Oracle® Insurance IStream

IStream Document Manager DMS Guide for IStream and Model Documents

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Chapter 1

Overview

Welcome to the IStream Document Manager DMS Guide for IStream and Model Documents.

This guide is for users who will be working with IStream documents and model documents in the DMS.

This chapter describes:

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Document Conventions

Tips, Notes, Important Notes and Warnings

Tip: A **Tip** provides a better way to use the software.

Note: A **Note** contains special information and reminders.

Important: An **Important** note contains significant information about the use and understanding of the software.

Warning: A **Warning** contains critical information that if ignored, may cause errors or result in the loss of information.

Other Document Conventions

- Microsoft Window names, buttons, tabs and other screen elements are in bold, for example: Click **Next**.

- paths, URLs and code samples are in the Courier font, for example: `C:\Windows`

- values that you need to enter or specify are indicated in the italicized Courier font, for example, `server_name`

- values that are optional are indicated with square brackets, for example `[reserved]`

IStream Document Manager

IStream Document Manager is a suite of integrated document capabilities, including document assembly, document management, search, workflow, collaboration and customization that support the entire document life cycle, across the enterprise. It enables organizations to better create, manage and distribute highly personalized, complex, error-free documents such as contracts, booklets and correspondence.

The IStream Document Manager DMS, IStream Author, IStream InfoConnector, IStream Assembler, IStream Visualizer, IStream Assembler Add-in for Microsoft Word, and IStream Author Add-in for Microsoft Word are all available to use with IStream Document Manager, as specified in your license agreement. IStream Publisher, Tracker, IStream Product Developer, IStream Communicator and IStream Writer are all complimentary products within the product suite.

The IStream Document Manager DMS includes document management capabilities such as:

- version control

- check in and check out of files

- index and searching

- folder structuring

- document viewing and retrieval

- reserving

- user and group Security

It also includes:

- document workflow

- collaboration

- project creation

- message boards

- interactive IStream document assembly

- model document management

The IStream Document Manager DMS provides an easy to use, highly flexible, web-based user interface.

The main types of documents you can work with in the IStream Document Manager DMS are:
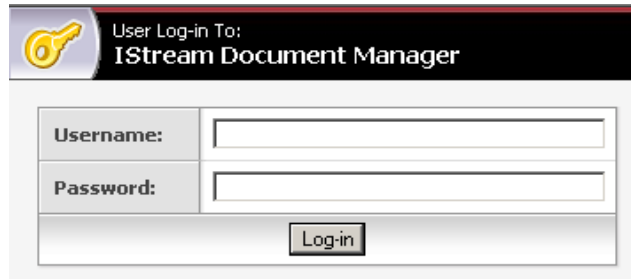
- *IStream Documents* on page 17

- *Model Documents* on page 39: this includes sections, and model documents in the outline format

Logging in to IStream Document Manager

IStream Document Manager runs in Internet Explorer.

Method: Log in to IStream Document Manager

1. In Internet Explorer, select the IStream Document Manager **Address** your administrator has set up for you (if it is not already selected).

2. Enter your **Username** and **Password,** then click **Log-in**.

You are now logged in to IStream Document Manager.

Note: When you first log in to Windows, an IStream cleanup utility briefly appears in a DOS window.

Configuring Internet Explorer

Complete the following procedure in Internet Explorer to ensure proper access to the DMS.

1. Click **Tools** > **Internet options**.

2. On the **General** tab, in the **Temporary Internet Files** section, click **Settings**.

3. Select the **Every visit to the page** option, then click **OK**.

Icons in IStream Document Manager

IStream Document Manager displays an icon next to each item in the DMS. The following table describes the icons that refer to IStream items:

Icon	Description
	IStream section (.CDS file)
	IStream model document (.CMS file)
	IStream document (.CLG file)
	IStream PDF document (regeneratable .PDF file)
	IStream Assembly server
Icons of Older IStream Documents	
	Old IStream model document format: a .CMS file created with Calligo 5.x and earlier
	Old IStream section: a .CDS file created with Calligo 5.x and earlier
	Old IStream document: a customizable .CLG file created with Calligo 5.x and earlier
	Old IStream document: a non-customizable .CLG file created with Calligo 5.x and earlier

IStream Document Manager Documentation

IStream Document Manager includes the following documents and online help files:

General Documentation

- The *IStream Document Manager Release Notes* include general product information, product enhancements and new features, supported platforms and third-party software, assorted considerations, and known issues and limitations.

- The *IStream Document Manager ReadMe* file describes the contents of the installation package.

- The *IStream Document Manager Glossary* contains definitions of commonly used IStream terms.

User Guides and Online Help

- The *IStream Assembler Online Help* describes how to generate documents from sections and model documents.

- The *IStream Assembler Add-in for Microsoft Word Online Help* describes how to perform certain IStream Assembler functions directly within Microsoft Word.

- The *IStream Author User Guide* describes how to create, edit, and test sections or model documents.

- The *IStream Author Add-in for Microsoft Word Online Help* describes how to perform certain IStream Author functions directly within Microsoft Word.

- The *IStream Customizer User Guide* describes how to modify the content of generated documents so that the changes will be applied during subsequent document generations.

- The *IStream Document Manager DMS Guide for IStream and Model Documents* describes how to edit and work with IStream sections and model documents using the DMS user interface.

- The *DMS Plug-in for Author Online Help* describes how to access DMS functionality in IStream Author.

- The *IStream InfoConnector Online Help* describes how to set up and configure IStream InfoSources.

Advanced Guides

- The *IStream Document Manager Guide for New Installations* explains how to complete a new installation of IStream Document Manager. It includes system requirements and detailed installation and configuration information.

- The *IStream Document Manager Upgrade Installation Guide* explains how to upgrade an *existing* installation of IStream Document Manager. It includes system requirements and detailed installation and configuration information.

- The *IStream Document Manager Message Reference Guide* contains lists of error, log and SDK messages from the various IStream components. It is for technical users who need additional information about the various IStream messages they receive.

- The *IStream Document Manager Technical Guide* is for system administrators and technical support staff who configure IStream Document Manager and set up links between it and their company's database. This guide is also for those who set up and maintain security groups and operators in the system, and who install, optimize, maintain and troubleshoot IStream Document Manager. It also describes installing and configuring IStream XML InfoSources for interactive and batch generation.

- The *IStream Assembler* and *Extensibility Toolkit Guides* contain detailed descriptions of the components in the IStream Toolkit, or SDK. They are for technical users who need to integrate IStream components with their own or other third party applications.

    In addition to the toolkit guides, the *IStream Toolkit SDK Samples Guide* gives an overview of the toolkit samples. The samples are working examples that can help you develop custom applications.

    For more information about the toolkit, see the *IStream Document Manager Toolkit ReadMe.*

Using the Online Help

This section describes how to use the Online Help and includes information about these topics:

The Contents of the Online Help

The Online Help contains the same contents as the related PDF document, but in an online Help format.

To open the Online Help, click the **Help** menu**.**

The Help is divided into two frames:

- the left frame displays the navigation tools: **Contents**, **Index** and **Search**

- the right frame contains the contents of each Help topic

There are different ways to find a Help topic:

Searching the Help

You can search the entire Help contents to find a specific topic.

Method: Search the Help

1. In the left pane of the Help, click the **Search** tab.

2. Enter the word(s) you want to search for, then click **Go!** or press Enter.

3. A list of Help topics is displayed in descending order by **Rank**. The Rank indicates how many times the word(s) you searched for appears in a Help topic. It can help indicate how relevant the topic may be in your search.

Tip: Use specific words in your search, for example: *model document*. Avoid using plurals, for example, "*sections,*" because this may limit your search results.

Using the Help Index

The Help **Index** contains a listing of all the Help topics in alphabetical order.

Method: Use the Help Index

1. In the left pane of the Help, click the **Index** tab.

2. Click the letter that corresponds to the topic you are searching for. You cannot select a letter that is greyed out, because it contains no index entries.

3. A list of all index entries beginning with the letter you selected is displayed.

4. Scroll to the index entry of the topic you are searching for.

5. Click the topic to view its contents in the main body of the Help.

Using the Help Table of Contents

When you open the Help, the **Contents** are displayed. The **Contents** contain main topics and their subtopics.

Each main topic appears as a book icon:

Each subtopic appears as a page icon:

Subtopics can also appear as book icons. In other words, books can appear within other books.

You can open a book by clicking a book icon or the text next to the book icon. This will expand the book and display the topics within that book.

To close an open book, click the book icon. The book "collapses", hiding the topics within the book.

Tip: When a Help topic is displayed, you can click the "Show in Contents" button to open the corresponding book that contains the displayed Help topic:

Navigating the Help

To go to the next or previous Help topic in the **Contents**, use the Next and Previous buttons in the right pane of the Help:

To go to the next or previous topic that you have viewed, use the **Forward** and **Back** buttons in your Web Browser.

Printing a Help Topic

You can print a Help topic in case you want to refer to it later.

Method: Print a Help topic

1.   Click the Print icon in the upper-right corner of the Help:

2.   The Print dialog box is displayed.

3.   Click **Print** to print the Help topic.

Chapter 2

IStream Documents

This chapter describes:

IStream Documents

IStream documents are the assembled documents that are created based on a model document: see *Model Documents* on page 39. These files have a.CLG file extension. In the Document Management System (or DMS), their MIME (Multipurpose Internet Mail Extensions) type is Microsoft Word.

You can produce IStream documents from:

- the Document Management System (DMS)

- IStream Author at an IStream Author client workstation

- IStream Assembler at an IStream Author client workstation (this could be local or remote generation)

- IStream Publisher

- Microsoft Word, at a client workstation with the IStream Assembler Add-in for Microsoft Word installed

Giving Permission to Generate from a Model Document

Before you can create an IStream document, the model document must have the appropriate permission, named **Generate from Model**, assigned to it.

Important: You must have **Edit Permissions** assigned to the model document to be able to assign permissions. If you do not, please contact your system administrator for help.

Method: Assign permissions to a model document for generation

1. Navigate to the folder that containing the model document (the .CMS file).

2. Click the model document **Functions** drop-down arrow and select **Permissions**.

    The **Permissions** page opens.
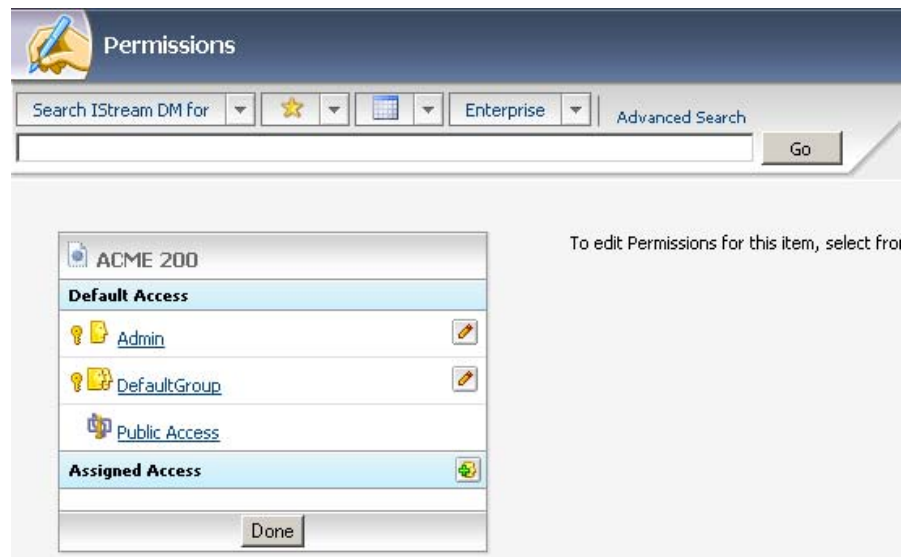
3. Click a link in the **Default Access** or **Assigned Access** sections. (For information about the fields in these sections, click **Help** > **For this Page.**)

    An **Edit Permissions** pane opens.

4. Select the **Generate from Model** check box.

5. Click **Update** on the **Edit Permissions** pane.

6. Repeat steps 3 to 5 to give **Generate from Model** permission to other users or groups.

7. Click **Done**.

    You are returned to the location of the master section in the DMS. Permission has now been assigned to allow generation.

Please note:

•   If this permission is applied to the **Public Access** group, *all* users will have permission to generate from this model document.

•   If you remove **Public Access** for a user in the DMS, documentation generation will fail for this user unless you also manually give permission for the Assembly Server object.

Adding an IStream Document to the DMS

You can add an IStream document to the DMS through remote generation from a model document stored on the DMS, or by adding an existing IStream document stored on the file system.

Using remote generation allows you to create IStream documents that you can regenerate later if database information changes, or if the model document changes. Remote generation uses either IStream Assembler or IStream Publisher to generate IStream documents.

If you add an IStream document stored on the file system to the DMS, you can regenerate the document from the DMS user interface once you have added it.

You can add a traditional IStream document (.CLG) to the DMS, or you can add an IStream PDF. Both types of files can be regenerated, but documents saved in .CLG format can also be modified in other IStream Document Manager applications, such as IStream Customizer.

You can also add a Word document generated from a model document to the DMS, but Word documents cannot be regenerated later.

Note: Remote generation is different from the **Make Generation** command on a model document's function drop-down menu. **Make Generation** creates a frozen version of the generated document that you cannot edit or regenerate.

Method: Add an IStream document to the DMS

1. Navigate to the folder where you want to add your IStream document.

2. Click **Add IStream Document**. Alternatively, from the **Add Item** drop-down list, select **IStream Document**.

   The **Add:IStream Document** page opens.

3. To add the IStream document by generating it from a model document on the DMS (remote generation), do one of the following steps:

- From the **Model Document** drop-down list, select the name of a model document on the DMS.

-OR-

- Click **Select Model** to browse the DMS for the model document.

4. To add an IStream document saved to the file system, enter the file's path in the **File** field, or click **Browse** to locate the IStream document.

When browsing for a document on the file system, remember that you can add an IStream document (.CLG file), or an IStream PDF. An IStream PDF is a regeneratable PDF document that was created by exporting a .CLG to .PDF format using the Assembler Add-in for Microsoft Word.

5. Select the **Edit** check box if you want to open the IStream document for editing after you have created it. See *Editing an IStream Document* on page 29 for more information.

If you select the **Edit** check box, the **Destination Format** drop-down list will be hidden. Do not select the **Edit** check box if the document being added is to be a Word document or PDF file. You can only use the **Edit** feature if the destination format is an IStream document.

6. Click the **Destination Format** drop-down list arrow (which is visible only if the **Edit** check box is cleared) and select the format you want the added item to be saved in: .CLG, a .PDF, or .DOC.

Note: If create the document as a .DOC file, the document will be generated and converted to a standard Word document. It will not be able to be regenerated.

7. Creating the document as a .PDF file converts the document to .PDF. Only the PDF version is stored in the DMS.

If you create the document as a .PDF file, the **PDF Password** and **Verify PDF Password** fields are available. Completing these fields will require users to enter the password that you specify to open the PDF.

If you do not want to add a password to the PDF, leave the **PDF Password** and **Verify PDF Password** fields blank.

8. Enter a **Name** for the IStream document.

9. To change the currently selected storage location for the IStream document, click **Browse IStream DM** to locate the area in the DMS where you want the IStream document created.

The **Select Container to Create In** page opens.

a. Navigate to the folder you want to add the IStream document to.

b. In the **Action** column, click **Select**.

The storage location appears in the **Create In** field.

10. Click **Add**.

If you have key data variables defined in the model document, you may be prompted to enter key data.

Assembly Server (or Publisher) generates an IStream document. You can view the generation log as the document is being generated.

Important: If the folder you specified in **Create In** has a category attached to it, any required attributes assigned to that category must have a value or generation will fail. An error message will display and no document will be added to the DMS. Therefore, ensure that all required attributes have a value when you assign them to a category.

11. When the generation is complete, click **OK**.

    You are returned to the page where you added the IStream document, or, if applicable, the IStream document is opened in Microsoft Word for editing.

12. Click the **Refresh** button in the browser if your IStream document has not been added.

Working with Existing IStream Documents

You **view** (**View as Web Page**), **Open**, or **Download** an IStream document in the same way as any other document in the DMS.

When you select **View as Web Page** for an IStream document (see *Viewing an IStream Document as a Web Page* on page 24), it is displayed in HTML format. The document appears as read-only and cannot be changed.

When you download an IStream document (see *Downloading an IStream Document* on page 24), a copy of the document is created locally in Microsoft Word format.

When you open an IStream document (see *Opening an IStream Document* on page 25), it is displayed in Microsoft Word format.

Note: The IStream document is a Microsoft Word document with additional IStream functions available to it.

Viewing an IStream Document as a Web Page

You can view an IStream document as a web page if you have the Livelink Filter Pack installed on your system.

Method: View an IStream document

1. Navigate to the document you want to view.
2. Click the **Functions** drop-down arrow and select **View as Web Page**.

   The document opens in the **View as Web Page** page in HTML format.

Downloading an IStream Document

You can download an IStream document, and create a copy locally in Microsoft Word format.

Method: Download an IStream document

1. Navigate to the document you want to download.
2. Do one of the following steps:
   • Click the IStream document name link. The **Document Overview** page opens. Click **Download**.

     - OR -

   • Click the **Functions** drop-down arrow and select **Download**. A **File Download** dialog box opens.

3. Click **Open** to open Microsoft Word within the browser window, displaying the IStream document contents, or click **Save** to save a copy of the Microsoft Word document to your local workstation.

Please note:

• When saving a document, if you chose to create a copy of it on your local workstation, the link between the IStream document on the DMS and the document you have copied and modified is no longer active. Modifications will only be reflected in the copy on your workstation, not in the copy in the DMS.

• Files that do not have a file extension in their **Name** will be downloaded as Microsoft Word files.

Opening an IStream Document

You can use the **Open** command to view your IStream document. **Open** displays the document in an embedded version of Microsoft Word. If you make any changes to the document, changes must be saved in a separate copy of the IStream document stored on your local file system, and are not retained in the copy saved on the DMS.

Method: Open an IStream document

1. Navigate to the document you want to open.

2. Click the **Open** link.

    The document is opened in read-only mode in Microsoft Word.

Viewing a Document's Overview Page

The behavior of a document's name link can be configured by the administrator so that it does one of the following actions when clicked:

• open the document in the browser

    - OR -

• open the document's overview page

If it has been configured, you can view a document's **Document Overview** page, which provides information about the document. You can also perform various functions from the **Document Overview** page, such as:

• opening, downloading or editing the document

• emailing a link to the document

• accessing previous versions of the document or the document's properties

• adding a rating to the document

Method: View an IStream document's Overview page

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1.   Navigate to the document that you want to view the **Document Overview** page of.

2.   Click the IStream document name link.
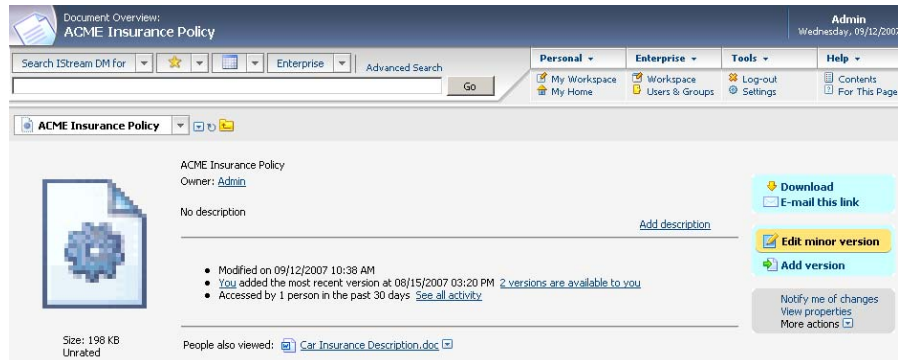
The **Document Overview** page opens.

Viewing the Generation Log for an IStream Document

You can view the generation log for an IStream document stored on the DMS using DMS functionality. Viewing the generation log can be useful to review generation errors, or saving or printing a copy of the log for your records.

Note: The **View Generation Log** feature is only available on IStream documents (.CLG files), and not on IStream PDFs.

Method: View the generation log

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1.   Click the **Function** arrow next to the name of the IStream document that has the log you want to view.

2.   Click **View Generation Log**.

3.   The log for the most recent generation of the IStream document opens in the current web page.

You can do the following steps:

- select the contents of the log and copy them for pasting into a word processing program

- save a `.txt` copy of the log on your local file system by choosing **File > Save As**.

- print a copy of the log by choosing **File > Print**.

4.   When you are finished working with the generation log, click the **Back** button in your browser to return to the area in the DMS where the source IStream document is stored.

Regenerating an IStream Document

You might regenerate an IStream document when:

- database entries have changed (for example, street addresses)
- model document changes have been made
- you need to verify the original generation

You can regenerate a traditional IStream document (.CLG file) or an IStream PDF. Not all PDF files are regeneratable IStream PDFs. IStream PDFs are created through remote generation in the DMS, or by exporting a .CLG file to .PDF format using the IStream Assembler Add-in for Word.

You can only regenerate documents that are unreserved in the DMS. For more information on reserved documents, see *Reserving or Downloading IStream Documents and Sections* on page 34.

Method: Regenerate an IStream document

1. Navigate to the document you want to regenerate.
2. Click the **Generate** link next to the file name. Alternatively, click the **Functions** drop-down arrow and select **Generate**.

    If you are regenerating an IStream PDF, you will be prompted to add a password to the PDF. Users will need to enter the password that you specify to open the PDF document. If you do not want to add a password, leave the **PDF Password** and **Verify PDF password** fields empty, and click **OK**.

    Document assembly begins, and you can view the generation log while the document is being generated.
3. A **Key Data** prompt will appear when you generate if you have key data defined and it is not persisted in the model. Enter the key data and click **Continue**.
4. When generation is complete, click **OK**.

    You are returned to the page where you generated the IStream document.

Please note:

- Regenerating an IStream document automatically creates a new version of the .CLG or .PDF file.

- When you use **Edit** or **Open** on a model document, the model document is saved as a temporary file. You can edit the file, but the **Generate** function from the IStream Author Plug-in will not be available. Please complete the edits to the model document and save the modified document back to the DMS. Once your edits are complete, you can create an IStream Document by:

  - selecting the **Add:IStream Document** function from the DMS

-OR-

- using the **New IStream Document** button available in either IStream Assembler or IStream Author Add-in for Microsoft Word.

Method: View changes from a previous version

1. Click the **Functions** drop-down arrow next to the IStream document with the versions that you want to view.

2. Select **Properties** > **Versions**.

   The **Versions Tab** opens.

3. Do one of the following steps:

   - Click the **File Name** link. The **Version Overview** page opens. Click **Open version**.

   - OR -

   - Click the **Functions** drop-down arrow beside any of the versions, then select **View as Web Page**. The document displays inside the browser.

Note: **View as Web Page** is only available if you have the Livelink Filter Pack installed on your system. If **View as Web Page** is not available, you can use the **Open** command to view your IStream document.

Editing an IStream Document

You can edit an IStream document before printing or sending it. The **Edit** function allows you to edit IStream documents using Microsoft Word. The .CLG properties of a document are maintained when you modify it.

Note: If the **Edit** function is not available in the DMS, contact your system administrator.

Updating File Formats

The first time you edit a specific IStream document created in a version earlier than IStream Document Manager 6.1, the format of the document will automatically be updated to reflect the new format introduced with IStream Document Manager 6.1.

The file is converted to the new format and saved back to the DMS before it is opened in Microsoft Word. All versions of this IStream document will now be in the new format. The converted version that is saved to the DMS is saved with a temporary file name (for example, 23719.tng).

If you save the IStream document after viewing or editing it in Microsoft Word, a new version is added to the DMS with the appropriate file name (for example, PolicyABC1234.clg). If you do not save the file, the most recent file will be in the new IStream document format with a temporary name (for example, 23719.tng).

We therefore recommend that you always save the document in Word the first time it is opened with IStream Document Manager 6.3.

Method: Edit an IStream Document

1. Navigate to the IStream document to be edited.

2. Click the **Edit** link. Alternatively, click the **Functions** drop-down arrow and select **Edit**.

Note: If you have never used the **Edit** function before, you may be prompted to install the **Edit** control.

3. The document opens in Microsoft Word. You can make changes to the document, and to the document's key data and PDF security options by choosing **Author > Document Properties** in Microsoft Word. For more information, see the *IStream Assembler Add-in for Microsoft Word* documentation.

4. When you are finished modifying the document, **Close** it.

5. You are prompted to save the changes made to your IStream document. You can choose from the following three options:

   • **Save the changes to IStream DM** saves the changes to the IStream document stored on the DMS, and creates a new version of it.

- **Save as a copy on your desktop** allows you to save the document as a separate copy on your file system, independent from the one saved on the DMS. Your changes will not be reflected in the copy of the IStream document stored in IStream Document Manager.

- **Discard the changes** ends the edit session without saving the changes that you made to any location.

Choose an option then click **OK**. Microsoft Word closes, and you are returned to the page in the DMS where you selected the **Edit** command.

6. To view the additional versions of the document on the DMS, click the **Functions** drop-down arrow and select **Properties > Versions**.

    The **Versions Tab** opens, displaying all versions of the document. See also *Reserving or Downloading IStream Documents and Sections* on page 34.

7. To view the file, click the **Functions** drop-down arrow beside any of the versions, and select **View as Web Page**.

Editing Function Considerations

Please note the following information about the **Edit function**:

- Edits made using the **Edit** command are not retained if you regenerate. Use IStream Customizer to retain changes made to your IStream document when you regenerate. See *Customizing IStream Documents* on page 32.

- You must have Microsoft Word installed. You should use the same version of Microsoft Word as the one used to author your model documents.

- You can only use the **Edit** function to modify a document if you have RESERVE permission on it, otherwise you cannot edit the document. For more information on reserved documents, see *Reserving or Downloading IStream Documents and Sections* on page 34.

- When you use **Edit** to work with a section, you will not have access to all of Author's wizards. For access to these, you need to open sections in Author instead using the **Author** command in the DMS.

- When you use the **Add IStream Document** function, you can select the **Edit** check box. If you do, the **Destination Format** drop-down list will be hidden.

- Do not select the **Edit** check box if the document being added is to be a Word document or a PDF file. Note that you can only use the **Edit** feature if the **Destination Format** is an IStream document.

- After the document is generated, the IStream document (.CLG) is saved in the DMS. If the **Edit** check box was selected on the **Add IStream Document** page, the Edit feature is automatically invoked, allowing you to make changes after generation.

- If you have Livelink Explorer installed, some of these sections may vary.

Note: To re-generate an IStream document after editing it in Word, you must save it to the DMS, and use the **Generate** link in the DMS.

- when clicking a hyperlink in an IStream generated document from IStream Document Manager, you will be asked if you want to save the document: click **No** to ignore the prompt and continue to the hyperlink destination

Customizing IStream Documents

You can use IStream Customizer to edit IStream documents. It is only when you edit an IStream document in IStream Customizer that the document retains the edits when the document is regenerated.

To customize documents using IStream Customizer:

- you must have IStream Customizer installed on your computer

- you must have the proper security permissions to use IStream Customizer

- the document you want to customize must be set up to be customized: see *Setting Document Permissions* on page 33 in the *IStream Customizer User Guide*

- the document must have tagged text

See the *IStream Customizer User Guide* for an explanation of all IStream Customizer functions.

Method: Customize an IStream document

1. Navigate to the IStream document to be customized.

2. Click the **Customize** link. Alternatively, click the **Functions** drop-down arrow and select **Customize**.

   Note: If you are using Windows Vista, an Internet Explorer warning may appear stating: **A website wants to open web content using this program on your computer**. Click **Do not show me the warning for this program again**, then click **Allow.**

   IStream Customizer opens.

3. If the **User Information** dialog box opens, enter the default **User name** and **Password** for InfoSources.

4. Add custom wordings to the tagged text blocks as necessary.

5. When you are done editing, QuickGen or regenerate the document to update it and apply the wordings.

6. Click **Save** and then **Close**.

   Another version of the document is added to the DMS.

Printing Documents

Once you have generated your document, you can print it. IStream Document Manager can process a single generated document or a batch of many documents. You may direct documents to a specific printer, or print on a specific schedule.
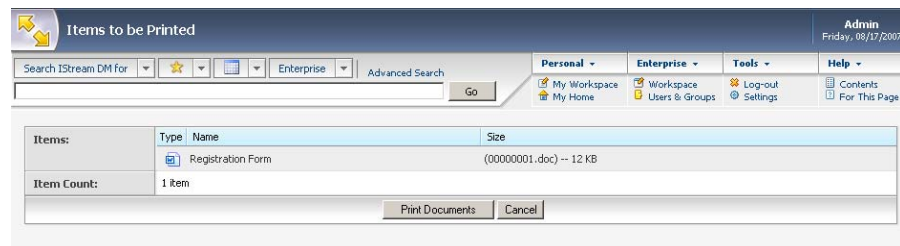
Note: This section applies to any IStream documents, Word documents or PDFs that are generated.

Method: Print one or more documents

1. Select the check box next to the documents you want to print.

2. Click the **Print** button .

    The **Items to be Printed** page opens.

3. Click **Print Documents**.

Printing in Batch Mode

IStream Document Manager supports printing of documents in batch mode with IStream Publisher. For details, see the IStream Publisher documentation.

Reserving or Downloading IStream Documents and Sections

When you reserve an IStream document (.CLG) in the DMS, you can download it.

When you reserve a model document (.CMS) or section (.CDS), you do not have the download function available from the **Reserve** screen, but you can download it after it has been reserved.

If the document in the DMS does not have a file extension, then a .DOC file extension is added to the file name when you download it.

If the document in the DMS already has a file extension, it is saved with its existing file extension (.CLG, .CMS, or .CDS). You will be able to open the document in the corresponding application (such as IStream Author or IStream Assembler), or you can open it in Word.

Reserving a document prevents other users from editing it. Reserved documents are shown in the DMS with a checkmark next to them.

Use the **Unreserve** command to allow other users access to the document for editing. Use the **Download** command to make and use a local copy of a document.

Categories and Attributes

Categories and attributes are useful tools when searching for a specific document or object within the DMS. For more information about how to use categories and attributes, see *Using Categories and Attributes with IStream Documents* on page 36.

Using categories and attributes eliminates having to perform full text searches on documents in the DMS.

Categories

A category is a classification or type of group of documents and other items.

For example, car insurance can be a category. This is a line of business within an insurance company. Users would typically want to search within that category in the DMS.

Attributes

An attribute is a field or data value that describes a document or other item that is stored as metadata to use in searches in the DMS.

For example, the policy number `12345` is an attribute value of the policy.

Attributes allows users to search for very specific documents by using attribute values in their searches.

Using Categories and Attributes in Searches

Categories and attributes work together during the search process. One or more attributes can belong to a category.

For example, instead of doing a full text search for a document with the text `12345`, you can search for a car insurance (category) document with a policy number of `12345` (attribute).

Categories and attributes work directly with key data and the DMS search engine.

Using Categories and Attributes with IStream Documents

This section describes how categories and attributes are used with IStream documents.

Categories and Key Data

When coding a model document in IStream Author, you can apply a category to the master section of the model document by using the **Key Data** tab of the **Properties** dialog box. You can view the **Properties** of the master section by clicking **File > Section Properties** in IStream Author.

For more information, see the *IStream Author Online Help* or *User Guide*.

Creating Categories

Users with administrator privileges create categories using the **Open the Categories Volume** page in the DMS. You cannot add categories to IStream documents by using the **Add Item** > **Category** function in the DMS.

Attributes need to be manually added to the category in the DMS that is assigned to the model document. The names of the attributes must match the names of the persistent variables in the model documents. Persistent variables do not need to be in key data.

Required Attributes

If a category has a required attribute, a value must be specified for both documents and folders. If required attributes are left blank, unexpected problems may occur. Attribute information from model documents override attribute information in the DMS.

Example

You create a model document in IStream Author that has a matching category name in the DMS. The model document does not have any persistent variables defined that match any attributes assigned to the category for the folder on the DMS. When you add the generated document to the DMS folder, the category is assigned to the document, but the attribute value from the folder category is not assigned.

Using Decimal Values

If decimal values are used in number-type persistent variables or in the key data of an IStream document that is stored on the DMS, you will not be able to update the **Category Information** page for this document. If you try to use decimals, a DMS error will occur.

Generating IStream Documents

When you generate an IStream document from the model document, IStream Assembler takes the category assigned to the model document and checks it against the category assigned to the folder where it is being stored. One of the following actions will occur:

- if the folder does *not* have a category, IStream Assembler will assign the model document's category to the IStream document

- if the folder *does* have a category, the IStream document will inherit the category of the folder, while also maintaining the model document category

- if both the folder *and* the model document have a category, the IStream document will have both categories assigned to it

Chapter 3

Model Documents

This chapter describes:

- *Model Documents* on page 40
- *Adding a New Master Section* on page 42
- *Adding a New Section* on page 45
- *Adding an Existing Section* on page 47
- *Promoting Model Documents* on page 48
- *Editing Model Documents and Sections* on page 49

Model Documents

A model document is like a template. The way a model document is structured determines how the output (the IStream document) appears.

A model document consists of a mandatory *master section* and other, optional sections that, when assembled, determine how a model document is generated.

A model document is constructed with references, rules, and sections.
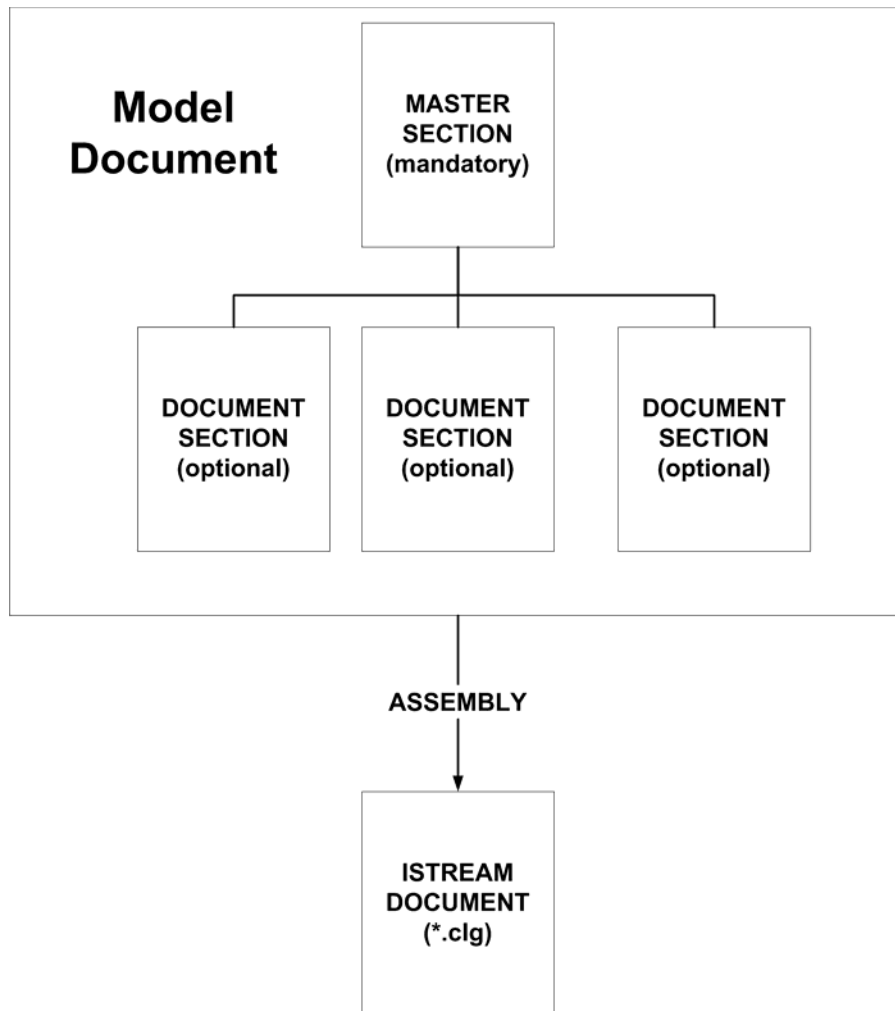
A model document is like the root and trunk of a tree. The document's other sections are like the branches.

To produce a generated document from a model document, the document generator examines all of the required branches of the tree, locating the data called for in each rule and expression. It then assembles this information into a generated document that can be viewed (see *Viewing an IStream Document as a Web Page* on page 24) and eventually distributed by a variety of methods, such as print, email, regular mail and fax.

In the IStream Document Manager, you can perform the following functions with model documents:

- *Adding a New Master Section* on page 42

- *Adding a New Section* on page 45

- *Promoting Model Documents* on page 48

- *Editing Model Documents and Sections* on page 49

Model Document Characteristics

A model document stored on a DMS has the following characteristics:

- When you create a new master section, it is stored within the folder that you specify.

- File extensions are not automatically entered. You must manually add the .CMS or .CDS extension. Adding extensions is essential when dealing with files going to and from a DMS repository to a file system repository.

Adding a New Master Section

This section describes how to add a new master section to the DMS using IStream Author. For more information about model documents and sections, see *Model Documents* on page 39, and the *IStream Author Online Help* or *User Guide*.

Storing sections on the DMS allows many authors to edit the sections that make up a model document. It also ensures that the resources of the Assembly Server are available to all users.

You can add a new master section to the DMS in the traditional format, or in the new model document outline format.

Method: Add a new master section and create a new model document in the traditional format

Note: Following this procedure will only create a traditional master section, not a model document outline. You must create the outline in IStream Author and save it directly to the DMS, or promote the model document outline from the file system to the DMS.

To create a model document outline and store it in the DMS, see *Add a new model document outline* on page 44.

1. Navigate to the folder in the DMS where you want to store the new master section.

2. From the **Add Item** drop-down list, select **IStream Section**.

   The **Add: IStream Section** page opens.

3. Enter a **File** path if you are importing from another document. You can click **Browse** to search for a file and then select it.

4. Select the **Create New Model** check box. This create the new section in the master section (.CMS) format, setting the section as the basis of a new model document. If you do not select the check box, the section is created in the .CDS (regular section) format.

5. Enter a **Name** for the new master section.

6. Do not enter a **Description** or any **Categories**, because this information is not saved.

7. Confirm that the folder in the **Create In** field is where you want the new master section to be saved on the DMS. If necessary, click **Browse IStream DM** to select a different location.

8. Click **Add**.

   IStream Author opens on your local workstation. The **New Master Section** dialog box opens.
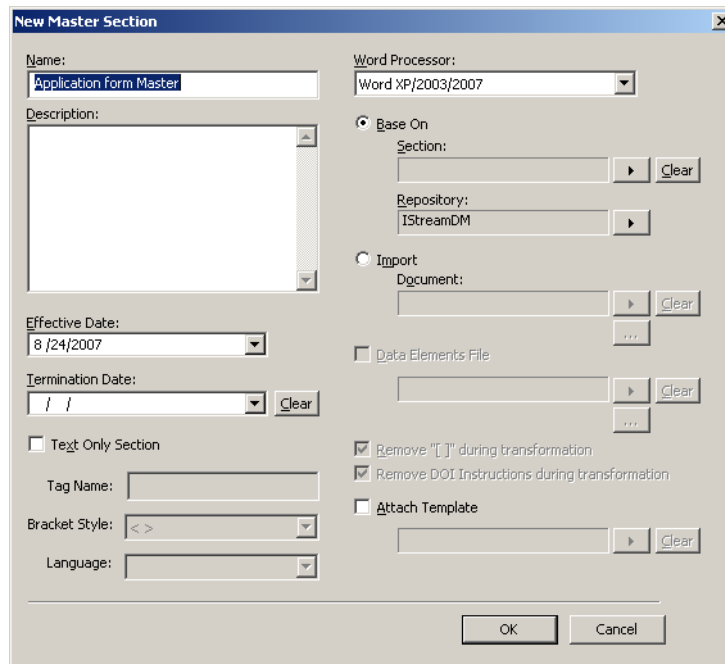
9. Click **OK**.

   The master section for the new model document is opened in IStream Author.

10. Click **OK**.

   The document is saved and compiled. The model document name appears in the title bar of the IStream Author window.

   You can continue working with the model document in IStream Author, or you can close the model document. For information on authoring model documents, see the *IStream Author Online Help* or *User Guide*.

   When you return to the DMS, navigate to the folder that you previously selected in the **Create In** field on the **Add: Model Document** page. The master section has been saved to that location.

Method: Add a new model document outline

1. In IStream Author, choose **File > New Model Document Outline**.

   The **New Master Section** dialog box displays.

2. Enter a **Name** for the new outline.

3. If necessary, enter a **Description**.

4. If necessary, modify the **Effective** and **Termination** dates.

5. To apply the attached template to all sections that you include in the outline later, select the **Attach Template** check box. Then, navigate to the Microsoft Word template that you want to attach to the outline.

6. Click **OK**.

   A new model document outline is created.

7. Click **File > Save As**.

   The outline is compiled, and the **Save As** dialog opens.

8. Verify that the DMS repository that you want to save the outline to is selected. You can see the name of the currently selected repository at the top of the **Save As** dialog.

   To choose a different repository:

   a. Click **Repository**

   b. Select one of the repositories available in the list, and click **OK**.

Note: You can use InfoConnector to establish a new repository if necessary. See the *InfoConnector Help* for more information.

9. Enter a **Name** for the model document outline. This name will be the one given to the model document outline in the DMS.

10. Click **Save**.

    The model document outline is saved to the DMS in the location that you specified. You can continue working with the model document in IStream Author, or you can close the model document. For information on authoring model documents, see the *IStream Author Online Help* or *User Guide*.

Adding a New Section

This section describes how to add a new section to the DMS using IStream Author. For more information on model documents and sections, see *Model Documents* on page 39 and the *IStream Author Online Help* or the *User Guide*.

Method: Add a new section

1.   Navigate to the folder in the DMS where you want to store the new section.

2.   From the **Add Item** drop-down list, select **IStream Section**.

     The **Add: IStream Section** page opens.

3.   Enter the new section **Name**. Do not use spaces or special characters.

     Do not enter a **Description** or **Category** because this information is not saved.

4.   Confirm that the folder in the **Create In** field is where you want the new section saved on the DMS. If necessary, click **Browse IStream DM** to select a different location.

5.   Click **Add**.

     IStream Author opens on your local workstation. The **New Sub Section** dialog box opens.
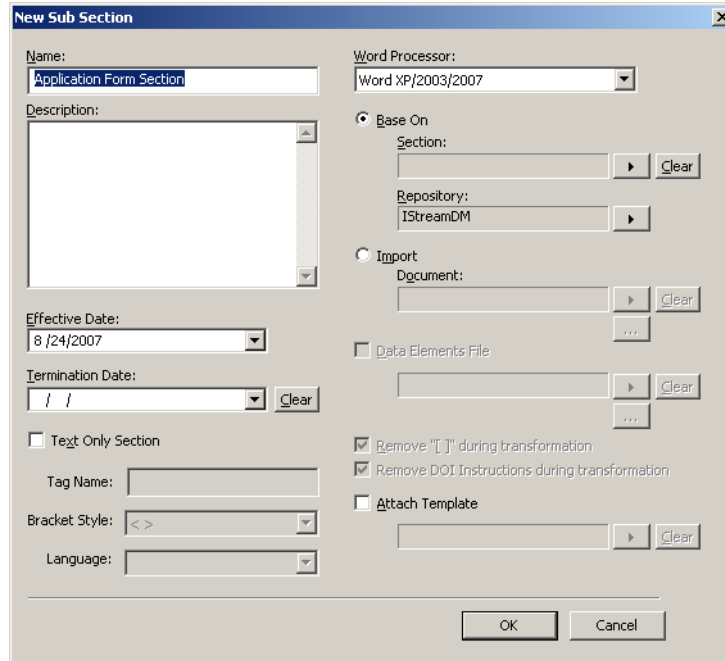
6. Click **OK**.

The new section is opened in Author.

7. Click **Save** on the **Author** toolbar.

The new section is saved and compiled.

You can edit the section in Author, or you can close it. For information on authoring model documents and sections, see the *Author Online Help* or the *Author User Guide*.

When you return to the DMS, navigate to the folder that you selected in the **Create In** field on the **Add: IStream Section** page. The new section has been saved to that location.

Note: The **Specific** tab within the **Properties** of a section contains values (such as the **Section Name, Effective Date** and **Termination Date**) that you cannot edit in IStream Document Manager. You can use IStream Author to edit these values.

Adding an Existing Section

If a section was previously stored on the file system, you can add it to the DMS.

Method: Add an existing section

1. Navigate to the folder in the DMS where you want to store the section.

2. From the **Add Item** drop-down list, select **IStream Section**.

    The **Add: IStream Section** page opens.

3. Enter the section name in the **Name** field.

4. Next to the **File** field, click **Browse**, and select the section (.CMS or .CDS file) file stored on a file system that you want to add to the DMS.

5. Confirm that the folder entered in the **Create In** field is where you want the section saved on the DMS. Click **Browse IStream DM** to select a different location.

6. Click **Add**.

When a master section is added to the DMS, you cannot generate documents from it until **Generate from Model** permission is given. See *Giving Permission to Generate from a Model Document* on page 19.

Promoting Model Documents

A model document cycles through various stages of development, quality assurance testing, and production. Often, a model document is stored on a different repository for each phase of its creation and use. When a different repository is used for each of the development, quality assurance, and production stages, you need to move your model documents from one location to another so that a new group of users can test, modify, or generate from the model documents as necessary.

The process of moving model documents from one repository to another is called *promotion*. To promote model documents from one repository to another, you should use the IStream Promoter utility. For more information and instructions, see the *IStream Promoter* chapter in the *IStream Document Manager Technical Guide.*

Editing Model Documents and Sections

Before being used in a production environment, model documents may need to be edited to ensure that they work properly when they are generated using Assembly Server or IStream Publisher.

When sections are stored on the DMS, you can edit them directly from the DMS instead of needing to open them in IStream Author first.

There are two main ways of editing model documents and sections:

- *Editing Model Documents and Sections Using IStream Author* on page 49

- *Editing Model Documents and Sections in Microsoft Word* on page 50

Editing Model Documents and Sections Using IStream Author

You can use IStream Author to edit model documents and sections.

Method: Edit model documents and sections using IStream Author

1. Navigate to the model document or section that you want to edit.

2. Click the **Author** link.

   Note: If you are using Windows Vista, an Internet Explorer warning may appear stating: **A website wants to open web content using this program on your computer**. Click **Do not show me the warning for this program again**, then click **Allow.**

   Author opens, and the document opens for editing.

3. Make the necessary changes within Author.

4. Click **Save**, then **Close** the document. For more information about authoring model documents, see the *Author Online Help* or *Author User Guide*.

IStream Author Editing Considerations

Please note the following considerations when editing documents using IStream Author:

- each time a document is edited and saved again in the DMS, a version is added to each section; for more information on versioning, and how to view previous versions of a document, see *View changes from a previous version* on page 28

- if an individual section is opened for editing outside of a model document, it cannot be generated; it can only be compiled; only a whole model document can be generated

- when you are editing a model document or section, the sections become reserved; they are not available to be edited by other users until they are unreserved - for more information on reserved documents, see *Reserving or Downloading IStream Documents and Sections* on page 34

Editing Model Documents and Sections in Microsoft Word

You can edit model documents and sections in Microsoft Word using the **Edit** command in the DMS.

Method: Edit model documents and sections in Microsoft Word

1. Navigate to the document on the DMS that you want to modify.

2. Click **Edit** next to the document. (If you have never used the **Edit** feature before, you may be prompted to install the **Edit** control.)

3. The document opens in Microsoft Word, ready to edit. You can change the code as necessary.

   Note: If you opened a master section created in model document outline format, you will be able to see the model document code, but you will not be able to modify it. To change the rules in a model document outline, you need to open the outline in IStream Author and use model document outline functionality to adjust the rules as appropriate. For more information, see *The Model Document Outline* on page 189 of the *IStream Author User Guide.*

4. When you are finished, click **Close**.

   You are prompted to save your changes. You can choose from the following options:

   - **Save the changes to IStream DM** saves the changes to the file stored on the DMS, and creates a new version of it.

   - **Save as a copy on your Desktop** allows you to save the file as a separate copy on your file system, independent from the one saved on the DMS. Your changes will not be reflected in the copy stored on the IStream Document Manager.

   - **Discard the changes** ends the edit session without saving the changes.

5. Choose an option, then click **OK**.

   Microsoft Word closes, and you are returned to the page in the DMS where you selected the **Edit** command.

Note: The document has been saved, but it may not have been compiled. To compile it, click the **Compile** link beside the document.

6. To view the additional versions of the document on the DMS, click the **Functions** drop-down arrow for the section, scroll to **Properties** and click **Versions**.

Editing Considerations

Please note the following information about the Edit command:

- you must have Microsoft Word installed, and its version must be the same as that used to author your model documents

- to compile sections, the IStreamDM Proxy needs to be running on the Assembly Server

- you can only **Edit** a document on which you have **Reserve** permission; for more information on reserved documents, see *Reserving or Downloading IStream Documents and Sections* on page 34

- when clicking a hyperlink in an IStream generated document from IStream Document Manager, you will be asked if you want to save the document: click **No** to ignore the prompt and continue to the hyperlink destination

- **Edit** does not include all of IStream Author's wizards; it is a Microsoft Word edit of the model.

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