Both



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### Contents

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modules work together in creating the Documanager document management system.

This *Documanager Workstation Guide* describes how you can use the Documanager Workstation module to perform such document management functions as annotating, importing, exporting, emailing, and printing documents in your Documanager system. Note that the availability of these functions for you is dependent on the rights assigned to you by the Documanager Administrator.

This manual also describes how to access Documanager workflows using Documanager Workstation.

## Contents

This manual is organized as follows:

- ◆ **Getting started:** This chapter describes starting and logging into the workstation, how to use the File Room, how to work with Cabinets, and how to use the Watched Folder. It also explains Documanager print and system options.
- ◆ **Using Documanager Workstation:** This chapter explains how to use the toolbar, folders, and details document management options.
- ◆ **Using Documanager Viewer:** This chapter explains how to use Documanager Viewer to view and annotate documents.
- ◆ **Working with workflow:** This chapter discusses how to access and work with Documanager workflows. This feature is not available in the Documanager Server Lite product.

- ◆ **Appendices:** Appendix A provides a listing of file types supported by Documanage Workstation. Appendix B provides information about actual size printing. Appendix C describes the User Notification Utility, which can be installed and run to let you know when you have work pending in Documanage. Appendix D describes the Documanage Filer Utility, which describes how to export documents into Documanage from Windows applications using a print driver.

# Conventions

The *Using Documanage Workstation* manual provides consistent typographic conventions and keyboard formats to help you locate and interpret information easily. These conventions are provided below.

## Typographic and keyboard conventions

Convention	Description
<i>Italics</i>	Command, dialog box, icon, and field names
San serif font	Directory, folder, and file names
1 <b>Numbered lists</b>	Provide step-by-step procedures for performing an action
◆   Bulletd lists	Provide grouped information, not procedural steps

## Preface

Related documents

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## Related documents

In addition to this manual, the following related publication(s) are also available from Skywire Software:

- ◆ *Administrator's Guide*
- ◆ *Programmers Guide to Documanager*

## Suggestions

We welcome your comments, suggestions, and concerns about this manual or any Oracle Software publication.

Send comments to:

Skywire's Documanager for Oracle Software Technical Documentation  
3353 Peachtree Rd NE, Ste. 800  
Atlanta, Georgia 30326

# *Getting Started*

---

## **Introduction**

Documanager Workstation provides a user interface to the Documanager Server. The main interface is the File Room where you can manage cabinets, use the Watched Folder, and set system and print options.

## **In this chapter**

The information in this chapter will help you answer the following questions:

- How do I start and log in to Documanager?
- What is the File Room and how do I use it?
- How do I work with the Watched Folder?
- What are Documanager Workstation options?
- What are Documanager Print options?

## Getting Started

Starting and Logging into the Workstation

# Starting and Logging into the Workstation

The first step in running Documanage is to start the program. Generally, you can start Documanage from the Windows *Start* menu.

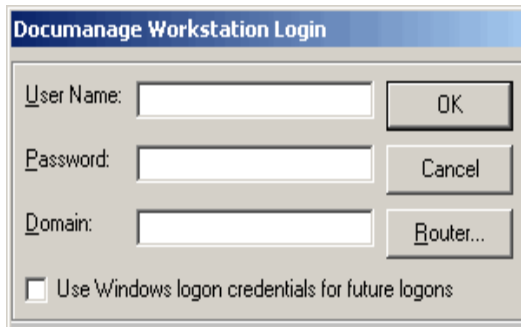
**NOTE:** Your Documanage startup process may differ from the one listed below. If so, please see your system administrator.

### *To start and log in to Documanage Workstation*

Before you can begin using Documanage, you must start and log in to the Documanage system by entering your Documanage user name, password and domain in the *Login* dialog box. This information will be the same that is used in your Windows system.

- 1 **Click the Windows *Start* menu.**
- 2 **Select *Programs/Documanage/Workstation*.**  
The *Documanage Login* screen opens.
- 3 **Enter your *User Name* and *Password* in the Login screen.**

The password will appear as a series of asterisks (\*\*\*\*, for example) in the *Password* text box.



The image shows a Windows-style dialog box titled "Documanage Workstation Login". It contains three text input fields: "User Name:", "Password:", and "Domain:". To the right of the "User Name:" field is an "OK" button. To the right of the "Password:" field is a "Cancel" button. To the right of the "Domain:" field is a "Router..." button. At the bottom of the dialog box, there is a checkbox labeled "Use Windows logon credentials for future logons".

**4 Enter the correct domain in the *Domain* field.**

The domain should be the Windows NT or 2000 workgroup of which the Documange user is part.

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**NOTE:** If you do not fill in the User Name, Password and Domain before clicking *OK*, your Windows logon credentials will be used.

---

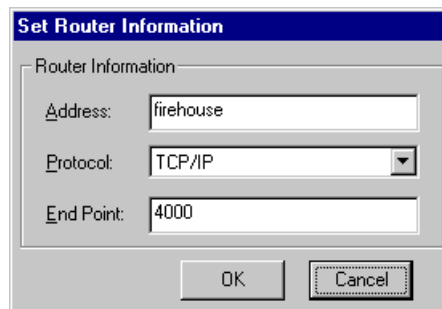
**5 Select the *Use Windows logon credentials for future logons* check box if the user wished to log into Documange using the logon credentials established when they logged onto their machine.**

---

**NOTE:** This option can also be set on the FileRoom tab of the Options dialog.

---

**6 Click the *Router* button to set the router information.**

A screenshot of a Windows-style dialog box titled "Set Router Information". The dialog has a blue title bar. Inside, there is a section titled "Router Information" with a light gray background. This section contains three fields: "Address:" with the text "firehouse" entered, "Protocol:" with a dropdown menu showing "TCP/IP", and "End Point:" with the text "4000" entered. At the bottom of the dialog, there are two buttons: "OK" and "Cancel".

- ◆ **Address:** This is the TCP/IP address or the domain name for the Documange Router.
- ◆ **Protocol:** This value is filled in automatically. This is TCP/IP network specific information. If you need to change the value consult with your network administrator.

## Getting Started

### Working with the File Room

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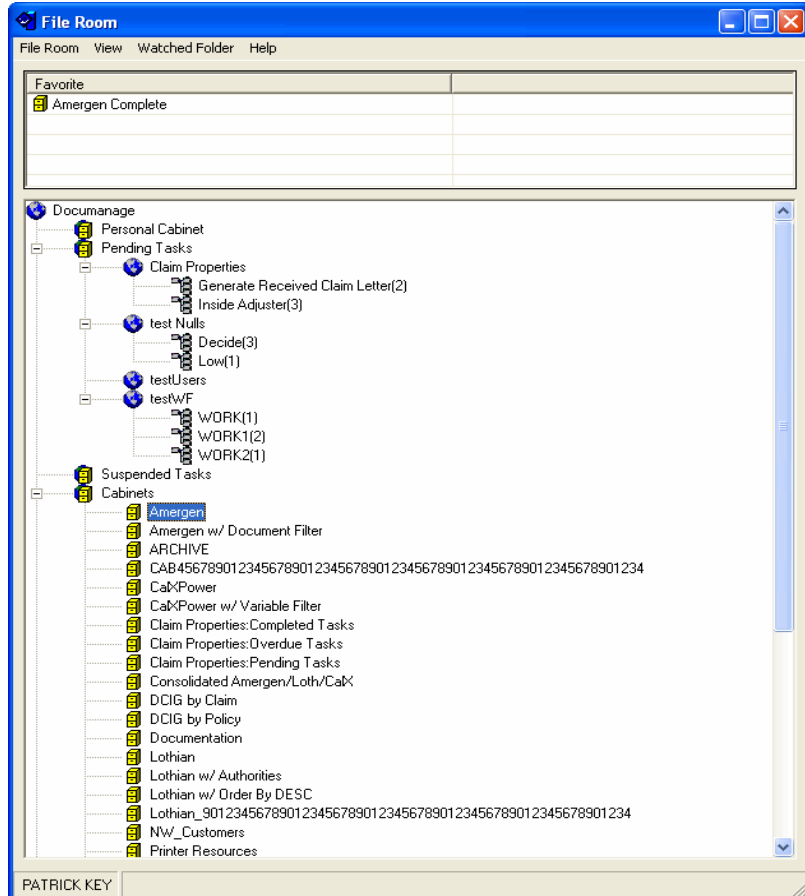
- ◆ *Endpoint:* This value is filled in automatically. This is TCP/IP network specific information. If you need to change the value consult with your network administrator.

7 Click **OK**.

## Working with the File Room

The File Room window opens once Documanager Workstation is started and you log in. The File Room organizes and provides access to Documanager components. File Room components display in a tree format. For example, a plus sign (+) to the left of a File Room item means that there are items

beneath it that are not currently displayed. A minus sign (-), means that all objects under that item are being displayed.



File Room components include:

- ◆ **Personal Cabinet.** Your private workspace.
- ◆ **Favorites.** The cabinets with queries you use most often.



- ◆ **Cabinets.** The Documange Cabinets to which you have access.
- ◆ **Tasks.** The workflow projects to which you are assigned and/or have access. NOTE: The workflow feature is not available in the Documange Server Lite product.
- ◆ **View Windows.** A list of each open Documange Viewer window.
- ◆ **Active Projects.** A list of each checked out project in the workflow. The workflow feature is not available in the Documange Server Lite product.
- ◆ **Document Edit Sessions.** A list of each document being edited in an external application.

The File Room also provides access to the Watched Folder and Documange Workstation options. See “Using the Watched Folder” on page 20 for more information on the watched folder. See “Documange Workstation Options” on page 32 for more information on Documange Workstation system options.

## Working with Cabinets

Documents in Documange are accessed through Cabinets. Much like a physical cabinet, a Documange Cabinet contains a collection of related folders. System cabinets are those cabinets set up by the Documange Administrator to which you have access. The Personal Cabinet is your own private workspace.

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**NOTE:** The Documanager Administrator creates Cabinets and user groups and grants security access. You do not need to perform such Documanager Administration functions.

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The benefits of a Documanager Cabinet are:

- ◆ security can be set for an individual
- ◆ multiple users can simultaneously access a document
- ◆ specific documents can be checked out within a particular folder

By default, only 100 folders can be viewed at any one time, though the Documanager Administrator can change this number. If the number of folders exceeds 100, you must use the *Next Set of Folders* option from the *Cabinet* menu to view these folders. To return to the previous 100 folders, you must use the *Previous Set of Folders* option from the *Cabinet* menu to view those folders. These limits can be changed from the Options dialog.

Cabinet folders can contain documents and sub-folders, which in turn can contain documents and further sub-folders, and so on. Depending on the access rights assigned to you by the Documanager Administrator, you may not see the same Cabinets, folders, and documents other Documanager users may see. This is done, among other reasons, for security purposes. For further details, please contact your Documanager Administrator.

## Opening a system cabinet

You can open a cabinet with or without filters. Opening a cabinet with filters allows you to search for specific folders based on a query. You can also open multiple instances of a cabinet with different views. For example, you can run

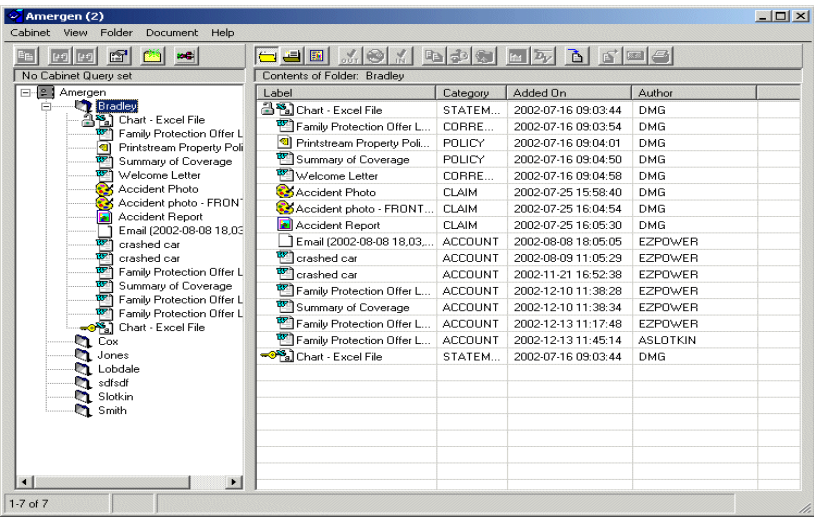
multiple queries on one cabinet and keep each query view open. The opened cabinets display as child nodes under the main cabinet node.

**NOTE:** You cannot open the Personal Cabinet using filters or in multiple instances.

*To open a cabinet*

- 1 **Go to the File Room.**
- 2 **Select the cabinet you want to open.**
- 3 **Right click and select *Open Cabinet*.**

The cabinet opens and displays all the folders associated with it.



**NOTE:** You can also open a cabinet by double clicking on the cabinet node. This option can be set on the FileRoom tab of the Options dialog.

### ***To open a cabinet with a query***

Documanage provides extensive search capability through its Cabinet Query feature. You can query a cabinet by selecting the cabinet, right clicking, and selecting *Open Cabinet with Query*. The *Cabinet Query* screen is divided into several tabs, each containing different fields.

- 1 Go to the File Room.**
- 2 Right click on the cabinet you want to search and select *Open Cabinet with Query* or if the cabinet is already open, select the *Set Cabinet Query* option from the *Cabinet* menu.**

The *Cabinet Query* dialog box opens. If the Cabinet has only one level, the *Folder Properties* tab is as shown here. If the Cabinet has several levels, the *Folder Properties* tab contains a tab for each level.

# Getting Started

Working with Cabinets

Cabinet Query

Folder Properties | Document Properties | Categories | Full Text Search | Edit SQL

Field	Operator	Value
Account Number	Includes	
Last Name	Equals	
First Name	Omits	
Mi	Not Equal	
Service Address 1	Begins With	
Service Address 2	Includes	
Service City	Not Equal	
Service State	Begins With	
Service Zip	Not Equal	

☒ Overrides Edit SQL Screen

☐ Case Sensitive☐ Indicate Empty Folders

OK

Clear

Clear All

Cancel

The *Cabinet Query* dialog box for a multi-level Cabinet is shown here. In addition to a *Level* tab for each level, the *Folder Properties* tab also contains a *Clear* button on the *Folder Properties* tab that clears all of the levels on the tab.

Field	Operator	Value
Claim Number	Equals	
Vehicle Id	Equals	
Claim Remarks	Includes	
Policy Number	Equals	
Claim Approved	Includes	

**NOTE:** You can also select *Open Cabinet with Query* by double clicking on the cabinet node. This option can be set on the *FileRoom* tab of the *Options* dialog box.

**3 Select the tab that corresponds to the type of search you want to conduct.**

The more information you enter regarding a document, the narrower your search.

You can choose from the following options:

- ◆ **Folder Properties.** Queries Folder Properties
- ◆ **Document Properties.** Queries various Document Properties
- ◆ **Categories.** Queries various Category Fields
- ◆ **Full Text Search.** Query for a set of words or phrases, or a complete sentence.
- ◆ **Edit SQL.** Write a SQL statement to query Folder, Document, and Extended Document Properties.

And conduct the following kinds of searches:

- ◆ **Includes.** Includes the words and phrases being queried.
- ◆ **Equals.** Search matches the words and phrases being queried
- ◆ **Omits.** Omits the words and phrases being queried.
- ◆ **Not Equal.** Search does not equal the words and phrases being queried.
- ◆ **Begins With.** Search starts with the words and phrases being queried.

- 4 **Enable the *Case Sensitive* checkbox in the lower-left corner to further define your search by requiring search results to match the case of your search criteria.**
- 5 **Enable the *Indicate Empty Folders* checkbox if you want to see which resulting folders are empty.**

If you inadvertently enter incorrect data, click *Clear* to erase that data.
- 6 **Click *OK*.**

---

**NOTE:** You can save cabinets with the Cabinet Query filters that you use most often by selecting Cabinet|Add to Favorites after running the query. The Indicate Empty Folders option will also be saved. The favorite will be stored in the Favorites node in the File Room.

---

## Removing a query

After you have used the Cabinet Query feature, and you again wish to see all of the folders and documents in the cabinet, you must clear the query. You do this by selecting the Clear query option from the Cabinet menu. Once the filter has been cleared, you are ready to perform the next query.

### *To remove filters*

- ◆ Select the Clear query option from the Cabinets menu (F12).

The filter is cleared and you are ready to perform a new search.

## Opening a cabinet with Variable Filters

The System Administrator can set up a cabinet so that it can be opened with a filter. This limits the folders and documents that you see to those matching the filter condition. For instance, a cabinet could be set up with a filter on the state field. A user could then open the cabinet and set the filter to see only folders that have an address in the state of Maryland. Another user could open the folder and see only folders that have an address in the state of Minnesota.

---

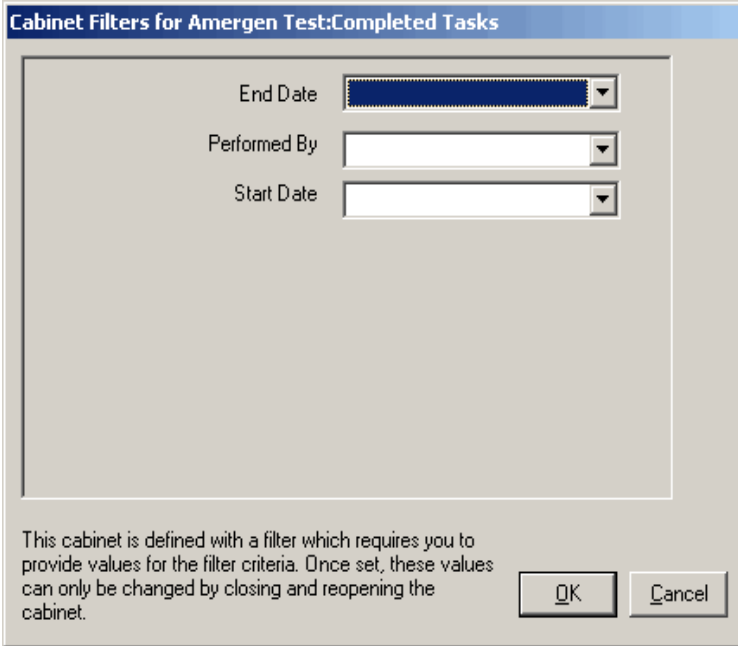
**NOTE:** Variable filters are distinct from a cabinet Query. The variable filters are set when you open the cabinet and they are maintained by the Documanage Server. A cabinet Query is set on the client side and can be cleared or changed.

---



***Setting the filter conditions for a cabinet.***

- 1 **Open a cabinet that has variable filters defined for it.**  
The Variable Filters dialog appears.



The image shows a dialog box titled "Cabinet Filters for Amergen Test:Completed Tasks". It contains three filter criteria: "End Date" with a blue dropdown menu, "Performed By" with a white dropdown menu, and "Start Date" with a white dropdown menu. At the bottom, there is a text box stating: "This cabinet is defined with a filter which requires you to provide values for the filter criteria. Once set, these values can only be changed by closing and reopening the cabinet." Below this text are "OK" and "Cancel" buttons.

- 2 **Select values from the End Date, Performed By and Start Date Lists.**
- 

**NOTE:** Once set, these values can only be changed by closing and reopening the cabinet.”

---

- ◆ If you assign a value to one filter variable, you must specify values for all of the filter variables.
- ◆ If you leave the End Date, Performed By and Start Date fields blank and click *OK*, the cabinet will be opened without any filters.

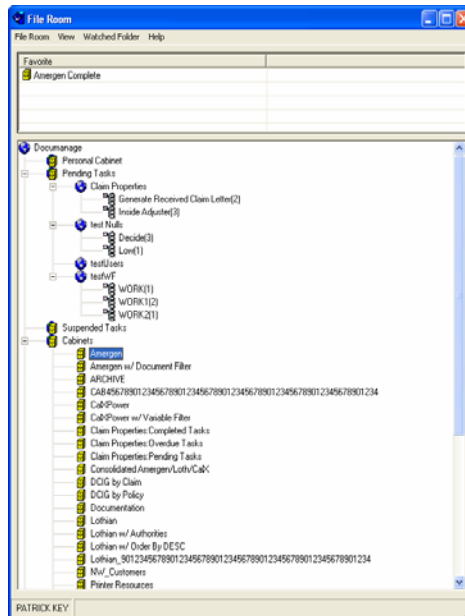
- ◆ When you open a cabinet with a variable filter in effect, an icon appears in the Filter Conditions panel of the Status Bar.

## Adding favorites to the File Room

The File Room allows you to save cabinets with the *Cabinet Query* filters that you use most often. This allows you to open the cabinet with the query filter already set. The *Indicate Empty Folders* option is also saved.

### *To add a favorite cabinet to the File Room*

- 1 Go to the File Room.



## Getting Started

### Working with Cabinets

---

- 2 **Right click on the cabinet you wish to open and select *Open Cabinet with Query*.**

The *Cabinet Query* screen opens.

- 3 **Set the correct filters.**

A cabinet opens based on your query.

- 4 **Select *Cabinet* | *Add to Favorites*.**

- 5 **Enter a name for the Favorite and click *OK*.**

- 6 **Return to the File Room.**

The name displays under the *Favorites* branch in the File Room. You can then open the favorite cabinets by double clicking or by right-clicking and selecting *Open Favorite*. You can remove the favorite cabinet by right-clicking and selecting *Remove Favorite*.

## Personal Cabinet

The Documanage Personal Cabinet is the location that contains folders and documents specific to you. Only you can access your Personal Cabinet, making it a secure location to store confidential documents.

Open the Personal Cabinet by double clicking the node or right clicking the node. It opens in a 2 paned view. In the left pane, listed under Personal Cabinet, are two folders by default: Checked-Out Documents, which is the location where documents checked-out to the personal cabinet appear and New Documents, that you can use for any documents you bring into the system. These folders display in a tree format similar to Windows Explorer. Clicking a left pane folder displays its contents in the right pane. (Note that only one folder can be open at any one time). The name of the open folder appears above the Label column on the right pane.

A small icon appears to the left of each document in the right pane. This icon serves as an identifier of that particular document. For example, a Microsoft Word document appears with a small blue “W” to its left, while a graphic icon appears to the left of each graphic image.

---

**NOTE:** By default, only 100 folders can be viewed at any one time, though the Documanager Administrator can change this number. If the number of Personal Cabinet folders exceeds 100, you must use the Next Set of Folders option from the Cabinet menu to view these folders. To return to the previous 100 folders, you must use the Previous Set of Folders option from the Cabinet menu to see those folders. These limits can be changed, however, from the Options dialog.

---

## Opening the Personal Cabinet

### *To open the Personal Cabinet*

- ◆ Select the Personal Cabinet and double click.

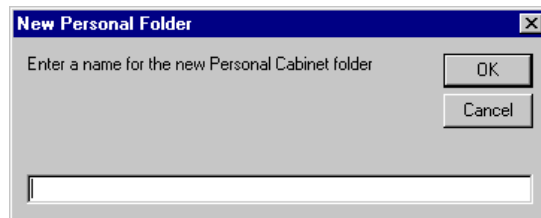
## Adding a folder to the Personal Cabinet

You can add folders to the Personal Cabinet. When you do so, the *New Personal Folder* dialog box displays, prompting you for a folder name. Once the folder name is entered and accepted, it appears in the Personal cabinet.

### *To add a folder to the Personal Cabinet*

- 1 **Go to the File Room.**
- 2 **Open the Personal Cabinet.**
- 3 **Select the *Add Folder* option from the *Folder* menu.**

The *New Personal Folder* dialog box opens.



- 4 **Enter a *Name* for this folder.**
- 5 **Click *OK*.**

## **Deleting a folder from the Personal Cabinet**

You can delete any folder as long as you have the necessary authorities and there are no documents directly under it. Folders containing documents from consolidated cabinets and sub-folders in a multilevel cabinet can be deleted. By default, folder delete authority will always be turned off. The Documanager administrator must enable the delete authority for each table and its user.

---

**NOTE:** A workflow folder cannot be deleted.

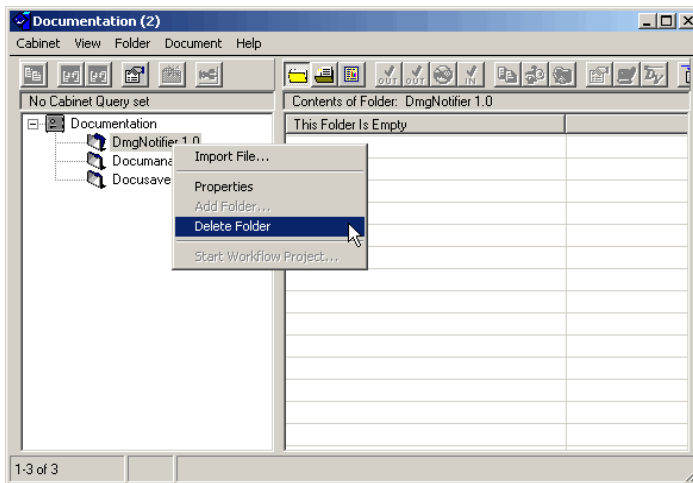
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## Getting Started

### Using the Watched Folder

#### *To delete a folder from the personal cabinet*

- 1 Go to the File Room.
- 2 Open the Personal Cabinet.
- 3 Select folder to delete.
- 4 Select the **Delete Folder** option from the **Folder** menu.



## Using the Watched Folder

The first time that you run the Documanage Workstation, an *Import to Documanage* folder is placed on your desktop. You can copy documents into this folder to later import into Documanage. On startup, Documanage Workstation polls the Import to Documanage folder. If there are documents in the folder, you are notified that there are documents in the Watched Folder

and asked if you want to view the contents of the folder. If you do not want to see this dialog in the future, click Cancel.

You can also check the Watched Folder from the File Room and can import the files at any time. Files are imported to the New Documents folder of the Personal Cabinet.

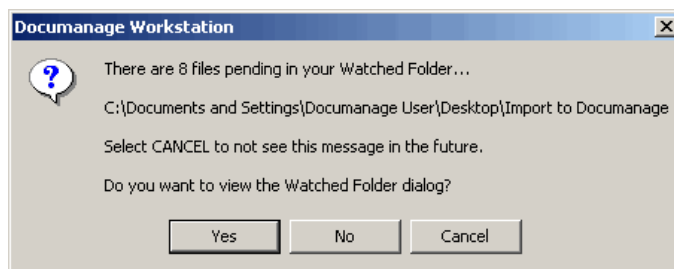
### ***To copy files into the watched folder***

- 1 **Locate, on your hard drive, the file(s) you want to copy.**
- 2 **Select the file(s) and copy.**
- 3 **Go to the Import to Documange folder on your desktop and paste the files.**

The files will remain in that folder until you import them to Documange using the Watched Folder option.

### ***To use the Watched Folder option when starting Documange Workstation***

- 1 **Open and login to Documange Workstation.**  
A dialog box opens if there are documents in the folder.



- 2 **Click *No* if you don't want to view the contents, or *Cancel* to not see the message in the future.**

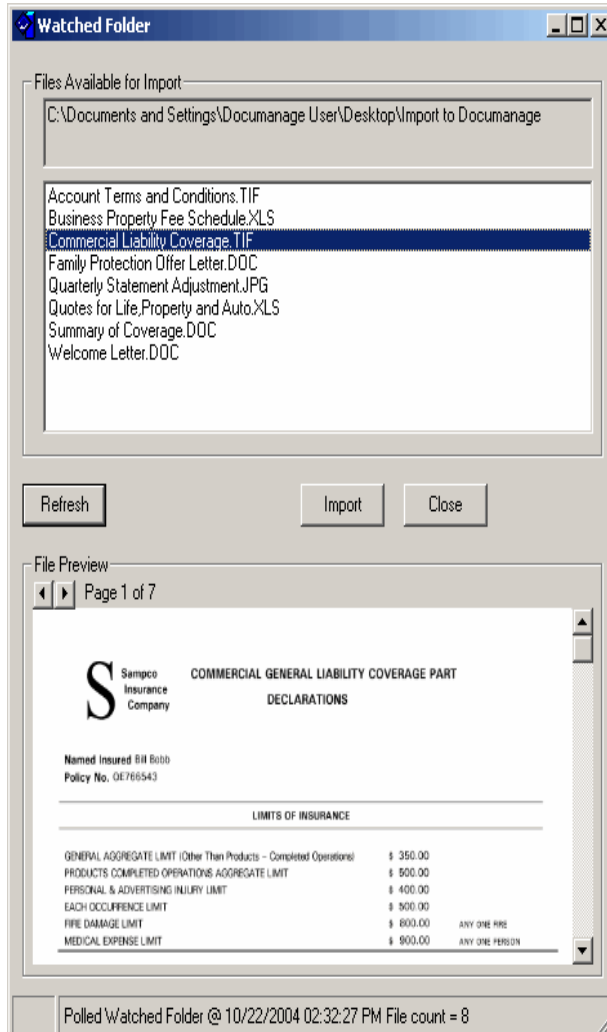


## Getting Started

Using the Watched Folder

### 3 Click Yes to view the contents of the folder.

The *Watched Folder* dialog box opens, displaying the files in the folder.



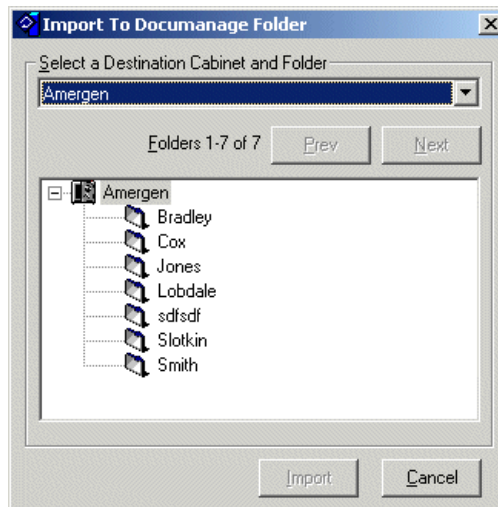
- 4 If you wish to refresh the list of files, click **Refresh**.
- 5 Select the file(s) you want to import and click **Import**.  
The file(s) you have selected appear in the *Folder Preview* area.

---

**NOTE:** Only jpg, tif, emf and bmp files can be viewed in the File Preview area.

---

- 6 Select where you want to import the document in the **Select a Destination Cabinet and Folder** drop down list.



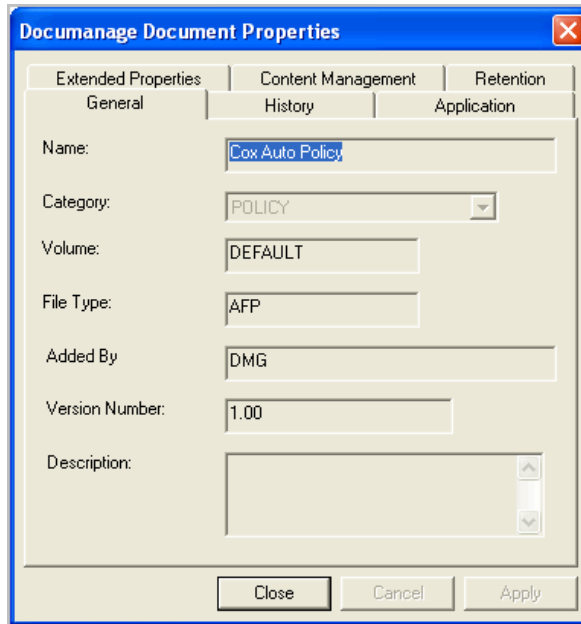
## Getting Started

Using the Watched Folder

---

**7 Click *Import*.**

The *Documanage Document Properties* screen opens.



The image shows a screenshot of the 'Documanage Document Properties' dialog box. The dialog has a blue title bar with the text 'Documanage Document Properties' and a close button (X). Below the title bar, there are three tabs: 'Extended Properties', 'Content Management', and 'Retention'. The 'Extended Properties' tab is selected, and it contains three sub-tabs: 'General', 'History', and 'Application'. The 'General' sub-tab is active, showing the following fields: 'Name:' with the text 'Cox Auto Policy', 'Category:' with a dropdown menu showing 'POLICY', 'Volume:' with a text box containing 'DEFAULT', 'File Type:' with a text box containing 'AFP', 'Added By' with a text box containing 'DMG', 'Version Number:' with a text box containing '1.00', and 'Description:' with a large empty text area. At the bottom of the dialog, there are three buttons: 'Close', 'Cancel', and 'Apply'.

**8 Enter the document properties and click *OK*.**

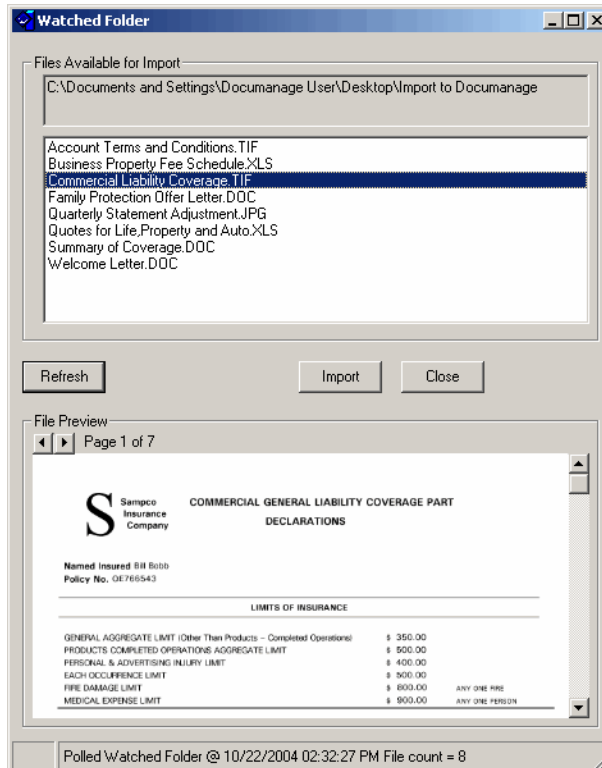
The document is placed in the selected cabinet and folder.

**9 Click *Cancel* to close the Watched Folder screen.**

## *To use the Watched Folder option from the File Room*

- 1 **Go to the File Room.**
- 2 **Select *Watched Folder|Start*.**

The Watched Folder dialog box opens and displays all the files ready for import.

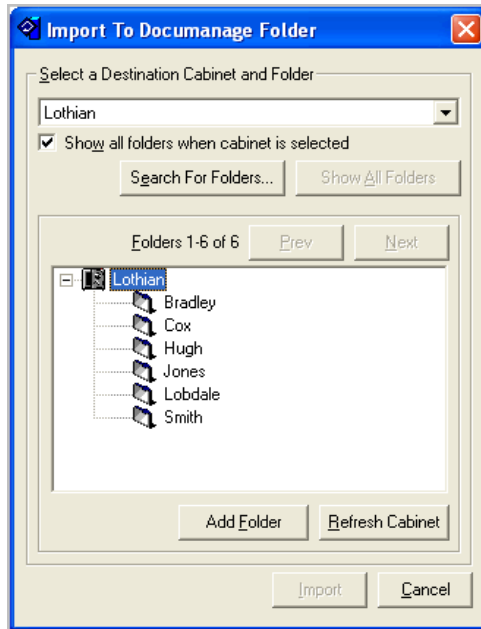


## Getting Started

### Using the Watched Folder

- 3 **Select the file you want to import and click *Import*.**

The *Import To Documanage Folder* dialog appears.



- 4 **In the cabinet list, click the cabinet into which you want to place the document**
- 5 **To display all the folders in the cabinet, go to step 6. To display selected folders in the cabinet, go to step 7.**
- 6 **Click *Show All Folders* (or select the *Show all folders when cabinet is selected* checkbox if it is not already selected). Go to step 16.**
- 7 **To display selected folders in the chosen cabinet click *Search For Folders*.**

The *Search For Folders* dialog box opens. The contents of the Folder Properties tab differs depending on whether the Cabinet contains one level, or several levels.

If the Cabinet has one level, the *Folder Properties* tab appears as it is shown here.

The screenshot shows the 'Search For Folders' dialog box with the 'Folder Properties' tab selected. The dialog has a title bar 'Search For Folders' and two tabs: 'Folder Properties' and 'Edit SQL'. The 'Folder Properties' tab contains a table with three columns: 'Field', 'Operator', and 'Value'. The table has four rows of data. Below the table is a large empty text area. At the bottom of the dialog, there are two checkboxes: 'Overrides Edit SQL Screen' (checked) and 'Case Sensitive' (checked). There are also two labels: 'Indicate Empty Folders' (unchecked) and 'Clear All'. At the very bottom are four buttons: 'OK', 'Clear', 'Clear All', and 'Cancel'.

Field	Operator	Value
Lname	Includes	
Fname	Includes	
Polnum	Includes	
Phonenum	Includes	

☒ Overrides Edit SQL Screen

☒ Case Sensitive ☐ Indicate Empty Folders

OK Clear Clear All Cancel

## Getting Started

### Using the Watched Folder

If the Cabinet has more than one level, the *Folder Properties* tab displays a *Level* tab for each level, as shown here. The *Clear* button clears all of the *Level* tabs.

**Search For Folders**

Folder Properties | Edit SQL

Level 1 | Level 2 | Level 3 | Level 4

Field	Operator	Value
Claim Number	Equals	
Vehicle Id	Equals	
Claim Remarks	Includes	
Policy Number	Equals	
Claim Approved	Includes	

Clear Level

☒ Overrides Edit SQL Screen

☒ Case Sensitive ☐ Indicate Empty Folders

OK Clear Clear All Cancel

- 8 Select the tab that corresponds to the type of search you want to conduct.**
- 

**NOTE:** The more information you enter describing a folder, the narrower your search.

---

Choose from the following options:

- ◆ Folder Properties—Queries Folder Properties
  - ◆ Edit SQL—Write an SQL statement to query *Folder Properties* and conduct the following kinds of searches:
    - ◆ Includes—Includes the words and phrases being queried.
    - ◆ Equals—Search matches the words and phrases being queried
    - ◆ Omits—Omits the words and phrases being queried.
    - ◆ Not Equal—Search does not equal the words and phrases being queried.
    - ◆ Begins With—Search starts with the words and phrases being queried.
- 9 Select the *Case Sensitive* checkbox if you wish to have the case of your search results match the case of your search criteria.**
- 10 Select the *Indicate Empty Folders* checkbox if you want to see which resulting folders are empty.**
- 11 If you enter incorrect data, click *Clear* to erase that data.**
- 12 Click *OK*.**  
The filtered folders are displayed in the selected cabinet.
- 13 Select the Folder into which you would like to place the document and proceed to step 16. If you do not see a Folder into which you would like to place the document, click *Add Folder* in the *Import To Documanage Folder* dialog.**

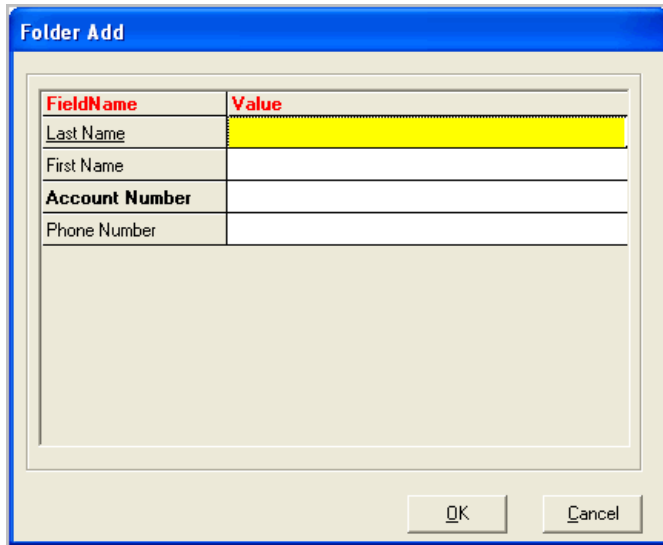


## Getting Started

Using the Watched Folder

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The *Folder Add* Dialog appears.



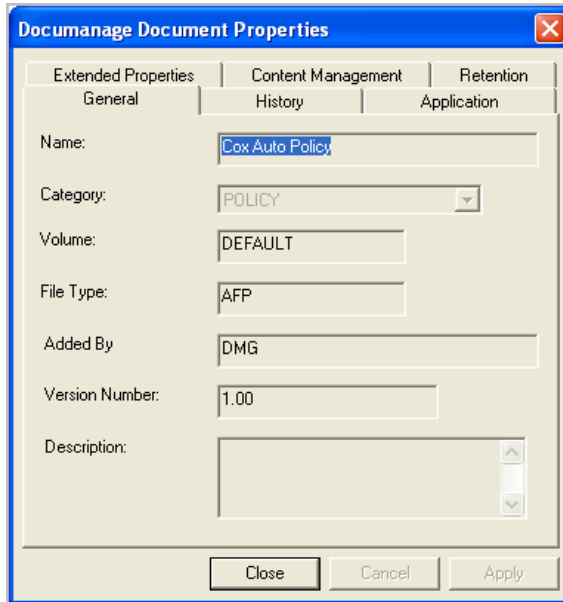
The image shows a 'Folder Add' dialog box with a blue title bar. Inside, there is a table with two columns: 'FieldName' and 'Value'. The 'Value' column for the first row is highlighted in yellow. Below the table is a large empty text area. At the bottom right are 'OK' and 'Cancel' buttons.

FieldName	Value
Last Name	
First Name	
Account Number	
Phone Number	

- 14 **Enter values for the Field Names in the dialog. Click *OK*.**  
A new folder appears in the selected cabinet.
- 15 **Select the new folder.**

**16 Click *Import*.**

The *Documanager Document Properties* screen opens.



The screenshot shows the 'Documanager Document Properties' dialog box. It has a blue title bar with a close button. The dialog is divided into three tabs: 'Extended Properties', 'Content Management', and 'Retention'. The 'Extended Properties' tab is active, showing a 'General' sub-tab. The 'General' sub-tab contains the following fields: 'Name' (text box with 'Cox Auto Policy'), 'Category' (dropdown menu with 'POLICY'), 'Volume' (text box with 'DEFAULT'), 'File Type' (text box with 'AFP'), 'Added By' (text box with 'DMG'), 'Version Number' (text box with '1.00'), and 'Description' (text area). At the bottom of the dialog are three buttons: 'Close', 'Cancel', and 'Apply'.

**17 Enter the document properties and click *OK*.**

The document is placed in the selected cabinet and folder.

---

**NOTE:** Many document fields are “sticky”. That is, they retain the last value defined for them and pre-fill the Document Properties dialog with the saved values. These values are used for all document import operations, and are even saved between sessions.

---

- 18 Click **Cancel** to close the *Watched Folder* screen.

## Documanage Workstation Options

There are several system options within Documanage Workstation. These are set through the *View* menu in the *File Room*.

### Logging

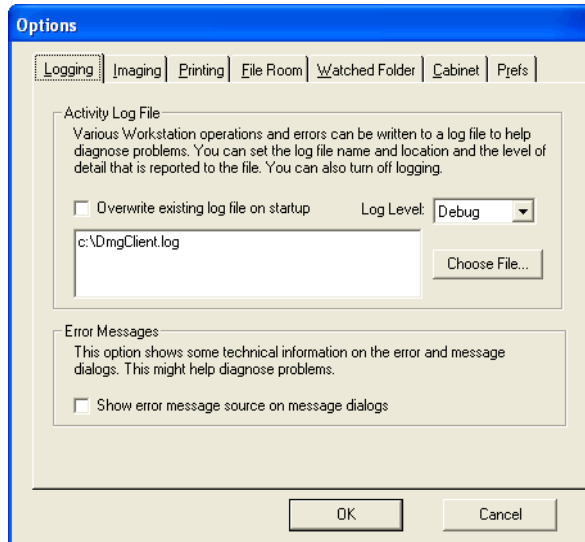
Logging records Documanage Workstation activity and is useful for troubleshooting. You can set log file name, location, and level of detail that is recorded in the log. Detail levels are Off, Debug, Detailed, and Normal, where Off records nothing and Debug records the most information.

## To set logging

1 **Go to the File Room.**

2 **Go to *View|Options*.**

The *Options* screen opens.



3 **Go to the *Logging* tab.**

4 **Select the *Log Level* from the drop down list.**

Levels include Off, Debug, Detailed, and Normal, where Off records nothing and Debug records the most information.

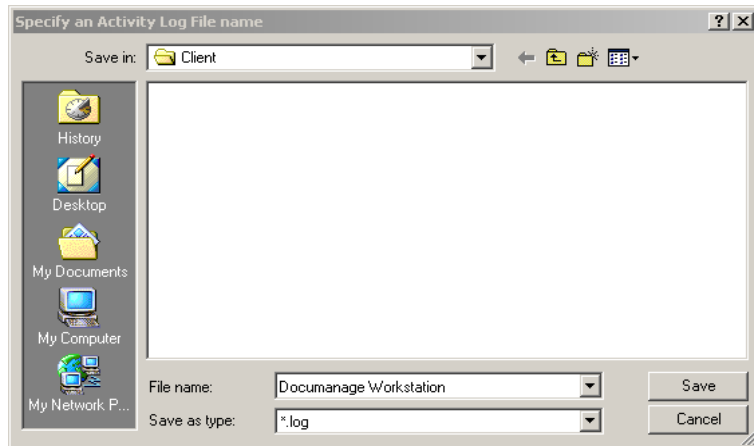
## Getting Started

### Documanage Workstation Options

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- 5 Click the **Choose File** button to specify the name and location of the.log file.

The *Specify an Activity Log File Name* screen opens.



- 6 Enter a name for the log file in the **File name** field and browse to the location you want to store the file in the **Save in** drop down list.

- 7 Click **Save**.

The file is created and saved in the specified location and the path displays on the *Logging* tab.

- 8 **Select *Overwrite existing log file on startup* to start a new log each time you start Documanager Workstation.**
- 9 **Select *Show error message source on message dialogs* to see the source for errors you encounter.**
- 10 **Click *OK*.**

## Imaging

There are several imaging options in Documanager Workstation. They are found on the *Imaging* tab of the *Options* dialog (View|Options|Imaging).

- ◆ Color Imaging Options allow you to alter the appearance of images derived from color AFP and MET files. You can render these images in color or black and white. NOTE that only certain AFP and MET files contain color. By default, Render color AFP and MET images in color is selected and AFP and MET files will display in color. You can render in black and white by disabling this option.
- ◆ Gray Scale Quality Settings allow you to turn gray scaling on and off and set the quality at which you'd like images grayscaled. High Quality results in the best image, but takes the longest to render. Low Quality results in a fair image, but renders quickly.
- ◆ 8-bit Color Quality Settings allow for high to low quality color rasterization of your images.

## Getting Started

### Documanage Workstation Options

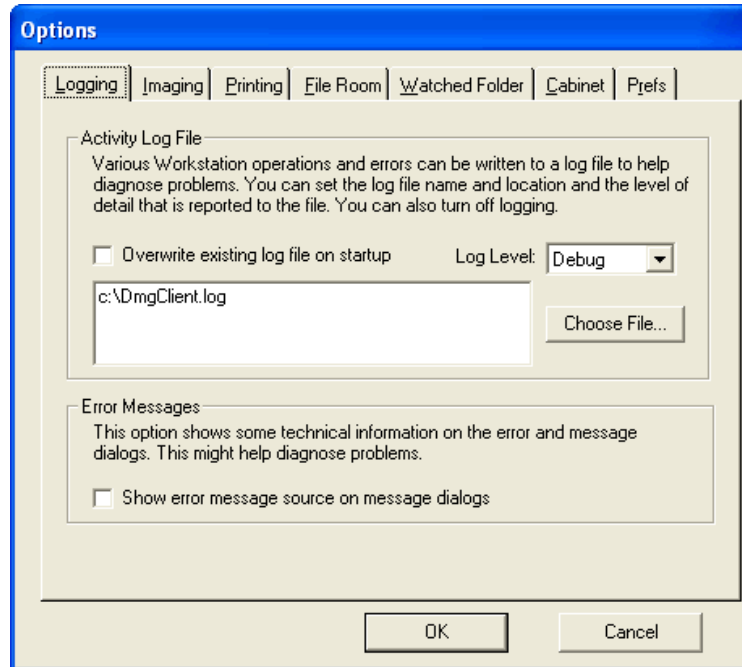
---

#### *To set color image options*

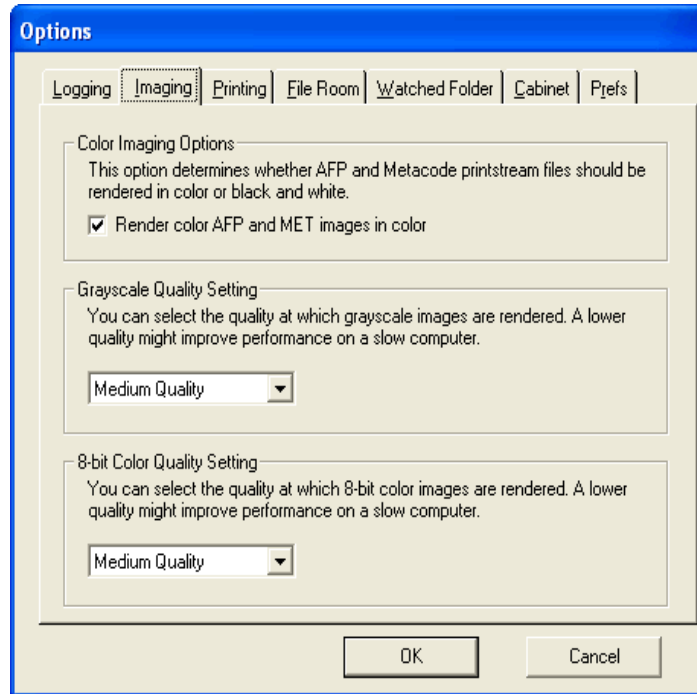
1 **Go to the File Room.**

2 **Go to *View|Options*.**

The *Options* screen opens.



3 Go to the *Imaging* tab.



4 Select *Render color AFP and MET images in color* if you want the color AFP and Metacode files to display in color or disable the option to display in black and white.

This option is enabled by default.

5 Click *OK*.

*To set grayscale quality*

1 Go to the *File Room*.

2 Go to *View|Options*.

The *Options* screen opens.



## Getting Started

### Documanage Workstation Options

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- 3 Go to the *Imaging* tab.
- 4 Select the **Grayscale Quality Setting** you want. **Medium Quality** is the default.
  - ◆ **Off.** Image rendered in black and white, not grayscale.
  - ◆ **Low Quality.** Image is rendered in grayscale quickly but at a fair to poor quality.
  - ◆ **Medium Quality.** Image is rendered in grayscale at an average time and quality.
  - ◆ **High Quality.** Image is rendered at an excellent quality but slower than the other options.
- 5 Click **OK**.

#### *To set 8-bit color quality*

- 1 Go to the **File Room**.
- 2 Go to **View|Options**.  
The *Options* screen opens.
- 3 Go to the *Imaging* tab.
- 4 Select the **color quality setting** you wish to use. Options vary from low to high quality with **High Quality** resulting in the highest quality rasterized image.
- 5 Click **OK**.

## Print Options

DCD files contain objects such as backgrounds, which can be flagged as display-only (i.e., to not print.) That is, they show on the screen, but when the document is printed they are not drawn. For example, you might have

background stock paper on which you print your images. The graphics on the stock paper display as overlays in Documanage Workstation so you can see on the screen what the printed image will look like. When printing, you do not want to print these overlays as they already exist on the stock paper.

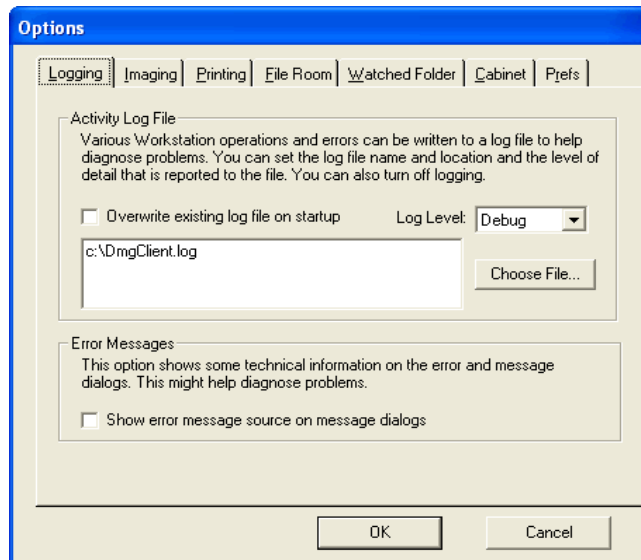
Documanage Workstation has an option: Ignore DCD printing tags (print DCD documents as displayed), which is disabled (unchecked) by default. When this option is disabled, objects tagged as display-only are not printed. To print the image as it appears on the screen, enable this option by checking the box.

### ***To set DCD Print Options***

**1 Go to the File Room.**

**2 Go to *View|Options*.**

The *Options* screen opens.

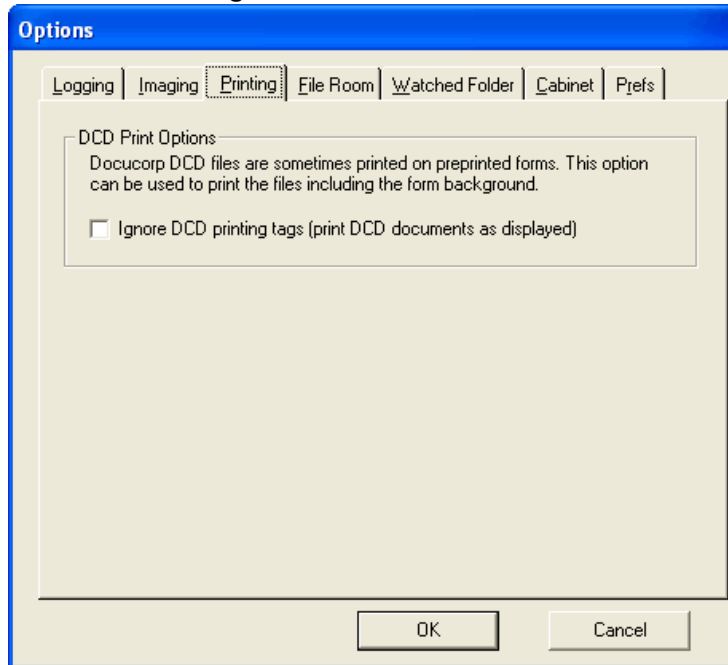


## Getting Started

### Documanage Workstation Options

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**3 Go to the *Printing* tab.**



**4 Select *Ignore DCD printing tags (print DCD documents as displayed)* to print the image that displays on the screen. If you do not want to print DCD tags, disable this option.**

This option is disabled by default and objects tagged as display only are not printed.

**5 Click *OK*.**

For information about printing a document see “Printing a Document” on page 133.

## File Room Options

File Room Options determine what happens when you double-click on a cabinet in the File Room. The default option will be shown in bold when you right click on a cabinet node.

The Cabinet Node Double-Click Action frame sets what should happen when a user clicks on a Cabinet node in the FileRoom.

The Documanage Login frame determines whether the Login dialog should be displayed or not. A checkbox on the Login dialog suppresses subsequent display of the dialog. If the login fails, the login dialog is displayed regardless of this setting. The UserName panel of the FileRoom status bar shows the currently logged-in UserName. The tool tip for this panel shows the Domain and UserName.

## Getting Started

### Documanage Workstation Options

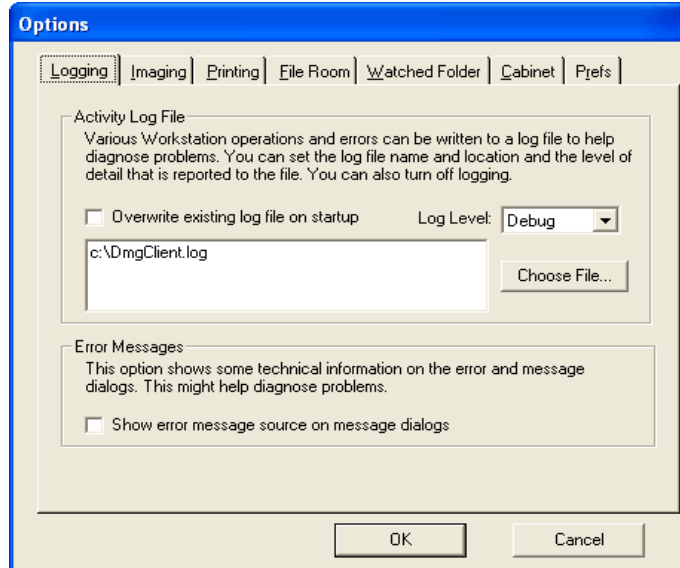
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#### *To set File Room Options*

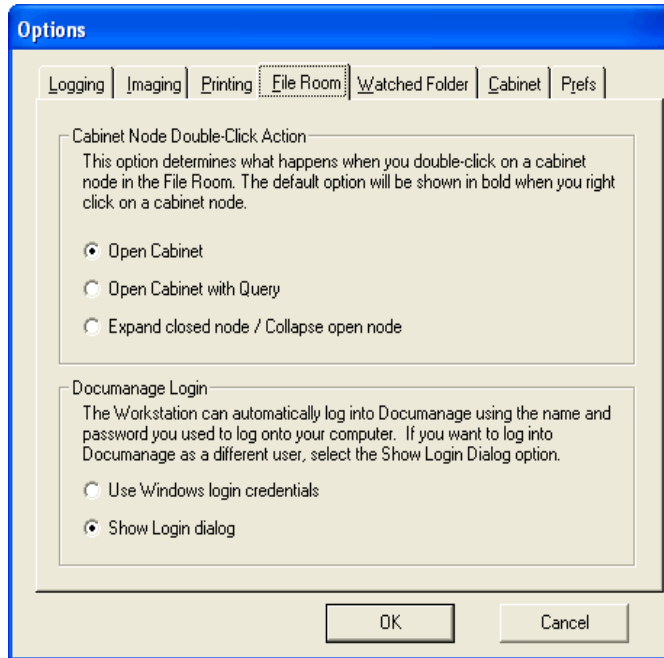
1 **Go to the File Room.**

2 **Go to *View|Options*.**

The *Options* screen opens.



3 Go to the *File Room* tab.



- 4 Under **Cabinet Node Double-Click Action**, click **Open Cabinet**, **Open Cabinet with Query** or **Expand closed node/Collapse open node** to determine what happens when a user clicks on a **Cabinet** node in the **FileRoom**.
- 5 Under **Documanager Login** frame, click **Use Windows login credentials** to have the **WORKstation** automatically log into **Documanager** using the name and password you used to log onto your computer. Click **Show Login dialog** if you want to log into **Documanager** as a different user.

---

**NOTE:** If the login fails, the login dialog is displayed regardless of this setting.

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## Getting Started

### Documanage Workstation Options

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**NOTE:** The UserName panel of the FileRoom status bar shows the currently logged-in UserName. The tool tip for this panel shows the Domain and UserName.

---

6 Click **OK**.

## Watched Folder Options

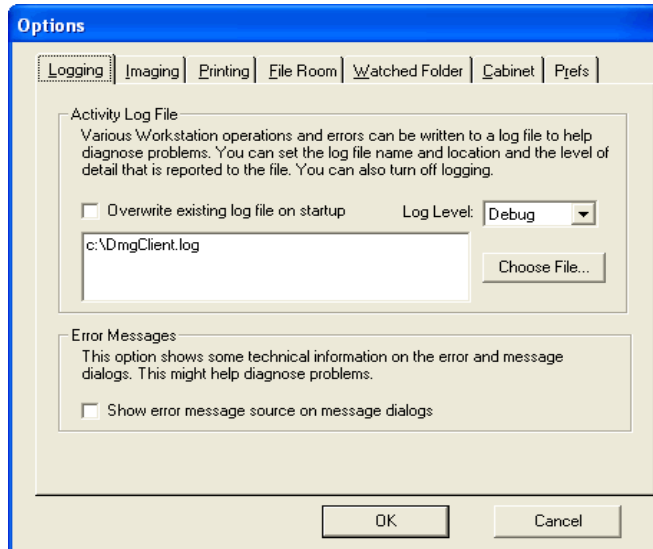
The Watched Folder tab sets up the Workstation to poll a designated folder for files to import into Documanage. The tab sets the location of the Watched Folder and how often it should be polled. The maximum polling interval is just over a minute.

## To set Watched Folder Options

1 **Go to the File Room.**

2 **Go to *View|Options*.**

The *Options* screen opens.



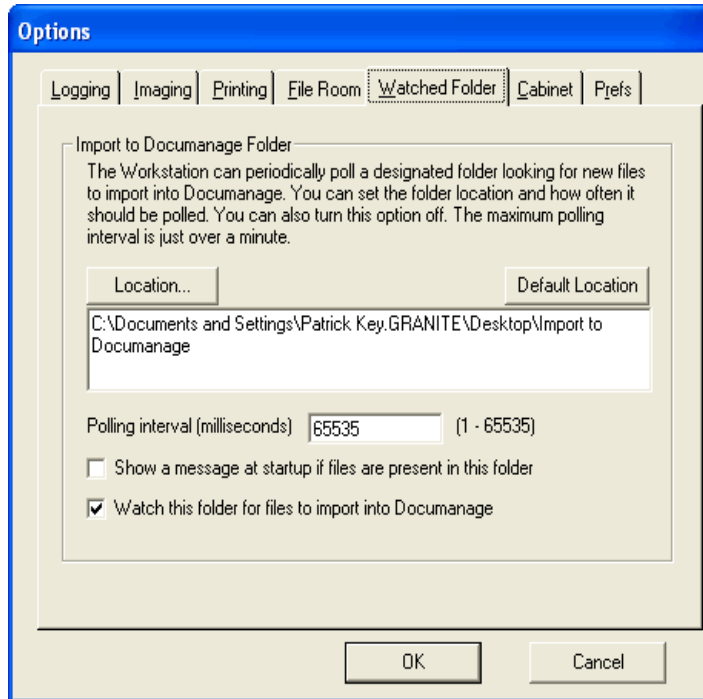


## Getting Started

### Documanage Workstation Options

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#### 3 Go to the *Watched Folder* tab.



#### 4 Click **Location...** .

A folder browse dialog appears that allows you to select a WatchedFolder location.

#### 5 Click **Default Location** to default the Watched Folder to \Documents and Settings\[Current Windows User]\Desktop\Import to Documanage.

The default path appears in the dialog window.

If the Watched Folder does not exist, a dialog will appear so that you can create one.

- 6 In the *Polling interval* box, enter the interval at which the Workstation polls the Watched folder for files to import into Documanager.
- 7 Select the *Show a message at startup if files are present in this folder.* checkbox to have the Workstation display a message if files are present in the Watched Folder at startup.
- 8 Select the *Watch this folder for files to import into Documanager.* checkbox to activate the Watched Folder.
- 9 Click *OK*.

## Cabinet Options

The Cabinet tab determines what happens when you double-click on a checked-out document. The currently available options are View Document or Edit Document with View Document as the default. The menu item corresponding to this setting is shown in bold on the context menu that appears when you right-click on a document. If the option is not available for a document. (because of user-authorities, for instance) no option is shown in bold double-clicking does nothing.

## Getting Started

### Documanage Workstation Options

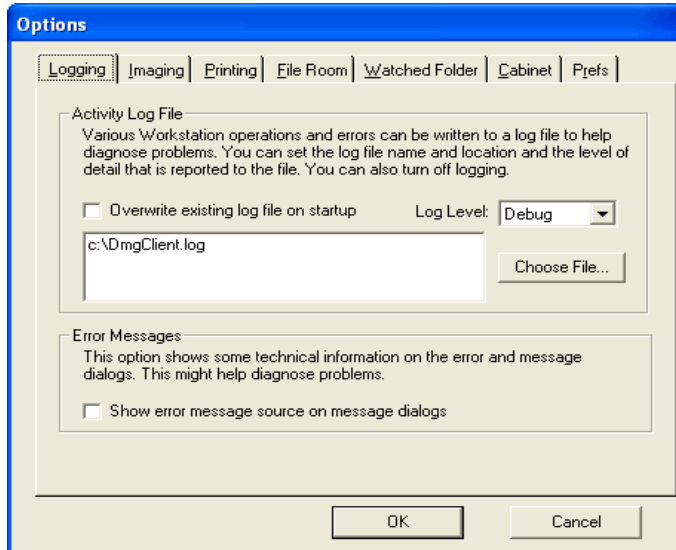
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#### *To set Cabinet Options*

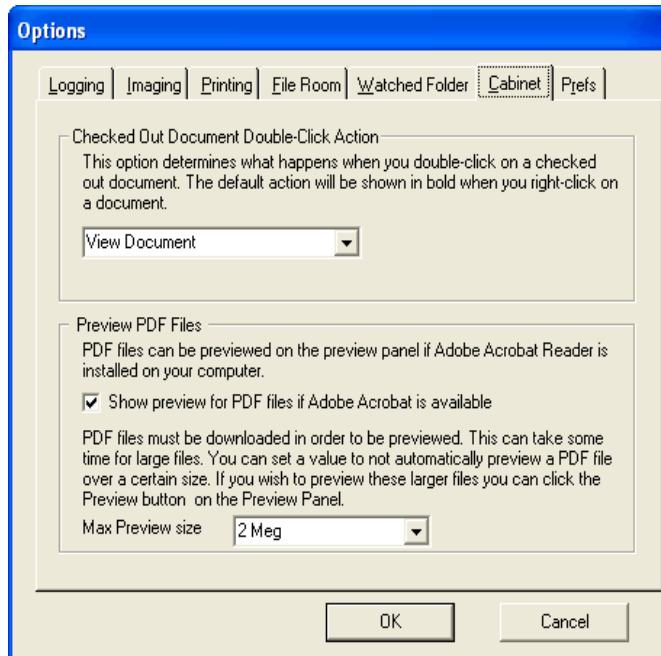
1 **Go to the File Room.**

2 **Go to *View|Options*.**

The *Options* screen opens.



3 Go to the **Cabinet** tab.



4 Select **View Document** or **Edit Document** from the list.

5 Click **OK**.

### To View PDF files

1 Go to the **File Room**.

2 Go to **View|Options**.

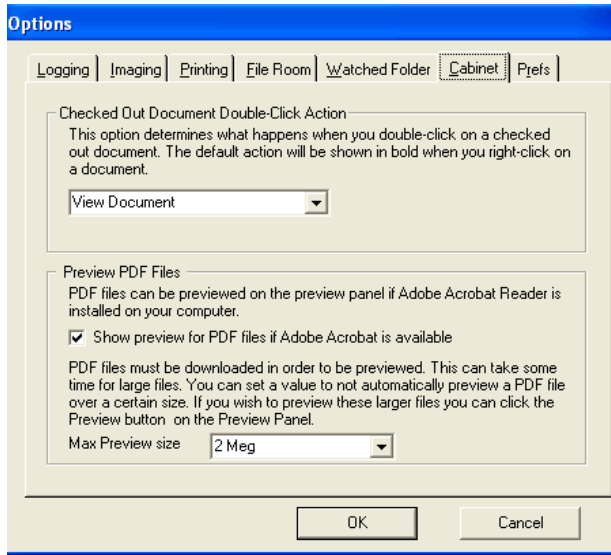
The *Options* screen opens.

## Getting Started

### Documanage Workstation Options

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#### 3 Go to the **Cabinet** tab.



- 4 PDF files can be previewed on the preview panel if Adobe Acrobat Reader is installed on your computer. You can check the option to preview PDF files if Adobe Acrobat Reader is available. Since the files have to be downloaded from the server to be previewed you can also limit the size of the document file to not automatically download the document for preview.

---

**NOTE:** With version 6.6, Documanage can now render PDF files natively, so this option is no longer necessary and should be turned off.

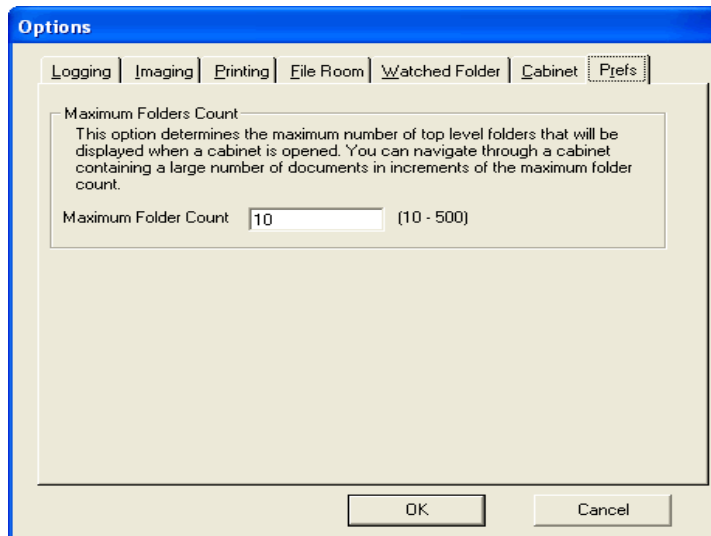
---

## Preferences

The Prefs tab allows users to set the number of top level folders that will be displayed when a cabinet is opened. (This value was formerly stored in the POffice.ini file but is now maintained by the Documanager Workstation).

### *To set the Preferences*

- 1 **Go to the File Room.**
- 2 **Go to View|Options.**  
The Options screen opens
- 3 **Go to the Prefs tab.**



- 4 **Enter the Maximum Folder Count.** The value can range from 10 to 500.
- 5 **Click OK.**

# Getting Started

Documanager Workstation Options

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# *Using Documanager Workstation*

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## **Introduction**

Documanager Workstation allows you to manage folders and documents within the Documanager. It offers browsing, query resolution, and integrated document display. Using Documanager Workstation you can add, edit and delete folders, check out a document; check in a document; cut, copy, and paste; import and print documents among other features.

## **In this chapter**

The information in this chapter will help you answer the following questions:

- How do I use the toolbar?
- How do I use folders?
- How can I manage documents?



# Working with the Tool Bars

The Documanage Tool Bars allow you to quickly access its features, which are discussed in detail in subsequent sections of this manual. Some of these features include: checking out a document, checking in a document, and importing and printing documents.









The Documanage Tool Bars are directly under the menu bar. The Tool Bar on the left is for folders. The Tool Bar on the right is for documents. Most features that can be accessed from the Tool Bar can also be accomplished by using menu commands. If you are unsure of a Tool Bar icon's function, simply position the cursor over the icon. Within a few seconds, its function will appear in a rectangular box near the icon.

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**NOTE:** To conserve screen space, you can choose to hide the Tool Bars and Status Bar by selecting the respective options on the Window menu.

---










## Tool Bar Buttons

Button	Function
	Expands all nodes. This is enabled for multilevel cabinets that contain folders.
	Displays the previous set of folders
	Displays the next set of folders
	Displays selected folder properties
	Adds a folder
	Starts a workflow project
	Shows selected folder contents
	Shows folder index information

## Using Documanage Workstation

### Working with the Tool Bars

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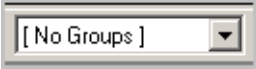
Button	Function
	Shows document image for annotating in place
	Checks out a document from Documanage Workstation
	Checks out a document to the current Cabinet.
	Undoes document check out
	Checks a document back in to Documanage
	Displays document history
	Shows who has the document checked out
	Shows the source cabinet for documents checked out to the personal cabinet
	Shows document properties

## Using Documanager Workstation

Working with the Tool Bars

Button	Function
	Opens document in Documanager Viewer or native application
	Imports a document into Documanager
	Exports a document from Documanager
	Launches a document in its native application so that it can be edited.
	Emails a copy of a document
	Prints a Documanager document

Lists

List	Function
	The Groups list groups the documents in the Cabinet tree by Category, Sub-Category, or Author. [No Groups], the default, indicates that documents are not grouped. The grouping that you select with this list is saved and asserted each time that you open the cabinet if the you save the cabinet definition as a Favorite.

# Working with Folders

Folders organize documents within each Documanage Cabinet. A folder represents specified LOB tables or views and can contain other folders or documents. A parent folder contains an item, such as a document or other folder.

Folders can be added to your Personal Cabinet or to each mapped cabinet. Depending on the permissions granted by the Documanage Administrator you can view, add, and edit folders, or only view folders to which you have permission. You can also delete folders if you have the authority and if the folder is empty.

## Using Documanage Workstation

### Working with Folders

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## Adding Folders

You can add folders to each cabinet if you have the proper authorities to do so.

### *To add folders*

- 1 **Go to the File Room.**
- 2 **Open the cabinet to which you want to add a folder.**
- 3 **Go to *Folder|Add Folder*.**

The *Folder Add* dialog box opens.

FieldName	Value
Lname	
Fname	
Polnum	
Phonenum	

---

**NOTE:** In multi-level cabinets, the fields of a child folder that match those of the parent are prefilled with the parent folder value. This helps ensure that foreign keys are set correctly.

---

- 4 **Enter the *Field Values* associated with the data types as defined in the database. All underlined fields are required. All bold fields are set to “Part of Key.” Values must match format established in the database.**

For example, if you are adding a folder to the Employee Cabinet, and the Employee ID is defined as Last Initial, First Initial, and 4 digit number, you would enter the employee ID as SA1234.

- 5 **Click *OK*.**

The folder is created.



## Editing and Viewing Folder Properties

Each folder in a cabinet has properties. These properties are the indexes of that folder. With the correct permissions from the Documanage Administrator, you can edit folder properties. These properties, which can differ from folder to folder, are actually indexes of that folder. For example, a car insurance company might have a folder containing information on a specific automaker, some of the properties you might see would include: auto maker, car type, model, year. The Documanage Administrator determines the properties you will see and which properties are editable. The Administrator can also determine the exact type of information that can be entered into a specific field as well as its length.

### *To edit or view folder properties*

- 1 **Go to the File Room.**
- 2 **Open the cabinet to which you want to view folder properties.**
- 3 **Select the folder whose properties you want to edit and right-click.**
- 4 **Select *Properties*.**

The *Folder Edit* screen opens.

Folder Edit

A-C71970F

FieldName	Value
Emp Id	A-C71970F
Fname	Aria
Minit	
Lname	Cruz
Job Id	10
Job Lvl	87
Pub Id	1389
Hire Date	1991-10-26 00:00:00

OK Cancel

- 5 **Edit the properties as necessary. Fields with a white background are editable. Fields with a colored background are read only.**
- 6 **Click *OK*.**

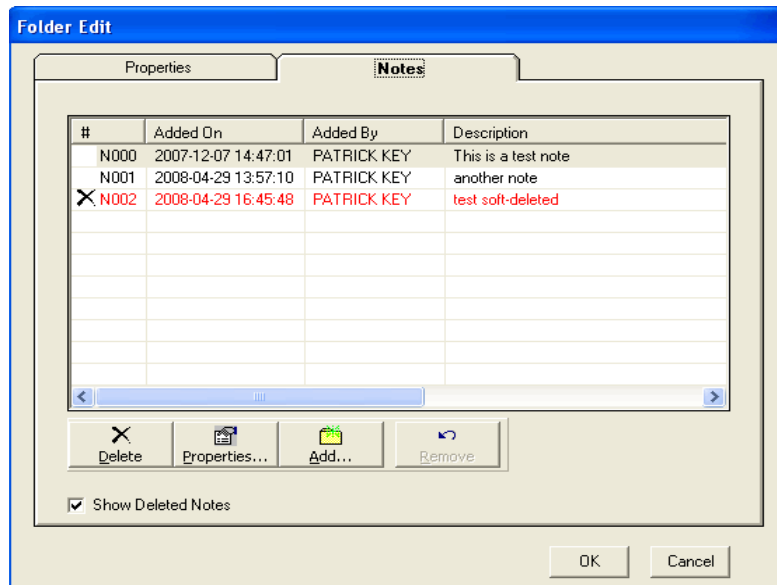
The folder properties are changed.

## Using Documanage Workstation

### Working with Folders

## Folder Notes

Documanage allows you to associate notes with a folder. Notes can be added to a folder at any time, and can be viewed whenever folder properties are viewed by switching to the Notes tab on the Folder Properties dialog.



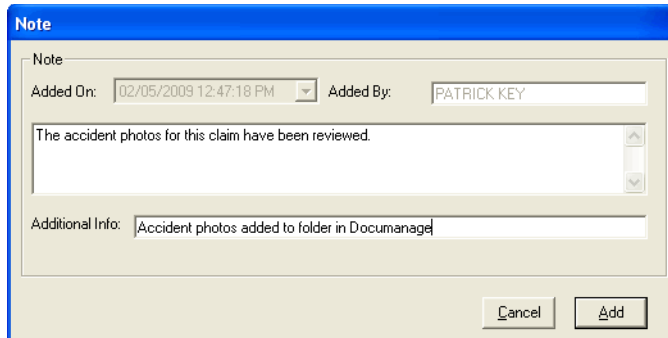
When a note is created Documanage will record the creation timestamp and the user who created the note. Once a note has been created it cannot be edited or deleted; however it can be marked for deletion ("soft-deleted"). Users can hide the notes marked for deletion via the checkbox on the Notes tab.

### *To add a note*

- 1 **Invoke the Folder Properties dialog.**

- 2 **Click the Add button.**

The Note Add dialog appears.



- 3 **Enter the note text (up to 1024 characters) and any additional information about the note.**

- 4 **Click the Save button.**

### *To "Soft-Delete" a note.*

- 1 **Invoke the folder properties dialog.**

- 2 **Select a Note from the list.**

- 3 **Click the Delete button.**

- 4 **The note is now marked for deletion (although notes are never actually deleted).**

- 5 **You can hide notes marked for deletion by unchecking the Show Deleted Notes checkbox on the Notes tab.**

## Using Documanage Workstation

### Working with Documents

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#### *To "Un-Delete" a note.*

- 1 **Invoke the folder properties dialog.**
- 2 **Select a deleted note from the list.**
- 3 **Click the Un-Delete button.**
- 4 **The note is no longer marked for deletion.**

## Working with Documents

Documanage assigns each document that it stores a unique set of properties, including the document's name, category, author, and version number. In addition to providing information about a document, document properties also serve as indexes that can be used to search for specific documents using the Cabinet Query feature.

You can display Document properties using the *Documanage Document Properties* dialog, which can be accessed through a menu option or by right-clicking the document name and selecting *Properties*. The dialog is divided into six tabs:

- ◆ *General*—The *General* tab accesses the document *Name*, *Type*, *Volume*, *File Type*, *Added By*, *Version Number*, *Category* and *Description*.
- ◆ *History*—The *History* tab displays the date and time the document was added to Documanage, the last edit date, checked out by and checked out for information, and due date.

- ◆ *Application*—The *Application* tab includes the document Sub-Category, Status, Date and Rendition Key. If your Administrator has defined text boxes or lists for a category, they will appear here as well.
- ◆ *Extended Properties*—You can use the *Extended Properties* tab to set up additional properties for each Category.
- ◆ *Content Management*—You can set the status of documents to *Approved*, *Released*, and/or *Obsolete* in the *Content Management* tab.
- ◆ *Retention*—Retention management keeps you from altering or deleting documents by putting automatic controls on how long documents will be retained and when they will be deleted. You use the *Retention* tab to determine the *Document Protection Status* of a document and to set its *Retention Review Date*.
- ◆ **General.** The *General* tab accesses the document *Name*, *Type*, *Volume*, *File Type*, *Added By*, *Version Number*, *Category* and *Description*.
  - ◆ *Name*: By default, the document name is the file name of the original imported document without its extension. The *Name* can be edited as the document is imported or while it is checked out. When a document is exported, its name is combined with its *File Type* to create the exported file name.
  - ◆ *Category*: You choose the category of a document from the Category list. Categories group documents according to the classification of their contents, such as an invoice or purchase order. If necessary, authorities can restrict the access of designated groups of users to only certain categories of documents.
  - ◆ *Volume*: The *Volume* is the name of the storage volume that contains the documents in a *Category*.
  - ◆ *File Type*: An extension for the document file name, like a DOS file extension. It indicates the format of the file imported into Documanager.

## Using Documanage Workstation

### Working with Documents

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- ◆ *Added By*: The name of the user who originally added the document. If you copy a document to Documanage, *AddedBy* remains the same for all versions of a document, even as new versions are checked in and old versions are archived.
- ◆ *Version Number*: The version number is the major or minor version of the document. You do not explicitly set the version number; instead, when you check in a major version of a document, the historical version retains its version information and the new or current version has its version incremented.
- ◆ *Description*: You enter data about the document into the *Description* field; Documanage does nothing to process this data except store and retrieve it.
- ◆ **History**. The History tab displays the date and time the document was added to Documanage, the last edit date, checked out by and checked out for information, and due date. Most of this information is unavailable for editing, since it is automatically entered and maintained by Documanage.
  - ◆ *Added On*: *Added On* contains the date and time the document was imported into Documanage; after the document is imported *AddedOn* never changes.
  - ◆ *Added From*: *Added From* indicates what client software initially imported the document.
  - ◆ *Last Edit By*: *Last Edit By* names the user who last modified the properties or content of the document. It is updated when changes are checked in.
  - ◆ *Last Edit On*: *Last Edit On* contains the date and time the properties or content of the document were last edited. This field is updated when changes are committed. The checked out copy of a document retains its previous *LastEditOn* until it is checked in.
  - ◆ *Checked Out By*: *Checked Out By* contains the user who checked out the document. For a document that is not checked out, this field will be blank.

- ◆ *Checked Out For:* The *Checked Out For* indicates the reason that a document is checked out. For a document that is not checked out, this field will be blank.
- ◆ *Due Date:* *Due Date:* is the time and date by which a checked out document should be checked back in. Documanage does not enforce this date; it is for information only. When you check out a document you specify the due date.
- ◆ **Application.** The *Application* tab includes the document Sub-Category, Status, Date and Rendition Key. If your Administrator has defined text boxes or lists for a category, they will appear here as well.
  - ◆ *Sub-Category:* Sub-categories are subsets of a document Categories. For example, if you have a document category called Contracts, sub-categories may include Sales Contracts, Marketing Contracts, and so on. Each Category can have as many sub-categories as necessary.
  - ◆ *Status:* The meaning of the *Status* field is defined by your Administrator, and may vary for different document categories.
  - ◆ *Date:* You enter a date and time into the *Date* field; its meaning is defined by your Administrator and does not depend on when the document was imported into Documanage. Documanage does not process *Date*; it only stores it and retrieves it. The *Date* is stored without time zone information, and does not receive any time zone adjustments, because Documanage cannot interpret what it means. *Date* may indicate the date on a piece of correspondence, or the date a statement was generated, for instance.
  - ◆ **Text Boxes**—Your Administrator can make up to two labeled text boxes appear in the Application tab. For example, for a Contract Category you could have a box labeled Company. You could enter Acme Inc. into this box whenever you imported a contract with Acme Inc., so that you could search for contracts with Acme Inc. later on. If the Administrator does not specify any text boxes, none will appear on the Applications tab.



## Using Documanage Workstation

### Working with Documents

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- ◆ **Lists**—Your Administrator can make up to two labeled lists appear in the Application tab. The lists can contain as many items as desired. The lists are used to classify the documents in the category when they are imported. You can search for documents using items from the lists that you have assigned to the documents. If the Administrator does not specify any lists, none will appear on the Applications tab.
- ◆ **Rendition Key**: The *RenditionKey* box contains information that a system performing document renditions—such as DocuFlex—uses to select one from among several documents in a rendition set. For instance, the key may include the color depth, resolution, and format information that can be used to select one graphic file from among several files in a rendition set. Documanage does not process the *RenditionKey*; it stores it for other applications.
- ◆ **Extended Properties**. Extended Properties are document properties that your Administrator can set up for each Category.
  - ◆ **Title**: This column contains the names of the extended document properties.
  - ◆ **Value**: This column contains the values of each of the extended document properties.
- ◆ **Content Management**. You can set the status of documents to *Approved*, *Released*, and/or *Obsolete* in the *Content Management* tab.

Click the following buttons to determine whether the document version is:

  - ◆ **Not Approved/Approved**: *Not Approved/Approved* indicates whether a document version has been approved. A document version that is approved cannot be deleted or changed; changes must be checked in as a new version of the document.
  - ◆ **Not Released/Released**: *Not Released/Released* indicates whether a document version has been released. A document version that is approved cannot be deleted or changed; changes must be checked in as a new version of the document.

- ◆ *Not Obsolete/Obsolete*: *Not Obsolete/Obsolete* indicates whether a document version has been designated as obsolete. *Not Obsolete/Obsolete* is not processed by Documange, but it can be used by other software.
- ◆ **Retention**. Retention Management keeps you from altering or deleting documents by putting automatic controls on how long documents will be retained and when they will be deleted. Use the Retention tab to determine the Document Protection Status of a document and to set its Retention Review Date.
  - ◆ *Document Protection Status*: *Document Protection Status* indicates the protection status of the document's category. Document versions can be protected for a set interval after they are imported into Documange, until a common review date, or forever.
  - ◆ *Retention Review Date*: Use the calendar in *Retention Review Date* to choose a date on which the document's retention status will be reviewed.
  - ◆ *Set Retention Date*: Click *Set Retention Date* to set the Retention Review Date you have chosen in the *Retention Review Date* calendar.

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**NOTE:** You can only change the retention review date of a document that is not checked out. The new review date must be later than any existing review date assigned to the document or its versions.

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### Bringing files in and out of the system

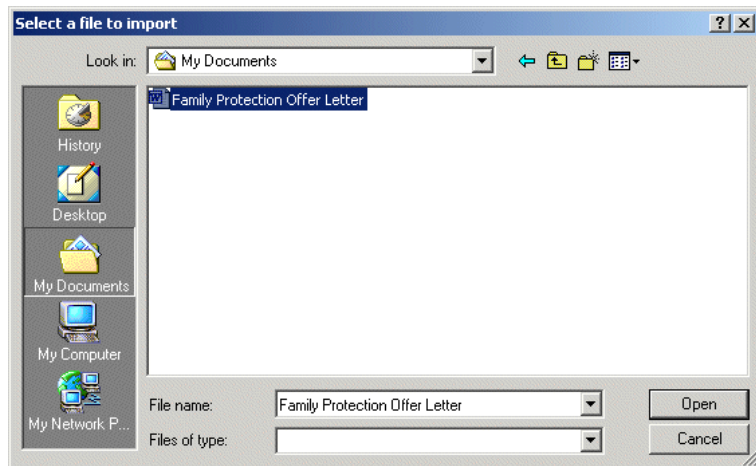
The following sections discuss Documanage's Import File and Export File options.

#### *To import a file*

This task is accomplished by using the Import File option from the Folder menu. Files will be imported to the currently open folder, although you can copy or move them to another folder, if desired.

- 1 **Go to the File Room.**
- 2 **Open the cabinet and select the folder to which you want to import the file.**
- 3 **Select the *Import File* option from the *Folder* menu.**

The *Select a file to import* dialog box opens.

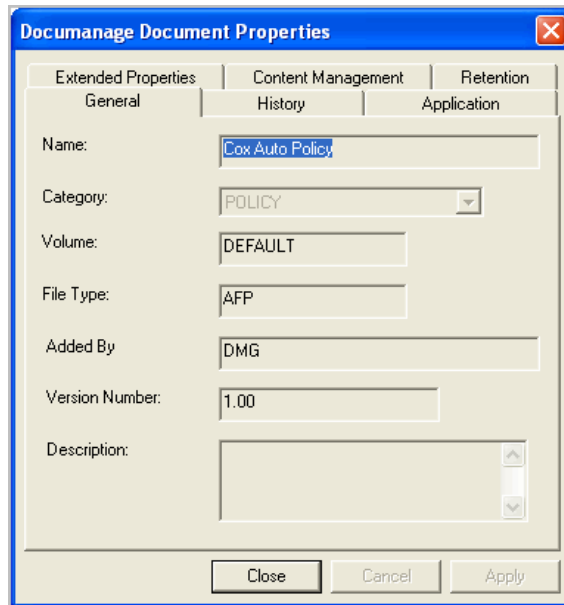


- 4 **Click the *Look in* drop-down list and select the drive and folder from which you want to import.**

5 **Select the file you want to import.**

6 **Click *Open*.**

The *Documanage Document Properties* dialog box appears.



**NOTE:** Many of the document fields are sticky so that they will be pre-filled with the last-used value.

7 **Type a new name for the imported document and make other changes on the *General* and *Application* tabs as necessary.**

8 **Enter the values for the extended document properties on the *Extended Properties* tab, if any exist.**

## Using Documanage Workstation

### Working with Documents

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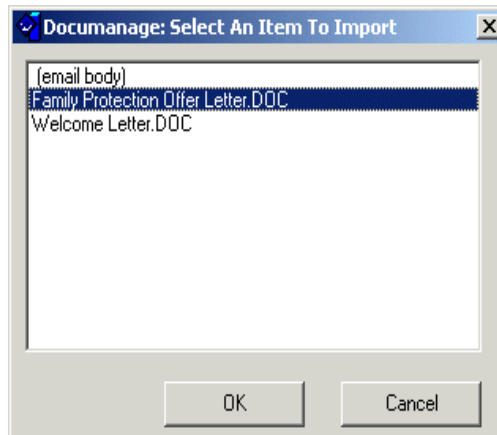
- 9 **Set the document status on the *Content Management* tab, as needed.**
- 10 **Click *OK*.**

### *To import a file from Microsoft Outlook*

You can import email and email attachments from Microsoft Outlook into Documanage. Check with your system administrator if you are unsure whether you have this option.

- 1 **Open Microsoft Outlook.**
- 2 **Select the email that you want to import into Documanage.**
- 3 **From the toolbar, click *Documanage*.**

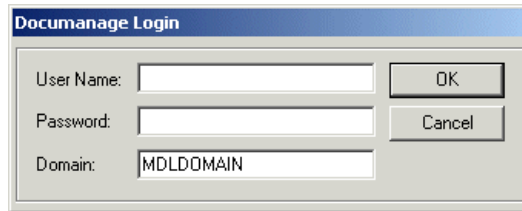
If the email has an attachment, the *Documanage: Select an Item to Import* dialog box opens. Go to step 4..



If the email does not contain an attachment the *Documanage Login* dialog box opens. Go to step 5.

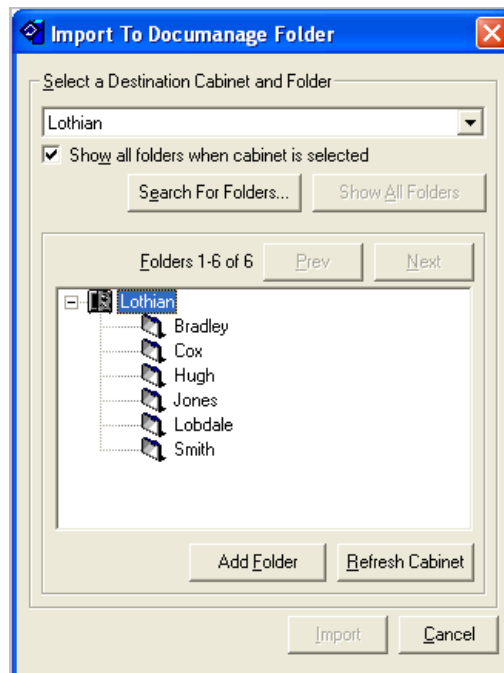
- 4 **Select the item you want to import into Documanage if the email you selected has an attachment.**

The *Documanage Login* dialog box opens.



- 5 **Login to Documanage.**

The *Import To Documanage Folder* dialog box appears.



## Using Documanage Workstation

### Working with Documents

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- 6 From the **Select a Destination Cabinet and Folder** list, select the cabinet into which you want to place the document
- 7 To display all the folders in the cabinet, go to step 8. To display selected folders in the cabinet, go to step 9.
- 8 Click **Show All Folders** (or select the **Show all folders when cabinet is selected** checkbox if it is not already selected). Go to step 15.
- 9 To display selected folders in the cabinet you have chosen click **Search For Folders**.

The *Search For Folders* dialog box opens. The contents of the Folder Properties tab differs depending on whether the Cabinet contains one level, or several levels.

If the Cabinet has one level, the *Folder Properties* tab appears as shown here.

The screenshot shows a dialog box titled "Search For Folders" with a blue header bar. Inside, there are two tabs: "Folder Properties" (selected) and "Edit SQL". The "Folder Properties" tab contains a table with three columns: "Field", "Operator", and "Value". The table has four rows of data. Below the table is a large empty rectangular area. At the bottom of the dialog, there are two checkboxes: "Overrides Edit SQL Screen" (checked) and "Case Sensitive" (checked). To the right of "Case Sensitive" is an unchecked checkbox labeled "Indicate Empty Folders". At the very bottom are four buttons: "OK", "Clear", "Clear All", and "Cancel".

Field	Operator	Value
Lname	Includes	
Fname	Includes	
Polnum	Includes	
Phonenum	Includes	

☒ Overrides Edit SQL Screen

☒ Case Sensitive    ☐ Indicate Empty Folders

OK    Clear    Clear All    Cancel



## Using Documanage Workstation

### Working with Documents

If the Cabinet has more than one level, the *Folder Properties* tab displays a *Level* tab for each level, as shown here. The *Clear* button clears all of the *Level* tabs.

**Search For Folders**

Folder Properties | Edit SQL

Level 1 | Level 2 | Level 3 | Level 4

Field	Operator	Value
Claim Number	Equals	
Vehicle Id	Equals	
Claim Remarks	Includes	
Policy Number	Equals	
Claim Approved	Includes	

Clear Level ☒ Overrides Edit SQL Screen

☒ Case Sensitive ☐ Indicate Empty Folders

OK Clear Clear All Cancel

- 10 **Select the tab that corresponds to the type of search you want to conduct.**

---

**NOTE:** The more information you enter describing a folder, the narrower your search.

---

Choose from the following options:

- ◆ Folder Properties—Queries Folder Properties
  - ◆ Edit SQL—Write an SQL statement to query *Folder Properties* and conduct the following kinds of searches:
    - ◆ Includes—Includes the words and phrases being queried.
    - ◆ Equals—Search matches the words and phrases being queried
    - ◆ Omits—Omits the words and phrases being queried.
    - ◆ Not Equal—Search does not equal the words and phrases being queried.
    - ◆ Begins With—Search starts with the words and phrases being queried.
- 11 **Select the *Case Sensitive* checkbox if you wish to have the case of your search results match the case of your search criteria.**
  - 12 **Select the *Indicate Empty Folders* checkbox if you want to see which resulting folders are empty.**
  - 13 **If you enter incorrect data, click *Clear* to erase that data.**
  - 14 **Click *OK*.**  
The filtered folders are displayed in the selected cabinet .
  - 15 **Select the *Folder* into which you would like to place the document and proceed to step 18. If you do not see a *Folder* into which you would like to place the document, click *Add Folder in the Import to Documanage Folder* dialog.**

## Using Documanage Workstation

### Working with Documents

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The *Folder Add* Dialog appears.

FieldName	Value
Lname	
Fname	
Polnum	
Phonenum	

- 16 **Enter values for the Field Names in the dialog. Click *OK*.**

A new folder appears in the selected cabinet.

- 17 **Select the new folder.**

- 18 **Click *Import*.**

The *Documanage Document Properties* dialog appears.

- 19 **Assign properties to the e-mail by filling in the boxes in the dialog. Click *OK*.**

---

**NOTE:** The date and time that the Workstation has imported the e-mail appear in the *Name* box of the *Documanage Document Properties* dialog. If you wish, you can enter the subject of the e-mail or some other descriptive title into the *Name* box.

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## Using Documanage Workstation

### Working with Documents

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- 20 Select the tab that corresponds to the type of search you want to conduct.**
- 

**NOTE:** The more information you enter describing a folder, the narrower your search.

---

Choose from the following options:

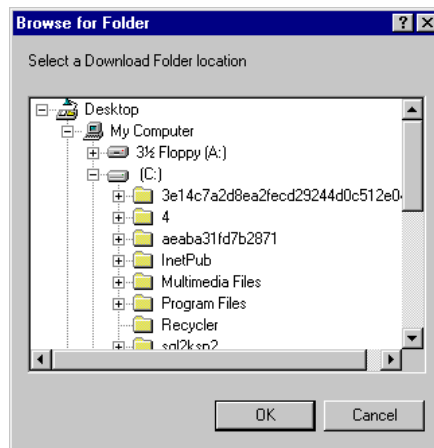
- ◆ Folder Properties—Queries Folder Properties
  - ◆ Edit SQL—Write an SQL statement to query *Folder Properties* and conduct the following kinds of searches:
    - ◆ Includes—Includes the words and phrases being queried.
    - ◆ Equals—Search matches the words and phrases being queried
    - ◆ Omits—Omits the words and phrases being queried.
    - ◆ Not Equal—Search does not equal the words and phrases being queried.
    - ◆ Begins With—Search starts with the words and phrases being queried.
- 21 Select the *Case Sensitive* checkbox if you wish to have the case of your search results match the case of your search criteria.**
- 22 Select the *Indicate Empty Folders* checkbox if you want to see which resulting folders are empty.**
- 23 If you enter incorrect data, click *Clear* to erase that data.**
- 24 Click *OK*.**
- The filtered folders are displayed in the selected cabinet.
- 25 Select the *Folder* into which you would like to place the document and proceed to step 16. If you do not see a *Folder* into which you would like to place the document, click *Add Folder* in the *Import to Documanage Folder* dialog.**

## To export a file

The Export File feature allows you to export a document to another location outside of the Documanage system. This task is accomplished by selecting the *Export File* option from the *Document* menu.

- 1 **Go to the File Room.**
- 2 **Open the cabinet and select the folder of the document you wish to export.**
- 3 **Select the document you want to export.**
- 4 **Select the *Export File* option from the *Document* menu.**

The *Browse for Folder* dialog box opens.



- 5 **Select the *Download Folder* location.**
- 6 **Select the folder to which you want to export.**
- 7 **Click *OK*.**

The document is exported.

## Using Documanage Workstation

### Working with Documents

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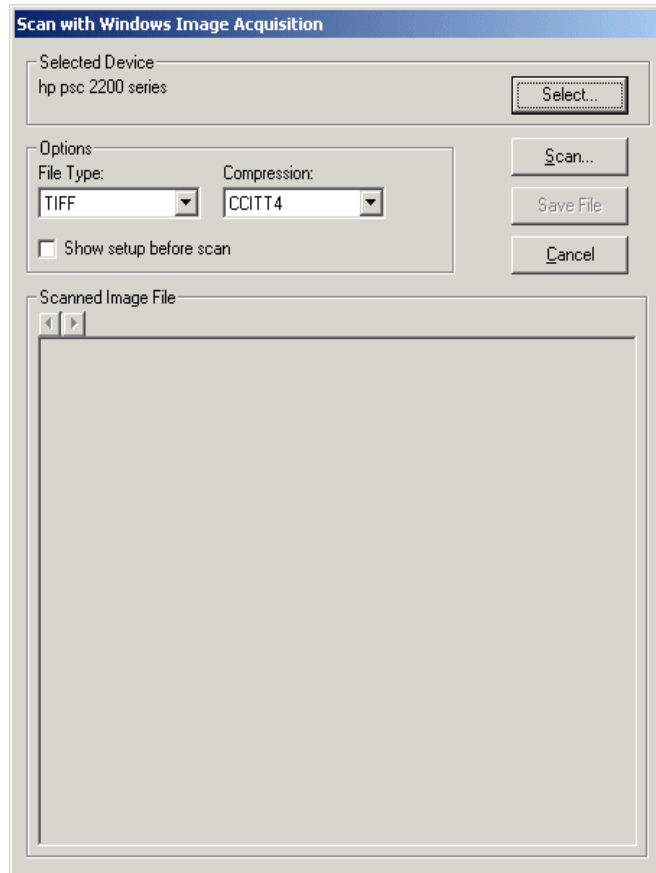
#### *To import a file by scanning*

The Documanage Workstation allows you to perform "ad hoc" scanning of documents to bring them into Documanage using the Scan option from the Document menu. You import Scanned documents into the current open folder, although you can copy or move them to another folder if you desire.

- 1 Go to the File Room.**
- 2 Open the cabinet and select the folder to which you want to import the scanned document.**
- 3 Select the Scan option from the Document menu.**

Different scan dialog boxes appear, depending on the operating system in use. Windows XP SP1 scans using Windows Image Acquisition (WIA). Other operating systems scan using Imaging For Windows (IFW). A message appears if these scanning libraries are unavailable.

Windows XP Windows Image Acquisition dialog box:



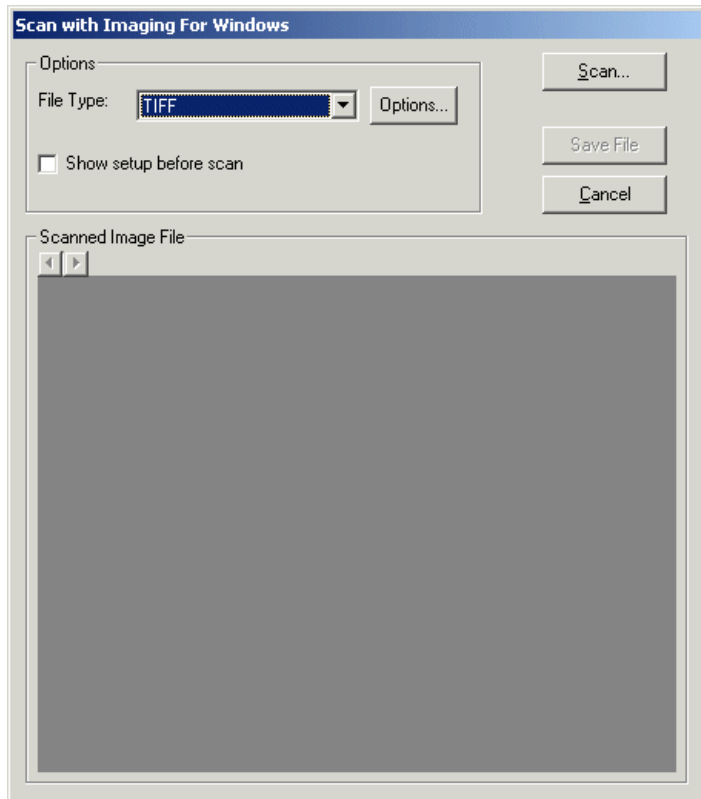


## Using Documanage Workstation

### Working with Documents

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Imaging For Windows (IFW) dialog box for other operating systems:



- 4 **Select the output file type and compression options for your scanned file.**

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**NOTE:** Depending upon your scanner, you may also be able to set other options. If your document contains more than one page, you must select the TIFF file type as this is the only file type that allows multiple pages in a single scanned file.

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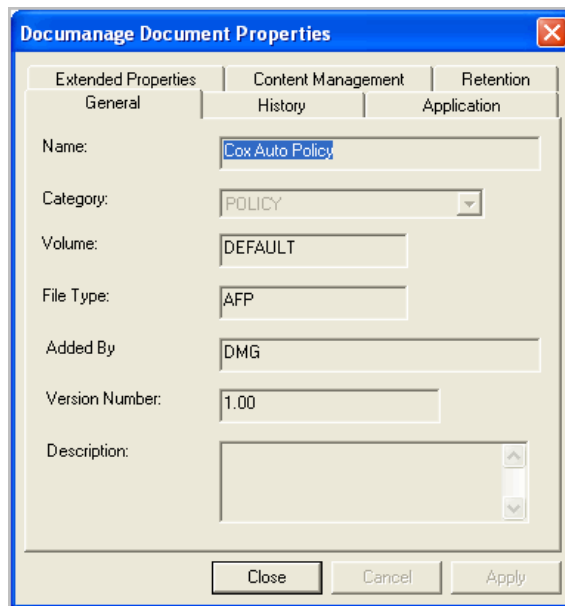
### 5 Click Scan.

The scanner scans the page.

**NOTE:** If you selected a TIFF file type, you will be prompted after each page to scan another page. When the scan operation is complete you will see an image of the scanned page. If the scanned file contains more than one page you will be able to navigate through the pages by clicking the arrows above the image.

### 6 Click **Save File** to accept the scanned file.

The *Documanage Document Properties* dialog box opens.



### 7 On the **General** and **Application** tabs, type a new name for the scanned document and make other changes as necessary.

## Using Documanage Workstation

### Working with Documents

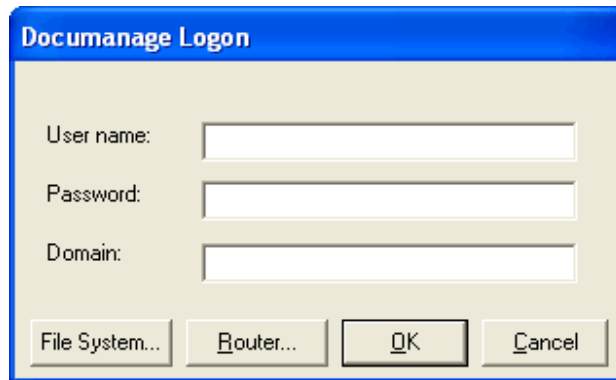
---

- 8 On the *Extended Properties* tab, enter the values for the extended document properties if any exist.
- 9 On the *Content Management* tab, set the document status as required.
- 10 Click *OK*.

### *Saving files to Documanage from other applications*

You can save files to Documanage from any application that conforms to the Open Document Management API (ODMA) standard. Such applications give an opportunity to access Documanage instead of the normal file system. The procedure given here shows dialog boxes that you see when using Microsoft Word.

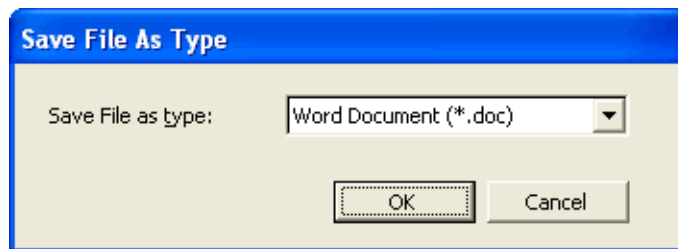
- 1 **From your application, click *File/Save As...*** .  
If you have not already logged onto Documanage, the Documanage Logon dialog box appears.



- ◆ *File System...* —Click *File System...* to access the save dialog that you normally use with your application.

- ◆ *Router...* —Click *Router* to access the Set Router Information dialog box. Refer to Step 6 of “To start and log in to Documanage Workstation.”
  - ◆ *Cancel*—Click *Cancel* to exit the dialog.
- 2 In the **Documanage Logon** dialog box, enter your **User name** and **Password**. Click **OK**.

The *Save File As Type* dialog box appears.

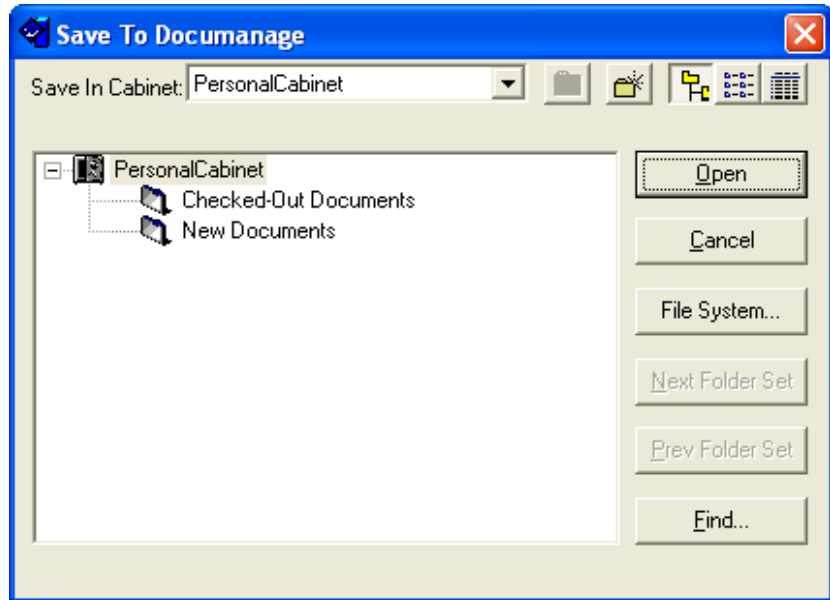


- 3 From the **Save File as type:** list, select the file format that you are going to use to save the file to Documanage. Click **OK**.

## Using Documanage Workstation

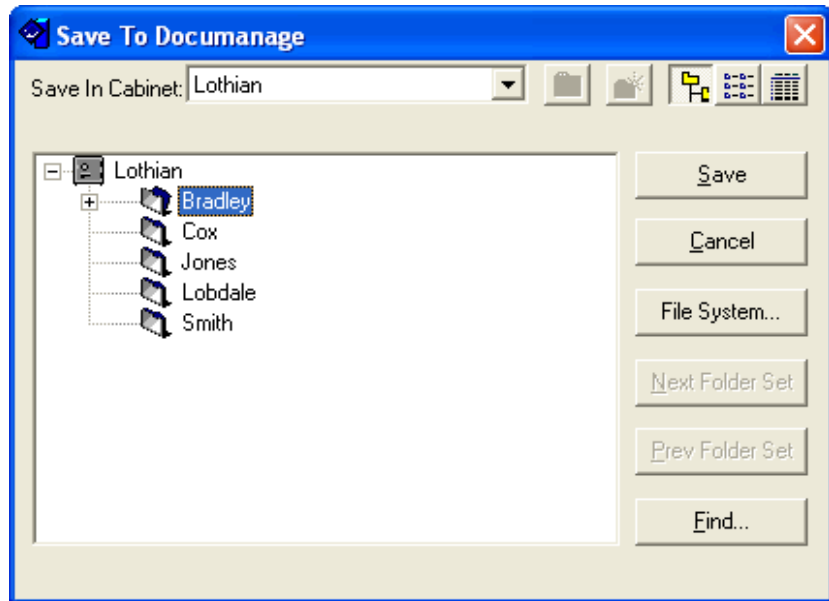
### Working with Documents

The *Save To Documanage* dialog box appears. The dialog shows a hierarchical (or "tree") view of the folders in multi-level cabinets.



- ◆ *File System*—Click *File System...* to access the save dialog that you normally use with your application.
  - ◆ *Cancel*—Click *Cancel* to exit the dialog.
  - ◆ *Next Folder Set*—Click *Next Folder Set* to go to the next set of folders.
  - ◆ *Prev Folder Set*—Click *Previous Folder Set* to go to the previous set of folders.
  - ◆ *Find...* —Click *Find* to search for folders. Refer to “To open a cabinet with a query” on page 9.
- 4 **From the *Save in Cabinet* list, select the Cabinet with the folder into which you want to save the file, or highlight a Cabinet and click *Open*. Select the file from the list of files under the Cabinet name.**

*Open changes to Save.*



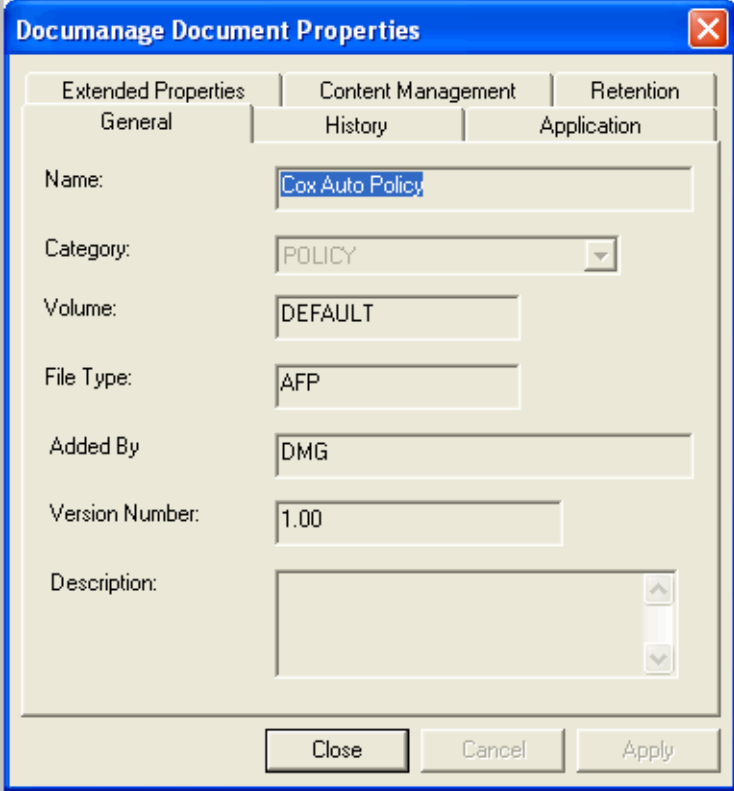
- 5 Click **Save**.

## Using Documanage Workstation

### Working with Documents

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The *Documanage Document Properties* dialog box appears.



The screenshot shows the 'Documanage Document Properties' dialog box. It has a blue title bar with a close button (X) in the top right corner. Below the title bar are three tabs: 'Extended Properties', 'Content Management', and 'Retention'. The 'Extended Properties' tab is selected, and it contains three sub-tabs: 'General', 'History', and 'Application'. The 'General' sub-tab is active, showing several fields: 'Name' (text box with 'Cox Auto Policy'), 'Category' (dropdown menu with 'POLICY'), 'Volume' (text box with 'DEFAULT'), 'File Type' (text box with 'AFP'), 'Added By' (text box with 'DMG'), 'Version Number' (text box with '1.00'), and 'Description' (text area). At the bottom of the dialog are three buttons: 'Close', 'Cancel', and 'Apply'.

---

**NOTE:** Many of the document fields are sticky so that they will be pre-filled with the last-used value.

---

- 6 **Type a new name for the imported document and make other changes on the *General* tab, as necessary.**
- 7 **Enter a date and time into the Added On field and make other changes on the *History* tab, as necessary.**
- 8 **Set the document retention review dates on the *Retention* tab, as needed.**
- 9 **Click *OK*.**  
Your application saves the file to the database associated with Documanage.

### ***Opening files in Documanage from other applications***

You can open files from Documanage in any application that conforms to the Open Document Management API (ODMA) standard. Such applications give an opportunity to access Documanage instead of the normal file system. The procedure given here shows dialog boxes that you see when using Microsoft Word.

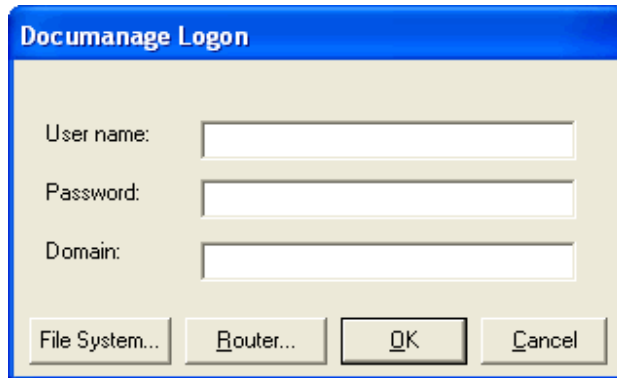
- 1 **From your application, click *File|Open...* .**  
If you have not already logged on to Documanage, the Documanage Logon dialog box appears.



## Using Documanage Workstation

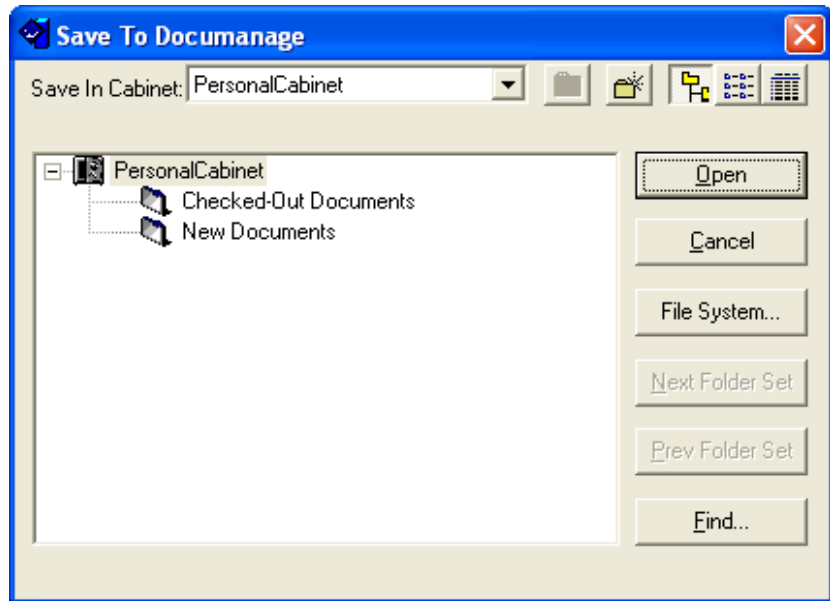
### Working with Documents

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- ◆ File System... —Click *File System...* to access the save dialog that you normally use with your application.
  - ◆ Router... —Click *Router* access the Set Router Information dialog box. Refer to Step 6 of “To start and log in to Documanage Workstation.”
  - ◆ Cancel—Click *Cancel* to exit the dialog.
- 2 In the **Documanage Logon** dialog box, enter your **User name** and **Password**. Click **OK**.

The *Save To Documanage* dialog box appears. The dialog shows a hierarchical (or "tree") view of the folders in multi-level cabinets.



- 3 From the *Save in Cabinet* list, select the Cabinet with the folder into which you want to save the file, or highlight a Cabinet and click **Open**. Select the folder and file from the list of files under the Cabinet name.

The file that you have selected opens in your application.

## Checking out a document

Checking out a document allows you to open and edit a document. There are a few ways to check out a document: *Check Out in Place* and *Check Out to Personal Cabinet*. *Check Out in Place* checks out the document from the current folder and lets you edit directly from that folder. This is beneficial if you need to make a few minor changes to only one document in one folder.

*Check Out to Personal Cabinet* checks out the document and moves it to the *Checked out Documents* folder in the *Personal Cabinet*. This method is good if you are editing multiple documents from multiple cabinets and folders. You can check all the documents out at once, work from a central location, and check them all back in when you are finished. This eliminates the need to jump around to multiple cabinets and folders to edit documents.

If you have documents checked out to the Personal Cabinet and forget the document source, you can use the *View Source* option from the *Document* menu in the Personal Cabinet. When selected, a separate cabinet opens showing you the cabinet and folder in which the document resides.

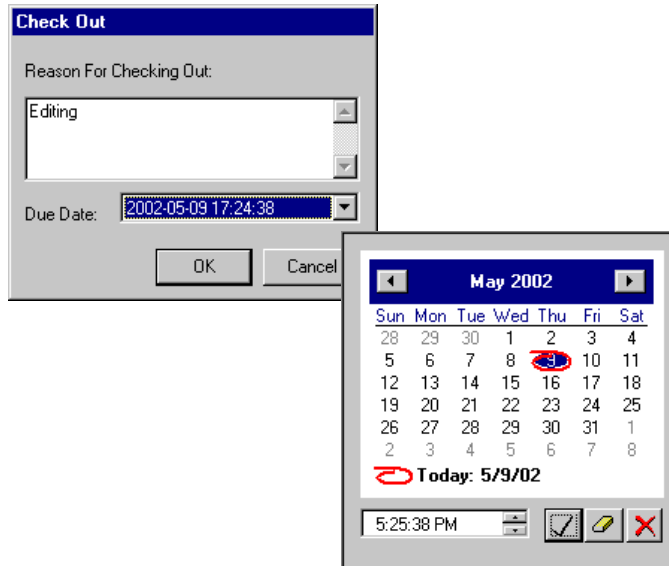
When a document is checked out, a lock displays to left of the document. The person who has the document checked out will see an open lock, all other users see a closed lock. The document is editable only by the person who checked out the document. All other users can view the document, but not edit.

### ***To check out a document in place***

- 1 Go to the File Room.**
- 2 Open the cabinet and folder where the document you want to check out resides.**
- 3 Select the document you want to check out.**

**4 Select the *Check Out in Place* option in the *Document* menu.**

The *Check Out* dialog box displays, with the current date and time appearing in the *Due Date* text box.



**5 Enter a reason for checking out the document.**

**6 Click *OK*.**

The document is checked out and can be opened and edited.

### ***To check out a document to the Personal Cabinet***

**1 Go to the File Room.**

**2 Open the cabinet and folder where the document you want to check out resides.**

**3 Select the document you want to check out.**

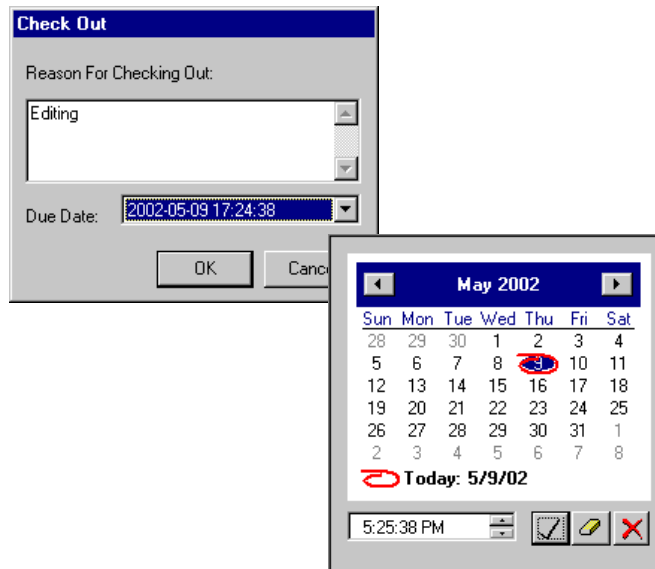
## Using Documanage Workstation

### Working with Documents

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- 4 **Select the *Check Out to Personal Cabinet* option in the *Document* menu.**

The *Check Out* dialog box displays, with the current date and time appearing in the *Due Date* text box.



- 5 **Enter a reason for checking out the document.**  
The document is checked out.
- 6 **Select the *Personal Cabinet* option from the *Cabinet* menu.**
- 7 **Double click the *Checked-Out Documents* folder.**  
The document you checked out is listed.
- 8 **Open and edit the copy in the Personal Cabinet.**

---

**NOTE:** If you inadvertently check out a document, you can “uncheck it out” by selecting the Undo Check Out option from the Document menu.

---

### Using Document Versioning

Documanage Workstation allows you to use document versioning to keep a history of your work. When a document is imported into the system it is considered version 1.0. You can check out, view, and edit this document. When you check the document back in, you are required to check it back as a certain version, which allows you to track the document history.

There are different types of version check in:

- ◆ **Same Version.** This overwrites the current version of the document with the changes you have made. The document version you checked out, is replaced. The document, as it was before your changes, **can not** be recovered.
- ◆ **Minor Version.** This increments the document version in small steps. For example, incrementing v1.0 to v1.1. This is good if you made only minor changes to the document.
- ◆ **Major Version.** This increments the version in large steps. For example, incrementing v1.0 to v2.0 or 1.3 to v2.0. This is useful if you made major changes to a document.

You can view a document's history and view the different versions of a document. However, you can check out and edit only the most recent version.

## Checking a document back in

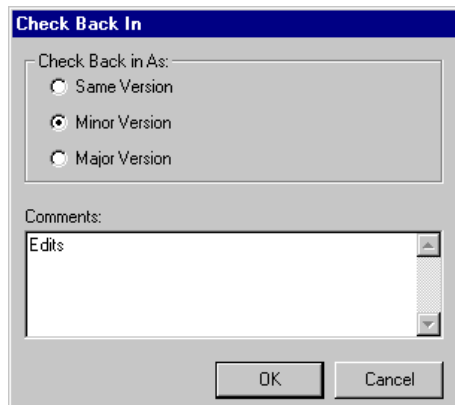
After you have checked out and edited a document, you should check the document back in. Once checked back in, the document is again available for use by anyone with access rights to it in Documanage.

When checking a document in, you must specify the version you are checking it in as.

### *To check a document in*

- 1 **Go to the document you want to check in.**
- 2 **Select *Check Back In* from the *Document* menu.**

The *Check Back In* dialog box opens.



- 3 **Select one of the *Check Back in As* radio buttons:**
  - ◆ Click *Same Version* if you do not want to show versioning of a document. Any changes that you make to the document after checking out will be permanent and the current version will be overwritten.



## Using Documanager Workstation

### Working with Documents

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- ◆ Click *Minor Version* if you want to show versioning of a document. Checking in as a minor version is best suited to those situations when only minor changes or annotations were made to the document. Minor versions increment as follows: Version 1.01, Version 1.02 and so on.
  - ◆ Click *Major Version* if major changes or annotations were made to the document. Major versions increment as follows: Version 1.0, Version 2.0, Version 3.0 and so on.
- 4 **Enter comments about what changes you made to the document if you selected *Minor Version* or *Major Version*.**
  - 5 **Select *OK*.**

The *OK* button only becomes active after you have entered comments.  
The document is checked back in.

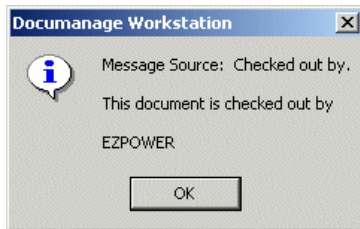
## Using Checked Out By

If a document has been checked out and you want to know which user has currently checked out that document, you can use the *Checked Out By* feature. Using this option displays a message box containing the user's name who has the document checked out. Note that this feature may only be used when a document is currently checked out; otherwise it is unavailable.

### *To use checked out by*

- 1 **Select the document that has been checked out.**
- 2 **Select the *Checked out by* option from the *Document* menu.**

A message box opens listing the user's name that checked out the document.



- 3 **Click *OK*.**

### Editing document properties

Each Documanage document has a unique set of properties. These properties include the document's name, category, author, and version number. In addition to providing information about a document, document properties also serve as indexes that can be used to search for specific documents using Documanage's Cabinet Query feature.

Document properties are displayed on the *Documanage Document Properties* dialog, which can be accessed through a menu option or by right-clicking the document name and selecting *Properties*. The minimum properties required for a document are a *Name* and a *File Type*. All other properties are optional.

#### *To edit document properties*

- 1 **Go to the File Room.**
- 2 **Open the cabinet and folder containing the document whose properties you want to edit.**
- 3 **Select and check out the document whose properties you want to edit.**
- 4 **Select the *Properties* option from the *Document* menu.**

The *Documange Document Properties* dialog box opens.

The screenshot shows the 'Documange Document Properties' dialog box. The 'General' tab is active, displaying fields for Name, Category, Volume, File Type, Added By, Version Number, and Description. The 'Name' field is highlighted with a blue selection bar. The 'Category' field is a dropdown menu showing 'POLICY'. The 'Volume' field shows 'DEFAULT', 'File Type' shows 'AFP', 'Added By' shows 'DMG', and 'Version Number' shows '1.00'. The 'Description' field is a text area. At the bottom are 'Close', 'Cancel', and 'Apply' buttons.

Fields with white backgrounds are editable. Fields with grey backgrounds are read only.

**5 Make the desired changes.**

**6 Click *OK* when finished.**

The changes to the Document Properties will be made when the document is checked back in.

### Moving a document

Documanage provides a quick and efficient way to move documents throughout Documanage. Using the *Cut* and *Paste* features, or “drag and drop,” you can move a document from one Documanage folder to another. You cannot cut portions of a document. You can only cut the entire document itself. You can also drag and drop a document from your system into Documanage.

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**NOTE:** Documents cannot be cut and moved outside of Documanage using this method.

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#### *To move a document within Documanage*

- 1 **Go to the File Room.**
- 2 **Open the cabinet and folder containing the document you want to cut and move.**
- 3 **Select the document you want to cut and move.**
  - ◆ “Drag and drop” the document to the folder where you want a copy of it to reside

OR

  - ◆ Select the *Cut* option from the *Document* menu. The document name is highlighted and the icon to the document’s left is grayed.
- 4 **Select the location to which you want to move the document.**

Any documents contained within the folder display in the right pane.
- 5 **Select the *Paste* option from the *Document* menu.**

The document is moved to the new location.

**6 Select the *Refresh* option from the *Cabinet* menu.**

The Documanage screen is refreshed and any elements that have changed appear on the screen.

---

**NOTE:** Refresh allows Documanage to show all of the changes that have been made to cabinets, folders, and documents since you last opened any of these elements. Refresh should be done to ensure that all Documanage users have the most up-to-date information in the system. Refresh should especially be performed after cutting, copying, and pasting documents.

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### ***To move a document from your system into Documanage***

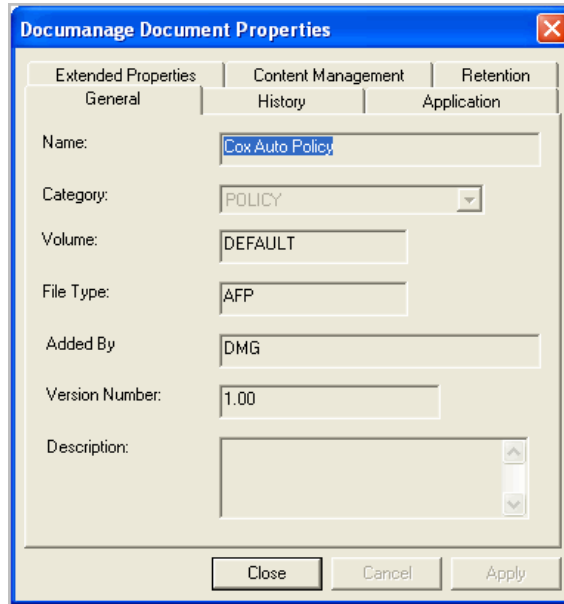
- 1 Locate the file you want to move from your system into Documanage.**
- 2 Open the Documanage Cabinet to which you wish to move the document.**
- 3 Drag and drop the document from your system into the folder you wish it to reside.**

## Using Documanage Workstation

### Working with Documents

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The *Documanage Document Properties* screen opens.



The screenshot shows the 'Documanage Document Properties' dialog box. It has a blue title bar with a close button. The dialog is divided into three main tabs: 'Extended Properties', 'Content Management', and 'Retention'. The 'Extended Properties' tab is active and contains a sub-tab 'General'. Other sub-tabs are 'History' and 'Application'. The 'General' sub-tab has the following fields: 'Name' (text box with 'Cox Auto Policy'), 'Category' (dropdown menu with 'POLICY'), 'Volume' (text box with 'DEFAULT'), 'File Type' (text box with 'AFP'), 'Added By' (text box with 'DMG'), 'Version Number' (text box with '1.00'), and 'Description' (text area). At the bottom are 'Close', 'Cancel', and 'Apply' buttons.

- 4 **Type a name for the imported document and make other changes on the other tabs as necessary.**

The document is moved into the folder.

- 5 **Select the *Refresh* option from the *Cabinet* menu.**

The Documanage screen is refreshed and any elements that have changed appear on the screen.

## Replace Document File

It is possible to replace the file associated with a document. For instance, you may have sent a copy of the document file to an associate for review and you now want to replace the document file with the reviewed copy. In order to replace the document file the document must be checked out by you.

### *To Replace a document file*

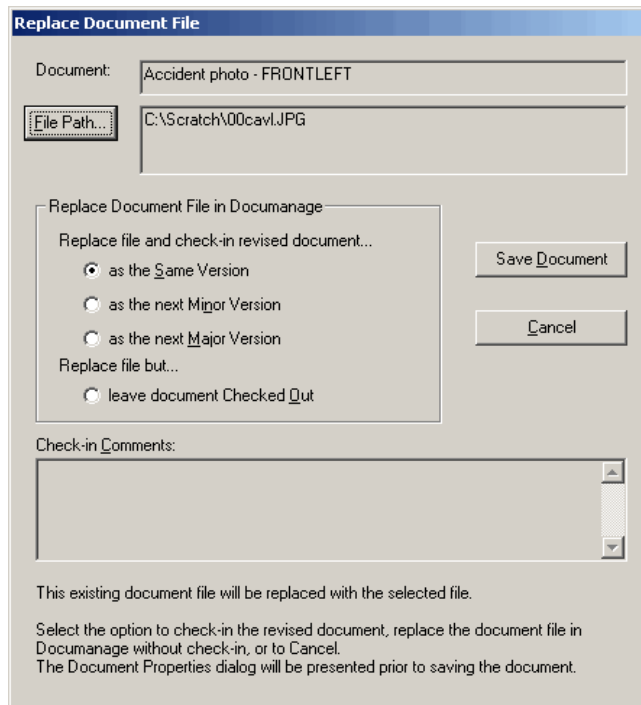
- 1 **Go to the File Room.**
- 2 **Open the cabinet and folder where the document you want to replace resides.**
- 3 **Select the document you want to replace and check it out if it is not already checked out.**
- 4 **Select the *Replace document file...* option in the Document menu.**  
The Replace Document File dialog box displays



## Using Documange Workstation

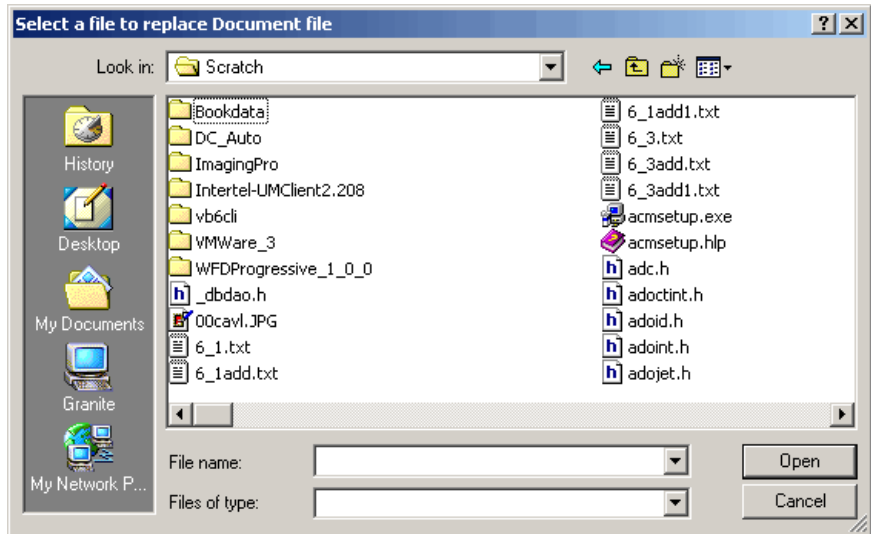
### Working with Documents

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#### 5 Click ***File Path...***

The Select File dialog appears.



**6 Select the file you want to use to replace the current document file.**

**7 Click *Open*.**

The Save Document button on the Replace Document File dialog is now enabled.

**NOTE:** You can replace the document file and leave the document checked out or you can check in the document as you replace the document file.

**8 Select the appropriate checkin option and enter comments if necessary.**

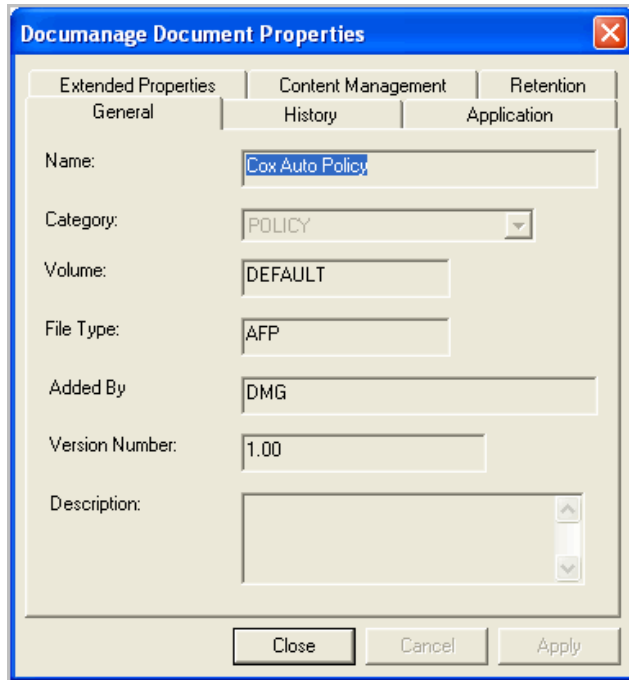
**9 Click the Save Document button.**

## Using Documanage Workstation

### Working with Documents

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The *Document Properties* dialog appears.



**10 Make any changes to the document properties that are necessary.**

**11 Click *OK*.**

The file associated with the document is now replaced with the file you selected.

---

**NOTE:** If you set the checkin options, the document is now checked in as well. If you elected to keep the document checked out, the file has been replaced but the document is still checked out.

---

### Edit Document File

It is possible to edit the file associated with a document. The document file is copied from the Documanage server to your computer and it is launched in the application associated with the file's extension on your computer. You can then work on the file in the creating application and save the changes back into Documanage. You can save the changes as a new major or minor version, or replace the existing version with the edited file. You can also replace the file with the edited file and leave the document checked out. In order to edit the document file the document must be checked out by you.

#### *To edit a document file*

- 1 **Go to the File Room.**
- 2 **Open the cabinet and folder where the document you want to edit resides.**
- 3 **Select the document you want to edit and check it out if it is not already checked out.**
- 4 **Select *Edit Document...* from the *Document* menu.**

The document file is copied to your computer and it is launched in the application associated with the file's extension. The *Edit Document* dialog box displays

## Using Documanager Workstation

### Working with Documents

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**Edit Document: Amergen - Family Protection Offer Letter**

Document: Family Protection Offer Letter

File Path: C:\DOCUME~1\PATRIC~1\GRA\LOCALS~1\Temp\ezp13.DOC

**Save Document to Documanager**

Save changes and check-in revised document...

- ☐ as the Same Version
- ☐ as the next Minor Version
- ☐ as the next Major Version

Save changes on server but...

- ☐ leave document Checked Out

**Save Document**

**Cancel Edit**

**Comments:**

This document is currently being edited in an external application.  
When the editing application is closed, the other options will become available.

All of the options on this dialog are unavailable except for the Cancel Edit button. The options become available when you quit the application that was launched with the file, or if you save the file from within the application.

**NOTE:** Earlier versions of Documange Workstation would only allow you to edit a single document file. You could not do any other operations in the Workstation until you had finished editing the document. *With version 6.6 of the Workstation you can now edit multiple document files and do other Workstation operations while the document edit sessions are in effect* (such as looking up document or folder information, etc). An icon will appear in the FileRoom tree under the Document Edit Sessions heading for each document edit session you have open. You can click on those icons in the FileRoom to switch between the edit session windows. If you shut down the Workstation while any document edit sessions are still active, you will be asked if you want to save the edited file to Documange or discard the edited file. In either case, the document will remain checked-out, but you can check it back in the next time you start the Workstation.

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- 5 **Edit the file in the creating application, then save your changes and quit the creating application.**

## Using Documanager Workstation

### Working with Documents

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The Edit Document dialog options are now enabled.

**Edit Document: Amergen - Family Protection Offer Letter**

Document: Family Protection Offer Letter

File Path: C:\DOCUME~1\PATRIC~1\GRA\LOCALS~1\Temp\ezp13.DOC

Save Document to Documanager

Save changes and check-in revised document...

☐ as the Same Version

☒ as the next Minor Version

☐ as the next Major Version

Save changes on server but...

☐ leave document Checked Out

Save Document

Discard Edited File

Comments:

This document was edited in an external application.  
Select the option to checkin the edited document, save the edited file into  
Documanager without checkin in, or to discard your changes.

---

**NOTE:** You can save the edited file as a new major or minor version (depending upon you user authorities) or you can replace the current version with the edited file. You can also replace the file with the edited copy but leave the document checked out.

---

**6 Click *Save Document*.**

The file associated with the document is now replaced with the file you edited. If you set the checkin options, the document is now checked in as well. If you elected to keep the document checked out, the file has been replaced but the document is still checked out.



## Copying a document

You can copy documents from one location in Documanage Workstation to another using the *Copy* and *Paste* features. You cannot copy portions of a document. You can only the entire document.

Documents cannot be copied out of the Documanage system, nor can documents that are cut or copied in non-Documanage applications be pasted into Documanage.

### *To copy a document*

- 1 **Go to the File Room.**
- 2 **Open the cabinet and folder containing the document you want to copy.**
- 3 **Select the document you want to copy.**
- 4 **Select the *Copy* option from the *Document* menu.**
- 5 **Select the location to which you want to copy the document.**
- 6 **Select the *Paste* option from the *Document* menu.**

The document is copied to the new location.

**NOTE:** You can also paste a shortcut to the document select the *Paste Shortcut* option from the *Document* menu. A shortcut is created to the document's new location. With Paste Shortcut, you are not inserting a copy into another location but are instead pointing to the original document's location. This assists you in saving storage space on your network. After pasting the shortcut you can view the shortcut properties by selecting the shortcut, right clicking, and selecting *Shortcut Properties*. The *Source Cabinet*, *Source Table*, *Source Document*, and *Folder Data* display.

---

**7 Select the *Refresh* option from the *Cabinet* menu.**

The Documanage screen is refreshed and any elements that have changed appear on the screen.

---

**NOTE:** Refresh allows Documanage to show all of the changes that have been made to Cabinets, folders, and documents since you last opened any of these elements. Refresh should be done to ensure that all Documanage users have the most up-to-date information in the system. Refresh should especially be performed after cutting, copying, and pasting documents.

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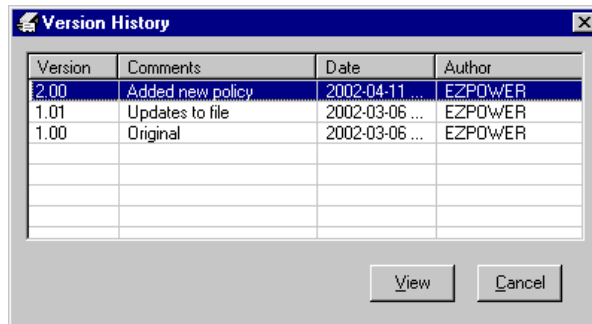
### Displaying a document's history

Documanage offers a Document History feature to allow you to view the number of existing versions of a document (the result of Checking Out/Checking Back In), as well as any comments previous users may have made in conjunction with those versions.

#### *To display a document's history*

- 1 **Go to the File Room.**
- 2 **Open the cabinet and folder containing the document whose history you want to view.**
- 3 **Select the desired document on which you want to get a history.**
- 4 **Select the *Document History* option from the *Document* menu.**

The Version History dialog box displays the document's history.



- 5 **Select a document version and click *View* if you wish to view a particular version of the document.**
- 6 **Close the *Document History* dialog box by clicking the *Cancel*.**

## Document Renditions

You use Renditions to group together files with the same content but different formats and so that you can use them in several applications, each of which refers to one file in the set. For instance, you can store the same image in a monochrome (or grayscale), a four-color and a TrueColor file. If you are using a page-layout application you can display the TrueColor file on your workstation screen and save a reference to it in your working document file. You can use the monochrome file to print the image on a black and white printer, or you can incorporate the four-color file into a pre-print color-separation file.

### Rendition Keys

Documanage stores a rendition key with each file's properties. This key contains a string that labels the files so that your applications can distinguish between their formats. You create the text for the rendition keys so that it can be used by your applications; it is not used by Documanage. “To edit document properties” on page 104 discusses how you can add a rendition key to a document's properties.

### Renditions Command

Selecting a document makes the *Renditions...* command on the Document menu available. When you click *Renditions...* the Edit Renditions dialog appears. You use *Edit Rendition Set* dialog to view Documents—which can be Documents or Historical Document Versions—in a rendition set, as well as add and remove Documents from a Rendition set.

## Using Documanage Workstation

### Working with Documents

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**NOTE:** To make the *Renditions...* command available on your workstation, your administrator must give your user group permission to allow rendition editing. He must also give your group authorities to perform renditions on specific database tables.

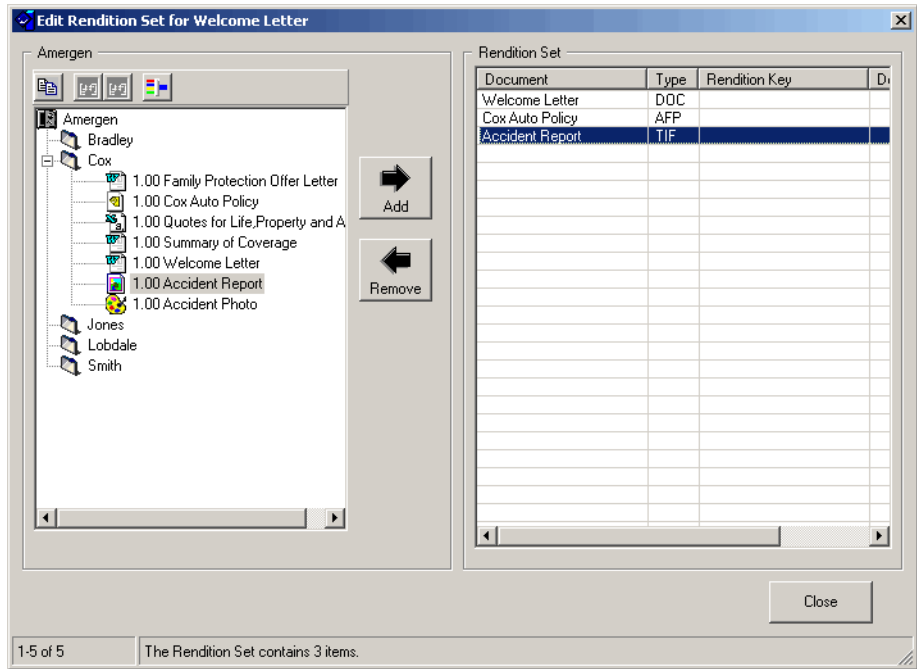
---

### *Viewing the renditions set for a document*

To review the renditions set for a document:

- 1 **Access the *Renditions...* command in the Document menu for the Cabinet window, the Pending Task Queue window, or the Active Project window.**
- 2 **Click *Renditions...* .**

The *Edit Rendition Set for...* dialog appears.



The title of the *Edit Rendition Set for...* dialog title ends with the name of the originating document. The left area of the dialog contains a tree view of the first level folders in the cabinet. Clicking on a node in the tree populates the node with any folders or documents in the first level folder. Clicking on a document node populates the node with any historical versions of the document. The version number of a document precedes its label.

**NOTE:** When bring up the *Edit Rendition Set for...* dialog from a Workflow queue, the cabinet tree only contains the items that exist in the Task Queue of the originating document, and the Query By Example button is unavailable.

## Using Documanage Workstation

### Working with Documents

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The *Rendition Set* area of the *Edit Rendition Set for...* dialog lists the members of the rendition set for the originating document—the document from which the Renditions dialog is invoked. The list only contains the originating document if you have not made it part of a rendition set.

- ◆ Click *Close* to close the *Edit Rendition Set* dialog.
- ◆ You can reorder and resize the columns in the Renditions Set area with the cursor. The columns remain as you left them after you have closed and reopened the dialog.

### *Adding documents to a Rendition Set*

- 1 **Select the documents you want to add from the cabinet tree.**
- 2 **Click *Add* or right-click the document and then click *Add Item to Rendition Set*.**

The item appears in the rendition set list.

---

**NOTE:** *Add Item to Rendition Set...* is unavailable if the item is already in a rendition set and the originating item is in a rendition set, if the item is the checked out copy of a checked out document, or the item is a document shortcut.

---

### *Removing and re-adding documents from a renditions set*

- 1 **Select the document you want to remove from the rendition set list and then click *Remove*, or right-click the document and then click *Remove Item from Rendition Set*.**

A message asking whether you wish to remove the selected document appears.

- 2 **Click *Yes*.**

The document is removed from the list and the list is refreshed.

The dialog highlights the document in the cabinet tree if it is available in the current cabinet result set in the left area of the dialog. This makes it easy to find the document and add it back to the set if you have removed it by mistake.

If the document you have removed is not displayed in the current set of folders, a message appears telling you that you must go to another cabinet result set.

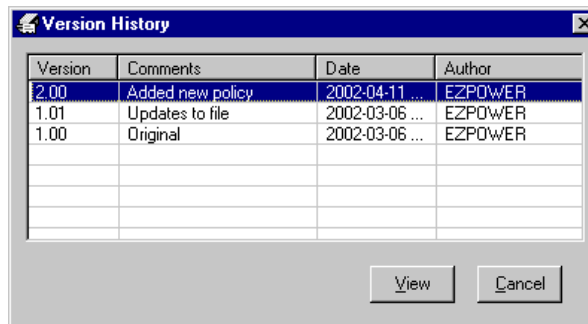
- 3 To find an document that is not in the current result set, navigate through the cabinet's folder list by clicking *Get Previous Set of Folders* and *Get Next Set of Folders* on the cabinet toolbar or use the *Query by Example* dialog to find the document. Click *Set Cabinet Query* in the cabinet toolbar to open the dialog.

### *To work with the Rendition set for an historical document version*

To work with the Rendition set for an historical document version, proceed as follows:

- 1 Open the *Document* menu.
- 2 Click *Document Version History...*

The *Document Version History* dialog appears.





## Using Documanager Workstation

### Working with Documents

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- 3 Right click on the document that you want to add to the Rendition set. Click *Renditions...* .**
- 

**NOTE:** The *Renditions...* command is available only if your administrative group has the authority to edit renditions.

---

- 4 Use the *Edit Rendition Set for ...* dialog to add a version of the document to the rendition set. Refer to “Adding documents to a Rendition Set” on page 124.**

## Emailing a document

There may be times when you want to send a copy of a Documanager document to someone outside of the Documanager system. You can do this by emailing the document. When you email a document, only a copy of the document is mailed - the original document remains in the folder.

When the person to whom you have emailed the document has completed working with it, they can send it back to you. You can then import the edited version back into Documanager and delete the unedited version.

### *To email a document*

- 1 Go to the File Room.**
- 2 Open the cabinet and folder containing the document you want to email.**
- 3 Select the document(s).**
- 4 Select Mail Document(s).**
- 5 Follow the directions of your email program. A copy of the document is emailed.**

# Using Documanager Workstation

Working with Documents

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# *Using Documanager Viewer and Annotating Documents*

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## Introduction

You can display documents quickly and easily using the Documanager Viewer. Once opened, document pages can be manipulated, annotated, and printed.

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**NOTE:** Keep in mind that Documanager Viewer is not a content editor. The original document itself is never altered, only annotations can be altered. If annotations are altered or added, you are asked if you want to save the annotations upon exiting Documanager Viewer.

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## In this chapter

The information in this chapter will help you answer the following questions:

- What is Document Resource and Index information?
- How do I scale a page?
- What kinds of annotations can I use?

## Viewing a document

You can view all Documanage Workstation documents to which you have access. The Documanage Administrator can specify a list of file extensions that will open the document in its creating application even if Documanage can view it natively. Most file types can be viewed natively in the Documanage Viewer. If Documanage encounters a file extension that it can not view, it will ask if you want to open the document in its creating application..

### *To view a document*

- 1 Go to the File Room.**
- 2 Open the cabinet and folder where the document resides.**
- 3 Check out the document if necessary.**  
(It is not necessary to check out a document in order to view it).
- 4 Double click the document.**  
The document opens. You can now view the document as necessary.

## Document Resource and Index Information

The Resource Information screen displays printer resources, and the Document Index Information screen displays index information that may be embedded in the printstream document. The Resource Information and Index Information screens only apply to AFP and Metacode file types.

### Document Resource Information

The Resource Information screen displays available and unavailable printer resources for the open AFP and Metacode print stream. After opening a document in Documanage Viewer, you can access this screen by going to *Image|Resource Information*. The screen can also be accessed from the *Fetch Resources* dialog box that is displayed when you open an AFP or Metacode print stream that contains missing printer resources.

The Resource Information screen lists found resources with a green check mark and missing resources with a red x. If the displayed document does not contain resources (such as a TIFF) None is displayed.

You can change the sort order of the resources by clicking the column headings.

### Document Index Information

The Document Index Information screen is accessed from *Image|Index Information* once you open a document in Documanage Viewer.

AFP and Metacode files may contain embedded index information. Print stream files processed by AccessCommander/NT v1.5.2 or greater and Docusave Server/NT may also contain an embedded “data map.” If a print stream file contains index information and an associated data map, Documanage Workstation can present this information in the *Document Index Information* screen. Files that do not contain the necessary information will still post the dialog with a `None Available` notice.

## Scaling a page

The commands on the Zoom menu (and/or the Scale drop-down menu on the Tool Bar) allow you to select the image scale for the page displayed in the main window. You can also select the image scale by clicking on the image and holding down CTRL+SHIFT to scale it down and CTRL+ALT to scale it up. This is useful, for example, when text is too small to read at a particular scale or when you're interested in only part of the information on the page. You can zoom to a certain percent of the image, fit the image to the window, or display the actual size of the image.

Depending on the size of your monitor and the main window, only a portion of the page may fit in the main window. You can use the grabber hand or scroll bars to position the desired part of the page in the window. With a large enough monitor the entire image displays.

## Zoom

The values listed on the Zoom menu show the relationship between the resolution at which the page was created and the screen resolution of your monitor. When you select 100%, each pixel of the image is displayed as one pixel on the monitor. Since most monitors have lower resolutions than the resolutions at which pages are scanned (monitors are typically under 90 dots per inch (DPI) while images typically run between 200 and 400 DPI), not all pixels of a scanned image fit on a PC monitor. The image appears much larger—only a part of it fits on the screen.

When you select a lower value, such as 50%, the Documanage Viewer Window scales the displayed image so 4 pixels of the image are displayed as one pixel on the monitor. At 25%, 8 pixels of the image are displayed as one pixel on the monitor, and so forth. Text and image appear smaller and more of the image fits on the screen.

Some images will display differently depending on image format. AFP documents are always rendered with a DPI of 240 while those from MET files use a DPI of 300. Since they are different, the same scaling factor results in different sized images. If you compare similar documents at the same scaling factor, such as 100%, created from those two file formats, they will look different. With the lower resolution, the AFP document will appear somewhat smaller on the screen than the like Metacode document at the same scaling factor.

### Fit to Window

*Fit to Width* and *Fit to Height* scale the image so it matches the window size in either width or height respectively.

### Actual Size

The *Actual size* command scales the image as closely as possible to the point where one inch of the original image appears as one inch on the screen. The exact scale factor used is dependent on the combination of the document resolution and the current display resolution settings.

See “Printing a Document” on page 133 for information about actual size printing.

## Printing a Document

You can print the page currently displayed in the Documanage Viewer Window, the entire document, any portion of the document, or document



## Using Documanage Viewer and Annotating Documents

### Printing a Document

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annotations. You can toggle the *Print displayed annotations* option on and off.

There are also several print options on the *Print Setup Options* screen. These include *Pixel to pixel*, *Actual Size*, and *Fit to page*.

### Pixel to Pixel

With *Pixel to pixel* printing, each pixel of the image matches a pixel on the printed page and is based on a pixel ratio of the image and the printer. For example:

- ◆ 600 dpi image & 600 dpi printer = same size printed image
- ◆ 300 dpi image & 600 dpi printer = width and height of printed image reduced to 50%
- ◆ 200 dpi image & 600 dpi printer = width and height of printed image reduced to 33%

### Actual Size

*Actual Size* printing scales an image so that one inch of the image equals one inch on the printed page.

Most images that are meant to span the entire paper size when printed are printed on All Points Addressable (APA) printers which allow printing to the edge of the page.

Non-APA printers have non-printable areas and are not as precise depending on printer settings. When printing an image using the *Actual Size* option on a non-APA printer, you may encounter cut off or misaligned images. For example, if you are using actual size printing on a non-APA printer and the image is larger than the printable area, parts of the image will be cut off.

See “Appendix B: Actual Size Printing” on page 173 for more information about actual size printing. See “Scaling a page” on page 132 for information about actual size scaling.

### Fit to Page

*Fit to page* scales each page to fit within the printable area.

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**NOTE:** If you have altered the document annotations, a dialog displays prompting you to save your changes before continuing. Click *Yes* to continue the print operation with annotation changes saved, *No* to continue the print operation without saving the annotation changes, or *Cancel* to end the print operation.

---

### *To print documents from a cabinet*

- 1 **Go to the File Room.**
- 2 **Open the cabinet and folder containing the document you want to print.**
- 3 **Select the document(s) that you want to print.**

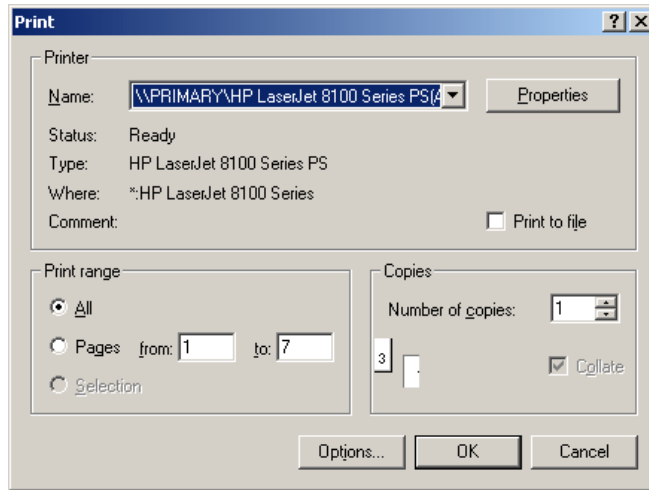
## Using Documanage Viewer and Annotating Documents

### Printing a Document

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- 4 **Select *Print Document(s)* from the *Document* menu.**

The *Print* dialog box corresponding to your selected printer displays.



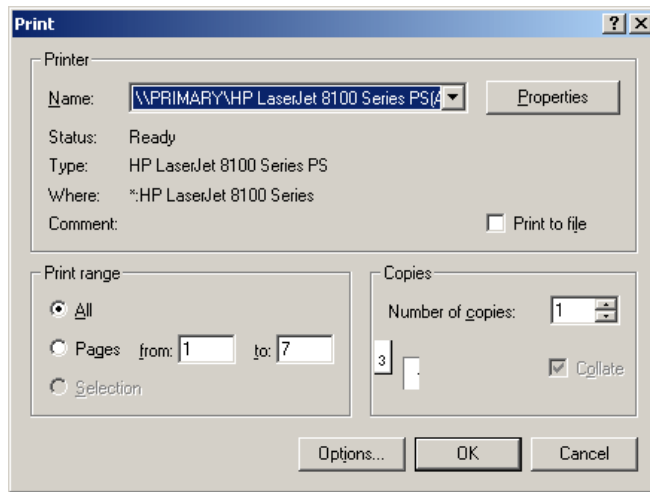
- 5 **Select the print range and number of copies that you wish to print.**
- 6 **Click *OK*.**

### *To print a document from the Viewer*

- 1 **Open it in the Viewer.**  
(It is not necessary to check out the document to view it.)

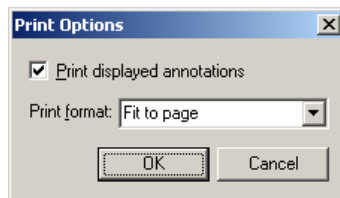
**2 Select the *Print* option from the *Image* menu.**

The *Print* dialog box opens.



**3 Click the *Options* button.**

The *Print Options* dialog box opens.



**4 Select *Print displayed annotations* option if you want to print the annotations associated with the displayed image.**

The option is checked by default. Click to uncheck the option if you want the displayed page image to print without its associated annotations.

## Using Documanager Viewer and Annotating Documents

### Working with annotations

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- 5 **Select *Pixel to pixel*, *Actual Size*, or *Fit to page* from the *Print format* drop down list.**

The default is *Fit to page*.

- 6 **Click *OK*.**

You are returned to the *Print* dialog.

- 7 **Select the print range and number of copies that you wish to print.**

- 8 **Click *OK*.**

The page is printed.

## Working with annotations

You can easily annotate any document that is opened in the Documanager Viewer Window. To annotate the document, select the *Annotation Mode* button or select *Annotation Mode* from the *Image* menu. You can set annotation properties by right-clicking the annotation icon on the tool bar and selecting *Properties*. You can also show and hide annotations by enabling/disabling *Show Annotations* on the *Annotations* menu. You can select existing annotations.

When you switch into annotation mode using the Documanager Viewer, the viewer attempts to lock the annotations so that only you can annotate the document. This lock ensures that all annotations are saved while annotating and saving a document. If the annotations are locked by someone else, you will not be able to switch into annotation mode but you will be able to see the annotations.

When a document is locked, a message displays at the bottom of the Viewer screen stating "Locked by: username @ yyyy-mm-dd hhmmss". If you

attempt to annotate a document that is currently locked by another user or session, the document opens in the Viewer, but the annotation options are disabled.

Documanager Workstation's annotations include:

- ◆ **Attach-a-Note.** Used for brief comments that can be “attached” to a document page. They function similarly to physical sticky notes. By default, the Documanager sticky note color is yellow with all text appearing as 12 point in size. You can change this color to virtually any color you choose.
- ◆ **Highlighter.** Functions similarly to a physical highlighter. Just like a physical highlighter, the highlighter annotation places a light color directly over document text to draw attention to it. By default, the highlighter color is yellow. You can change these defaults, if desired.
- ◆ **Filled Rectangle.** Places a filled bar over any part of a document you choose, making that part of the document unreadable. A filled rectangle is well suited for documents where security is foremost such as sales profit reports, balance sheets, and other financial data.
- ◆ **Rubber Stamp.** Places a stamp on the document indicating the document's status. Options are: Approved, DRAFT, Received, and Rejected.
- ◆ **Drawn objects.** These objects include straight line, free hand line, and hollow rectangle. You can set color and size for drawn objects.
- ◆ **Text.** There are several text annotation options.
  - ◆ **Typed Text** allows you to type text on top of the image
  - ◆ **Text From File** allows you to import a text file which can be overlaid on top of the image

## Using Documange Viewer and Annotating Documents

Working with annotations

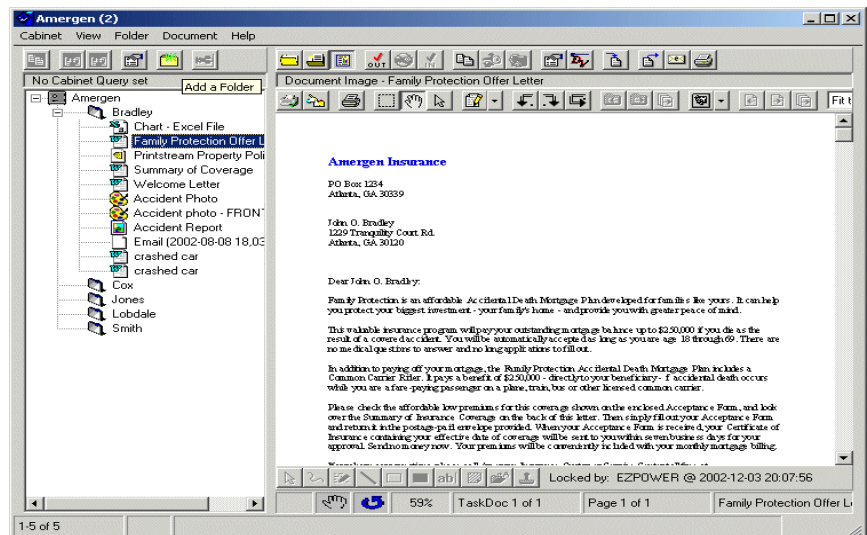
### Annotating and viewing in Place

Documents can be annotated and viewed in the cabinet window, if so desired. This allows for quick and easy annotation updates and viewing without opening a separate window.

#### *To annotate in place*

- 1 **Open the cabinet and folder containing the document you wish to annotate.**
- 2 **Select the document you wish to annotate in the left pane of the Cabinet window and click the Show Document Image button from the toolbar.**

The image is displayed in the right pane of the Cabinet window.



### 3 Annotate as necessary.

## Attach-a-Note Annotation

Notes function similarly to physical sticky notes. That is, they are used for brief comments that can be “attached” to a document page. By default, the Documanage sticky note color is yellow with all text appearing as 12 point in size. You can change this color to virtually any color you choose. You might want to do this, for example, to differentiate one sticky note from another within the same document. You can customize the size, font, and foreground and background colors of sticky note annotations.

### *To create an attach-a-note annotation*

- 1 **Open the document in the Viewer.**
- 2 **Select *Attach-a-Note* from the *Annotations* menu.**  
The mouse pointer changes to a cross hair.
- 3 **Click in the document where you want the upper-left corner of the note to appear.**
- 4 **Drag the mouse until the sticky note is the desired size.**
- 5 **Release the mouse button.**  
The *Attach-a-Note Text Edit* box opens.



## Using Documanage Viewer and Annotating Documents

Working with annotations

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- 6 **Type the desired text and click *OK*.**
- 7 **Change the properties as necessary.**

### Highlighter Annotation

Highlighter annotations function similarly to a physical highlighter. Just like a physical highlighter, the highlighter annotation places a light color directly over document text to draw attention to it. By default, the highlighter color is yellow. You can change these defaults, if desired.

#### *To create a highlighter annotation*

- 1 **Open the document in the Viewer.**
- 2 **Select *Highlighter* from the *Annotations* menu.**
- 3 **Click in the document where you want to begin the highlight. Drag the mouse across the desired text and release the mouse button.**
- 4 **Change the properties as necessary.**

### Filled Rectangle Annotation

Filled rectangle annotations place a colored bar over any part of a document you choose, making that part of the document unreadable. A filled rectangle is well suited for documents where security is foremost such as sales profit reports, balance sheets, and other financial data.

### ***To create a filled rectangle annotation***

- 1 Open a document in the Viewer.**
- 2 Select *Filled Rectangle* from the *Annotations* menu.**
- 3 Click in the document where you want to begin the filled rectangle. Drag the mouse across the desired text and release the mouse button.**

### Rubber Stamp Annotation

Rubber Stamp annotations allow you to indicate the document's status by placing a stamp on the document. Stamp statuses include: Approved, DRAFT, Received, and Rejected. You can customize the rubber stamp. You can create a rubber stamp from scratch or use a pre-defined one. You can also delete or edit a rubber stamp.

#### *To create a rubber stamp annotation*

- 1 **Open a document in the Viewer.**
- 2 **Select *Rubber Stamp* from the *Annotations* menu.**  
A list of rubber stamp statuses display: *Approved*, *DRAFT*, *Received*, and *Rejected*.
- 3 **Select the status you need and click the mouse on the document.**  
The status and date display on the document. NOTE: Dates do not display for the DRAFT stamp.
- 4 **Customize as necessary.**

#### *To customize the rubber stamp*

- 1 **Open a document in the Viewer**
- 2 **Right-click the rubber stamp icon and select *Properties*.**  
The *Rubber Stamp Properties* screen opens.
- 3 **Click the *Create Text* button to create a new stamp with new text.**  
The *Create Text Rubber Stamp* dialog box opens.

- 4 Enter the **Stamp Name** and **Stamp Text**. You can also set the **Font**.
- 5 Click **OK**.
- 6 Click the **Create Image** button to create a new image for a stamp.  
The *Create Image Rubber Stamp* dialog box opens.
- 7 Browse to and select the image you want to use for the rubber stamp.
- 8 Click **OK**.
- 9 Click **OK** when all stamps are created and customized.

### ***To edit a rubber stamp***

- 1 Open a document in the Viewer
- 2 Right-click the rubber stamp icon and select **Properties**.  
The *Rubber Stamp Properties* screen opens.
- 3 Select the stamp you want to edit from the **Stamps** list.
- 4 Click **Edit**.  
The *Edit Text Rubber Stamp Properties* dialog box opens.
- 5 Edit the **Stamp name**, **Stamp text**, and **Font** as necessary.
- 6 Click **OK**.

## Using Documanage Viewer and Annotating Documents

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### *To delete a rubber stamp*

- 1 **Open a document in the Viewer**
- 2 **Right-click the rubber stamp icon and select *Properties*.**  
The *Rubber Stamp Properties* screen opens.
- 3 **Select the stamp you want to delete from the *Stamps* list.**
- 4 **Click *Delete*.**  
The stamp is deleted.
- 5 **Click *OK*.**

## Selecting an Annotation

You can select an annotation to edit or move it. There are several ways to select an annotation.

### *To select all annotations*

- 1 **Open the document you want to view.**
- 2 **Select *Select All* from the *Edit* menu.**  
All annotations are selected.
- 3 **Edit the annotations as necessary**

### *To select individual annotations*

- 1 **Open the document you want to view.**
- 2 **Select *Select Annotations* from the *Annotations* menu OR select the annotation pointer icon.**  
The annotation pointer is enabled.

**3 Click on the annotation you want to edit.**

You can tell the annotation is selected by the handles on the annotation.

**4 Edit the annotation as necessary.**

### Setting Annotation Properties

You can set annotation properties. This includes setting transparency, line width, color, text, and font and text size. You can change annotation properties in several ways. You can set the properties of an annotation type or you can change the properties of a single annotation. For example, if you want to change the color of all free hand lines, you would set annotation properties from the toolbar. If you want to change the color of one or two free hand lines that are already drawn, you can change the color by selecting the specific lines.

#### *To set annotation type properties*

**1 Open a document in the Viewer.**

Select the annotation icon whose properties you wish to set.

**2 Right-click the icon.**

The *Properties* menu opens.

**3 Select *Properties*.**

The *Properties* dialog box opens. Most annotations, like the Highlighter, Lines, and Rectangles buttons, provide the standard color and pixel width properties that you can set and change as you want. The Typed Text, Text from File, and Attach-a-Note annotations also allow you to change font style and font sizes in addition to color.

## Using Documanage Viewer and Annotating Documents

Working with annotations

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- 4 **Change the annotations as necessary.**

### *To set individual annotation properties*

- 1 **Open a document in the Viewer.**
- 2 **Select the annotation whose properties you want to change and right click.**

The *Properties* menu opens.

- 3 **Click *Properties*.**

The *Properties* dialog box opens. Most annotations, like the Highlighter, Lines, and Rectangles buttons, provide the standard color and pixel width properties that you can set and change as you want. The Typed Text, Text from File, and Attach-a-Note annotations also allow you to change font style and font sizes in addition to color.

- 4 **Change the annotation as necessary.**

If you want to change the text for an Attach-a-Note or Typed Text annotation, you can do so. Right click the annotation and select *Edit*. The *Text Edit* dialog box opens and you can edit the text.

## Editing Annotations

You can use Cut, Copy, Paste, and Clear in exactly the same manner as found in any Windows program, such as Microsoft Word. Only the annotations themselves are affected by these options. In no way will you be able to alter the actual document.

Note that in order to cut or copy an annotation in a document, you must first select it. For example, with the attach-a-note annotation, you can tell it is selected by the handles that surround it. Note also that when you cut or copy an annotation and then paste it, the pasted copy appears in the exact same location from where it was cut or copied. Therefore, when performing this

## Using Documanager Viewer and Annotating Documents

Working with annotations

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operation, you should drag the pasted annotation to the desired location in the document.



# Using Documanager Viewer and Annotating Documents

Working with annotations

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# Working with Workflow

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## Introduction

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**NOTE:** This feature is not available in the Documanager Server Lite product.

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Documanager Workstation provides routing of documents along a pre-defined series of destinations (people or departments, for example) in an organization. Documanager's Workflow Designer module enables you to design a workflow map which contains the steps needed to route documents for a particular project. Workflow Designer provides complete flexibility in handling workflows from the very basic to the very complex, depending upon your organization's needs.

Your Documanager Administrator will have set up workflow maps. This chapter describes how to use the maps to complete a project. Procedures for setting up workflow maps are in the *Administering Documanager* manual.

# In this chapter

The information in this chapter will help you answer the following question:

→ How do I use workflow maps in projects?

## Understanding workflow

A *workflow map* is a set of *tasks* and *links* which form the complete steps needed to route documents. A task is a destination where the documents are routed to or from. A link is the connection from one task to another. A map is processed by advancing from task to task along each link connecting them together.

### Workflow roles

There are several roles in the workflow model that are assumed by users. These roles fall into one of three categories, whose respective functions are explained below.

- ◆ **Administrators.** Administrators are responsible for designing and maintaining a workflow map. An additional duty is monitoring a workflow for adequate throughput and lack of bottlenecks. All Administrators are database users within the DMANAGE database.
- ◆ **Managers.** Managers are responsible for assigning teams of people to various tasks. All managers are users whose names are taken from NT, LDAP, or database security. Only one manager is assigned to each task.

- ◆ **Team Members.** Team members are responsible for performing the various tasks in a workflow. Each team consists of one or more groups taken from NT, LDAP, or database security.

## Getting started

Your Documange Administrator will have used the Workflow Designer to create workflow maps containing the steps needed to route documents for a particular project. Once the maps have been created, they are ready for your use.

---

**NOTE:** For information on defining workflow maps see the “Workflow Designer” in the Documange Administrators Manual.

---

## Using maps in projects

Documange Workstation is used to create, work on, and manage workflow folders, or “projects,” based on workflow maps. Team members use Documange Workstation to process the tasks in a map.

The first step in starting a project is determining whether the data you will use to create a map already exists in the workflow table. There are different procedures for creating a project depending on whether the data row exists in the table or not. Since the workflow is based upon a table in a database, you need to ensure that you do not create duplicate rows for the data. If you create duplicate rows, the table may be unusable or may not be updated properly.

## Working with Workflow

### Using maps in projects


---

**NOTE:** One way to check whether the data exists is to create a cabinet based upon the table. By looking at the cabinet you have created, you can view the folders in the cabinet and find out whether the data is already in the table. Have your Documanage Administrator assist with determining if the data exists: you may not have rights to add cabinets or add data rows to tables.

---

If the data exists follow instructions "To start a project from an existing folder". If it does not exist follow instructions "To start a project by new folder". You can only start projects if you are a member of a team assigned to the BEGIN task in a workflow.

### *To start a project by new folder*

- 1 **Go to the File Room.**
- 2 **'Pending tasks' will be listed, or possibly any 'Overdue' tasks. Expand this node to see any available workflows, represented by the  symbol.**

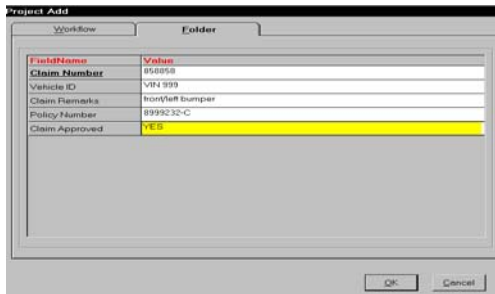
The existing workflows are displayed.
- 3 **Select the workflow you want to start, right click, and select Create New Workflow Project.**

The Project Add screen opens.
- 4 **Select the priority value (it can be a value from 1 and 10) in the Priority drop down list.**

This priority is solely for the user's informational purpose. It does not rank one workflow over another in the In-Box.

- 5 Click the ... button next to the Due Date box. Select the due date for the project from the Enter date dialog box.
- 6 Type any comments about the project in the Comments text box. (Comments are required).
- 7 Go to the Folder tab and enter the Field Values associated with the field types as defined in the database. All underlined fields are required. All bold fields are set to "Part of Key". Values must match format established in the database.

For example, if you are adding a folder to the Claim Properties workflow Cabinet, and the Claim number is bold and underlined, it is required and Part of the Key.



Field Name	Value
<b><u>Claim Number</u></b>	850058
Vehicle ID	VIN 999
Claim Remarks	front bumper
Policy Number	8999232-C
Claim Approved	YES

- 8 Click **OK**.  
The workflow displays under the related Tasks node.

## Working with Workflow

### Processing a Project

---

#### *To start a project from an existing folder*

- 1 **Go to the File Room.**
- 2 **Open the cabinet containing the folder on which you want to base the workflow.**
- 3 **Select the folder on which you want to base the workflow.**
- 4 **Select Start Workflow Project from the Folder menu.**

The Project Add screen opens. There are 3 tabs:

  - ◆ **Workflow.** Contains the project attributes
  - ◆ **Folder.** Contains folder properties
  - ◆ **Documents.** Lists the documents in the folder
- 5 **Select the priority value (it can be a value from 1 and 10) in the Priority drop down list, on the Workflow tab.**

This priority is solely for the user's informational purpose. It does not rank one workflow over another in the In-Box.
- 6 **Click the ... button next to the Due Date box. Select the due date for the project from the Enter date dialog box.**
- 7 **Type any comments about the project in the Comments text box.**
- 8 **Click OK.**

The workflow displays under the related Tasks node.

## Processing a Project

All tasks in a workflow map that are currently being processed or are waiting to be processed are shown in a “task queue.” All the task queues are shown in

the File Room in Documanage Workstation. Specifically, tasks appear in the Tasks node which the File Room displays in a separate area from the cabinets. The Tasks node displays only those tasks to which you are assigned.

Maps are displayed with their map names. Beneath each name are all the task queues that are waiting to be processed as part of the workflow. Each task is displayed by the task description. Next to each task description is a number listed in parentheses. This is the number of projects in the task queue.

The first step in processing projects is viewing the projects which need to be completed. To view projects, double-click a task description. A window displays a list of the projects that are waiting to have that task processed. Check out a project from the task queue to take responsibility for the work done on the project. After you check out a project, you can check it back in, advancing it, or forward it.

Documanage Workstation also makes it easy for you to export files from a project, copy or import files into a project, view a project's properties, mail documents from a project, and view or print a document from a project.

### ***To check out a project***

If work needs to be done on a particular project in a queue, then the project can be checked out. This locks the project, ensuring that no other team members can process the project until the person who checked it out has advanced it.

- 1 Double-click the task for the map you wish to process.**

The Task screen opens displaying the current projects associated with the workflow. Each project is represented by a folder.



## Working with Workflow

### Processing a Project

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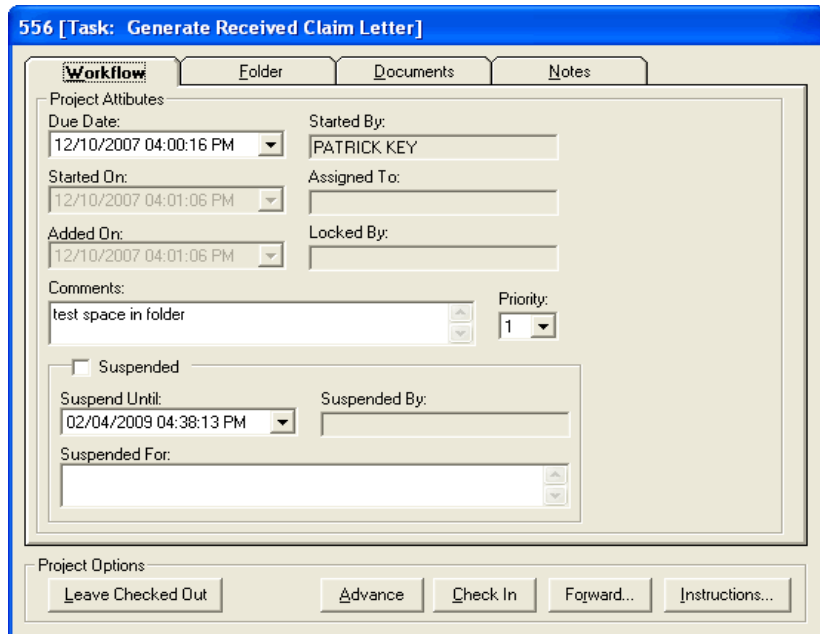
- 2 **Select the project you want to check out. Either select Project|Work on Project from the menu, right-click on the folder and select “Work**

**on Project” or click on the  button on the tool bar.**

The Active Project window opens. Tabs available in the dialog box include Workflow, Folder, and Documents.

The project is checked out and a key displays next to the project. All other users see a lock.

- 3 **Edit as necessary. You can then check the project back in, advancing the project, or forward it.**



556 [Task: Generate Received Claim Letter]

**Workflow** | Folder | Documents | Notes

Project Attributes

Due Date: 12/10/2007 04:00:16 PM Started By: PATRICK KEY

Started On: 12/10/2007 04:01:06 PM Assigned To:

Added On: 12/10/2007 04:01:06 PM Locked By:

Comments: test space in folder Priority: 1

☐ Suspended

Suspend Until: 02/04/2009 04:38:13 PM Suspended By:

Suspended For:

Project Options

Leave Checked Out Advance Check In Forward... Instructions...

---

**NOTE:** If you cancel the checkout of a project but you’ve already made changes to documents in that workflow, those changes remain.

Cancelling a checkout only affects the project properties, not the documents associated with the project (which may have changed.)

---

### ***To suspend a project***

You can suspend a project until a specified date. Suspension is useful when a project is waiting for an external process to complete (e.g., a letter to arrive).

**1 Create a Workflow Project.**

See “To start a project from an existing folder” on page 156 for detailed information.

**2 Open the task.**

**3 Right click the folder on which you’d like to work and select *Work on Project* from the Project menu.**

The *Active Project* dialog opens.

**4 Select the *Suspended Until* drop down list to specify a date and then click the check mark. The project will be suspended until this date.**

**5 Select the *Suspended* check box and click *Check In* to check in the project or *Leave Checked Out* to keep the project checked out.**

The project is suspended until the specified date, and is displayed under the *Suspended Tasks* node in the File Room. The suspended project icon will be displayed beside the suspended project in the *Suspended Tasks* queue. This icon changes to a clock once the suspension becomes overdue.

---

**NOTE:** A suspended project can be unsuspended (i.e. "resumed") by any member of the project group, unless the project is checked-out. In that case, only the person who checked out the project can unsuspend it.

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## Working with Workflow

### Processing a Project

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#### *To check out for edit*

When you are working on a workflow project, you can check out a document in place and edit it.

- 1 **Begin a workflow.**
- 2 **Right click on the document you wish to edit and select *Checkout for Edit*.**

The document editor opens and you can edit the document.

- 3 **Save the changes.**
- 4 **Check the document in as desired.**

#### *To advance a project*

When all work on a project has been completed, the project can be advanced.

- 1 **Check out the project.**
- 2 **In the Active Project window, click Advance.**

The Choose a Decision dialog box displays.

If the task is not a human decision, the project is advanced. If the task is a human decision, then follow steps 3 and 4.

- 3 **Select a decision to which you wish to advance the project, then click *OK*.**
- 4 **Click Yes to save the change.**

The project advances.

#### *To check in a project*

You can check in a project so that other team members can access it. When work on the project is not yet complete but you do not want to keep it locked

away from other team members, you can check in the project. The project remains at the same task and is not advanced to the next task in the workflow.

**1 Check out the project.**

**2 In the Active Project window, click Checkin.**

The project is checked in, and other team members are now able to check out the project.

***To forward a project***

A project can be assigned to another person for processing. This is called forwarding the project. The project is checked in under the name of the person to whom it was forwarded.

**1 Check out the project.**

**2 In the Active Project window, click Forward.**

The Project Forward dialog opens with a list of available task team members.

**3 Select a user to forward the project to from the Active Project window.**

**4 Click OK.**

The project is forwarded.

***To export a file***

**1 Check out the project containing the file you wish to export.**

The Active Project Window opens.

**2 Go to the Documents tab and right click the file you wish to export.**

**3 Select Export File.**

The Browse for Folder dialog box opens.

## Working with Workflow

### Processing a Project

---

- 4 **Drill down to the location to which you want to export the file, then click *OK*.**

All files that you export from a workflow also remain in their original workflow location.

#### *To copy a file into a project*

- 1 **Navigate to and right-click the file you wish to copy.**

The Active Project window opens.

- 2 **Select Copy.**

- 3 **Click the workflow folder into which you want to copy.**

- 4 **Select Paste from the Document menu.**

The document is pasted into the project.

#### *To import a file into a project*

- 1 **Check out the project to which you wish to import the file.**

The Task dialog box opens.

- 2 **Go to the Documents tab.**

- 3 **Right click and select Import File.**

The Select a file to import dialog opens.

- 4 **Browse to and select the file you want to import then click Open.**

The Documange Document Properties screen opens.

- 5 **Type a new name for the imported document and make other changes on the General and Application tabs as necessary.**

- 6 **Click *OK*.**

The file is imported.

***To view a project's properties***

- 1 Open the task for the project whose properties you want to view.**
- 2 Select Properties from the Project menu.**  
The Project Properties screen opens.
- 3 View the properties.**

***To mail a document from a project***

You can e-mail a document from a workflow project to someone outside of the Documanage system. Any documents that you mail from a workflow project also remain in their original project location.

---

**NOTE:** You must have access to a valid e-mail server for this feature to be functional.

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- 1 Select the document(s) you want to mail.**
- 2 Select *Mail Document(s)* from the Project menu.**
- 3 Follow the directions of your mail client to mail the document(s).**

***To view a document from a project***

- 1 Select the document you want to view.**
- 2 Select View Document from the Document menu.**  
The document displays in the Documanage Viewer.

## Working with Workflow

### Processing a Project

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#### *To print a document from a project*

- 1 **Select the document(s) you want to print.**
- 2 **Select *Print Document(s)* from the Document menu.**
- 3 **A Print dialog box displays.**
- 4 **Click *OK*.**

# ***Appendix A: Supported File Types***

The following is a list of file types currently supported by Documanager when the server is running on a Windows operating system. Documanager will attempt to display documents of these types in the internal Documanager Viewer and allow annotation. Not all features of every file format are necessarily supported by the Documanager Viewer and its supporting libraries. If a file type cannot be displayed or the image quality is not sufficient, your Administrator should configure the file type on the Documanager Server to "switch-launch" into another application supporting that file type such as the native creating application. This is done using the "FileTypes.INI" file. Files displayed in this way cannot be annotated within Documanager. Documanager Lite does not include support for most of these image types.

## **Word Processing: Generic**

- ◆ ASCII Text 7 & 8 bit
- ◆ ANSI Text 7 & 8 bit
- ◆ Unicode Text All versions
- ◆ HTML Versions through 3.0
- ◆ IBM Revisable Form Text All versions
- ◆ IBM FFT All versions



## Appendix A: Supported File Types

Word Processing: DOS

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- ◆ Microsoft Rich Text Format All versions
- ◆ PDF - Adobe Portable Document Format file

## Word Processing: DOS

- ◆ DEC WPS (WPL) Plus Versions through 4.1
- ◆ DEC WPS Plus (DX) Versions through 4.0
- ◆ DisplayWrite 2 & 3 (TXT) All versions
- ◆ DisplayWrite 4 & 5 Versions through Release 2.0
- ◆ Enable Versions 3.0, 4.0 and 4.5
- ◆ First Choice Versions through 3.0
- ◆ Framework Version 3.0
- ◆ IBM Writing Assistant Version 1.01
- ◆ Lotus Manuscript Versions through 2.0
- ◆ MASS11 Versions through 8.0
- ◆ Microsoft Word Versions through 6.0
- ◆ Microsoft Works Versions through 2.0
- ◆ MultiMate Versions through 4.0
- ◆ Navy DIF All versions
- ◆ Nota Bene Version 3.0
- ◆ Office Writer Version 4.0 to 6.0
- ◆ PC-File Letter Versions through 5.0
- ◆ PC-File+ Letter Versions through 3.0
- ◆ PFS: Write Versions A, B, and C
- ◆ Professional Write Versions through 2.1
- ◆ Q&A Version 2.0
- ◆ Samna Word Versions through Samna Word IV+
- ◆ SmartWare II Version 1.02
- ◆ Sprint Versions through 1.0
- ◆ Total Word Version 1.2

- ◆ Volkswriter 3 & 4 Versions through 1.0
- ◆ Wang PC (IWP) Versions through 2.6
- ◆ WordMARC Versions through Composer Plus
- ◆ WordPerfect Versions through 7.0
- ◆ WordStar Versions through 7.0
- ◆ WordStar 2000 Versions through 3.0
- ◆ XyWrite Versions through III Plus

## Word Processing: Windows

- ◆ JustWrite Versions through 3.0
- ◆ Lotus AMI/AMI Professional Versions through 3.1
- ◆ Microsoft Windows Works Versions through 4.0
- ◆ Microsoft Windows Write Versions through 3.0
- ◆ Microsoft Word for Windows Versions through 2002
- ◆ Microsoft WordPad All versions
- ◆ Novell Perfect Works Version 2.0
- ◆ WordPerfect for Windows Versions through 7.0
- ◆ Professional Write Plus Version 1.0
- ◆ Legacy.....Versions through 1.1
- ◆ Q&A Write for Windows Version 3.0
- ◆ WordStar for Windows Version 1.0

## Spreadsheets

- ◆ Enable Versions 3.0, 4.0 and 4.5
- ◆ First Choice Versions through 3.0
- ◆ Framework Version 3.0
- ◆ Lotus 1-2-3 (DOS & Windows) Versions through 5.0

## Appendix A: Supported File Types

### Databases

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- ◆ Lotus 1-2-3 Charts (DOS & Windows) Versions through 5.0
- ◆ Lotus 1-2-3 (OS/2) Versions through 2.0
- ◆ Lotus Symphony Versions 1.0, 1.1 and 2.0
- ◆ Microsoft Excel Windows Versions 2.2 through 2002
- ◆ Microsoft Excel Macintosh Versions 3.0 - 98
- ◆ Microsoft Excel Charts Versions 2.x - 7.0
- ◆ Microsoft Multiplan Version 4.0
- ◆ Microsoft Windows Works Versions through 4.0
- ◆ Microsoft Works (DOS) Versions through 2.0
- ◆ Microsoft Works (Mac) Versions through 2.0
- ◆ Mosaic Twin Version 2.5
- ◆ Novell Perfect Works Version 2.0
- ◆ QuattroPro for DOS Versions through 5.0
- ◆ QuattroPro for Windows Versions through 10
- ◆ PFS: Professional Plan Version 1.0
- ◆ SuperCalc 5 Version 4.0
- ◆ SmartWare II Version 1.02
- ◆ VP Planner 3D Version 1.0

## Databases

- ◆ Access Versions through 2.0
- ◆ dBASE Versions through 5.0
- ◆ DataEase Version 4.x
- ◆ dBase Version 1.3
- ◆ Enable Versions 3.0, 4.0 and 4.5
- ◆ First Choice Versions through 3.0
- ◆ FoxBase Version 2.1
- ◆ Framework Version 3.0
- ◆ Microsoft Windows Works Versions through 4.0
- ◆ Microsoft Works (DOS) Versions through 2.0

- ◆ Microsoft Works (Mac) Versions through 2.0
- ◆ Paradox (DOS) Versions through 4.0
- ◆ Paradox (Windows) Versions through 1.0
- ◆ Personal R: BASE Version 1.0
- ◆ R:BASE 5000 Versions through 3.1
- ◆ R:BASE System V Version 1.0
- ◆ Reflex Version 2.0
- ◆ Q & A Versions through 2.0
- ◆ SmartWare II Version 1.02

## Graphics: Generic

- ◆ Binary Group 3 Fax All versions
- ◆ BMP (including RLE, ICO, CUR & OS/2 DIB) Windows
- ◆ CDR (if TIFF image is embedded in it)
- ◆ Corel Draw versions 6.0-8.0
- ◆ CGM - Computer Graphics MetafileANSI, CALS, NIST, Version 3.0
- ◆ DRW - Micrografx Designer Versions through 4.0
- ◆ DXF (Binary and ASCII) AutoCAD Drawing Interchange Format Versions through 12-14
- ◆ EPS Encapsulated PostScript TIFF header only
- ◆ FMV - FrameMaker Vector Version 5.0
- ◆ GDF - IBM Graphics Data Format Version 1.0
- ◆ GEM - Graphics Environment Manager Metafile Bitmap and Vector
- ◆ GIF - Graphics Interchange Format Compuserve No specific version
- ◆ GP4 - CALS Raster Type I and II
- ◆ HPGL - Hewlett Packard Graphics Language Version 2.0
- ◆ IMG - GEM Paint No specific version
- ◆ JPEG All versions
- ◆ MAC MacPaint No specific version
- ◆ MET - OS/2 PM MetafileVersion 3.0

## Appendix A: Supported File Types

### Graphics: High-End

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- ◆ PCD - Kodak Photo CD Version 1.0
- ◆ PCX PC Paintbrush No specific version
- ◆ Perfect Works (Draw) Novell version 2.0
- ◆ PIC Lotus No specific version
- ◆ PICT1 & PICT2 (Raster) Macintosh Standard Bitmap only
- ◆ PIF - IBM Picture Exchange Format Version 1.0
- ◆ PNG - Portable Network Graphics Version 1.0
- ◆ SDW Ami Draw
- ◆ Snapshot (Lotus) All versions
- ◆ SRS - Sun Raster File Format No specific version
- ◆ TGA (TARGA) Truevision Version 2.0
- ◆ TIFF Versions through 6
- ◆ TIFF CCITT Group 3 & 4 Fax Systems Versions through 6.0
- ◆ WMF Windows Metafile No specific version
- ◆ WordPerfect Graphics [WPG and WPG2] Versions through 2.0
- ◆ XBM - X-Windows Bitmap x10 compatible
- ◆ XPM - X-Windows Pixmap x10 compatible
- ◆ XWD - X-Windows Dump x10 compatible

## Graphics: High-End

- ◆ AI - Adobe Illustrator File Format Versions through 9.0
- ◆ CDR - Corel Draw Versions through 6.0-8.0
- ◆ DSF - Micrografx Designer Windows 95, Version 6.0
- ◆ DWG - AutoCAD Native Drawing Format Versions 12-14
- ◆ IGES - Initial Graphics Exchange Specification Version 5.1

# Documaker and Docuflex Output Types

- ◆ DCD - Docucorp Compound Document
- ◆ DCZ - Docucorp Compressed File (output from Docusave Server)
- ◆ IBM AFP support, including IBM AFP MO:DCA
- ◆ Xerox Metacode

**Appendix A: Supported File Types**  
Documaker and Docuflex Output Types

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# Appendix B: Actual Size Printing

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## Printers: APA vs. Non-APA

All Points Addressable (APA) printers are precise printers that allow printing to the edge of the page, and are used to print Print streams. Because APA printers image the entire surface of the paper, page images generated for these printers, such as print streams, often have contents that fill the entire page.

Non-APA printers are not as precise in paper alignment, and contain non-printable areas around the edge of the page. Non-printable areas vary by printer model.

## Actual Size Printing on Non-APA Printers

*Actual Size* printing scales an image so that one inch of the image equals one inch on the printed page.

*Actual Size* printing is meant to imitate what an APA printer does. However, it is not possible to duplicate what APA printers do on non-APA printers. If you need real APA output, you must print to a real APA printer. It is unrealistic to expect all output on all non-APA printers to look like output from an APA printer.



## Appendix B: Actual Size Printing

### Actual Size Printing on Non-APA Printers

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When using Actual Size printing on non-APA printers you may encounter the following:

- ◆ Some of the image gets cut off around the edges.
- ◆ When holding the pages up to the light with edges aligned, Actual size printing doesn't line up perfectly with output from an APA printer.
- ◆ The printed image position from one printer is different than the printed image position from a different printer, even if they are the same type of printer.
- ◆ When printing multiple copies of the same image on a non-APA printer, it doesn't always come out on exactly the same spot on the page.

The following are possible explanations to the above printing issues.

- ◆ Non-APA printers have non-printable areas around the edges. If some of the image falls into the non-printable area, then that part of the image is cut off. If you must see the entire image, don't choose *Actual Size*.
- ◆ Non-APA printers don't always have accurate alignment. Try adjusting the printer.
- ◆ Paper feeds on non-APA printers are not necessarily consistent. Try adjusting the printer.

# ***Appendix C: User Notification Utility***

The Documanage User Notification Utility is an optional application that can be installed and run on your computer to let you know when you have work pending in Documanage. When it is run, the utility inserts an icon into the Windows System Tray on the Windows Taskbar. The icon will change color depending upon the "urgency" of the work pending for you in Documanage. You can also right click on the icon to show a menu which presents various options. You can select an option to see what work items are pending for you in Documanage. Another option enables you to change various settings for the utility. You can also choose an option to shut down the utility.

## **Operation**

At startup the utility reads the notification options and polling interval and starts a log if one is defined. It then attempts to log into Documanage using the Operating System logon credentials. (Should it fail to login, a login dialog appears. Cancelling this dialog shuts down the Documanage Notifier.)

The utility inserts the status icon into the Windows System Tray. It then queries Documanage for work pending for the user. The User Notification Utility checks for the following work items in Documanage:

- ◆ Overdue Pending Projects
- ◆ Available Pending Projects

## Appendix C: User Notification Utility

### User Notification icon

---

- ◆ Overdue Suspended Projects
- ◆ Available Suspended Projects
- ◆ Available files in the New Documents folder of the Personal Cabinet

The Notification Utility categorizes work items as Pending Projects, Suspended Projects, or New Files. The color of the status icon changes based on a set of default options, or based on the options you have set. When Documanager Notifier shuts down, it logs off Documanager and removes the icon from the System Tray.

## User Notification icon

The User Notification icon, which appears in the Windows System Tray, changes color to indicate the "urgency" of the work. You can specify the polling interval and which work items correspond to each icon color.

The User Notification icon has three color levels: red, yellow and green.



The color of the icon reflects the condition of the work that most "urgent" work condition. For instance, if a Pending Project is overdue and another Pending Project is available but not overdue, the icon will be red because that reflects the most "urgent" work condition.

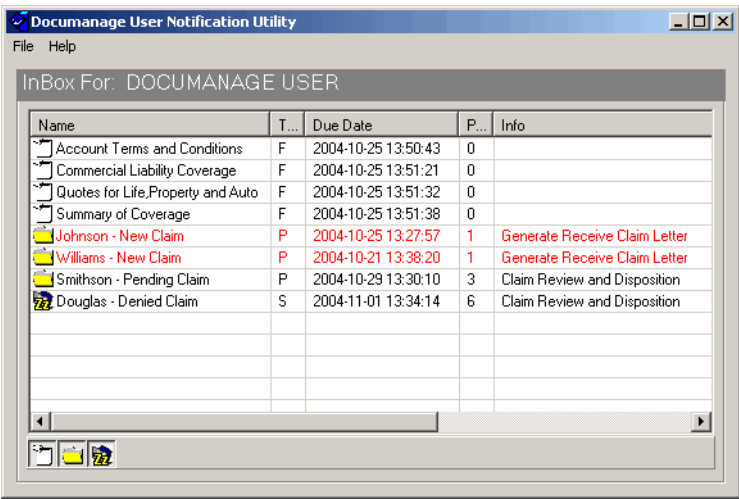
## Notification Utility Dialogs

When you hold the cursor over the Notification icon in the System Tray, a screen tip appears. The screen tip displays the number of pending work items (If several items are pending, only the first is reported) when the icon is red or yellow. The screen tip tells you to right-click on the status icon to get more information when the icon is green. Right clicking on the icon displays a shortcut menu. The menu options are as follows:

- ◆ Show Pending Items—presents a dialog that lists pending work items.
- ◆ Options...—presents the Options dialog
- ◆ Shutdown Documanager Notifier— quits the Notification Utility

## Show Pending Items dialog

Double-click on the status icon to display the Show Pending Items menu option.



The menu lists pending work items. Double-clicking an item in the list presents a dialog that tells you to work on the item in the Documanage Workstation.

The Show Pending Items menu has a File menu and a Help menu. The Help menu presents an About Box that is identical to the one in the Documanager Workstation.

The File menu options are as follows:

- ◆ Refresh Pending Items —refreshes the list of pending work items
- ◆ Options...—calls up the DmgNotifier Options dialog
- ◆ Close—closes the Pending Items dialog
- ◆ Shutdown Documanager Notifier—quits Documanager Notifier

## Options Dialog

A set of default settings initially determine which work item conditions cause the color of the Notification icon to change. If you want to set color conditions different from these, or change the polling interval, you can set the color level corresponding to each work item status in the Settings, Logging, Pending Projects, Suspended Projects and New Files tabs of the Dmg Notifier Options dialog. The Summary tab then gives an overview of what work conditions correspond to each color level of the status icon.

## Appendix C: User Notification Utility

### Notification Utility Dialogs

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#### Notification Icon default settings

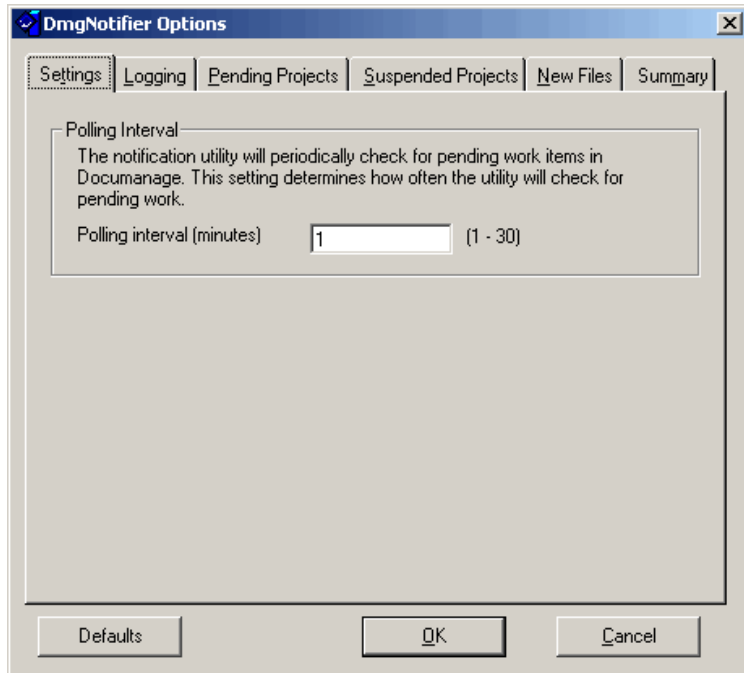
You can apply the default icon color settings by selecting the Default button.

The default icon colors for the notification levels are as follows:

- ◆ The User Notification icon will be *red* if:
  - ◆ One or more Pending Projects are overdue
  - ◆ One of more Suspended Projects are overdue
- ◆ The User Notification icon will be *yellow* if:
  - ◆ One of more Pending Projects are available
  - ◆ One of more Suspended Projects are available
- ◆ The User Notification icon will be *green* if:
  - ◆ One or files are available in the New Documents folder of your Personal Cabinet
  - ◆ Or if no work is pending

## Settings Tab

You can change the notification level for any of the items through the Options dialog and you can also change the polling interval. The default polling interval is one minute, with a range of one to thirty minutes.





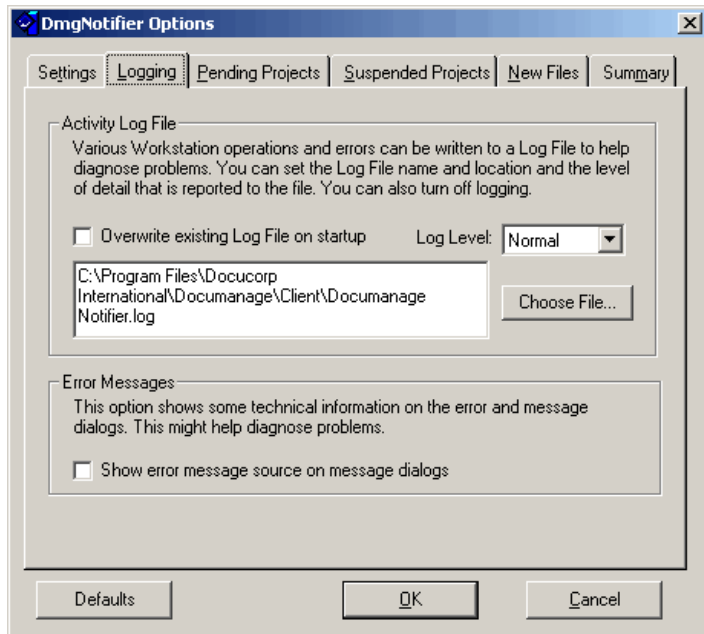
## Appendix C: User Notification Utility

### Notification Utility Dialogs

---

#### Logging Tab

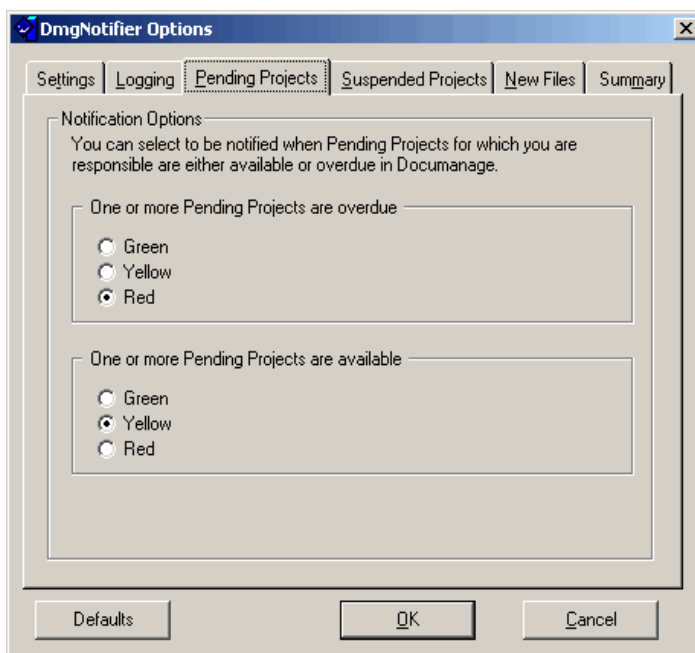
Activity Log File options, which follow those of the Documange Workstation, are also available.



#### Pending Projects tab

The Pending Projects tab lets you set what color the icon should be if one or more Pending Projects are overdue and what color the icon should be if one or more Pending Projects are available.

The color notification levels can be customized using the Pending Projects tab in the DmgNotifier dialog.



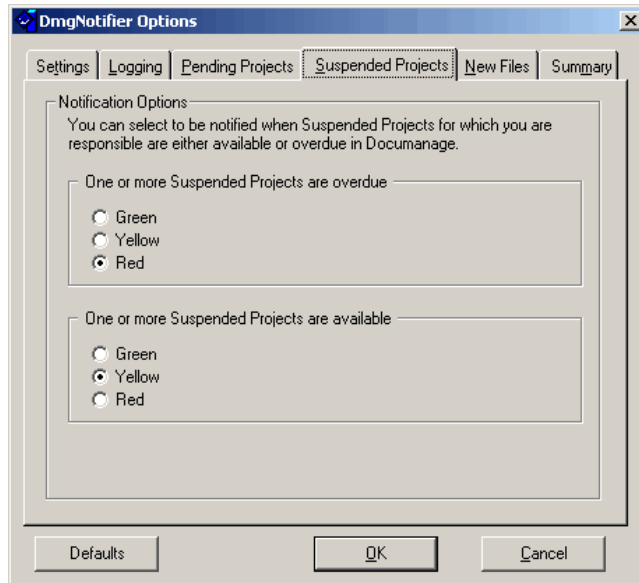
## Appendix C: User Notification Utility

### Notification Utility Dialogs

---

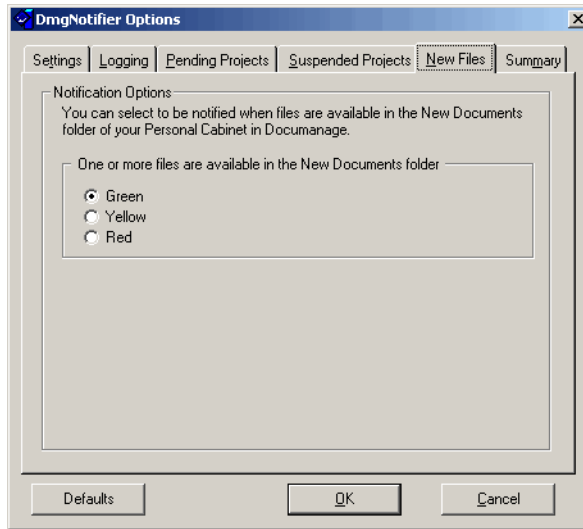
#### Suspended Projects tab

The Suspended Projects tab lets you set what color the icon should be if one or more Pending Projects are overdue and what color the icon should be if one or more Suspended Projects are available.



### New File tab

The New File tab lets you set what color the icon should be if one or more files are available in the New Documents folder of your Personal Cabinet.



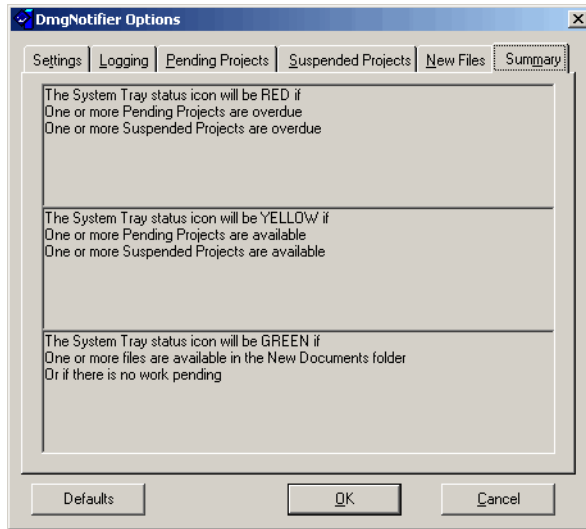
## Appendix C: User Notification Utility

### Notification Utility Dialogs

---

#### Summary tab

Once the color levels are set the Summary tab will give an overview of what color the icon will be depending on what work item conditions are present.



Click *OK* to save the Options. Click *Cancel* to dismiss the Options dialog without saving any changes.

# ***Appendix D: Documanager Filer***

The Documanager Filer (DmgFiler) utility makes it simple to file documents directly into Documanager from any Windows application that can send files to a printer. Windows applications generate TIFF and PDF files using a print driver supplied with Documanager Filer. The Filer then opens a dialog that you use to send these files directly into the Documanager document store.

## **Setting up the Filer Print Driver**

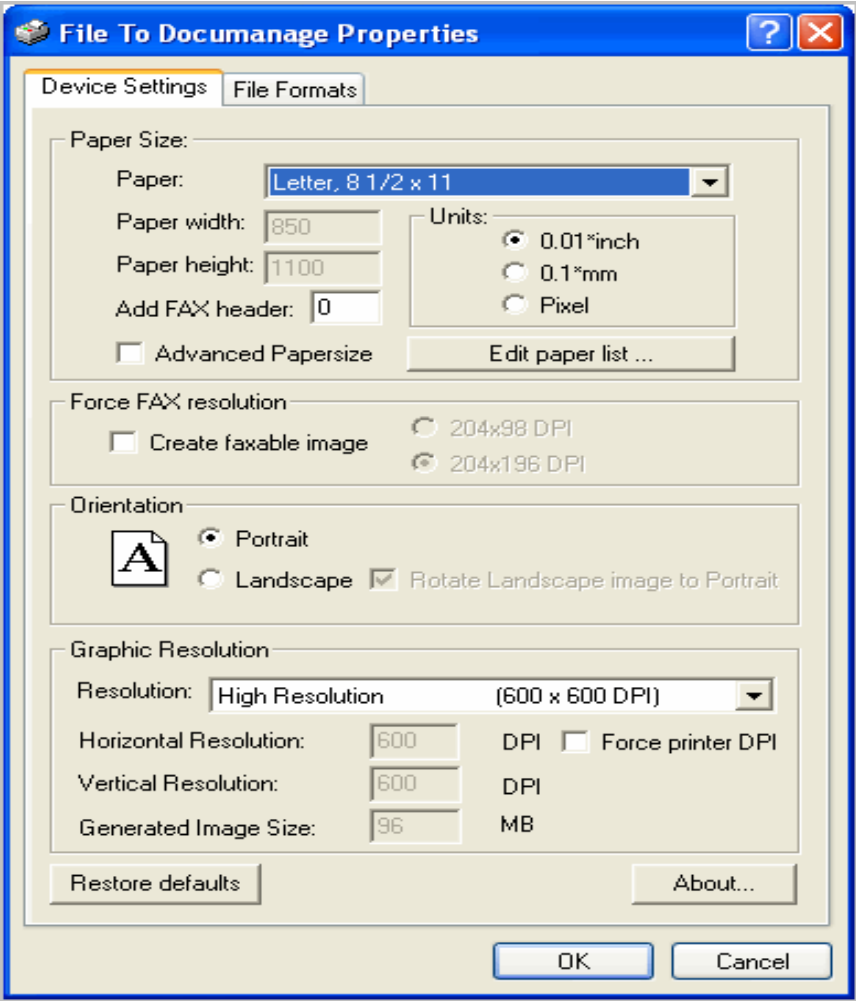
You can set up the File to Documanager print driver by making settings to the Device Settings and File Formats tabs. These tabs appear in the “File to Documanager Properties” dialog that you can access from an application, or from the “File to Documanager Print Preferences” dialog that you can access from the “Start Menu.”

### **Device Settings tab**

The “Device Settings” tab sets the paper size, paper orientation and the graphic resolution of the files output from the print driver to the Filer.

# Appendix D: Documanage Filer

Setting up the Filer Print Driver



### Paper Size

- ◆ Paper—To change the paper size, select the Paper list. The paper sizes in the list range from those used for envelopes to those used for large A size pages. Also included is a user-definable variable page size, which can be set in increments of 0.01 inch, 0.1 mm, or a pixel. There are 45 Standard paper sizes, and 36 Advanced paper sizes, as well as software specific paper sizes such as FAX paper size, Variable paper size and Variable paper size specified in pixels.
- ◆ Variable Paper Size—The “Variable Paper Size” is specified in 0.01 inch or 0.1 millimeter (mm) units.

---

**NOTE:** Millimeters = pixels x 254/DPI or pixels = millimeters x DPI/254.

---

- ◆ Variable Paper Size In Pixels—“Variable Paper Size In Pixels” can be any size within the boundary of the Microsoft environment. It can have a maximum width and height of 65535 x 65535 pixels. The DPI information will be ignored.

---

**NOTE:** The “Variable Paper Size In Pixels” is a special case. Normally, page size times DPI is equal to the image size in pixels. With the “Variable Paper Size In Pixels” setting, the image size in pixels is absolute and the DPI can be set arbitrarily. The “Variable Paper Size In Pixels” setting can be very useful in Web and graphic applications where the physical size of the image is a critical factor.

---

- ◆ Paper width: —Paper width is shown in the selected unit: 0.01 inch, 0.1 mm, or a pixel.
- ◆ Paper height: —Paper height is shown in the selected unit: 0.01 inch, 0.1 mm, or a pixel.



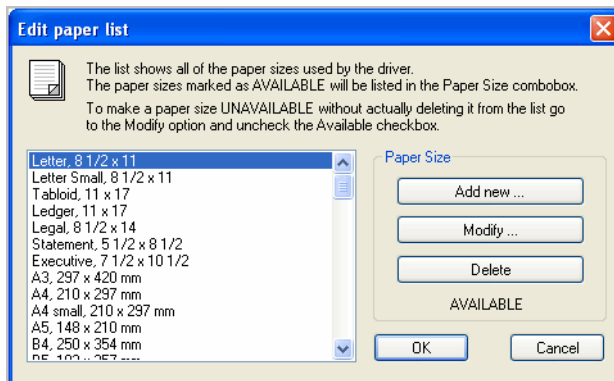
## Appendix D: Documanage Filer

### Setting up the Filer Print Driver

- ◆ **Units:**—The units are the type of measurement used to describe the paper width and height. The units can be 0.01 inch, 0.1 mm, or a pixel.
- ◆ **Add Fax Header**—The value entered in the Add Fax Header box reduces the standard page height by the specified number of pixels. This option can be used to attach private page header information on the top of each page. For example, if the page height is 2200 pixels and the fax header field is set to 100, the generated image height will be 2100 pixels.
- ◆ **Advanced Papersize**—select “Advanced Papersize:” to list the paper size in the list of Advanced papers in the “Paper:” list.

### Edit Paper List

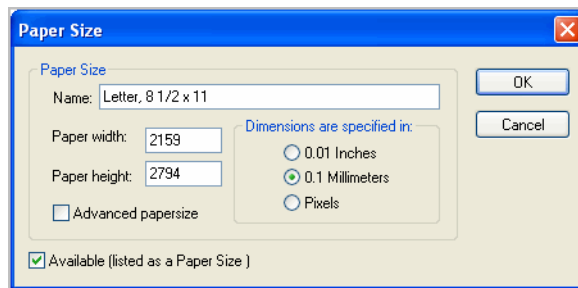
- ◆ **Edit Paper list**—Click “Edit Paper List” to customize the list of the paper sizes used by the printer driver. You can add new paper sizes, as well as modify the name, size or availability of existing paper sizes.



- ◆ **Add new...**—Click “Add new...” to add a new paper size to the list of existing paper sizes. Refer to “Add or Modify Paper Size” on page 191.

- ◆ **Modify...**—Click “Modify...” to change the parameters of the selected paper. The user can change the name of the paper which is shown in the paper selection list, the width and height of the paper, the availability of the paper and also the paper size can be marked as Advanced paper. Refer to “Add or Modify Paper Size” on page 191.
- ◆ **Delete**—Click Delete to remove a selected paper size from the list. Once a paper is deleted, it must be added again to the list of the papers by clicking “Add new...”. To temporarily remove a paper from the list of papers, make it UNAVAILABLE by deselecting Available.

### Add or Modify Paper Size



- ◆ **Name**—Enter the name of the paper size in the Name box. This is what will be listed in the Paper sizes box.
- ◆ **Paper width: and Paper height:**—Use these boxes to set the width and the height of the paper.
- ◆ **Dimensions are specified in:** —The numbers you enter in Paper width and Paper height can be specified using different units: 0.01 Inches, 0.1 Millimeters or Pixels. The printer driver can store the paper size in pixels or in 0.1 millimeters. If you specify the paper size in 0.01 Inches, due to the conversion the actual size of the image may be slightly different. The difference can be a maximum of 0.1 mm.

## Appendix D: Documanager Filer

### Setting up the Filer Print Driver

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- ◆ **Advanced papersize**—Select “Advanced paper size:” to list the paper size in the list of the Advanced papers.
- ◆ **Available**—Select “Available” if the paper size is in the list of the papers. If you need to remove a paper size from the list of the papers shown by the printer driver, we recommend de-selecting “Available” rather than permanently deleting the paper size from the list.

### Force FAX resolution

Set up the driver to create faxable images with one of two resolutions using the Force FAX resolution area.

- ◆ **Create faxable image** —Select Create faxable image to automatically create images that have a fax paper sizes and fax resolutions. The paper sizes and graphic resolutions are not restricted, but the resulting image file will have a fax-able page size and fax-compatible resolution. For example, if the page is Letter paper size and 600 DPI, the generated file width will be 1728 pixels.
- ◆ **204x98 DPI or 204x96 DPI**—With ‘Create faxable image’ selected, you can select resolutions between 204x98 DPI (Standard Fax Resolution) and 204x196 DPI (Fine Fax Resolution).

### Orientation

Set up the driver to create pages with their long dimension vertical or horizontal using the Orientation area.

- ◆ **Portrait or Landscape**—Select Portrait or Landscape to set the default page orientation. This orientation is also used for fax transmissions. If Landscape orientation is selected the driver will report landscape paper orientation to the printing application, but the image on the page will be rotated 90 degrees so that the actual saved image will still be in portrait

orientation just like when you print in landscape mode. This makes it possible to fax a page printed in landscape orientation.

- ◆ Rotate a Landscape Image to Portrait—With landscape mode selected, selecting Rotate a Landscape Image to Portrait rotates the generated landscape image 90 degrees so it can be printed. Selecting “Create Faxable Image” automatically activates this option.

## Graphic Resolution

From the Graphic Resolution list, select the default resolution (typically measured in dots per inch, or DPI), for printing graphic images. Available resolutions are shown in the Graphics Resolution list. These resolutions are as follows:

- ◆ 204 x 98 DPI—Draft resolution (standard fax mode).
- ◆ 204 x 196 DPI—Low resolution (fine fax mode).
- ◆ Low Resolution (200x200 DPI)—If the Fax Output check box is selected the resolution is 200x200 DPI internally, but the image is stored as 204x196 DPI. This feature is useful when printing from an application that can’t print correctly when the horizontal and vertical resolution values are different. Selecting this setting will print the page correctly and the image can still be faxed.
- ◆ Medium Resolution (300 x 300 DPI)
- ◆ High Resolution (600 x 600 DPI)
- ◆ Custom Resolution max. (3000x3000 DPI)—The “Horizontal” and “Vertical” resolution fields are grayed out until you select “CUSTOM Resolution max (3000x3000)”.
- ◆ Horizontal and Vertical Resolution—The custom resolution can be set manually up to 3000 DPI in the “Horizontal Resolution” and “Vertical Resolution” fields.

## Appendix D: Documanager Filer

### Setting up the Filer Print Driver

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- ◆ **Generated Image Size**—When using settings over 600 DPI one should be aware of the amount of memory that each file will use.
- 

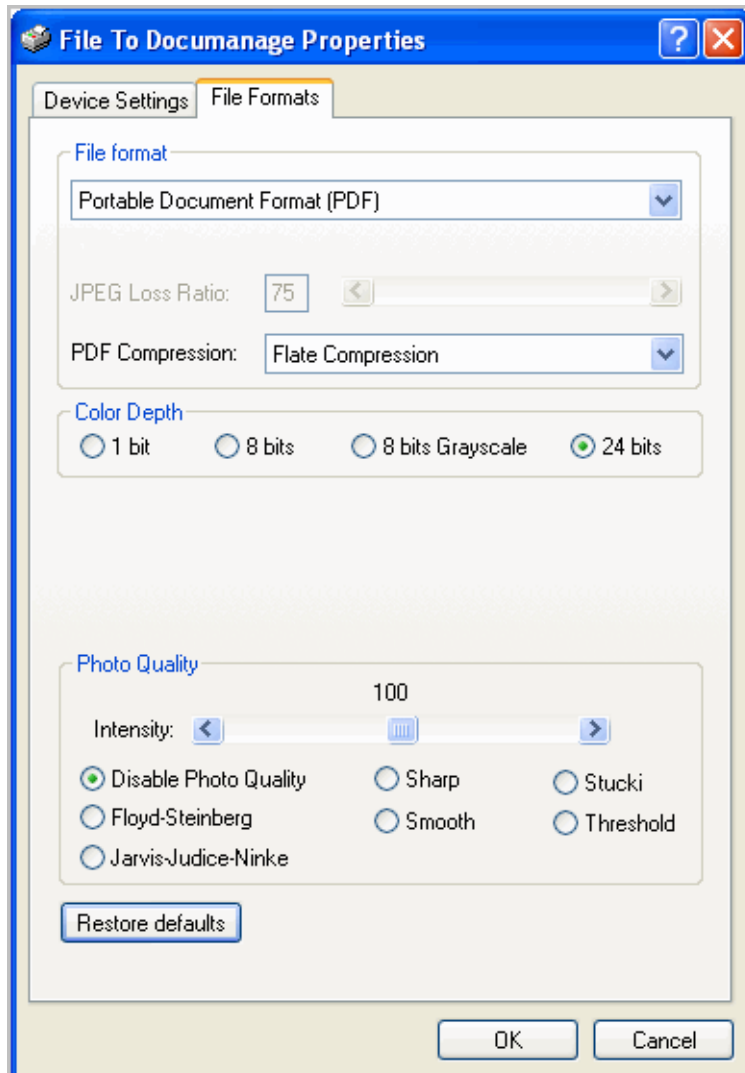
**NOTE:** When selecting a resolution for faxing, remember that increased resolution slows down transmission speed, while lower resolutions increase throughput at the cost of image quality.

---

- ◆ **Force Printer DPI**—If you select “Force Printer DPI,” documents will always use the printer’s resolution, no matter what DPI setting is specified by the document properties (for Microsoft Excel documents, for example).
- ◆ **Restore Defaults**—Click “Restore defaults” to restore all of the default printer settings. The “File Formats” tab allows you to set the output file format and its compression.
- ◆ **Print**—Click “Print.” The File To Documanager print driver generates an output file, and the Documanager Filer dialog appears. See “Filing Documents to Documanager” on page 197.

## File Format tab

Use the File Format tab to set the output image file type, color depth, and the type of dithering used by the print driver.



## Appendix D: Documanage Filer

### Setting up the Filer Print Driver

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- ◆ File Format—Click on the File Format list box to select the output image file type for the driver. Click on the down arrow to scroll through the available selections. The current selections are:
    - ◆ Portable Document Folder (PDF) 1.4
    - ◆ TIFF with JPEG Compression
    - ◆ TIFF Group 3, 1 Dimension (CCITT Group 3 1D compression)
    - ◆ TIFF Group 3, 2 Dimension (CCITT Group 3 2D compression)
    - ◆ TIFF Group 4 (TIFF CCITT Group 4 compression)
- 

**NOTE:** The list of file formats changes depending on the selected bit depth.

---

- ◆ JPEG Loss Ratio—JPEG Loss Ratio sets the quality of a JPEG file. A higher value produces a higher quality image; however the file size will be larger. Conversely, a lower value produces a lower quality image, but the file size will be smaller.
- ◆ PDF Compression: —The compression used for an Acrobat file. Each color depth has an option to use either no compression or the following:
  - ◆ for 1 bit—CCIT Fax compression,
  - ◆ for 8 bits—Runlength compression,
  - ◆ for 8 bits grayscale—Runlength Compression,
  - ◆ and for 24 bits—JPEG compression
- ◆ Color Depth—The color depth buttons set the number of bits representing the color of each pixel in the generated image. The value can be 1 bit, 8 bits, 8 bits Grayscale and 24 bits.

The file types shown in the File Format combo box depend on the color depth. The user can only select from file types compatible with the current color depth setting. For example: if 1 bit is selected, the TIFF JPEG file type will not be shown.

### Photo Quality

Digital half-toning, also referred to as spatial dithering, produces the illusion of continuous-tone pictures on media that is only capable of displaying binary picture elements (FAX machines and most printers, for example). Use the Photo Quality area to select one of five high quality dithering filters which perform dithering in the print driver.

The Floyd-Steinberg and Jarvis-Judice-Ninke dithering filters are popular filters. The Smooth, Sharp, and Stucki filters produce better quality output, although they are less popular. The Floyd-Steinberg is the fastest, because it requires the least computation. The Stucki is the slowest, but produces the highest quality output. Floyd-Steinberg is the default filter setting.

Use dithering to FAX or to transmit color pictures on a monochrome device. When a color picture is faxed from a desktop fax machine, the result is unrecognizable in most cases. On computer-generated faxes, the output quality can be increased to picture quality using the printer driver.

- ◆ Intensity scroll bar—The Photo Quality settings area also contains an Intensity scroll bar that lets you control the intensity of the output image. The lower the Intensity value is, the darker the output image will be.
- ◆ Restore defaults—Click “Restore defaults” to reset all of the settings on the *File Formats* tab to their original settings.

## Filing Documents to Documanage

The left side of the Documanage File dialog contains a File Room Window which shows a tree listing the folders and documents in each of the Documanage cabinets. Refer to “Working with the File Room” on page 4.

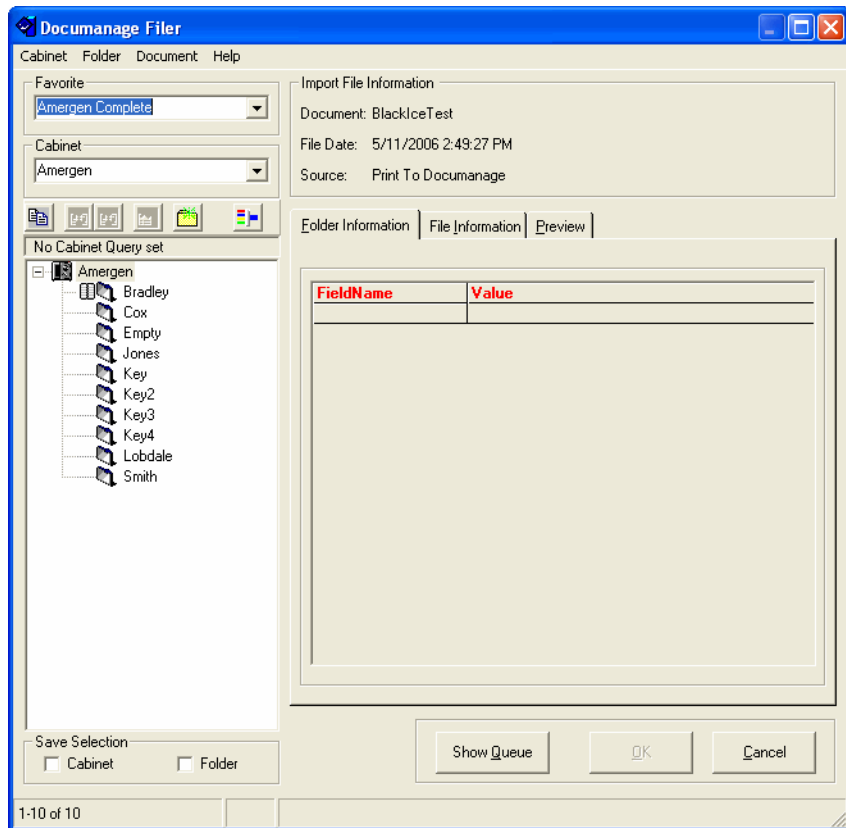


## Appendix D: Documanager Filer







Filing Documents to Documanager

Any Favorites defined in the Documanager Workstation are also available. These can be selected from the picklist on the left top of the window. Refer to “To add a favorite cabinet to the File Room” on page 15.

You can also check the options to save the currently selected cabinet and folder. The next time you run the Documanager Filer the cabinet and folder will be automatically selected and opened. This is a useful feature if you commonly file documents into the same place.



The following table describes the functions of the buttons above the File Room window.

Button	Function
	Expand all nodes in multilevel cabinets containing folders.
	Scroll through the previous set of folders.
	Scroll through the next set of folders.
	Displays selected folder properties.
	Add a folder to a cabinet if the proper if you have the proper user authorities.
	Activate the Query by Example utility, which filters the folder list.

## Import File Information

The *Import File Information* area contains the name, the filing date and the source of the document whose information and content is displayed in the *Preview*, *File Information* and *Folder Information* tabs immediately below.

## Appendix D: Documanager Filer

Filing Documents to Documanager

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### Preview, File Information and Folder Information tabs

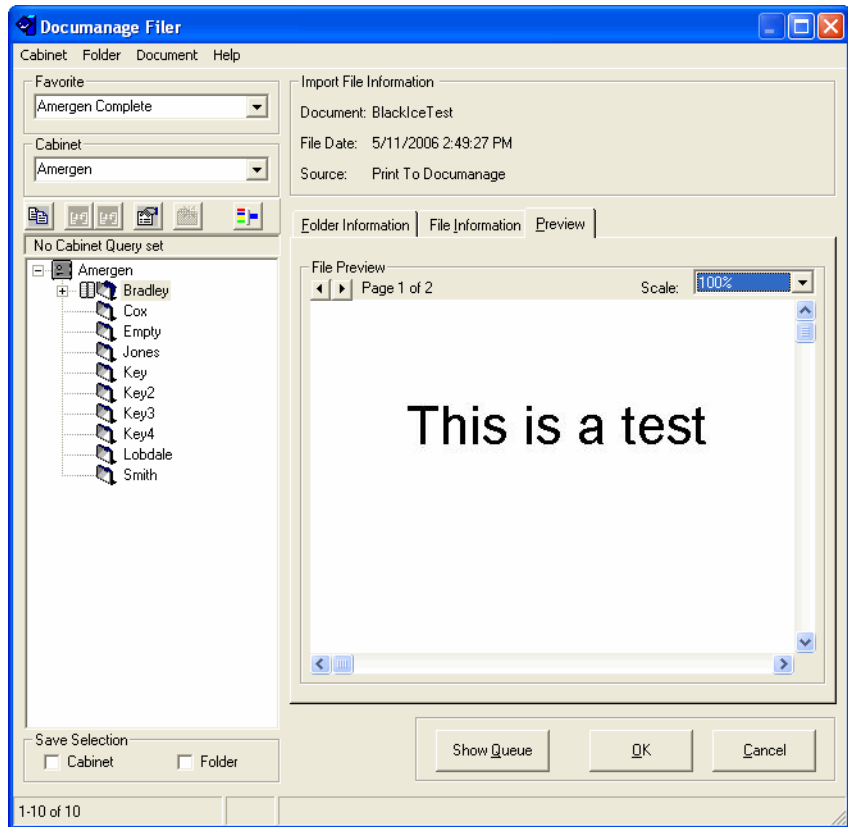
A *Preview* tab, a *File Information* tab, and a *Folder Information* tab appear below the *Import File Information* area:

- ◆ The viewing window in the *Preview* tab shows the contents of TIFF files. It can also show the contents of PDF files if Adobe Acrobat Reader is installed on your machine.

## Appendix D: Documange Filer

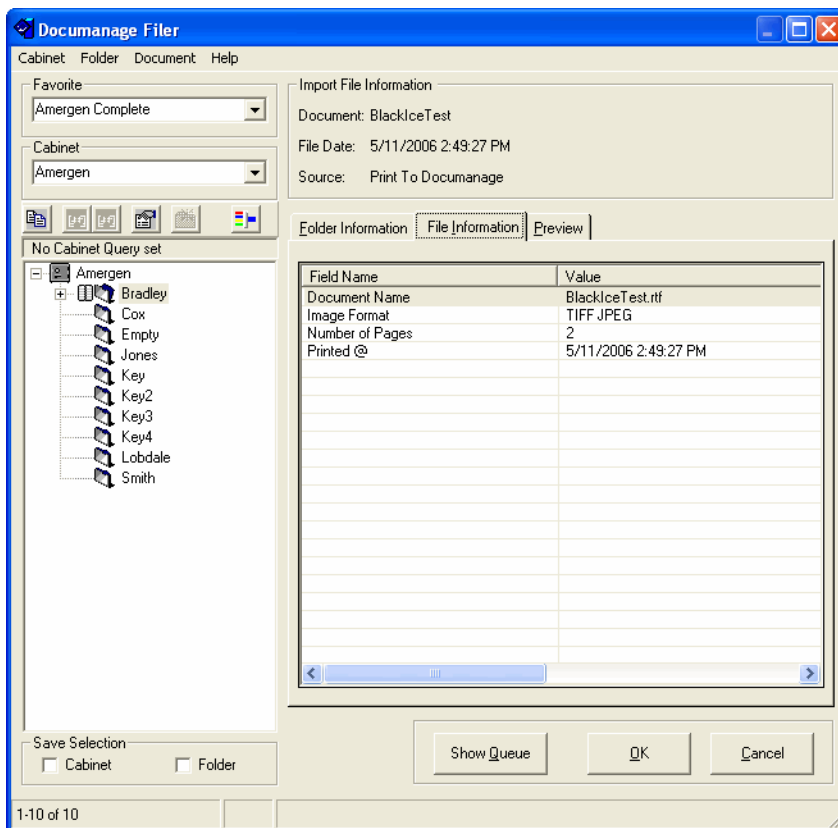
### Filing Documents to Documange

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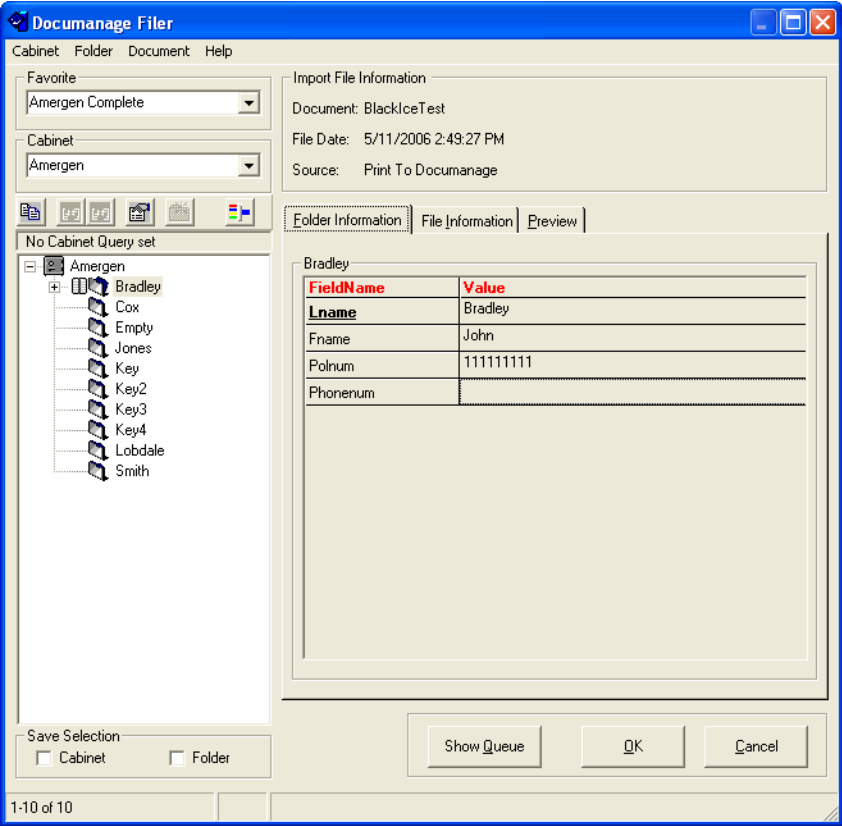


- ◆ The *File Information* tab shows the properties of the print job.

## Filing Documents to Documanager



- ◆ The *Folder Information* tab shows information about the currently selected folder.

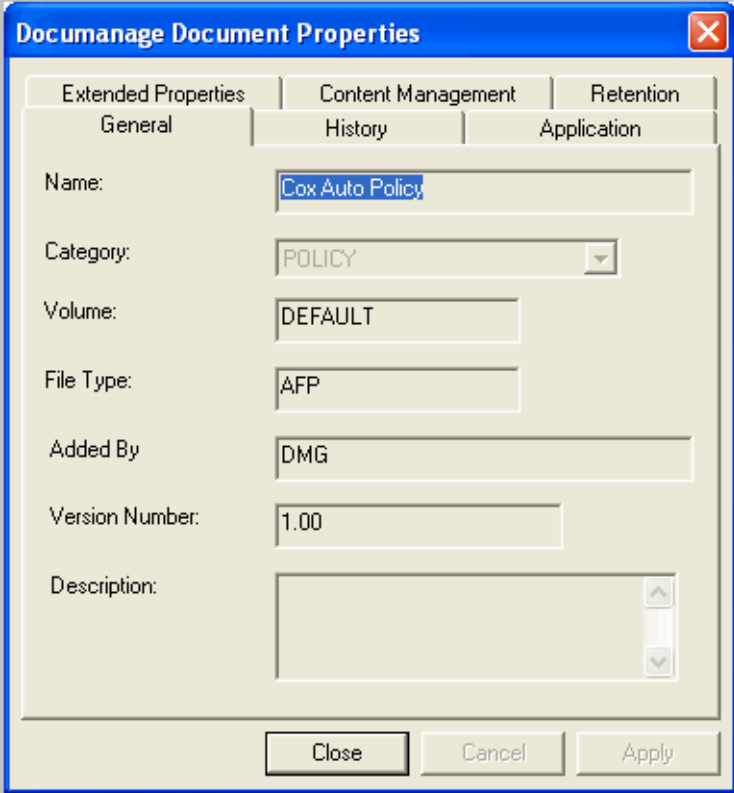


## Appendix D: Documanage Filer

Filing Documents to Documanage

### Document Information

After selecting a folder displayed in the File Room Window of the Documanage Filer tab, click *OK*. The *Document Properties* dialog appears. Here you can set the properties for the document, including its *Category* and *Description*. Refer to “Editing document properties” on page 104.



The image shows a dialog box titled "Documanage Document Properties". It has a blue title bar with a close button (X) in the top right corner. The dialog is divided into three main tabs: "Extended Properties", "Content Management", and "Retention". The "Extended Properties" tab is selected and contains three sub-tabs: "General", "History", and "Application". The "General" sub-tab is active, showing the following fields:

- Name: Cox Auto Policy
- Category: POLICY (dropdown menu)
- Volume: DEFAULT
- File Type: AFP
- Added By: DMG
- Version Number: 1.00
- Description: (empty text area with up/down arrows)

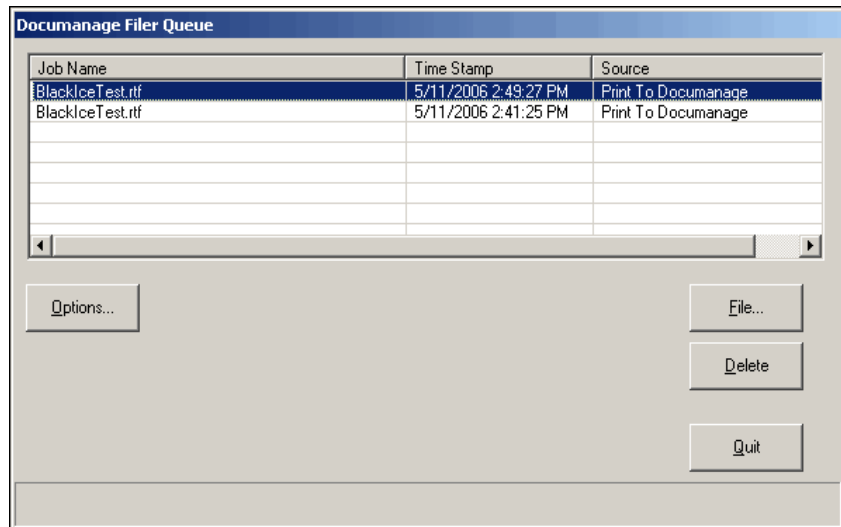
At the bottom of the dialog are three buttons: "Close", "Cancel", and "Apply".

Click *OK*. The Filer sends the print driver file into Documanage and displays a message indicating that it has been successful.

If there are other print jobs pending, they are listed in the Documanage Filer Queue dialog. Refer to the description of the “Filer Queue” on page 205.

## Filer Queue

If you click *Cancel* or *Show Queue* in the *Documanage Filer* dialog, the *Filer Queue* dialog appears. The *Filer Queue* dialog lists all of the jobs that are ready to be filed. The dialog allows you to continue to send jobs to the Filer even if your connection to the Documanage Server is temporarily unavailable.



- ◆ *File...* —Select a pending job from the job listing in the dialog and then click *File...* to send it to Documanage. The *Documanage Filer* dialog appears. Refer to “Filing Documents to Documanage” on page 197.



## Appendix D: Documanage Filer

### Options

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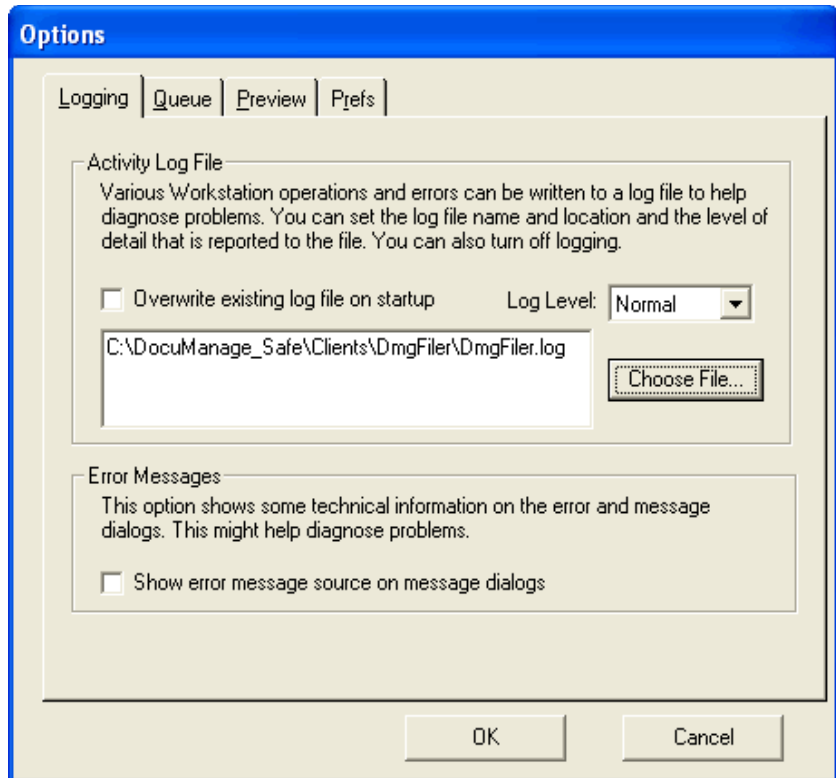
- ◆ *Delete*—After you highlight a file that you want to remove from the pending jobs queue, click *Delete*. A message dialog appears. Click *Yes* to confirm that you want to remove the file from the jobs list in the *Filer Queue* dialog.
- ◆ *Options...* —Click *Options* to set the options for the Filer. The *Options* dialog appears. Refer to “Options” on page 206.
- ◆ *Quit*—Click *Quit* to exit the Filer. A message appears. Click *Yes* if you are sure that you want to exit the Filer. If you quit the Filer, the *Filter Queue* dialog will list the same unfiled jobs the next time that the Filer is launched.

## Options

The *Options* dialog sets up options for the Filer. It has a *Logging* tab, a *Queue* tab and a *Preview* tab.

### Logging tab

Use the *Logging* tab to set up a log file for Documanage Filer. Use the log file to help diagnose any problems that you might have with the Filer.



### ◆ Activity Log File

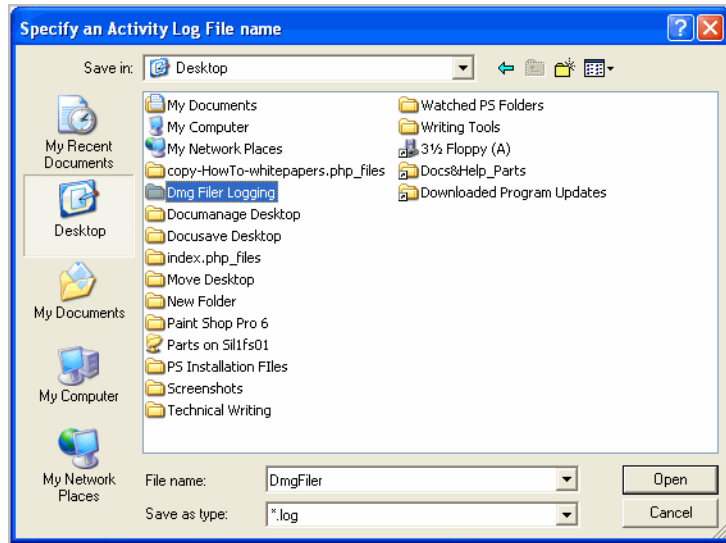
Use the *Activity Log File* area to select the location, verbosity, and the permanence of the log file.

- ◆ **Overwrite existing log file on startup**—Select *Overwrite existing log file on startup* if you want to have the Filer delete the log file each time that you start your computer.

## Appendix D: Documanage Filer

### Options

- ◆ **Log Level:**—From the Log Level: list, select the verbosity of the messages sent to the log file. Levels include Off, Debug, Detailed, and Normal, where Off does not record any messages to the log file and Debug records the most messages to the log file.
- ◆ **Choose File**—Click *Choose File...* for the Specify an Activity Log File name dialog, which you can use to specify a location and name for the logging file other than the defaults.

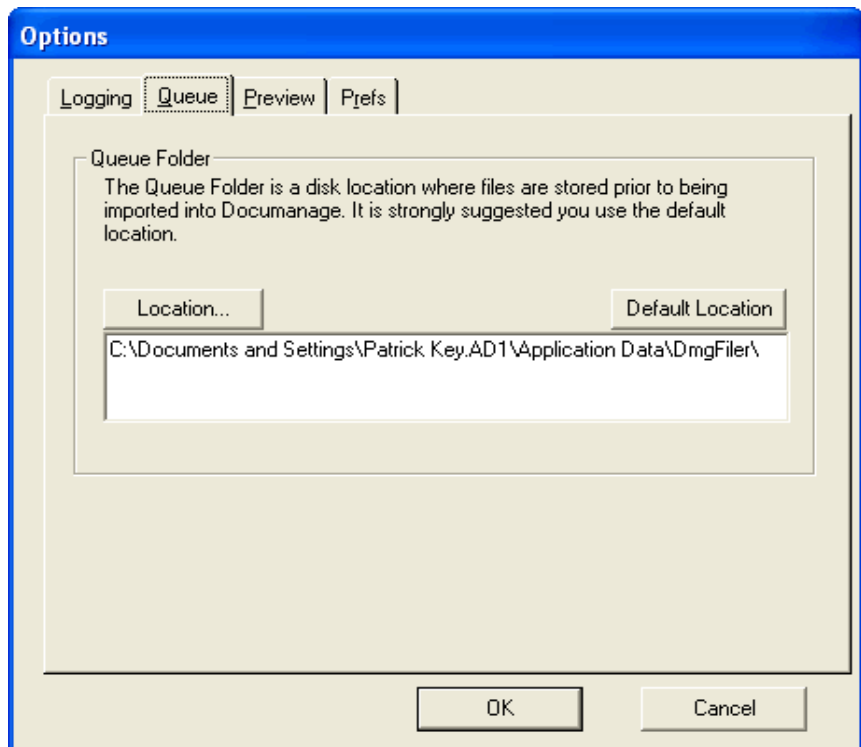


- ◆ **Error Messages**—When you select *Show message source* on message dialogs the part of the Filer that is producing an error is written to the log file. The message source is also appears in the message dialogs which the Filer produces when it encounters a critical error.

## Queue tab

Use the *Queue* tab to specify the folder where the Filer stores files before sending them to Documanage.

- ◆ Click *Default Location* for the default folder. It is strongly suggested that you use the default location.

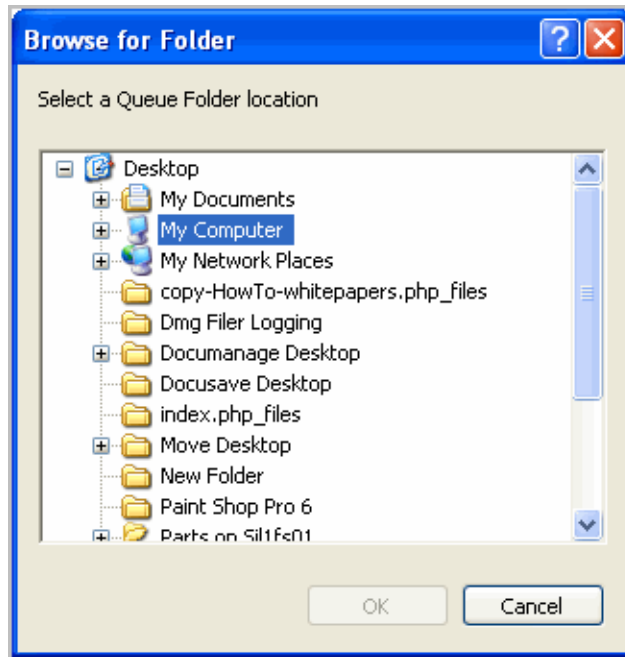


- ◆ Location—Click *Location...* to open the Browse for Folder dialog, which you can use to specify a folder other than the default folder.

## Appendix D: Documanage Filer

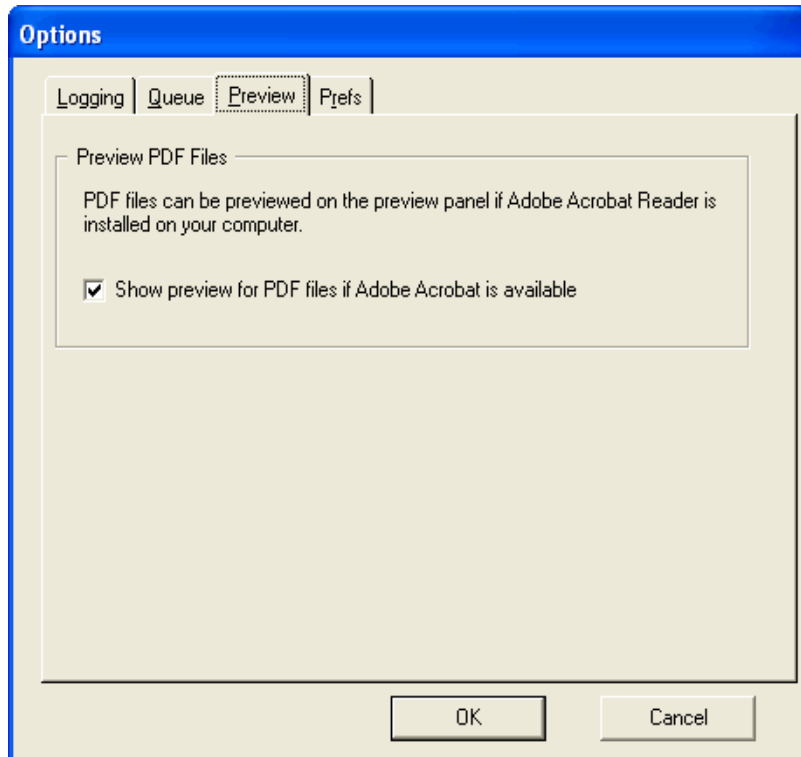
### Options

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## Preview tab

Use the *Preview* tab to turn off the preview of PDF files. Previewing PDFs with Acrobat can sometimes slow down the Filer.



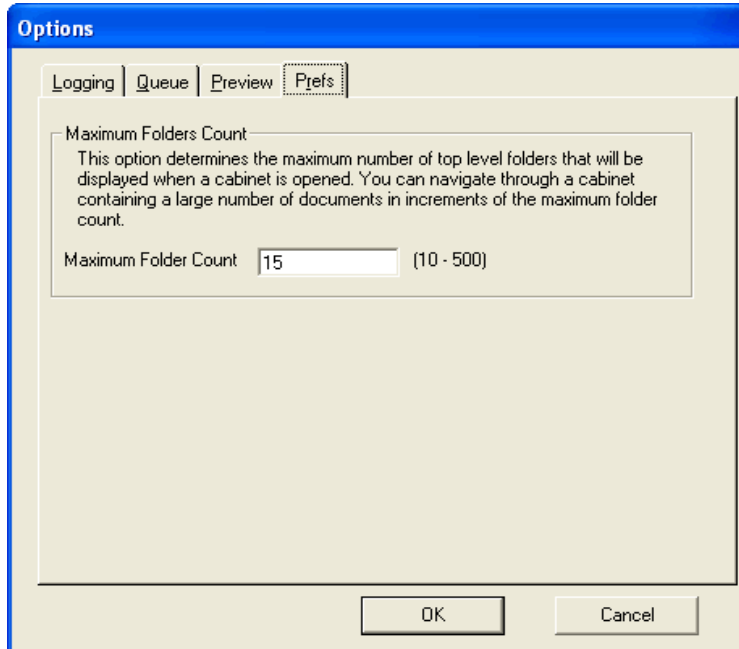
## Appendix D: Documanage Filer

### Options

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## Preferences Tab

Use the Preferences tab to set the number of top-level folders that will be displayed when a cabinet is opened. (This value was formerly stored in the POffice.ini file but is now maintained by the Documanage Filer).



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