User's Guide

PowerDOCS

Version 3.5.1

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The information contained in this Guide is subject to change without notice. If this Guide is provided in both printed and electronic form, the electronic form will govern in the event of any inconsistency.

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Chapter

1

Introduction

In This Chapter

This chapter provides a basic overview of PowerDOCS and the benefits of using PowerDOCS as your document management solution. The chapter also contains workstation requirements, typographic conventions used in this manual, training, and technical support information.

Introduction

PowerDOCS provides valuable assistance in helping you control and manage the documents within your organization. Word processing documents, spreadsheets, forms, images, e-mail messages—any type of file you want to save—can be tracked through PowerDOCS. With PowerDOCS, the Windows client to DOCSFusion's Advanced Document Management environment, you have the capability to search across multiple file servers. You can search for documents on any server without having to manually log in to the other servers or require help from your network administrator. Regardless of the size of your organization, PowerDOCS can be an invaluable tool in managing the documents stored on your network.

PowerDOCS Attaché gives you the ability to download documents from a Library and work with them offline. For more information about PowerDOCS Attaché, refer to the *Attaché User's Guide*.

Additionally, PowerDOCS is designed specifically for the Microsoft Windows environment. This gives you all the conveniences of multi-tasking, as well as access to a vast array of Windows applications. If you are a Windows user, you will quickly appreciate the added convenience that built-in document management provides.

PowerDOCS Design

PowerDOCS derived its name from its power and flexibility.

PowerDOCS:

- can run on a variety of network environments.
- can use a number of industry-standard SQL databases.
- allows easy customization.
- is integrated with a number of popular Windows applications.
- appears at the root level of Windows Explorer.

Because of the flexibility of PowerDOCS, it is sometimes necessary to give varying instructions for certain applications or network operating systems. This manual refers to specific network operating systems or applications whenever possible to clarify procedures. In addition, since PowerDOCS is so customizable, many of the procedures and dialog boxes discussed in this manual may have been modified by your PowerDOCS administrator. If this is the case, the PowerDOCS administrator can give you the correct procedures for your organization.

How PowerDOCS Works

PowerDOCS allows you to locate documents in seconds, rather than hunting for documents through a tedious directory search. A *Document Profile* is attached to every file or document that you create. The Document Profile is much like a library catalog card, containing an Author, Document Name, and Description for every document. When you want to retrieve a document, you can enter the information you need into a search that locates the Document Profiles that were created in your organization. Of course, you must have the proper access rights to be able to retrieve a document.

PowerDOCS provides you with a host of powerful, easy-to-use search features, and lets you search remote file servers automatically. You can search for any words in the text of the document or any of the information on the Document Profile. Once you begin using PowerDOCS, you will wonder how you ever got along without it!

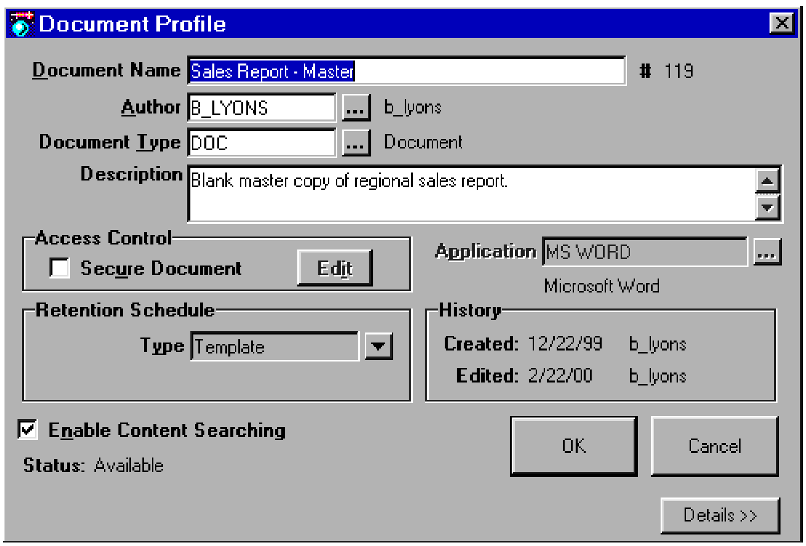
The Document Profile

The following screen is an example of a Document Profile, which is associated with every document stored in PowerDOCS and holds the information used in document searching. Chapter 3, "Creating and Profiling Documents," discusses how to fill out a Document Profile. Chapter 5, "Searching and Retrieving," explains how to search for a document by using the information stored in its profile.

When PowerDOCS was installed at your site, your PowerDOCS administrator indicated the type of industry you are in, such as legal or financial. The choice made by your administrator affects the labels on the fields of the Document Profile, as well as on other screens.

Figure 1.1

The Document Profile form



NOTE The Document Profile shown above is the default dialog box shipped with PowerDOCS. Your PowerDOCS administrator has the capability of customizing your Document Profile to best fit the needs of your organization; therefore, the Document Profiles on your system may be somewhat different.

The Library

With PowerDOCS, every document has an associated Document Profile, and every Document Profile is assigned to a *Library.* A library is a collection of Document Profiles, including all tables related to each profile. Every Document Profile created for a document is assigned to a specific library. On a large network, your PowerDOCS administrator may have set up multiple libraries. You can create and retrieve documents from any library. Organizations with multiple offices usually have at least one library per office.

What Does PowerDOCS Do for Me?

Chances are, you have had the unfortunate experience of searching for a document by the tedious process of hunting through terse subdirectory and file names. If you have ever been forced to guess what an eight-character file name means or had to spend hours deciphering your coworkers' file-naming schemes while they were on vacation, then you understand the need for PowerDOCS.

PowerDOCS:

- replaces the terse DOS directory structure and naming with easy-to-read, searchable Document Profiles.
- locates documents from anywhere in your organization in seconds.
- provides many shortcuts to your normal work routine.

See Chapter 5, “Searching and Retrieving,” for detailed information on the various PowerDOCS search capabilities.

Some of the Search options and other primary features of PowerDOCS are summarized below.

Recently Edited Documents

The Search Results dialog box features a list called Recently Edited Documents. This list consists of the last 30 documents you edited, and offers access to a document with a simple double-click. The appropriate application launches, retrieving the document you selected. For more information, see the section titled "Quick Searches" in Chapter 5.

Profile Search

Profile searching is fast and simple. The Profile Search feature lets you find documents matching any entries in one or more of the fields on the Document Profile. For example, when you know nothing about a document except its author, or who entered (typed) the document, or the client for which the document was produced, you can use the Profile Search feature. The profile search uses query by example (QBE) and is as easy as typing in the information that you know about the document. PowerDOCS can search all libraries or just the ones you specify. For more information, see the section titled "Profile Searching" in Chapter 5.

Content Search

PowerDOCS provides a comprehensive Content Search capability. The Content Search feature enables you to search the text of your documents or profiles with specific words, phrases, or words within proximity of each other. For example, in just seconds you can determine which documents in your organization contain the name "Jessica Tandy." Documents that meet the criteria you specify will be ranked by relevance. You can use Content Searches in conjunction with Profile Searches to obtain more specific search results. For more information, see the section titled "Content Searching" in Chapter 5.

Quick Searches

PowerDOCS allows you to store frequently used searches for quick access. The Quick Searches feature can be accessed from the PowerDOCS Desktop Search menu, the PowerDOCS Explorer tab, or from Quick Retrieve. For more information, see the section titled "Quick Searches" in Chapter 5.

With PowerDOCS, you can search all documents on your organization's network, even documents in different cities. This is possible through the global network searching. This allows searching on wide area networks as easily as on local area networks. With its robust searching capabilities, PowerDOCS can search any number of file servers.

Version Tracking

Our two-dimensional Version Tracking feature allows you to store up to 99 major versions of a document. You can also store up to 26 sub-versions of each major version. The PowerDOCS administrator designates the maximum allowable number of versions that can be created for each document. This feature is very useful for forms, position papers, agreements, or other iterative work. See Chapter 4, "Working with Document Versions," for further information.

Form Selection

With PowerDOCS, your administrator can set up multiple Document Profiles and Search forms that you can use to create and search for documents. The Document Profiles are assigned by application, so you can choose different profiles based on which application you are using and which type of document you created. Default field values can be defined for each of the forms to speed your data entry.

Security

Access to documents may be limited, so that only authorized users or groups can access or view documents and their profile information. See Chapter 3, "Creating and Profiling Documents," for further information.

Check-in/ Check-out

The Check-in/Check-out feature tracks documents that users have copied from or locked on the network, and notes when the documents will be returned. You can check out a document to diskette, and then check in the document as a new document, a new version, or a replacement of the old document with new edits. See Chapter 6, "The Document Menu," for further information.

Document History

The Document History feature provides a log of every activity performed on a document through PowerDOCS, such as Create, Edit, Print, New Version, Checkout, Copy, and Look. Chapter 6, “The Document Menu,” fully describes the Document History feature.

Projects

The Projects feature allows you to logically group related documents. A given document may be contained in multiple projects, and a project can be included as a sub-project of others. Essentially, you create electronic "folders" in which to group documents. See Chapter 7, “Projects,” for further information.Your PowerDOCS administrator can rename the Projects feature to a term more meaningful for your organization.

Templates

Forms or boilerplate documents can be created in any application and saved with PowerDOCS as Templates. Templates can be retrieved by any user, but edits must be saved as a new document. See Chapter 3, “Creating and Profiling Documents,” for further information.

PowerDOCS Attaché

PowerDOCS 3.5.1 includes the new Attaché feature that lets you work with PowerDOCS documents while being disconnected from the network. Upon startup, PowerDOCS will automatically detect whether or not the DOCSFusion server is available. If the server is unavailable, the user will be prompted to work in undocked mode. The server unavailability may be due to the fact your computer is not connected to your network or because the DOCSFusion server is not functioning at the time you log on to PowerDOCS. In the event the server goes down during a docked PowerDOCS session, PowerDOCS 3.5.1 will automatically switch to undocked mode.

PowerDOCS 3.5.1 does not support every PowerDOCS feature during undocked sessions; however, Attaché and PowerDOCS are still very powerful document management applications. Attaché affords the following features:

- Local storage of documents for undocked use
- Ability to add new documents during undocked use
- Ability to import documents during undocked use

- Ability to view, print, and edit Shadow documents
- Automatic monitoring of DOCSFusion server availability
- Ability to e-mail documents stored for undocked use, including Shadow documents
- Ability to view limited document information while in undocked mode
- Application integration using ODMA, Interceptor, Passive Integration, and Directory Monitoring

During Attaché sessions, e-mail integration and Microsoft Outlook Client integration with PowerDOCS will be unavailable. In addition, Quick Searches, Projects, and the ability to work with paper documents are features that are not supported in Attaché. Refer to the *Attaché User's Guide* for more information.

Workstation Requirements

The following chart lists the hardware and software requirements for running PowerDOCS with DOCSFusion 3.5.1.

Processor	Recommended:	Pentium 200+
Memory	Recommended:	128 MB
Operating System	Microsoft Windows NT Server 4.0 with Service Pack 5 or later (required by the DOCSFusion Server), Microsoft Windows NT Workstation 4.0 with Service Pack 5.0 or later, Windows 98 Second Edition, or Windows 2000.	
Certified DOCS Open Libraries	DOCS Open 3.8 or later.	

Documentation Conventions

This documentation uses the following fonts and styles to indicate different types of information.

Convention	Meaning
Regular Italic font	Indicates a new term or variable in a command line. For example, replace *filename* with the name of a file.
`Monospaced font`	Indicates a file, directory, drive or command name, program code, or other text that appears on the computer screen. For example, the default Oracle library is usually `ORACLE_HOME/DBS` or `ORACLE_HOME/RDBMS73`.
Bold	In instruction steps, indicates information you must type. In text, indicates emphasis.
>	Separates items on more than one cascading menu or successive choices of icons or program groups.

Related Documentation

PowerDOCS Installation Guide

- *PowerDOCS Installation Guide*—explains preinstallation steps and walks you through the PowerDOCS installation. This guide also provides information on configuring application and e-mail integration for PowerDOCS 3.5.1.

DOCSFusion Documentation

- *DOCSFusion Setup and Administrator's Guide*—explains the various administrator utilities available with PowerDOCS and how to use them. This guide also provides information on installing and setting up a DOCSFusion server.

- *DOCS Designer and Data Dictionary*—explains how to enhance PowerDOCS with DOCS Designer. Topics include creating forms, adding tables and columns, adding and changing filters.

Training Classes

Hummingbird (Document and Knowledge Management Solutions) offers courses at authorized Training Centers worldwide. For more information or to register for classes, call Hummingbird Education Services at (613) 238-1761.

Where to Go for Information

On the Web

Our website at http://www.hummingbird.com/support/dkm/ carries the most up-to-date information on DOCSFusion and PowerDOCS. This information is presented in technical bulletins and in WebSupport Solutions, each dealing with a specific topic that is not covered or that updates printed information. Before installing DOCSFusion/PowerDOCS, we suggest you browse through the bulletins for items that may be pertinent to your installation. For WebSupport, you will be asked to enter your user name and password for authentication. If you have not requested logon access to WebSupport, you can do so at http://www.hummingbird.com/support/dkm/ .

On the Fusion Family CD

The 3.5.1 Release Notes reside in the \PowerDOCS folder in a file called PowerDOCSReadme.rtf, which can be read by most text editors and word-processing programs. The release notes contain information that came to light after the documentation was printed. Known bugs and workarounds are also detailed in the Release Notes.

The DOCSFusion product line's online manuals, which are published in PDF format, are provided on the Fusion Family CD. To read these manuals, you will need a copy of Adobe Acrobat Reader installed on your machine. A setup program for Acrobat Reader 4.05 is provided on the DOCSFusion CD. If you do not already have a copy, follow the instructions below.

1. Insert the Fusion Family CD in your computer's CD-ROM drive.
2. The DOCSFusion Product Line Installation menu will be displayed. Click Documentation.
3. Click Install Acrobat Reader. The Acrobat Reader version 4.05 install program will launch.
4. Follow the onscreen instructions and install the program. When complete, exit the DOCSFusion Product Line Installation menu.

The PowerDOCS manuals are found in the `..\Program Files\PCDOCS\PowerDOCS` directory. To access these manuals, start Acrobat Reader and select File>Open. Navigate to the `..\Program Files\PCDOCS\PowerDOCS` directory and select the file you want to open.

- **PowerDOCS.PDF.** The *PowerDOCS User's Guide*
- **PDInstall.PDF**. The *PowerDOCS Installation Guide*
- **PDAttache.PDF.** The *PowerDOCS Attaché User's Guide*

To access the entire DOCSFusion documentation set:

1. Insert the Fusion Family CD in your computer's CD-ROM drive.
2. The DOCSFusion Product Line Installation menu will be displayed. Click Documentation.
3. Select Browse Documentation. Double-click the `PDFs` directory.
4. Double-click `COVERDOC.PDF`. Acrobat Reader will launch and a menu listing the DOCSFusion documentation set will appear.
5. To open a document, click the document name.

The entire DOCSFusion product line documentation set, which includes the online manuals and the Windows Help files, can be installed on a network drive or any local machine. This gives you access to the documentation from the Start menu. To do this, follow steps 1 and 2 above. Select Install Documentation and follow the onscreen directions.

By default, the PowerDOCS Help files are installed with PowerDOCS. To access Help while using PowerDOCS, press F1.

Technical Support

If you have questions about installing or administering PowerDOCS, you can contact Hummingbird Technical Support Department from 8:00 A.M. to 8:00 P.M. EST.

PowerDOCS Technical Support	124 Marriott Drive Tallahassee, FL 32301 Phone: 850.942.5000 Fax: 850.942.8085 E-mail: supportTLH@hummingbird.com
Asia/Pacific Technical Support	Level 12 80 Mount Street North Sydney, NSW 2060 Phone: +61.2.9923.2011 Fax: +61.2.9922.3097 E-mail: SupportSyd@hummingbird.com
European Technical Support	2 rue Rouget de L'Isle 92137 Issy-les-Moulineaux, France Phone: +33.1.46.29.07.40 Fax: +33.1.46.29.55.22 E-mail: support.eu@pcdocs.com

Chapter

2

Getting Started with PowerDOCS

In This Chapter

This chapter describes the components that make up the PowerDOCS client software and details the basic features of the PowerDOCS User Interface. This chapter will help you decide which PowerDOCS components will best suit your needs.

Introduction

PowerDOCS is composed of several different components, each having its own mode of access and each operating independently. This allows you the flexibility to access PowerDOCS in various ways at any given time, according to your immediate needs. The following interfaces are available with PowerDOCS if you choose to install them all:

- **The PowerDOCS Desktop.** The Desktop serves as the program's "home base." This desktop is a powerful new tool for viewing and acting on the contents of document libraries managed by PowerDOCS. All functions and features are available from this desktop, so you will quickly appreciate its ease of use.

- **The PowerDOCS Explorer.** The Explorer offers all the functionality of PowerDOCS without some of the features of the desktop. For more information, refer to the "Using the PowerDOCS Explorer" section at the end of this chapter.

- **PowerDOCS from Within Windows Explorer®.** You can access and use PowerDOCS from within the Windows Explorer.

- **PowerDOCS Outlook Client.** You can access PowerDOCS from within Microsoft Outlook 98 and 2000.

- **Start>Find>PowerDOCS Documents.** If you've installed the PowerDOCS System extensions, you can select Find from the Windows Start menu and search for PowerDOCS documents.

NOTE Before you can run PowerDOCS, DOCSFusion must be running. Your system administrator may have set up DOCSFusion to start automatically. Check with your administrator on this issue.

There are several methods available for starting PowerDOCS. Your PowerDOCS administrator may have disabled a certain method or may have set up a different procedure for you to use when loading PowerDOCS. Check with your administrator if you are uncertain.

Starting PowerDOCS

With a typical PowerDOCS installation, there are several possible methods for starting PowerDOCS. When you launch any method of PowerDOCS, the following Login window will appear. Select your primary library and then enter your user name, password, and network name. If you want to save your password to your Password List, click the check box.

Figure 2.1

PowerDOCS Login window

NOTE The ability to save your password while logging in is limited to Windows 95 and Windows 98 users. Windows NT and Windows 2000 users must modify their Registry to allow for this convenience. Check with your PowerDOCS administrator to see if this option is available to you.

Your user name can be either of the following:

- Your User ID in the DOCS Library.
- A network user name if you have a LAN account that the DOCSFusion server can verify (for example, a Windows NT Domain user name).

Your password can be either of the following:

- Your DOCS Library password, to be used if you logged in to PowerDOCS using your DOCS Library User ID.
- Your LAN account password, to be be used if you logged in to PowerDOCS using your LAN account User ID.

The Network name field is optional unless you are using NetWare version 3.x. Enter the name of the NetWare Server.

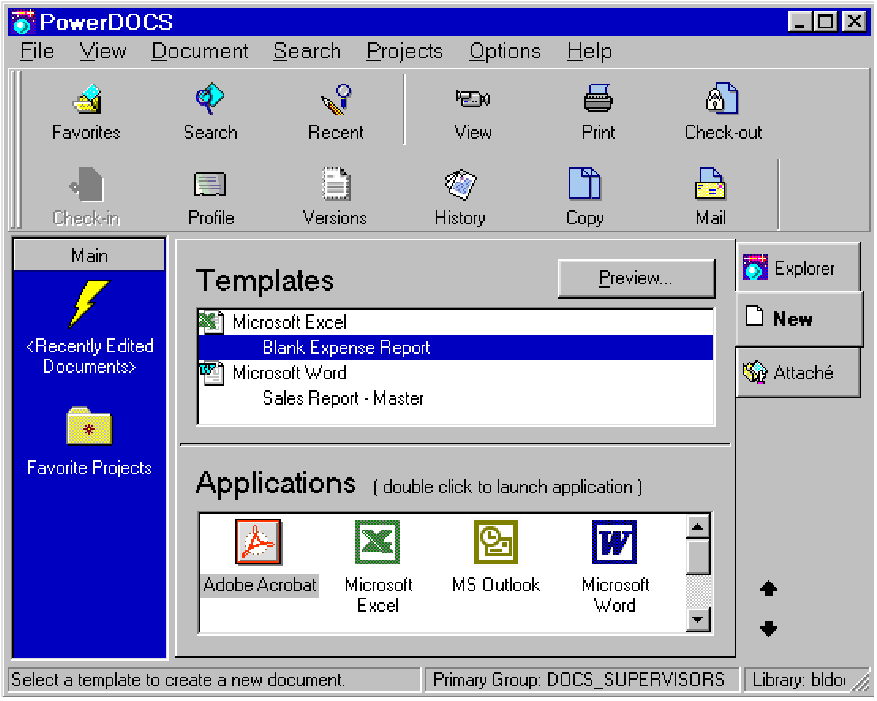
NOTE For more information on document access and security, refer to Chapter 9 of the *DOCSFusion Setup and Administration Guide*.

You can launch PowerDOCS using any of the following methods:

- To open the PowerDOCS Desktop, which offers all of the program's features from one window, start PowerDOCS from your Windows Start menu. From the Programs menu, click the PowerDOCS program group and then click PowerDOCS 3.5.1. Enter your user name and password at the Login prompt. The PowerDOCS Desktop is displayed, as shown in Figure 2.2. For more information about manipulating documents through the Desktop, refer to the section called "The Desktop Features."

Figure 2.2

The PowerDOCS Desktop



- Another method of starting the PowerDOCS Desktop shown in Figure 2.2 is to locate the PowerDOCS icon (shown below) on your Microsoft Windows desktop and double-click it. Enter your user name and password at the Login dialog box and the PowerDOCS Desktop will be displayed. For more information about manipulating documents through the Desktop, refer to the section called "The Desktop Features."

Figure 2.3

The PowerDOCS Desktop Icon

- To open the PowerDOCS Explorer, locate the PowerDOCS Explorer icon (shown below) on your Microsoft Windows desktop and double-click it. The triple-pane view appears.

Figure 2.4

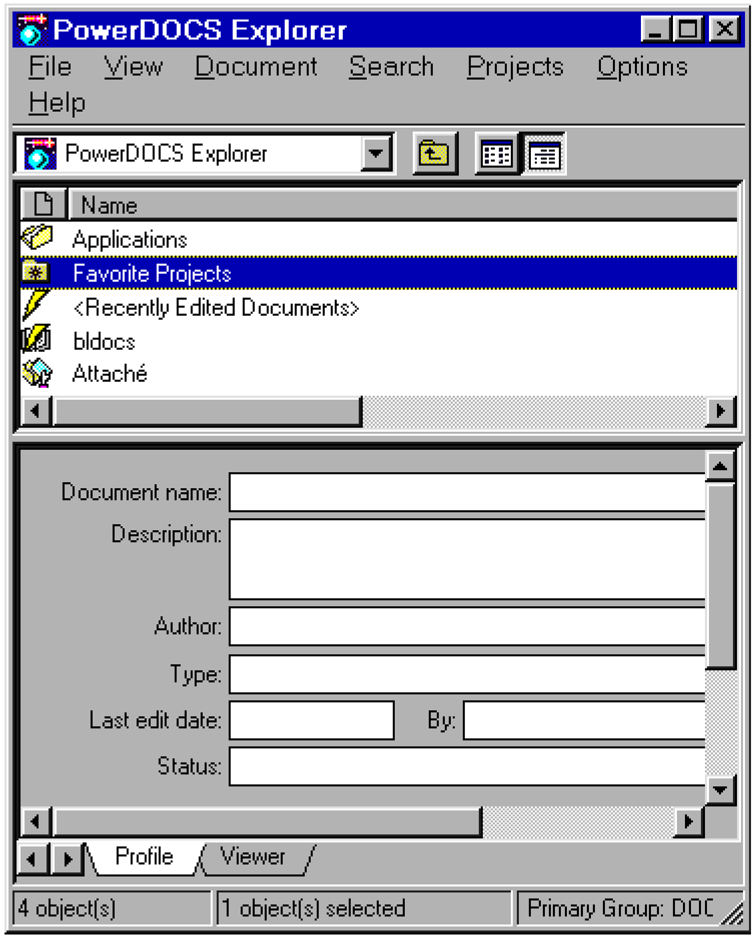
The PowerDOCS Explorer Icon

You may also highlight the PowerDOCS Explorer, right-click, and select Open from the shortcut menu. A double-pane view of the PowerDOCS Explorer appears, as shown in Figure 2.5.

The purpose and function of the PowerDOCS Explorer is described in the section called "Using the PowerDOCS Explorer."

Figure 2.5

The PowerDOCS Explorer default window

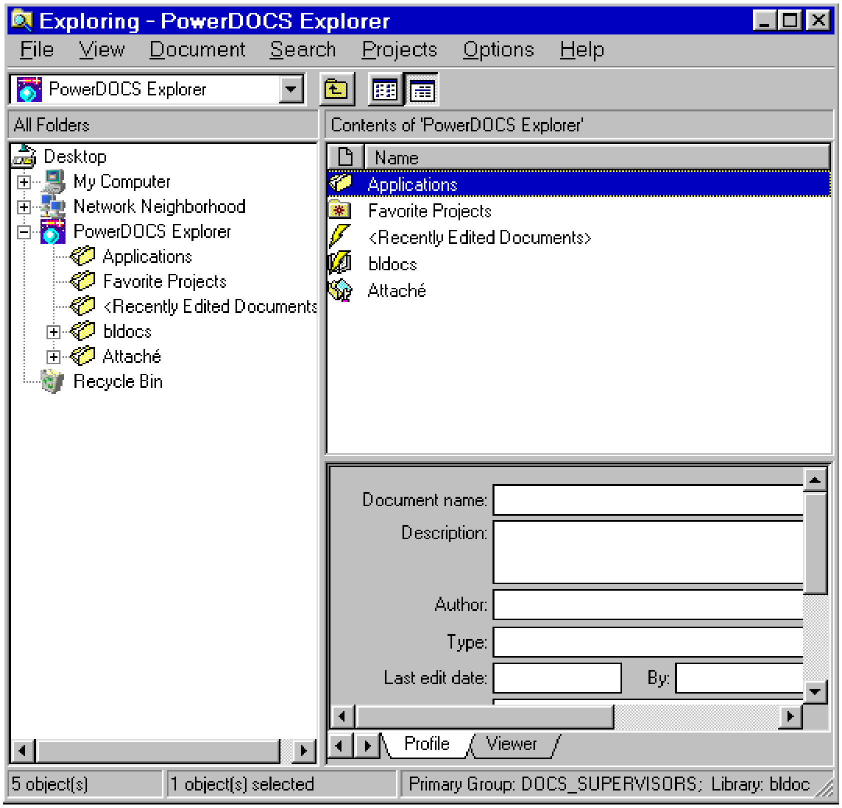


To open a triple-pane view of the PowerDOCS Explorer, select the View menu> Add-ons. The following view of PowerDOCS Explorer is displayed.

For more information about Add-ons, refer to "Viewer Add-on" on page 54 and "Profile Add-on" on page 56.

Figure 2.6

Triple-pane view of PowerDOCS Explorer

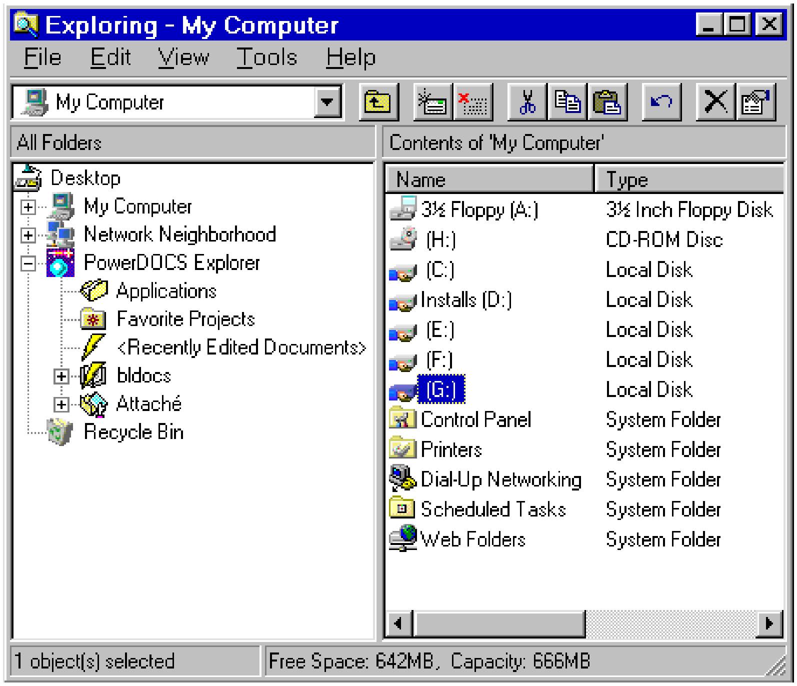


- To start PowerDOCS from Windows 95 or Windows NT Explorer, double-click the PowerDOCS icon from within the Windows Explorer window. Your hierarchy of PowerDOCS libraries, Quick

Searches, projects, and documents becomes visible and available for action from within Windows Explorer, as shown in Figure 2.7.

Figure 2.7

Using PowerDOCS from Windows Explorer



- To find PowerDOCS documents, you can access the PowerDOCS Search Results dialog box by clicking first the Windows Start button and then Find. From the Find submenu, click PowerDOCS documents. A Search Form dialog box appears, where you can initiate a search.

  You can also find PowerDOCS documents from Windows Explorer by selecting Tools>Find>PowerDOCS Documents. A Search Form dialog box appears, where you can initiate a search.

  For more information, refer to the section called "Finding a Document Using Quick Searches" in Chapter 5 of this guide.

  Since you can customize your Windows desktop and Explorer views, your screen may not look exactly like the one shown above.

This chapter discusses the various items that *may* be on the PowerDOCS Desktop. If they are optional items, they are designated as such. Read the section in this chapter called "Customizing Your PowerDOCS Desktop" for information on setting up the Desktop to meet your specific needs.

TIP You can select View>Refresh (F5) any time you make a change on your PowerDOCS Desktop, and the changes will be displayed immediately.

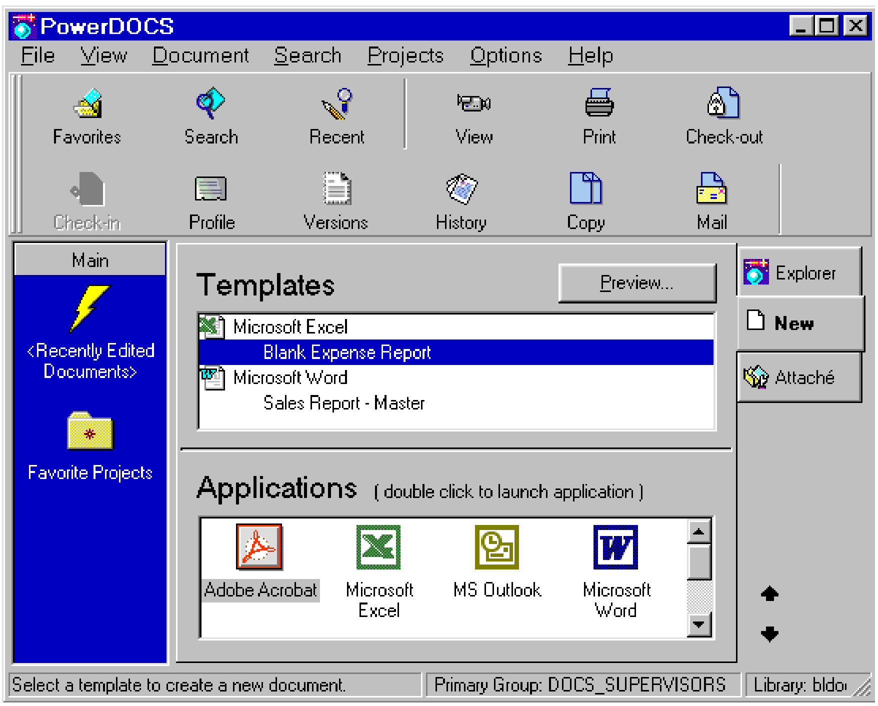
The PowerDOCS Desktop

This chapter describes the PowerDOCS interface organization and how to customize its features. Through PowerDOCS, you can now browse through the hierarchy of libraries, projects, and documents and perform actions on any item that you have rights to.

PowerDOCS is designed to help users organize their tasks more efficiently. The majority of users generally work with a small, focused set of projects, documents, and Quick Searches. PowerDOCS helps users concentrate on the tasks they perform most often, while still offering an extensive document management feature set.

Figure 2.8

PowerDOCS Desktop Applications pane



The Desktop Features

The PowerDOCS Desktop is easy to use. This section discusses the various features of the PowerDOCS Desktop. Remember, because you can choose whether or not to display some of the features on your system's desktop, features that are customizable are designated in this guide as "Optional."

Applications

The Applications pane, shown in Figure 2.8 above, lists applications, such as Microsoft Word and Excel. This pane is only visible when the New tab is active on the PowerDOCS Desktop. For more information about the New tab, see the section called, "The New Tab." See Chapter 8, "Using Applications with PowerDOCS," in this guide for specific information about using PowerDOCS with each application available to you. Chapter 3, "Creating and Profiling Documents," tells you how to create and save documents with these applications using PowerDOCS.

The Menus

A menu bar appears along the top of the Desktop. These menu options list the PowerDOCS commands. Some of the menus or commands may appear dimmed because they are not currently available or you do not have rights to them. The menus and commands are discussed in this manual when needed for a particular procedure.

The Toolbar

The PowerDOCS toolbar displays the most commonly and frequently used menu functions for easier access to these features. You can customize the toolbar to better suit your needs or preferences. This process is explained in the section called, "Customizing Your PowerDOCS Desktop." As shown in Figure 2.8, buttons that appear dimmed are currently not available for use.

System Information

PowerDOCS displays system and document information along the bottom of the Desktop if you have the Status Bar active from the View menu. To activate the Status Bar, select View>Status Bar. This will display the name of your primary PowerDOCS group, the current primary library and your user name.

The Favorites Bar

The Favorites Bar appears vertically along the left side of the PowerDOCS Desktop by default and is designed to provide quick access to the documents, projects, and Quick Searches you use most. By default, the Main group is the only existing Favorites group, shown in Figure 2.9. The Main group consists of the Favorite Projects icon and the Recent Edits icon. Clicking the Favorite Projects icon displays any projects you have placed there for quick and frequent access. Clicking Recent Edits displays a list of the 30 documents you have most recently edited. Setting up your Favorites Bar to display specific documents and projects helps you avoid drilling into document lists to find a document. Instead, you can bring a document up on your screen by simply clicking on it from the Favorites Bar.

This section shows you how to add documents and projects to the default Main group on the Favorites Bar and also tells you how to set up your own groups, adding documents and projects to them as well.

Adding the Favorites button to your PowerDOCS toolbar:

1. Before adding documents to the Favorites Bar, you can add the Favorites button to the toolbar. From the View menu, select Customize>Toolbar.

2. When the Customize dialog box appears, scroll down the list of Available buttons to the Favorites button. Highlight Add to Favorites Bar and click Add. Then click Close. The Favorites button now appears on your toolbar. For more information on customizing the toolbar, refer to the "Customizing Your PowerDOCS Desktop" section later in this chapter.

To add documents or projects to the Main group of the Favorites Bar:

1. With the Explorer tab active on the PowerDOCS Desktop, double-click a Quick Search, such as Recently Edited Documents, or a project to display a list of documents in the upper right pane of the Desktop.

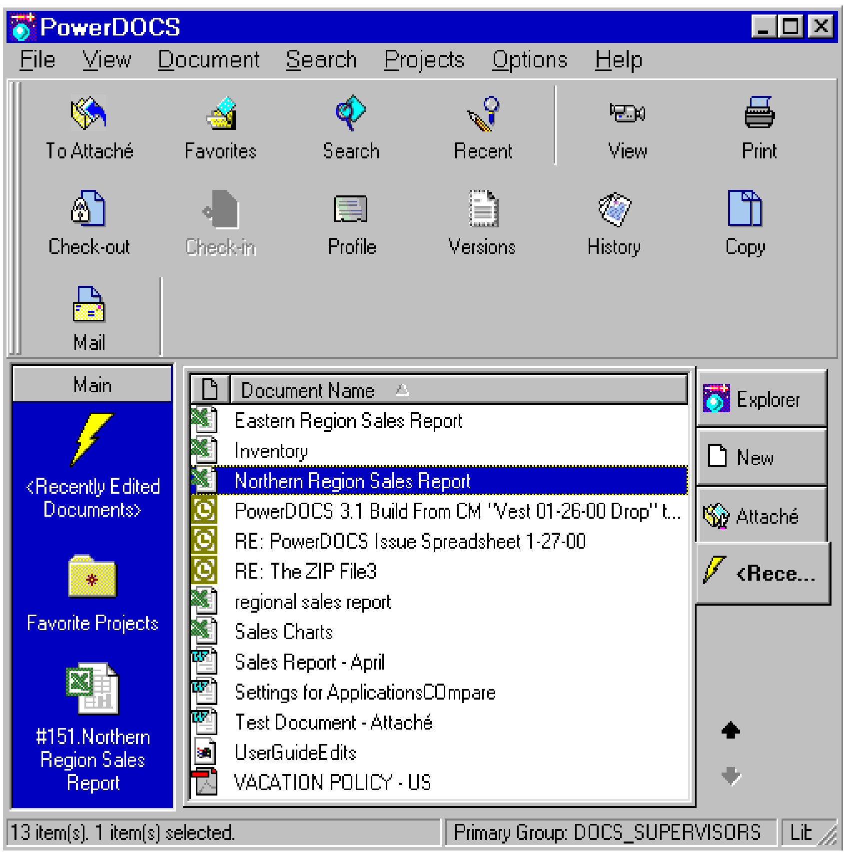
2. Locate the document, project, or Quick Search you want to add to the Favorites Bar and click to select it.

3. Click the Favorites button on the PowerDOCS toolbar. The selected item now appears under the Recent Edits icon on the Favorites Bar, shown in Figure 2.9.

NOTE You can also drag and drop documents, projects, and Quick Searches from the Explorer tab to the Favorites Bar.

Figure 2.9

Document #151 "Northern Region Sales Reports" has been added to the Favorites Bar of the PowerDOCS Desktop.



To add a new group to the Favorites Bar:

1. Place the mouse pointer over the Favorites Bar between icons and click the right mouse button.

2. From the shortcut menu that appears, click Add New Group. At the top of the Favorites bar, a new group field appears with the default name New Group highlighted.

Figure 2.10

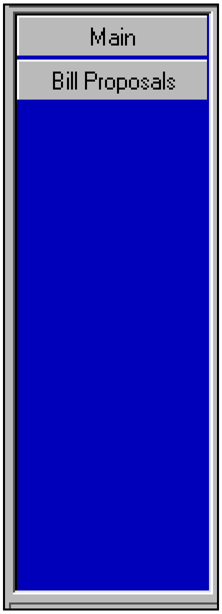
The dialog box for adding new groups to the Favorites Bar.

3. Enter a name for the new group you are creating and click OK. In this example, we have created a new group called “Bill Proposals.”

   The group appears at the top of the Favorites Bar, as shown in Figure 2.11. When you select the Main group, the other groups will move to the bottom of the Favorites bar.

Figure 2.11

The Bill Proposals group is active on the Favorites Bar and ready for new documents or projects.

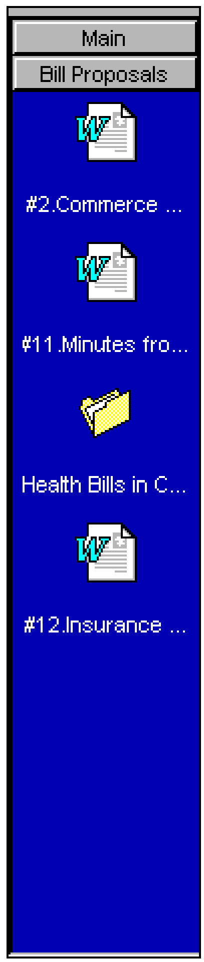


4. Double-click a Quick Search, such as Recently Edited Documents, or a project to display a list of documents in the upper right pane of the Desktop.

5. Locate the document you want to add to this new Favorites Bar group and click the document to select it.
6. Click the Favorites button on the PowerDOCS toolbar. The selected document now appears in your new group.
7. You can click a project and then click Favorites to have a project appear in the Favorites Bar. Figure 2.12 shows that we added documents and projects to the Bill Proposals group we created.

Figure 2.12

The Bill Proposals group is active and displays the added project and documents.



You can remove the Favorites Bar from your PowerDOCS Desktop view by clicking Favorites Bar from the View menu. This will deselect it and hide it from view until you select it again. You can also click your right mouse button for the shortcut Favorites menu and click Hide Favorites Bar.

For information about using the Favorite Projects folder on the Favorites Bar, refer to the "Favorite Projects" section in Chapter 7 of this guide.

Recently Edited Documents

The Recently Edited Documents list, shown in Figure 2.13, offers the easiest way to open a document using PowerDOCS. It lists the last 30 documents you edited. You can access this list by clicking the Recent Edits icon in the Favorites Bar or by selecting Recently Edited Documents from the Search menu. The Search menu displays three additional document listings, Template Documents, Checked-out Documents, and Restored Documents. Described in detail in Chapter 5, "Searching and Retrieving," the Recently Edited Documents list is a powerful and handy tool for retrieving documents.

Projects

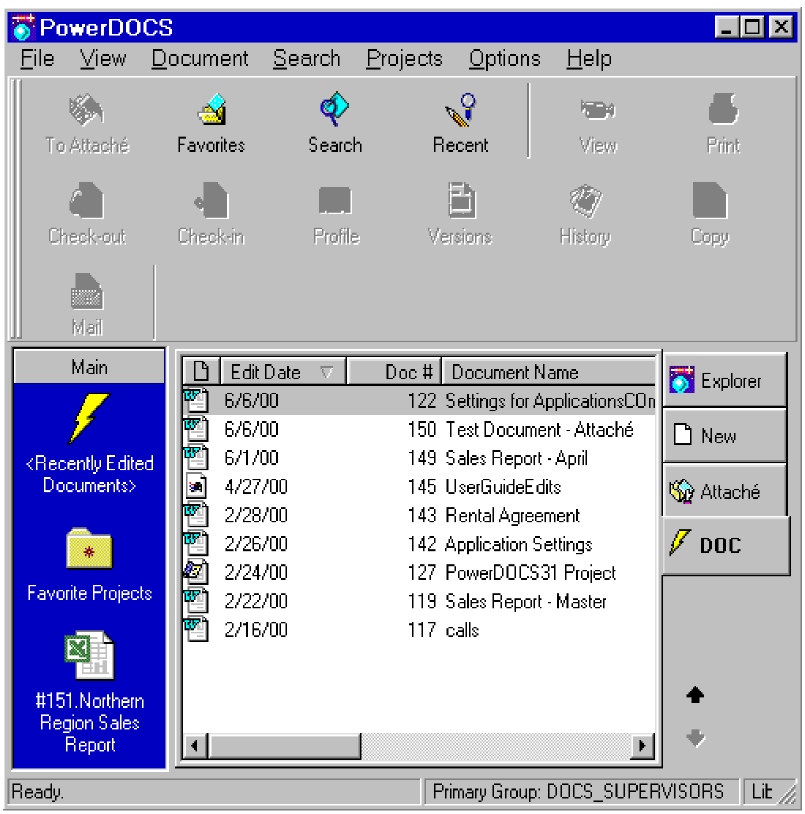
(Optional) If you select the Explorer tab on the PowerDOCS Desktop, you can click Desktop Projects or All Projects to display your current list of projects and the library each belongs to. When you create a project, if you select Iconized on Desktop, the project will be displayed under Desktop Projects for each person that has rights to the project. The All Projects group contains all of the projects that you have rights to, whether the project was Iconized on Desktop or not. This provides quick and convenient access to the documents associated with your projects. The Projects feature may have a different name in your organization. Check with your PowerDOCS administrator to see if this feature's name has been changed. Read Chapter 7, "Projects," for a description of the Projects feature.

Using the PowerDOCS Desktop Tabs

PowerDOCS has three tabs, Explorer, New, and Attaché, that appear along the right side of the Desktop. Other tabs are created during individual PowerDOCS sessions, when you search for documents or add new items. For example, if you search for all documents with the document type DOC, the DOC Quick Search appears as a tab, as shown in Figure 2.13. This tab remains for the current session of PowerDOCS and will be gone once you restart the program unless you right-click the tab and select Keep Open. You can save your search criteria as a permanent Quick Search if you want to access it indefinitely. For more information on saving Quick Searches, see the section called "Saving Search Criteria" in Chapter 5.

Figure 2.13

Temporary Quick Search DOC appears as a tab on PowerDOCS Desktop



NOTE If you want to look at the Search Results tab in a two- or three-pane view, select View>Tree.

The New Tab

The New tab is the default view when you start PowerDOCS. This tabbed view is pictured in Figure 2.2. This Desktop view contains two panes, Templates and Applications, and is used to create new documents and launch available applications. For more information about creating templates and documents, refer to Chapter 3, "Creating and Profiling Documents." For more information about applications, see Chapter 8 and Chapter 9.

You can turn off the Templates pane in the New tab. Select the View menu>Templates.

You can rename the New tab. Place your cursor on the tab and right-click. Select Rename. Type the new name and press Enter.

The Attaché Tab

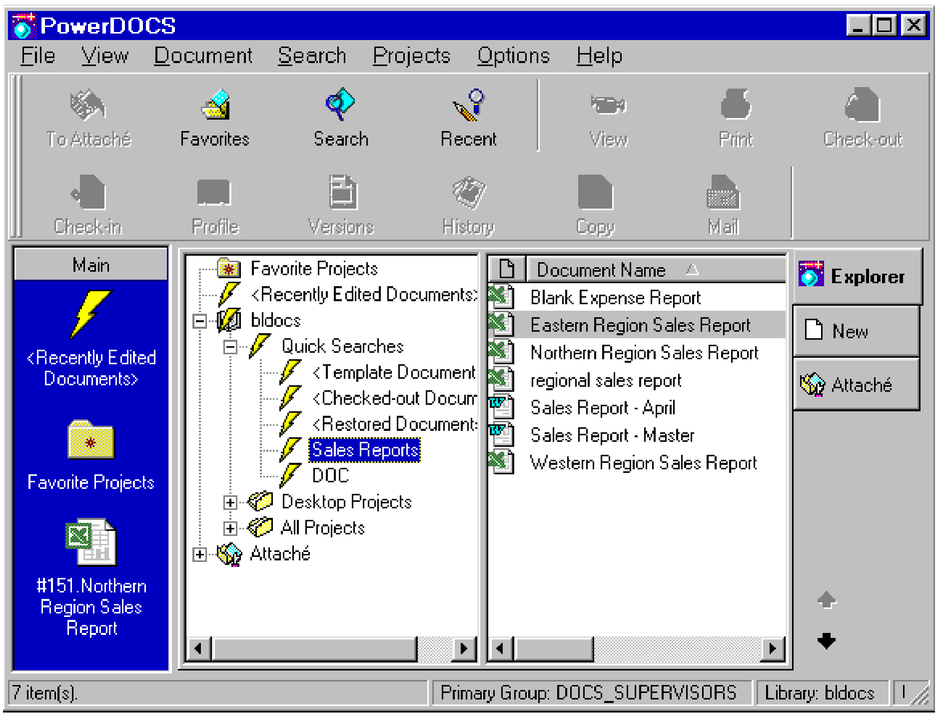
The Attaché tab displays documents you have downloaded for undocked use, including documents you have shadowed to your local workstation. For more information about Attaché, refer to the *PowerDOCS Attaché User's Guide*.

The Explorer Tab

The Explorer tab provides a traditional user interface for viewing the hierarchy of documents and projects within PowerDOCS libraries. You can browse a library’s contents through projects or access documents through the Quick Search feature. All of the document management features of PowerDOCS are available from the PowerDOCS Explorer tab.

Figure 2.14

The PowerDOCS Desktop view using the Explorer tab



The Explorer tab organizes the PowerDOCS features into the Favorites icon bar, if you have it displayed, and two or three panes. The left pane looks and behaves similarly to Microsoft Windows Explorer and consists of the hierarchy of Favorite Projects, Quick Searches, Desktop Projects, and All Projects.

From the PowerDOCS Explorer tree displayed in the left pane, you can perform the following actions:

- Click the plus sign (+) to display the contents of a main category such as Desktop Projects or Quick Searches.
- Double-click an item to display its contents. Its projects and/or documents will be displayed in the upper-right pane of the PowerDOCS Desktop.
- Double-click a Quick Search and the search results will be displayed in the upper right pane of the PowerDOCS Desktop.

From the upper-right pane of the PowerDOCS Desktop you can perform the following actions:

- Click a document once to view its contents or profile in the lower-right pane if Add-ons have been activated.
- Using the right mouse button, click a document to produce a shortcut Document menu, from which you can select options such as Open, View, or Print. For more information about the Document menu commands, refer to Chapter 6.
- Double-click a document to launch the associated application and open it within PowerDOCS.

The third and optional pane displays the Viewer and Profile Add-ons. Information about the Add-ons is detailed in the next section of this manual.

Viewing a Document or Profile Using PowerDOCS Add-Ons

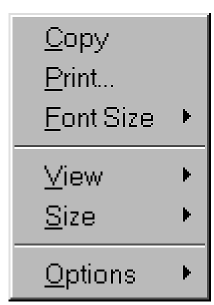
PowerDOCS allows you to view either a document's contents or the profile of a highlighted document when the Explorer tab is active on the PowerDOCS Desktop. For these Add-ons to be available, you must manually turn them on. To do this, select View>Add-Ons, and PowerDOCS will then activate these options. Two Add-ons tabs, the Viewer tab and the Profile tab, determine what is displayed in the lower- right pane of the Desktop.

Viewer Add-on

To view a document's contents, select the document and click the Viewer tab at the bottom of the PowerDOCS Desktop. You can use the scroll bar to the right of the view window to view the entire document.

To open the application from the Viewer window, click the application button shown in the lower right-hand corner of the window. This feature is not available for all integrated applications.

Click your right mouse button within the view window to produce the following shortcut menu.



This shortcut menu allows you the following options:

- **Copy:** You can copy a section of text that has been highlighted using the click and drag method.

- **Print**. You can print the contents that are displayed in the viewer. Selecting this option produces the Print dialog box, from which you can change your print options, print quality, or printer selection.

- **Font Size:** If you have set your View to Draft or Normal, you can view the sub-menu commands of Enlarge, Reduce or Reset. These options affect size of text displayed in the Viewer Add-On.

- **View**. The View option produces a submenu of Draft, Normal or Preview. Draft mode displays all text in Arial font, 10 point, normal, as set by the default Display in Options of this shortcut menu. Normal mode displays text in the font that the document was originally typed in. Preview zooms out to display the document as it looks on paper.

- **Size**. When using the Preview mode, the size menu options are visible. The choices are: Full Size, Fit to Window, and Fit Window to Width. You can select the page size that best fits your needs as you view a document's contents.

- **Options**. This menu produces a submenu of Display, Print, and Clipboard.

  — **Display**: Determines how document contents will appear within the viewer. You can change the font or type size and you can designate what format you want to use to view unrecognized file formats.

  — **Print**: Determines how a document prints from the viewer. You can change the font or type size, change the margins, add a header to the printed document, and so forth.

  — **Clipboard:** This options allows you to designate which file formats you want to allow as text on the clipboard.

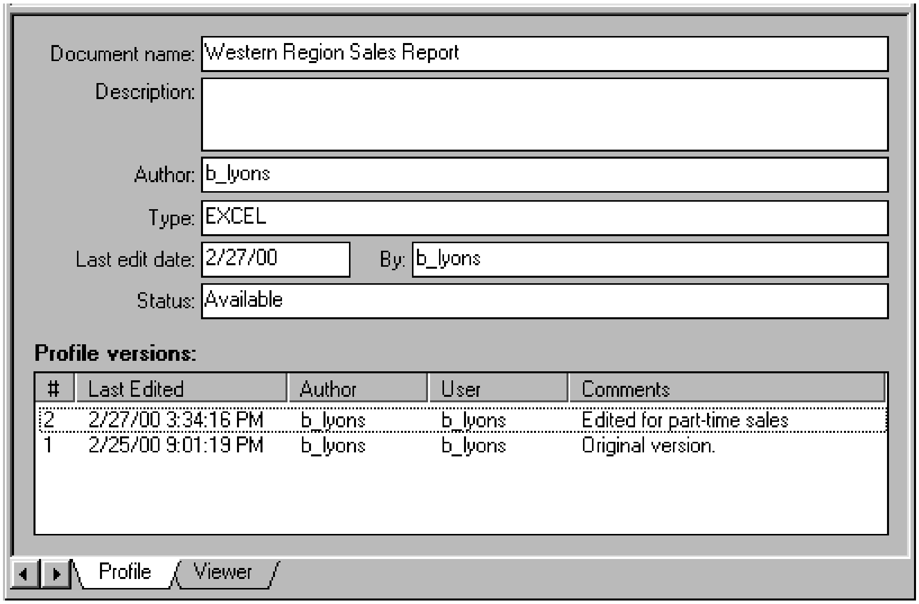
For more information on the Viewer application options available with archive, spreadsheet, and database documents, refer to the "View" section in Chapter 6.

Profile Add-on

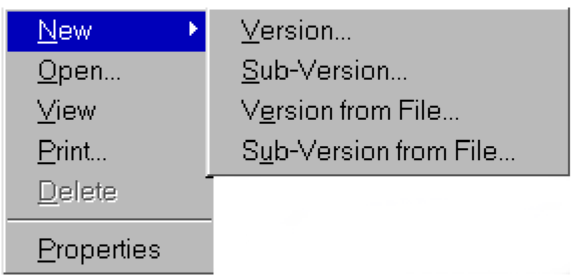
To view a document's profile information, select the document and click the Profile tab at the bottom right of the PowerDOCS Desktop. The profile is displayed in the lower pane. All existing versions of the document are displayed in the Profile versions portion of the window.

Figure 2.15

Profile Add-On



Select a version and right-click to view the shortcut menu with these options: New, Open, View, Print, Delete, and Properties. The New menu expands to include Version, Sub-version, Version from File, and Sub-Version from File.



Delete is only available if your document has more than one version.

For more information on working with Versions, refer to Chapter 4, Working with Document Versions.

Customizing Your PowerDOCS Desktop

As stated above, certain features on the PowerDOCS Desktop are customizable. When you are ready to exit PowerDOCS, make sure your desktop is set up the way you want it to be when you reenter PowerDOCS. The configuration is saved in that format for all future sessions until you change it.

Customizing the Toolbar

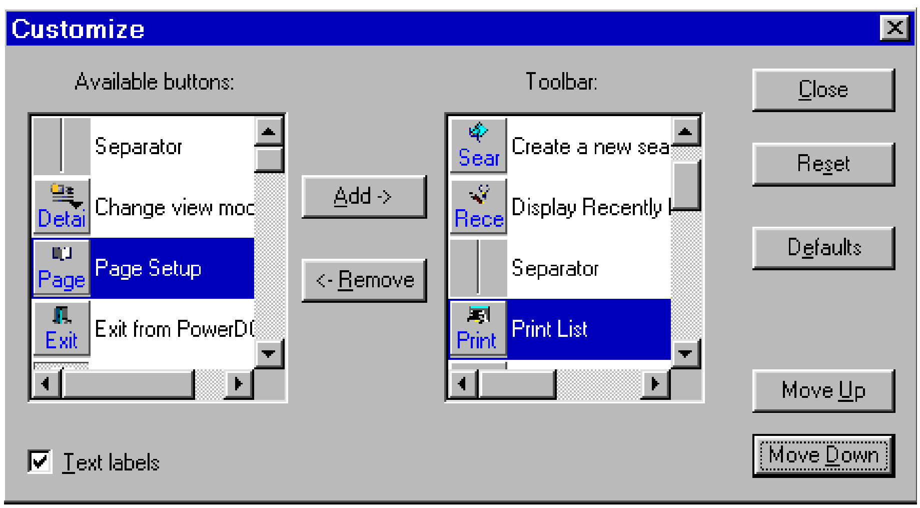
The PowerDOCS toolbar is entirely customizable.

To set up buttons:

1. Choose Customize from the View menu. Then click Toolbar. The following dialog box is displayed:

Figure 2.16

The Customize dialog box



2. To add a button to the bar, simply click the desired option from the Available buttons column on the left and click Add. The option appears in the Toolbar column on the right.

3. To reorder the buttons, click any button in the Toolbar column; then click the Move Up or Move Down button until your selected button is where you want it.

4. If you decide you want to return to the default toolbar setup, click the Defaults button. You can also erase your edits to the toolbar once per session by clicking Reset.

5. When you are satisfied with your changes, click Close. Your changes automatically appear on the toolbar in the position that you determined.

NOTE You can also place your cursor between buttons on the toolbar, right-click to produce a shortcut menu, and then select Customize.

The text labels check box is selected by default. If you would like your buttons to appear on the toolbar as graphics without text, uncheck this field.

To remove a button from the toolbar:

1. To remove a button from the toolbar, you need to follow the same procedure you used to add a button. Choose Customize from the View menu and then click Toolbar. The Customize dialog box appears, shown in Figure 2.16.

2. From the Toolbar column, click the button you want to remove and click Remove. The button moves into the Available buttons column.

3. Click Close to save your changes, and the button(s) you removed will no longer appear on the toolbar.

Customizing the Columns

PowerDOCS allows you to customize which columns appear in your document lists, such as Recently Edited Documents, and in what order. By default, PowerDOCS displays the PowerDOCS document number, the document name, and the application that created the document. There are several other columns that you may choose to display. For example, you may decide that you want to see the Document Type for each document displayed on your PowerDOCS Desktop.

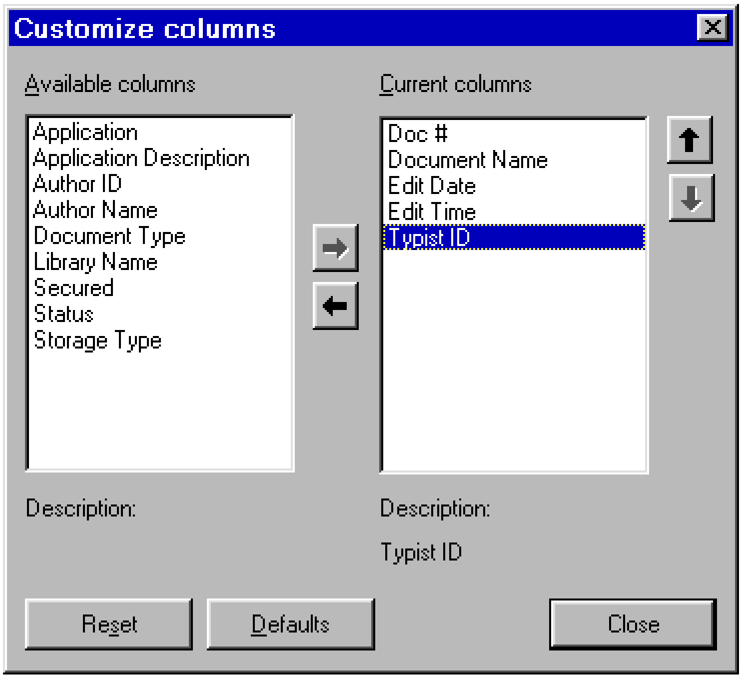
NOTE You must have a document list, such as Recently Edited Documents, open in PowerDOCS in order to add or remove columns.

To add or remove columns on a document list:

1. From the View menu, choose Customize and then click Columns. The Customize Columns dialog box appears, shown in Figure 2.17.

Figure 2.17

PowerDOCS Customize Columns dialog box for adding custom columns to the Desktop.



2. In the Available Columns pane, click the column you want to add and then click Add. The column will appear in the Current columns pane on the right. In the example shown above, the user has chosen to add the Typist ID column.

NOTE You can cancel any changes you have made by clicking the Reset button. To return to the system defaults, click Defaults.

3. Click Close to save your changes.

To change the order of your current columns:

1. Open the Customize Columns dialog box. To change the order of a column, click the column name in the Current Columns pane; then click either Up or Down arrows. When you have arranged your columns in the desired order, click Close to save your changes.

Note You can also place your cursor between column headers and right-click to produce the shortcut menu shown in Figure 2.18. Select Edit Columns or Delete Columns.

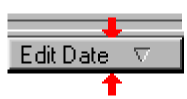
Figure 2.18

Shortcut menu for customizing columns

2. You can also reorder columns directly from the Desktop by dragging and dropping each column where you want it. To do this, place the pointer on the column you want to move; then click and hold the primary mouse button. Drag the column to its new location and release the mouse button. Red arrows serve as insertion markers to indicate where the column will drop. The column will appear where you placed it.

Figure 2.19

Column insertion Markers



Using the PowerDOCS Explorer

If you do not want to start the PowerDOCS Desktop, you have the option of running an extension of PowerDOCS from the Windows desktop.

Running PowerDOCS from the PowerDOCS Explorer Icon

Some users may want the functionality of PowerDOCS without all the features of its Desktop. PowerDOCS provides a quick and simple alternative to the Desktop called the PowerDOCS Explorer. This component provides all of the PowerDOCS document management in a more basic user interface.

NOTE Installing the PowerDOCS Explorer was optional when you installed PowerDOCS on your computer. If you chose not to install this option, you will not have access to it. You should run the installation program again and choose to install PowerDOCS Explorer.

Opening a Two-Pane View of PowerDOCS Explorer

You can choose to open a two-pane view of PowerDOCS Explorer, shown in Figure 2.5, or a three-pane view, shown in Figure 2.6.

To open the two-pane PowerDOCS Explorer, locate the icon (shown below) on your Microsoft Windows desktop, right-click and select Open.

The PowerDOCS Explorer appears.

Opening a Three-Pane View of PowerDOCS Explorer

To open the three-pane view, on your Windows desktop double-click the PowerDOCS Explorer icon, or right-click and select Explore. PowerDOCS Explorer will launch with three panes, as shown in the next figure.

To set up the three-pane Explorer as the default:

1. From your Windows desktop, double-click the My Computer icon.
2. Select View>Options to open the Options dialog box.
3. Select the File Types tab.
4. In the Registered File Types list, select Folder and then click the Edit button.
5. In the Actions box, click Explore and then click the Set Default button.
6. Close the Edit File Types window and the Options window.

   The next time you launch PowerDOCS Explorer, the three-pane view will automatically be displayed.

PowerDOCS Explorer Features

From either view of the PowerDOCS Explorer, you can access any application, document, or project that you have rights to, and you can perform a variety of functions.

- Double-click a specific application to launch the application and create documents.
- Double-click a specific document to launch the associated application and open the document within PowerDOCS.
- Highlight a specific document and click the right mouse button to bring up a shortcut Document menu. The Document menu allows you to perform a number of tasks. For more information, refer to Chapter 6 of this guide.

- Place the pointer on a selected document or project; then click and hold the left mouse button to drag it outside the PowerDOCS window to your Windows desktop or Explorer and release the mouse button. You will be asked if you want to create a shortcut to the document or project. If you click Yes, PowerDOCS creates a shortcut to that item in the location you selected.
- You can perform searches by double-clicking one of the four standard Quick Searches that ship with PowerDOCS, by clicking a saved Quick Search, or by selecting New Search from the Search menu and entering information into a search form. For more information about searching, refer to Chapter 5 of this guide.
- From your Windows desktop or Explorer, you can drag one or more documents into PowerDOCS and create a Document Profile for the document(s). To do this, highlight a document or group of documents. Click and hold the left mouse button. Place the mouse cursor over a project where you want to place the document(s) and release the mouse button. You can also release the mouse button over a library name, if you want the document to exist in a library but not in a specific project. A Document Profile appears. Complete the Document Profile and click OK. This document now resides in PowerDOCS in the location you selected. For more information, refer to Chapter 3, "Creating and Profiling Documents."

Using PowerDOCS from Within Windows Explorer

PowerDOCS resides at the root of the Windows Explorer, giving you access to your hierarchy of Libraries, Quick Searches, Projects, and Recently Edited Documents. From within Windows Explorer, you can view this hierarchy and also take action on any of these items.

To start PowerDOCS, click the PowerDOCS icon from within Windows Explorer. Your Explorer window may appear similar to the one in Figure 2.20.

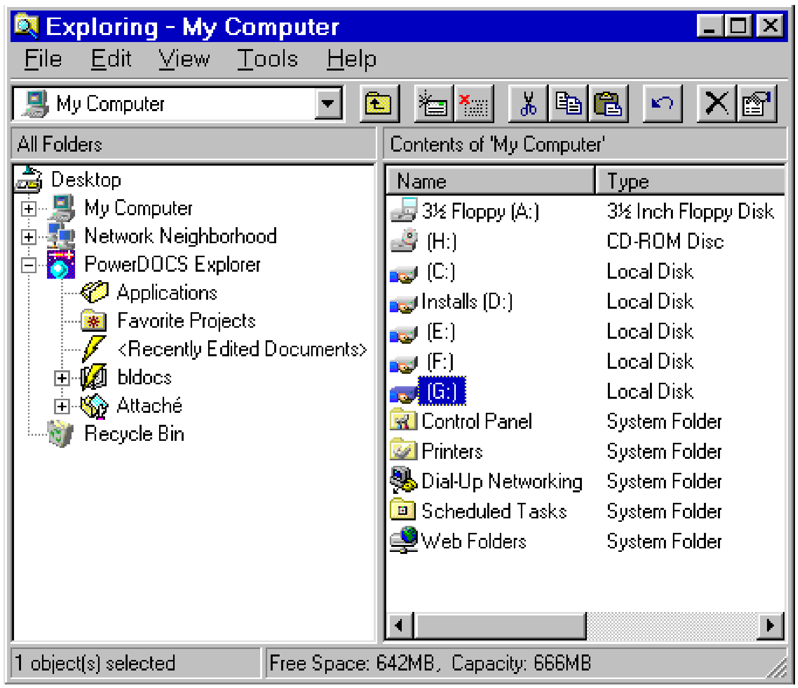


Figure 2.20

Using PowerDOCS from within Windows Explorer.

PowerDOCS, from within Windows Explorer, consists of the hierarchy of Favorite Projects, Quick Searches, Desktop Projects, and All Projects.

From the left Explorer pane you can perform the following actions:

- Click the plus sign (+) to display the contents of a main category such as Desktop Projects or Quick Searches.
- Click an item to display its contents. Its projects and/or documents will be displayed in the right pane of Windows Explorer.
- Click a Quick Search and the search results will be displayed in the right pane of Windows Explorer.

From the right pane of Windows Explorer you can perform the following actions:

- Using your right mouse button, click a document to produce a shortcut Document menu, from which you can select such options as Open, View, or Print. For more information about the Document menu commands, refer to Chapter 6.
- Double-click a document to launch the associated application and open it within PowerDOCS.

Chapter

3

Creating and Profiling Documents

In This Chapter

This chapter describes several methods of creating and saving documents and includes instructions on filling out the Document Profile, setting security to your documents, and retrieving documents.

Introduction to Document Management

PowerDOCS helps you organize and manage three basic types of files: documents, projects, and profiles for paper documents. *Documents* are files created in various integrated applications. *Projects* are folders that associate various documents into one related group. *Profiles for paper documents* are Document Profiles that serve as pointers to a physical location for various types of paper documents.

Before You Begin

This chapter outlines procedures for creating and profiling documents in PowerDOCS. Your PowerDOCS administrator may have modified the Document Profile dialog box using DOCS Designer. In this case, some of the procedures in this chapter may not directly apply to you. Your PowerDOCS administrator can provide you with the proper instructions for creating and profiling documents.

Creating Documents in PowerDOCS

Creating Documents from Within an Application

PowerDOCS handles document creation flexibly. You can either launch an application from the Desktop and create your document using the application's normal procedures or create the document directly from the PowerDOCS Desktop. This section describes how to launch the application before creating your documents.

To create a document in PowerDOCS:

1. From the PowerDOCS Desktop, select the New tab and double-click the application you want to use to create your document.

2. After the application loads, use the normal procedures for creating a document in that application.

3. You will be prompted to profile your document when you save the document. Fill out the Document Profile dialog box using the procedures outlined in the section titled “Filling Out the Document Profile” and click OK when you are finished.

NOTE If more than one Document Profile is available to you, you will be given a listing of profile options to choose from.

If you want to save the document to a library other than your default library, use the Save As command rather than Save. Select the library you want to save to and click OK. The Document Profile will be displayed. Since PowerDOCS forms are associated with a particular library, you will only see the forms available for the library you select. Ask your PowerDOCS administrator about replicating library information.

NOTE Your system administrator has the option of preventing you from saving to a different library.

Non-Integrated Application Information

If you are creating documents in a non-integrated application (see Chapter 8 in this guide for a listing of integrated applications), your procedure will be somewhat different. If you launch the application from the Applications pane on the PowerDOCS Desktop and then create a document, you will not be prompted with a Document Profile dialog box when you choose Save. Instead, you will receive the normal Save dialog box for the application you are using. You should save the document in the directory displayed, and when you exit the application, you will be prompted to profile any documents you created during that session.

If you want to import a document into PowerDOCS, read the section in this chapter called "Creating PowerDOCS Documents by Importing."

Creating Documents Using Directory Monitoring

Directory Monitoring keeps track of documents that are created in non-integrated applications and prompts you to profile the documents upon returning to PowerDOCS.

To create a document using Directory Monitoring:

1. From your PowerDOCS Desktop, double-click the application in which you want to create your document.
2. Once you have created and edited your document, select Save from the File menu. The native Windows Save dialog box is displayed.
3. Enter a name for your document in the Name field and click Save.
4. After the document is saved in the native application, a new Document Profile is displayed.
5. Fill out the Document Profile dialog box using the procedures outlined in the section titled "Filling Out the Document Profile" and click OK when you are finished.

6. Exit the application.

Note If you want your documents to be profiled in PowerDOCS, you must launch the non-integrated application from the PowerDOCS Desktop.

Creating Documents from the Desktop

In order to create documents directly from the PowerDOCS Desktop, you must first have document templates created within the applications you will be using. Not all users have rights to create document templates, so you should check with your PowerDOCS administrator if none are available to you.

Creating Template Documents

It is likely that your PowerDOCS administrator has already set up template documents for you, in which case you can proceed directly to the section below, titled "Creating Documents Using the New Tab." However, if you have no template documents defined, and your PowerDOCS administrator has given you "create template" rights, you should follow these steps. If you are not sure that you have rights to create template documents, check with your PowerDOCS administrator.

To create PowerDOCS template documents:

1. From the PowerDOCS Desktop, select the New tab and double-click the application you want to use to create your document.

2. After the application loads, use the normal procedures for creating a document in that application.

3. You will be prompted to profile your document when you save the document. Fill out the Document Profile dialog box using the procedures outlined in the section titled "Filling Out the Document Profile" and click OK when you are finished.

4. When you fill out the Document Profile dialog box, specify "Template" as the Storage Type. If this option is unavailable to you, ask your PowerDOCS administrator to set up templates for you.

5. Select View>Refresh (F5) to update the list of available templates with the template you just created. Your new template will not appear until you have refreshed the window.

   The Document Name you entered on the Document Profile will be listed below the application that the template was created in.

TIP You can create several templates in each application, leaving one blank for general use and others including standard text that you want to appear each time you load the template.

Creating Documents Using the New Tab

Once you have a template defined for the application that you want to use, you can create documents directly from the PowerDOCS Desktop.

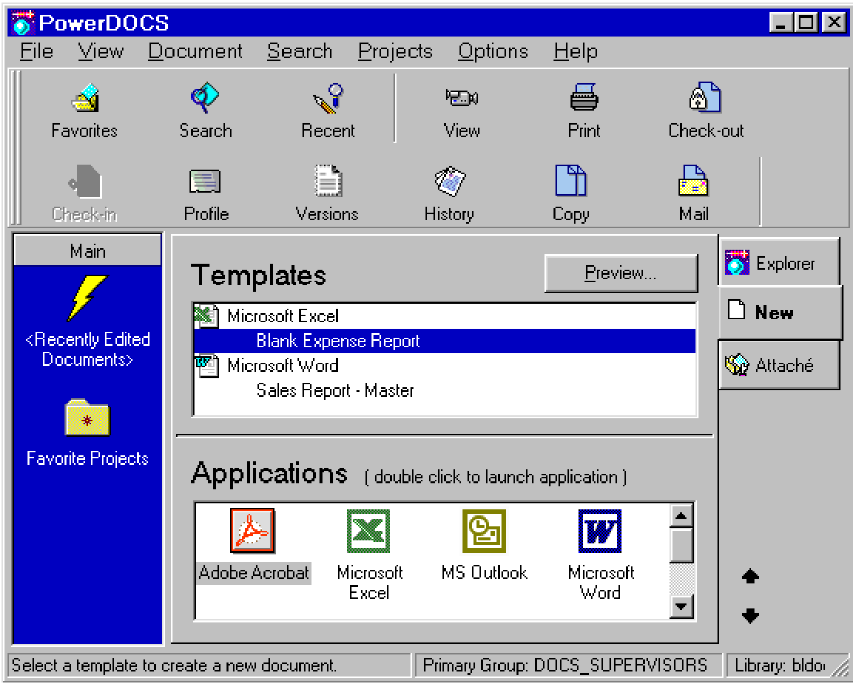
To create documents from the Desktop:

1. Click the New tab on the PowerDOCS Desktop. Two panes appear, pictured in Figure 3.1. The upper pane displays your available templates, and the lower pane displays your applications.

To view the format of a template, click the template and then click the Preview button.

Figure 3.1

With the New tab selected, the PowerDOCS Desktop displays the available applications and templates.

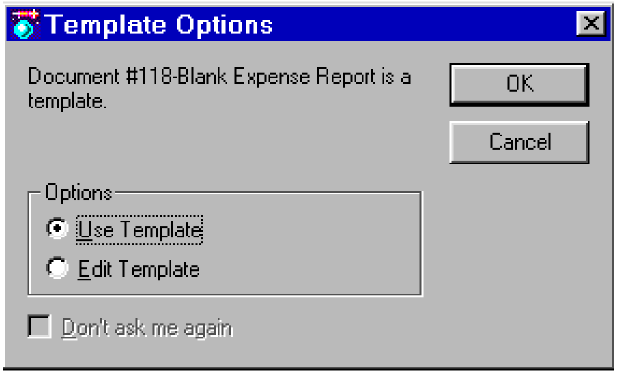


2. Double-click the template you want to use.

3. If you have rights to edit the template, the following dialog box is displayed. If you do not have rights to edit the template, skip to Step 5.

Figure 3.2

Choose to create a new document using the template as an example, or edit the actual document template.



4. If you want to use the template to create a new document, click Use Template. If you want to edit the actual template, click Edit Template.

5. A Select Version dialog box is displayed. Select the version of the template you want and click OK.

6. A Document Profile dialog box will be displayed. If more than one profile is available to you, you will be given a list of profile options to choose from. Fill out the Document Profile using the instructions provided in the section called "Filling Out the Document Profile." Click OK when you are finished.

7. You can then create and save your document.

NOTE Your system administrator has the option of preventing you from saving to a different library.

Creating Documents by Dragging and Dropping

PowerDOCS allows you to create a document by dragging a file from your Windows desktop or Explorer and dropping it into PowerDOCS. Once you have dropped the new file(s), PowerDOCS recognizes that the new file needs a profile and prompts you to complete a Document Profile. If you dropped more than one file into PowerDOCS, it will continue to prompt you with profiles until each new document has a Document Profile.

To create a document by dragging and dropping:

1. Select one or more files on the Windows desktop or Explorer. To select multiple files, press the Ctrl key as you use the left mouse button to click the files of your choice.

2. With the file(s) selected, click and hold the left mouse button as you drag the pointer into PowerDOCS.

3. Release the left mouse button to drop the file into a project or library.

4. A Document Profile appears. Complete the profile using the procedures outlined in the section called "Filling Out the Document Profile" and click OK when you are finished.

Creating PowerDOCS Documents by Importing

If you have multiple documents you want to bring into PowerDOCS, your system administrator can help you use the Document Import utility provided with DOCS Open. If you want to import documents into PowerDOCS individually, you can use the Import File utility from the File menu of the PowerDOCS Desktop.

PowerDOCS allows you to import files from:

- A local hard drive
- A floppy disk or CD

- A network drive

NOTE Your PowerDOCS administrator may have disabled this option.

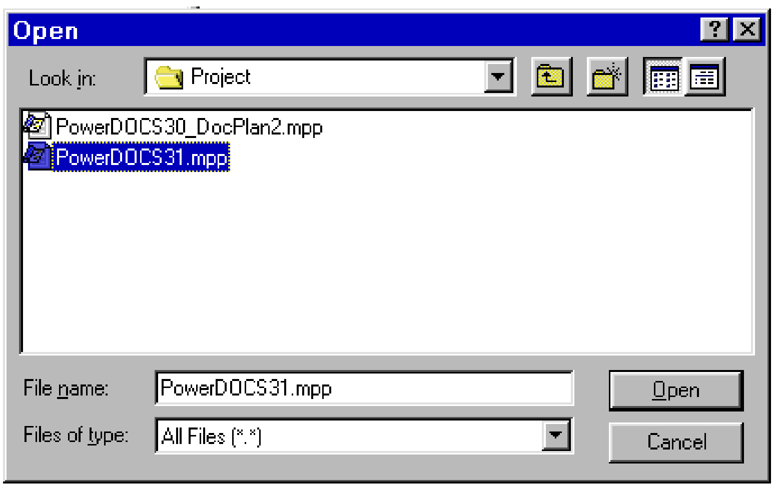
To import an individual document:

1. From the PowerDOCS Desktop, choose File>Import File. Using the Open dialog box, select the file you want to bring into PowerDOCS and click Open. You can browse through your drives and directories to find the document.

NOTE To import a file from a disk, CD, or a network drive, simply select the appropriate drive from the Open dialog box, locate the file you want to import, and continue following the instructions in this section.

Figure 3.3

Open dialog box



2. A Document Profile appears. Complete the profile using the procedures outlined in the section called “Filling Out the Document Profile” and click OK when you are finished.

   The file is copied (not moved) to your normal PowerDOCS document storage path and is immediately available for search and retrieval through PowerDOCS.

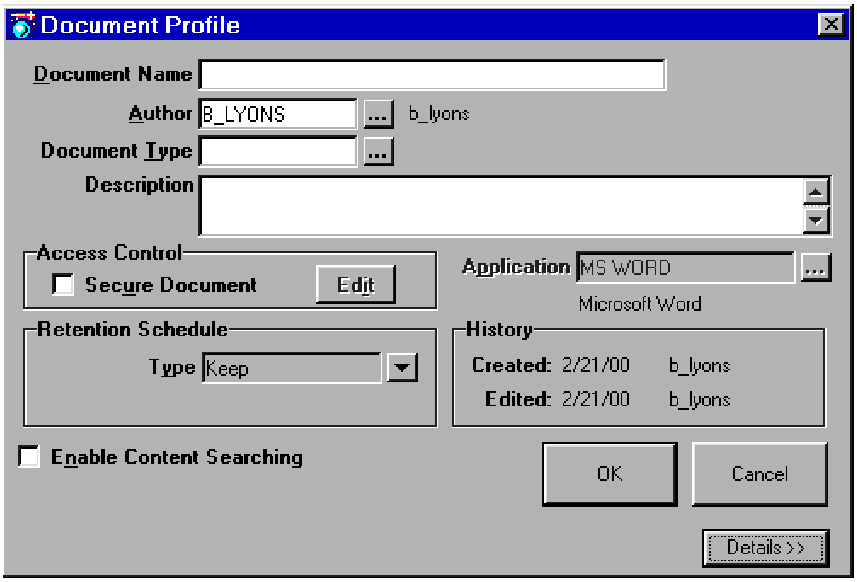
Profiling Documents in PowerDOCS

The Document Profile

A Document Profile, like the dialog box pictured below, represents each document stored in PowerDOCS. Profiles contain the information used to search for and locate documents. To make locating your documents easy, you must fill out a Document Profile for each document created with PowerDOCS. The more detailed and accurate the information entered in a Document Profile, the easier it is to find the document later. Your PowerDOCS administrator may have defined several different profile forms (specific defaults on the Document Profile dialog box) for you to use. Your administrator will help you decide which profile type to use when creating documents.

Figure 3.4

The Document Profile dialog box



Filling Out the Document Profile

- Some of the fields on the Document Profile dialog box are already completed for you, but you can change them if you want. Others, such as those in the History section, are filled in but cannot be visited. Certain fields, such as the storage information, may be locked (that is, read-only) by your PowerDOCS administrator. If you cannot visit a field, just ignore it and move on.

- Your PowerDOCS administrator also may have renamed some of the fields on your Document Profile dialog box. In this case, your administrator must inform you which of your field names corresponds to the default PowerDOCS field names. This chapter describes each of the fields on the default Document Profile form as it is shipped with PowerDOCS.
- Not all of the fields described in this chapter are on every Document Profile, and you can have additional fields. Your PowerDOCS administrator decides which fields you must fill out and any restrictions imposed on these fields. When filling out a field, you can type a partial value, then press the Tab key. PowerDOCS will attempt to find a match. If a unique value is found, the field will be populated with that value. If several values are found, a table lookup list of those values will be displayed.
- For each Document Profile, there are certain fields that must be completed before you can save the file. When you click OK, PowerDOCS reminds you with a message if you forget to fill in a required field.

NOTE If you previously had default Personal Profile Form Settings set up in DOCS Open, you can use these settings when filling out a profile in PowerDOCS. PowerDOCS, however, does not allow you to create or edit these settings.

Moving Around the Document Profile

While filling out the Document Profile, the following keys are available:

- TAB moves to the next field.
- SHIFT+TAB moves back to the previous field.
- The arrow keys can be used for editing your entries.
- The ellipsis points (...) button (or F2) on the Document Profile dialog box initiates a lookup form. The following section describes this helpful feature.

- The ⇩ button designates a *combo box*. A combo box lists the choices available for that field; click any item on the list to select it.
- ALT and the underlined letter in a field label allow you to advance directly to that field. For example, ALT+A will advance you directly to the Author field.

Lookup Form

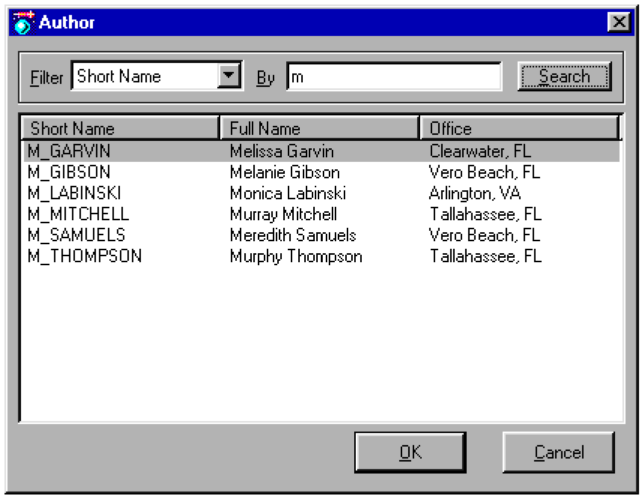
Document Profile fields that are followed by ellipsis points (...) allow you to browse all available entries for that field. These fields are validated against a predefined list of eligible entries set up by your PowerDOCS administrator. Each of these fields provides a *lookup form* to assist you in finding the correct values. If you are unsure of the spelling of a particular value, click the lookup button beside the field. A lookup form for that field appears. If you want to search by a column other than the first column displayed, select a different column from the Filter field. Then, in the By field, type the first letter(s) of the value you are looking for and click Search.

NOTE To narrow your search, enter as many search characters as possible before you click Search.

For example, if you perform a table lookup search by Author and enter an "M" in the By field, and then click Search, a screen similar to the following would be displayed:

Figure 3.5

PowerDOCS Lookup Form for the Author field



From a lookup form, you can:

- Scroll up and down to find the value for which you are looking.
- Click the desired entry and click OK, or double-click an entry to have that value entered into the field on the form. Enter additional characters in the Search field to narrow the list of lookup values.

Column Sorting

You can change the sort order of your columns with a simple mouse click. If you want your listing to be sorted by a different column, simply click that column. By default, PowerDOCS sorts in ascending order. Click the sorted column again to have the column sorted in descending order.

If you change sort columns, the new column will be the primary sort column and the previous column will be the secondary sort column. For example, if your Document Type list was originally sorted by Type

ID, and you clicked the Storage Type column, the list would be sorted by Storage Type, then by Type ID.

Using Wildcards in your Table Lookup Search

SQL wildcards can be used to perform a table lookup search. The following items are examples that when entered into the table lookup Search field will produce the described results when the Search button is clicked.

```
_ones%
```

would show all values containing the string "ones" preceded by a single character. The results might be Jones Hartsfield, Tones Music, etc.

```
[M-Z]inger%
```

would show Minger and Sons, Ringer Phones, Singer Sewing Machines, etc. from M through Z. (Brackets can only be used with Microsoft SQL Server and Sybase.)

```
M[^a]%
```

would display all data beginning with M but excluding A as the second character. (Brackets can only be used with Microsoft SQL Server and Sybase.)

```
[MR]idge%
```

would return Midge and Ridge. (Brackets can only be used with Microsoft SQL Server and Sybase.)

The Document Profile Fields

This section discusses the behavior of the Document Profile fields when you save or resave a document. The following conventions are used:

- Field names appear in **bold** type.
- Fields required by PowerDOCS are indicated by [Required].
- Fields that are validated against a predefined list of values are indicated by [Validated]. When visiting any validated field, you can use the lookup button.

NOTE Your PowerDOCS administrator may have changed the names of any of these fields. If this is the case, ask which of your field names correspond with the default field names described here.

- Fields can have a default entry assigned by each individual user. The PowerDOCS Personal Profile Form Settings feature can expedite the completion of the Profile Entry form for each document you save if you have already set up personal profile defaults in DOCS Open. PowerDOCS does not allow the creation of these default settings.

Required Fields

- **Document Name:** [Required] Document Name is a descriptive name for the document. The name can be up to 240 characters and may include spaces and any of the character sets used by Windows (ANSI by default).

Depending on how your system is installed, Document Names may or may not need to be unique. Your PowerDOCS administrator can tell you. If your system is set up to require unique Document Names, the name you enter in this field must be unique among all other Document Names in the same library.

Using unique Document Names allows you to retrieve documents directly by their name or number since both are unique identifiers of the document. Chapter 5, "Searching and Retrieving," explains how to do this. Perhaps the most beneficial use of unique Document Names is that they are distinguishable in your search results when you are attempting to retrieve a document. Examples of how unique Document Names can easily be composed are listed below:

- LTR to J. Smith re: Merger
- Memo Re: Company Holidays
- FY99 Budget Request
- Hanson - Jones Agreement
- 10/12/98 Board Mtg Minutes
- LTR to B. Jones re: Relocation
- **Author:** [Required, Validated] This is the user ID for the author. When a correct entry is made, the full name of the author is displayed to the right of the Author ID field.
- **Document Type:** [Required, Validated] Document Type identifies document categories such as MEMO, LETTER, or REPORT. When you enter the Document Type, additional fields are filled in for you:
    - **Storage Type:** This is a value for Archive, Delete, Keep, Optical, or Template documents.
    - **Retention Days:** If Archive, Delete, or Optical is chosen, this field will appear and represents the number of days this document will remain on the system past the last edit date.
    - **Enable Content Searching:** This field indicates whether the document is to be full-text indexed. Checking this field allows users to search the content of this document and Document Profile for words or phrases.

In some organizations, certain fields may be locked (you cannot change them), or they may be totally hidden. If this is the case, you can ignore these fields.

TIP Some Document Types allow you to create and track multiple versions of a single document. To use this capability, choose a Document Type that accepts multiple versions. The maximum number of versions for each Document Type is determined by your PowerDOCS administrator. Chapter 4, "Working with Document Versions," will help you understand how version tracking works with PowerDOCS.

Other Fields You Can Visit

- **Description:** [Freeform text] This can be any descriptive text about the document. This field may be labeled "Title/Subject" in your organization. When performing a QBE (query by example) search (see Chapter 5, "Searching and Retrieving Documents"), you can search for the document based on the words contained in this field.

- **Access Control/Secure Document:** [May be Required] If you want to limit access to your document, click the Secure Document field. If you want to designate document access, click the Edit button. Read the section called "Access Control," later in this chapter.

- **Retention Schedule Type:**[May be Required] Indicates the future destination of this document after the retention days expire. The Document Type you choose fills in a value for this field, but depending on how your PowerDOCS administrator set up your system, you may be able to change it. The default value for this field is associated with the selected Document Type. A combo box contains the following choices:

  — **Archive:** The document is archived and removed from the system, but the Document Profile remains. Archived files can be recovered whenever needed. Documents with this storage type are physically archived when the PowerDOCS administrator runs the Archive utility. If you select this value, the Retention Days field is activated.

— **Delete:** The document is eventually deleted from the system. Documents given this storage type are automatically deleted after the expiration of their retention days, when the PowerDOCS administrator runs the Delete utility. Depending on the method of deletion your PowerDOCS Administrator uses, the Document Profile may remain or may be deleted. If you select "Delete," the Retention Days field is activated.

— **Keep:** Check this option to indicate that you want the document to be retained on the network for active use indefinitely. The document is not selected for deletion or archiving.

— **Template:** Templates are used for documents such as standard forms and form letters for the organization. Only members of a PowerDOCS administrator-determined group can mark a document as a template or edit a template document. Copies of templates can be retrieved by any user. When the copy is saved, a new Document Profile must be completed.

A common use of the Templates feature is for form documents, such as those used in the real estate, insurance, and legal industries. The PowerDOCS Quick Search feature, which allows you to save search criteria, would give you easy access to your templates at any time. For information on the Quick Search feature, read "Quick Searches" in Chapter 5.

— **Optical:** Documents designated as Optical are archived similarly to documents designated as Archive, except instead of being archived to tape, they are stored on optical disk. If you select "Optical," the Retention Days field is activated.

— **Retention Days:** [May be Required] The Document Type you choose fills in a value for this field, if applicable; however, depending on how the PowerDOCS administrator set up your system, you may be able to change it. Retention Days is the number of days the document remains on the system past the last edit date. This field is available when the Storage Type field indicates a value of Archive, Delete, or Optical. The Retention Days field is inaccessible if the document is marked as "Keep" or "Template."

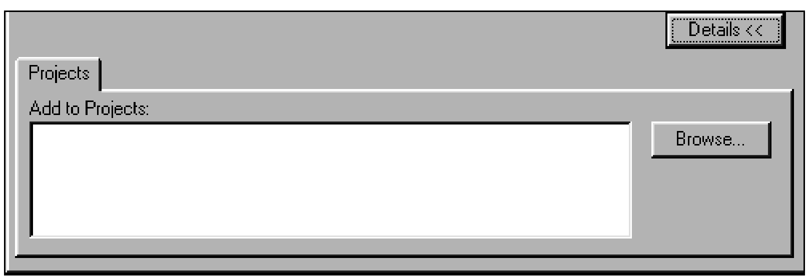
When the retention days expire, the document becomes a candidate for archiving or deleting. Any time a document is edited and saved, the Retention Days countdown begins again.

- **Enable Content Searching:** [May be Required] The Document Type you choose fills in a value for this field, and depending on how the PowerDOCS administrator set up your system, you may be able to change it. This field indicates if the document is to be full-text indexed. Check this box to allow users to search the content of this document and Document Profile for words or phrases.
- **Details**: [Optional] The Details button expands the Document Profile and allows you to save the document directly to a specific library or project. To save a document to a specific library or project, follow these steps.

1. Fill out the Document Profile fields and click Details. The Document Profile Form expands to show the Projects tab.

Figure 3.6

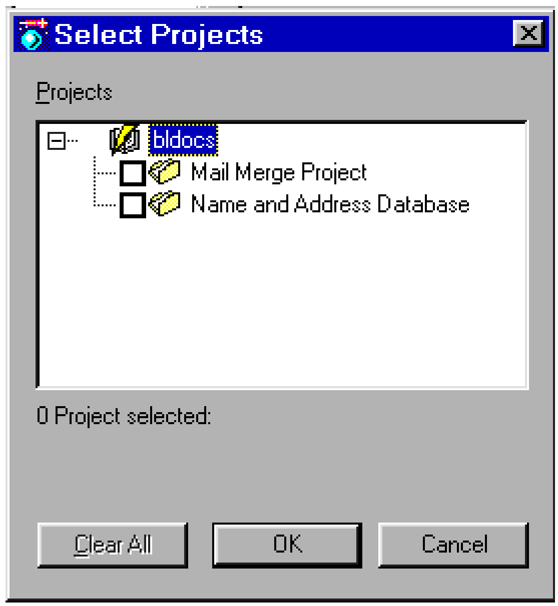
The Project tab



2. Click Browse to access the Select Projects dialog box. The libraries and projects accessible to you will be shown. Click plus (+) or minus (-) to expand and contract the listing.

Figure 3.7

The Select Projects dialog box



3. Select one or more projects into which you want to save the document. Click OK.

4. Click OK to save the Document Profile.

Entering Multiple Values into Profile Fields

To use multi-value fields, your administrator must create a Profile Search form and Document Profile form containing fields that support entering more than one value. Ask your administrator which fields on your Document Profile support multiple values.

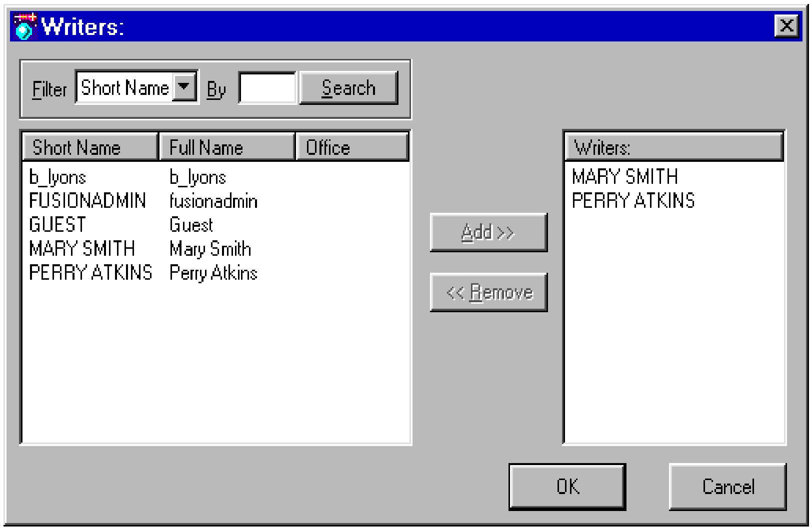
NOTE You cannot enter multiple values in a field by using the keyboard. You must use the table lookup button.

To enter more than one value in a field:

1. Click the table lookup button for the appropriate field. A dialog box similar to the following is displayed.

Figure 3.8

Dialog box to select multiple values for the Writers field



2. To select more than one entry, highlight an entry from the left pane and click Add. Select as many names as you want to appear in this field.

3. To remove an entry from the left pane, select the entry and click Remove. Click Clear Selections to deselect any highlighted entries. To select all of the entries in the right pane, click Select All.

PowerDOCS Supplied Fields

The following fields cannot be changed by the user. The cursor does not visit these fields during the creation or editing of a Document Profile. However, you can search for a document using these fields on a QBE search. See Chapter 5, "Searching and Retrieving Documents."

- **Application:** Application identifies the primary computer program that handles this document. This field defaults to the application you used to create the document.

NOTE The Application field can be changed when importing from the Desktop (using File/Import File), or when profiling documents from the Profile New Documents list, which is displayed when documents are created in non-integrated applications.

- **Created:** This field lists the creation date and author of the Document Profile. This information is located in the Document History field. See the "History" section in Chapter 6, The Document Menu," for more information on the Document History.
- **Edited:** The Edited field indicates the date the document was last edited and the author of the edits. It is automatically updated by the system after every edit session. The Document History (discussed in the "History" section in Chapter 6) shows the accumulated production history of the document, including the date, time, and author of each edit session.
- **Status:** This field indicates the current state of the document. Some common status indications are "Available," "Being Edited," and "Checked-Out."

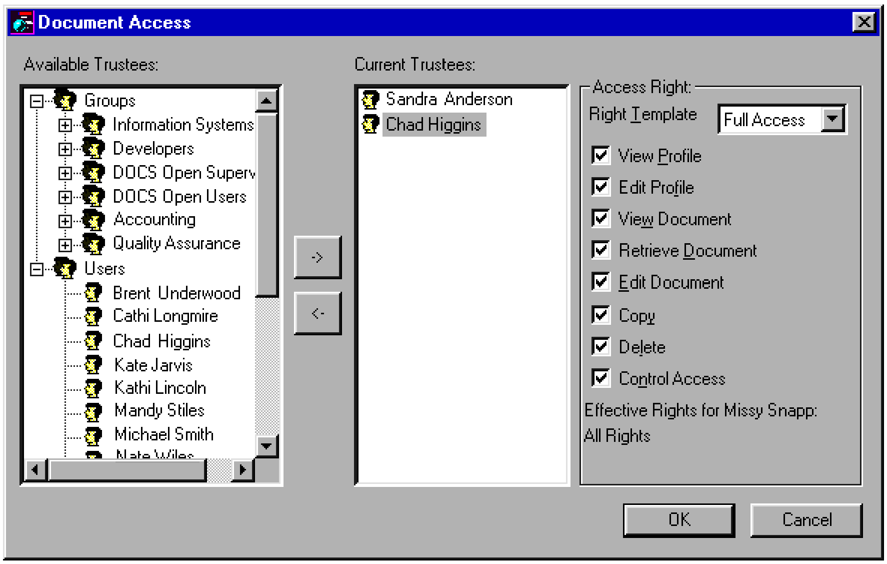
Access Control

The PowerDOCS Access Control feature allows you to restrict access to your documents. *Trustees* are users who have access to your document. They can have varying degrees of rights, ranging from view only, to edit, to modifying trustee rights themselves.

If you want to designate trustees for your document, check the Secure Document box on the Document Profile and then click the Edit button. A dialog box similar to the following is displayed:

Figure 3.9

PowerDOCS Document Access dialog box

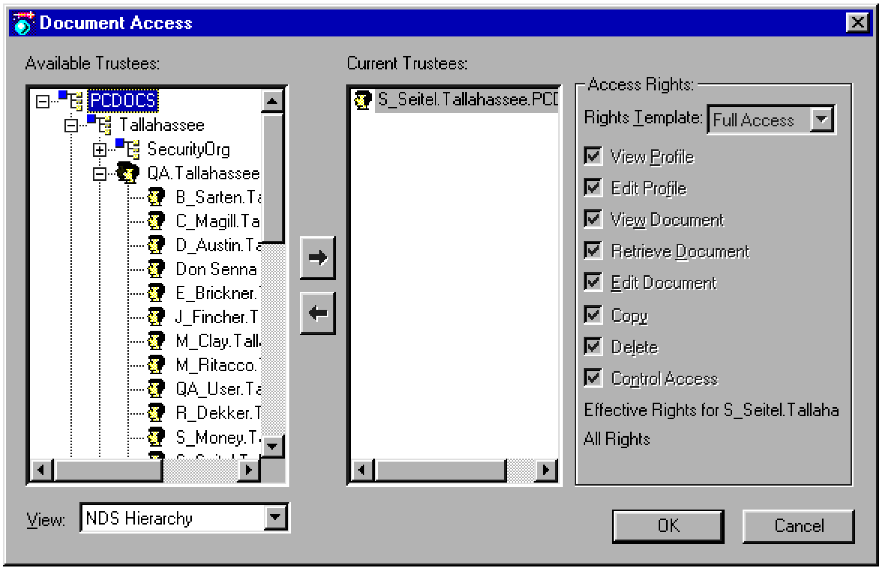


Hierarchical Directory Lookup

Your view of the above dialog box may be different if your administrator has associated a library with a NetWare Directory Service (NDS). If your libraries are associated with an NDS, you have the option of looking at the Available Trustees list as either flat or NDS. A Flat listing is similar to the one shown in Figure 3.10. An NDS listing appears as follows. Use the plus and minus signs to expand and collapse the hierarchy.

Figure 3.10

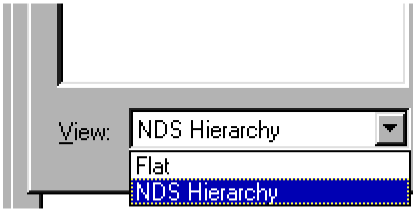
PowerDOCS Document Access dialog dox - NDS hierarchy view



To change between NDS and Flat directory structure, select the desired View, shown in the lower right corner of the dialog box.

Figure 3.11

View field



Individual Rights

From the Document Access dialog box, you can assign security access rights by user or group. The eight access rights provided by PowerDOCS security are:

- **View Profile:** Users can view, but not edit, the Document Profile.
- **Edit Profile:** Users can view and edit the Document Profile.
- **View Document:** Users can view, but not edit, the document.
- **Retrieve Document:** Users can retrieve the document. They may also view the Document Profile. Any edits made must be saved as a new document.
- **Edit Document:** Users can edit the document.
- **Copy:** Users can retrieve a copy of the document and save it as a new document. Editing of the original document or Document Profile is not allowed.
- **Delete:** Users can delete the document.
- **Control Access:** Users with this right can control access to the document (change the rights of any user/group assigned here).

Rights Templates

PowerDOCS has several rights templates you can select to assign a defined set of rights. These templates are designed for your convenience, rather than to limit you in any way. You can use the templates as they are, modify them to suit your needs, or forego the templates altogether and customize your own rights assignments. To use the Rights Templates feature, click the Rights Template box on the Document Access dialog box. The Rights Templates include the following:

- **View Profile:** This template allows designated users to view the profile of a selected document. The user will not be able to edit the profile, view the document, retrieve the document, or edit the document.

- **Read Only:** This rights template allows users to view the Document Profile and document. The user will not be able to edit or delete the document. The individual rights selected are: View Profile, View Document, Retrieve Document, and Copy Document.

- **Normal Access:** This template allows users to view and edit the Document Profile. It also allows users to view, edit, retrieve, and copy the document.

- **Full Access:** This template gives users all rights to the document. These rights are those granted in Normal Access plus delete and control access privileges.

- **Custom:** This option is selected automatically by PowerDOCS if you make individual rights selections that do not coincide with any of the predefined rights templates.

Assigning Rights

The user who entered the document has all rights by default. Other users and groups can be easily assigned access rights to the document.

To assign rights for a particular user or group:

1. From the Available Trustees list, double-click users and/or groups. Listings of all valid users/groups are then displayed.

2. Click the desired users or groups to whom you want to grant access and click the → button.

3. All users and groups that have been added appear on the Current Trustees list with full access granted by default. To change the rights for any user or group on the Current Trustees list, click that user or group and either choose one of the predefined rights templates or select the desired individual access rights. If you choose individual rights that do not coincide with any of the rights templates, "Custom" is displayed in the Rights Template dialog box.

Removing Rights

To remove the access rights of a particular user or group:

1. From the Document Access dialog box, click the user or group you want to remove access from in the Current Trustees list.
2. Click the left arrow button. The rights of the user or group to this document are revoked.

NOTE You cannot delete your own rights to a document.

Personal Profile Form Settings

To facilitate the process of completing Document Profiles, PowerDOCS allows you to set up your own default entries to appear in the profile fields each time you create a new document. For example, if the documents you generally work with are documents authored by you, you can set yourself as the default in the Author field. You can assign personal profile form settings for each of the profile forms available to you.

If multiple profile forms are available to you, but you normally use only one of the forms, you can select that one forms to override all of the others. This eliminates a step in the document creation process in that you would not be prompted to select a specific form each time you needed to profile a document. Clearing the override is very simple when you need to use a different profile form.

Entering Personal Profile Form Settings

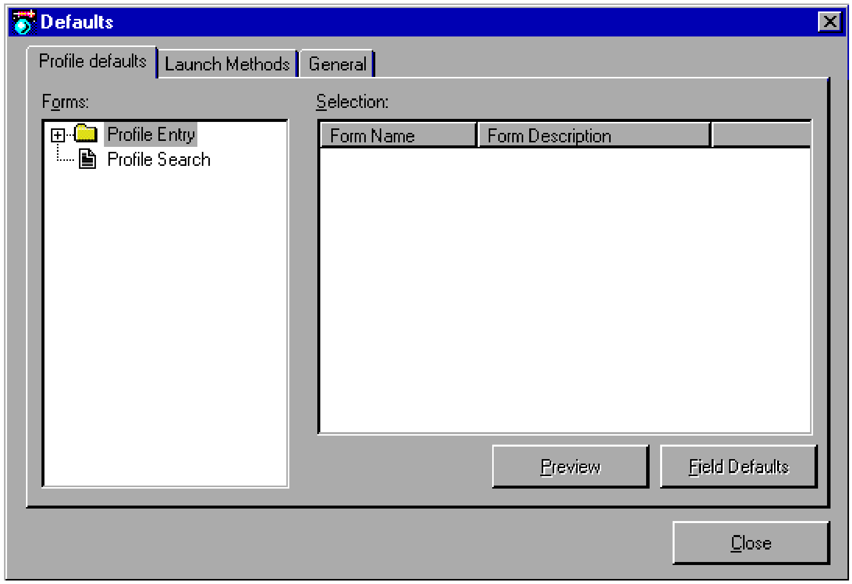
To set up personal profile form settings:

1. From the PowerDOCS Options menu, select Defaults.

2. Click the Profile defaults tab. The following dialog box appears.

Figure 3.12

Active Profile Defaults tab on the Defaults dialog box



3. With the Profile defaults tab active, double-click the Profile Entry folder. This folder then expands to display the primary Profile Entry form for your group. This list also displays any applications for which other Profile Entry forms are defined. If you click any of the items in this list, the Profile Entry forms defined for that item are displayed in the Form Name column in the right pane of this dialog box.

4. To enter default settings, click on a specific profile in the Form Name column.

5. Click the Field Defaults button. The profile will be displayed. You can use the Preview button to view the profile before opening it.

6. Complete the profile fields with the default information you want to automatically appear each time you create a new document.

You can use the table lookup button to browse and select default values.

NOTES You can modify your Personal Profile Form Settings at any time. You are not required to fill in all of the fields.

Your administrator may have already entered defaults for some of the profile fields. In this case, you can override these defaults with your own. If your administrator assigned access rights, those rights will be combined with the rights you assign.

Some fields, such as the Application field, may be unavailable because PowerDOCS reads the values internally and automatically completes the fields.

You can assign default trustees if you want, but if your default trustees of your primary form differ from those on an application-specific form, the Access List will show both sets of trustees when you are completing a profile.

7. When you have completed your personal profile defaults for the desired fields, click OK.

8. To set up a default Profile Entry form, select the form that you want to override all others for a particular application.

   When profiling documents in that application, only the override form will be displayed. You will not see a list of available forms. When you need to save to a different Profile Entry form, simply return to Options>Personal Profile Form Settings, select the form you want and click Clear Override. The list of available forms will appear when you next profile a document.

9. Click Close.

For more information about setting up default values on profile forms, refer to the “Personal Profile Search Defaults” section in Chapter 5 of this guide.

Setting Up Defaults for Access Control

When using default profile form settings or designating a default profile form, you can set up Access Control defaults also. If you typically want certain trustees to have certain rights to your documents, you can designate those rights once instead of having to enter them each time you create a document.

Your administrator sets Access Control defaults on the group level. If you set defaults for yourself or other user trustees, then these defaults that you set up on a personal level will override the group-level defaults set by the administrator or by you. For instance, the group, DOCS_USERS, is set up with Read Only rights, which apply to all members of the group. Chuck Jeffries is a member of DOCS_USERS, but you want Chuck to have Full Access to your documents. If you grant him Full Access to documents at the Personal level, this will override his group-level Read Only access.

Group-Level Default ACL	Personal Default ACL	Overriding ACL
Chuck Jeffries - Read Only	Chuck Jeffries - Full Access	Chuck Jeffries - Full Access
No group default	Chuck Jeffries - Full Access	Chuck Jeffries - Full Access
Chuck Jeffries - Read Only	No Personal Default	Chuck Jeffries - Read Only
Chuck Jeffries - Normal Access	Chuck Jeffries - View Profile	Chuck Jeffries - View Profile

To set up Access Control defaults, follow the instructions in the section "Entering Personal Profile Form Settings." After you click the Field Defaults button to display the sample Document Profile, click the Edit button under Access Control. The Document Access dialog box appears, allowing you to set default rights for users.

Profiling Paper Documents

PowerDOCS will keep track of your paper documents as well as your electronic files. For example, if you have charts, maps, or reference material that cannot be stored on a computer, you can fill out a Document Profile stating the physical location of the item. Any activity to the document can be tracked through the Document History feature. The item can be checked out with the Check-Out feature (described in the section titled, "Check-out," in Chapter 6), and you can view the history or profile in the same manner as you would a normal electronic document. See the topics titled "History" and "Display Profile" for more information.

To profile a paper document:

1. Choose Profile Paper Document from the Document menu on the PowerDOCS Desktop. If multiple profiles are available to you, you will be presented with a listing from which to choose. When you make your choice, a blank Document Profile form is displayed.

2. Complete the Document Profile using the procedures described in this chapter.

3. Click OK, then Close to save the profile.

Document Shadowing

If your PowerDOCS administrator has allowed document shadowing, copies of the PowerDOCS documents you work on will be shadowed to your local drive (C: drive, by default). The drive and directory that stores the shadowed documents are determined by the Shadow Path Template of your Primary Library.

Editing a shadowed copy of a document is often more efficient, due to network traffic, or even necessary, in server-down situations. When documents are shadowed, PowerDOCS will assign file names similar to the file names assigned when documents are checked out (LibraryName-DocumentNumber-VersionNumber-

DocumentName.File Extension). An example shadow document name might be Northeast-#46-v3-Gaines_Street_Proposal.Doc.

Delete Shadowed Documents

Your PowerDOCS administrator may have set up your system to have PowerDOCS save an additional copy of every document to your computer's local hard disk in order to reduce network traffic and to prevent down time in the event the server is unavailable. As these documents build up, the hard disk may fill, and the documents should be deleted. PowerDOCS provides a simple utility to automate this process. This option is available to all users.

NOTE Your PowerDOCS administrator may have elected to have this procedure automatically run. If so, the documents will be deleted each time PowerDOCS is loaded.

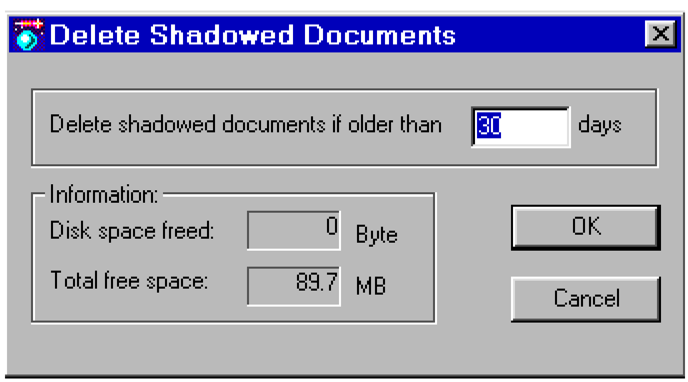
This procedure only deletes copies of your documents. The originals are safe on the file server. Also, PowerDOCS will not delete non-PowerDOCS documents from your hard drive.

To delete shadowed documents from your local hard disk:

1. Choose Delete Shadowed Documents from the PowerDOCS Desktop Options menu.

Figure 3.13

Dialog box for deleting shadowed PowerDOCS documents.



2. Enter the number of days you want documents to be kept on your local drive. All documents older than this number of days will be deleted.

3. Click OK to begin the delete process. You will be notified of the number of files deleted, how much disk space was freed, and the total amount of current free disk space.

Chapter

4

Working with Document Versions

In This Chapter

This chapter explains why versions are helpful for tracking document changes. It also details the tasks necessary to create versions and sub-versions, as well as new documents with current edits.

Introduction

Why Use Multiple Versions?

Imagine that you are a scientist writing a paper on your current research. Throughout the process of writing, you discover new aspects of your theories and new ways of describing the topic. However, you would like to keep a record of your changes. If you were using PowerDOCS, every time you made significant changes to the paper, you could save it as a new version. You could even edit previous versions and save them as sub-versions. Later, when someone asked you what led you to the final result, you would have an electronic record of all the steps along the way.

Two-Dimensional Version Tracking

Version tracking in PowerDOCS is two-dimensional. While you can save multiple versions of your document, you can also save sub-versions of each version.

A version has a numeric designation (1, 2, 3...). A sub-version has a numeric and an alphabetic designation, denoting its relationship to the version (1A, 1B, 2A...). The table below shows the two-dimensionality (both horizontal and vertical) of PowerDOCS version tracking.

Table 4.1 Two-Dimensional Version Tracking

Versions	Sub-version
1	
2	2A, 2B, 2C, 2D
3	
4	4A
5	

There are many options available when editing documents with multiple versions. For example, edits made to any version of a document could replace the original version, be saved as a new version, or be saved as a completely new document with a new profile.

Edits made to an earlier version (see version 4 in the chart above) can be either saved as a sub-version (4A) or as a completely new document with a new profile.

Versions and sub-versions give you a more precise audit trail of the evolution of a document. Suppose your organization is negotiating an important agreement that has gone through numerous versions, and the negotiations reach an impasse. The parties could go back to an earlier version and try again.

NOTE Your PowerDOCS administrator may permit two additional options: to allow you to replace previous versions of documents with edited versions or to create new versions from previous versions.

General Guidelines for Using Versions

This section describes some basic functions and capabilities of the Versions feature, while presenting a few of the dialog boxes that you will commonly see when you are working with document versions. This section does not provide instructions for creating document versions or sub-versions. If you are unfamiliar with versions and need step-by-step instructions, refer to the section called, "Creating and Replacing Versions" later in this chapter.

Editing the Version Properties

PowerDOCS allows you to specify the author and typist and enter comments for each document version. You enter this information when creating a new version or sub-version. You can edit this information from the Version Properties dialog box at any time.

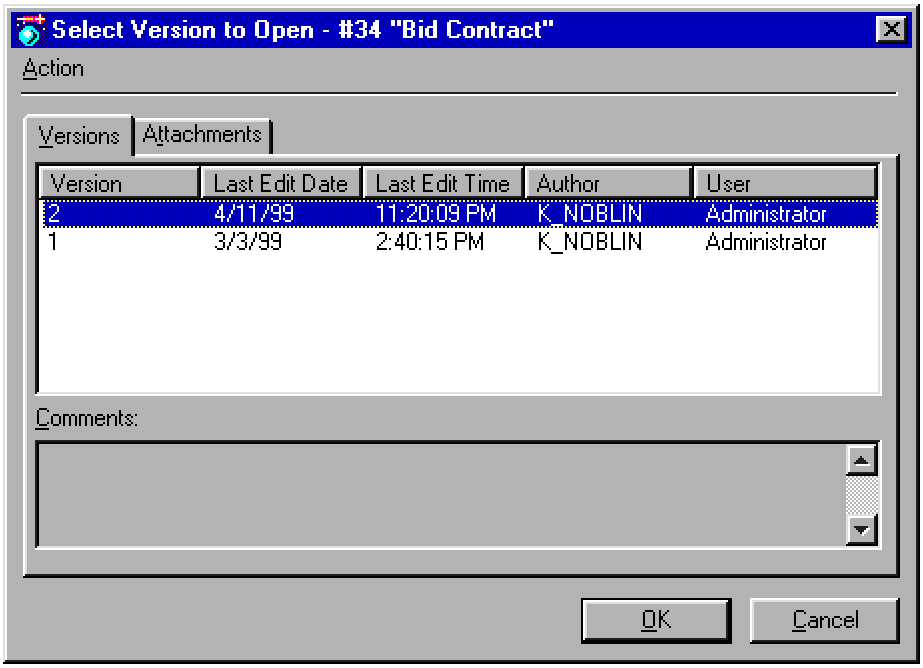
To edit the Version Properties:

1. From a document list, such as Recently Edited Documents or a search results list, highlight the document you are interested in.

2. From the Document menu, select Versions & Attachments. The following dialog box will be displayed.

Figure 4.1

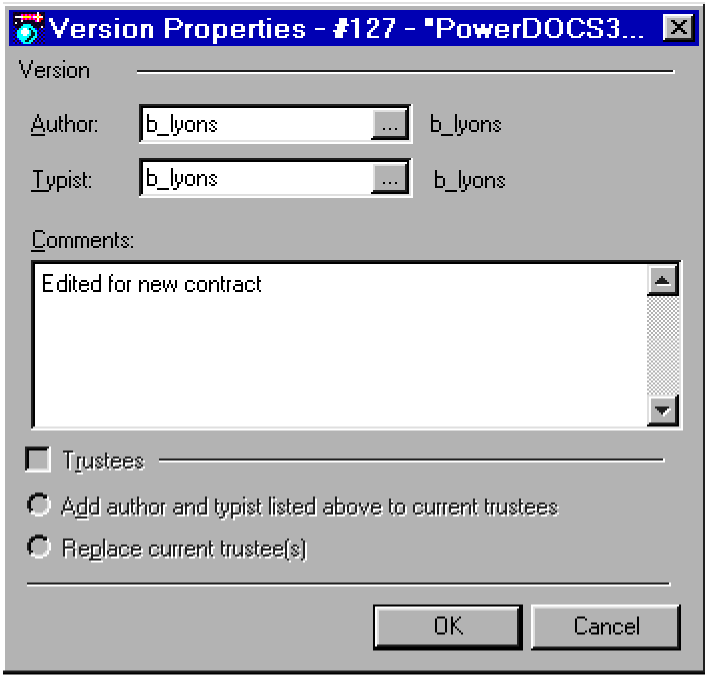
Select Versions dialog box for document #35



3. Highlight the version you are interested in and select Version Properties from the Action menu. The Version Properties dialog box appears.

Figure 4.2

The Version Properties dialog box displays a version's author, typist, and comments.



4. From the Version Properties dialog box, you can edit any of the displayed fields.

- **Author**: You can type a new Author in this field or click the table lookup (...) button to browse for names.
- **Typist**: You can enter a new typist in this field or click the table lookup (...) button to browse for names.

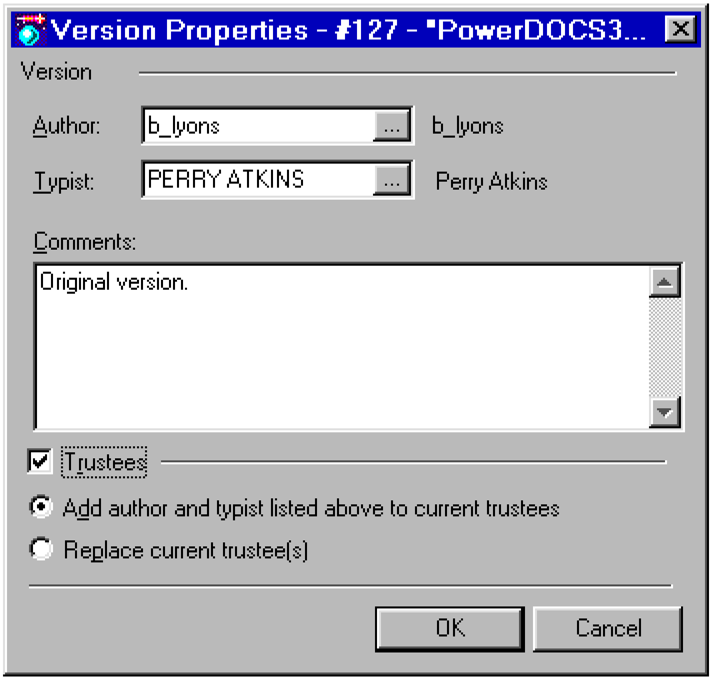
- **Comments:** You can overwrite or append to the comments in this field.

Note Your PowerDOCS administrator may have disabled the ability to change version properties or typist.

5. If you are editing a secure document and change the author or typist, the Trustees option at the bottom of the dialog box is accessible.

Figure 4.3

Version Properties dialog box showing Trustees option



If you want to change the trustees of this version, check the Trustees check box. You can either Add author and typist listed above to the trustees listing or replace the current trustees of the document.

6. When you have completed your edits, click OK to return to the Select Version dialog box.

7. Click Close to return to the document list where you originally selected the document.

Importing a Version or Sub-version from an External File

PowerDOCS allows you to import an external file into PowerDOCS and designate it as a new version or sub-version to any profiled document. The following instructions specifically address importing a file as a new version of a document. These same instructions apply to creating a sub-version of a document.

To import a file as a new version:

1. From a document list, such as Recently Edited Documents or a search results list, highlight the document you want to create a new version for.

2. From the Document menu, select Versions & Attachments.

3. The Version Selection dialog box appears for the highlighted document. From the Action menu, select Import Version from File. If you want to import a sub-version for a version of this document, you can select Import Sub-version from File instead.

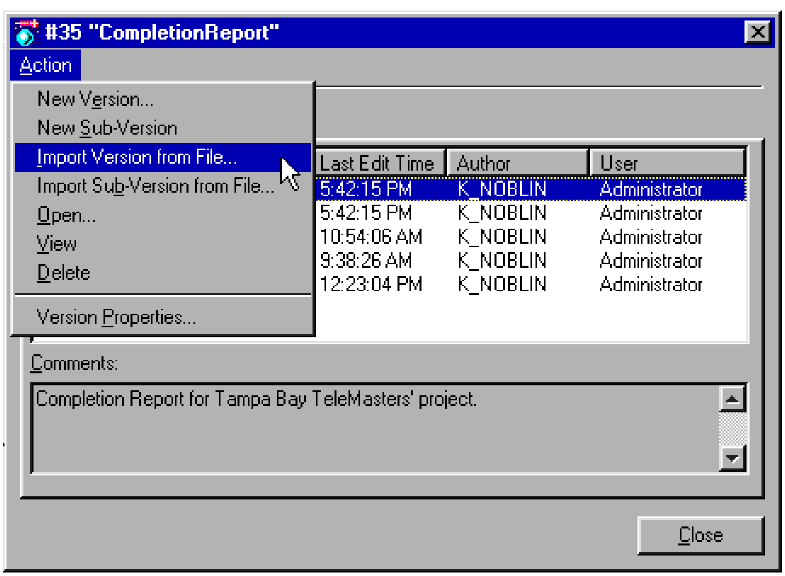


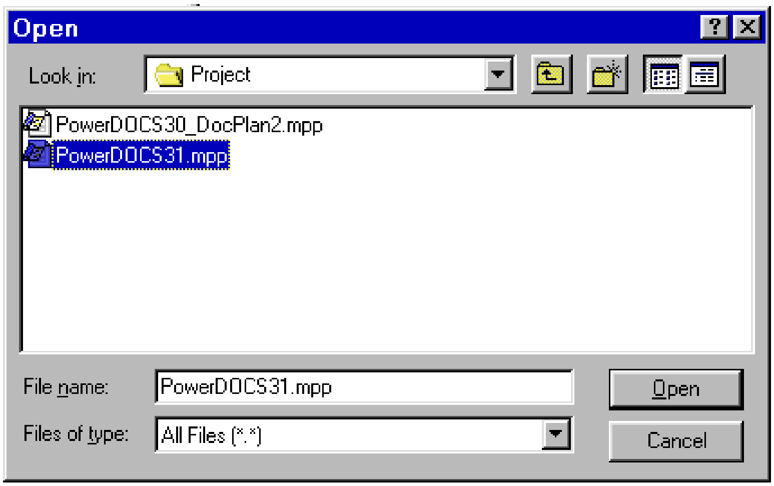
Figure 4.4

Import Version from File menu option from the Version Selection dialog box

4. A Windows Open dialog box appears, from which you can browse your directories for the document you want to import.When you have located the correct document, highlight it and click OK.

Figure 4.5

A Windows Open dialog box



5. A Version Properties dialog box is displayed. Enter the Version author, typist, and any comments that relate to this version. Click OK when you are finished. PowerDOCS will then add this imported document as the latest version of the document you originally selected.

Deleting a Document Version

PowerDOCS allows you to delete a document version, if you have the appropriate access rights.

To delete a document version:

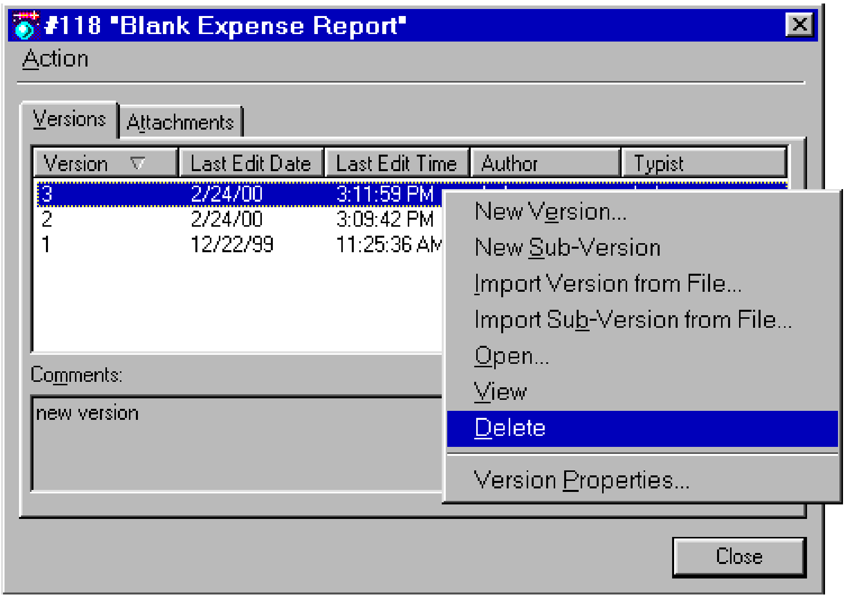
1. From a document list, such as Recently Edited Documents or a search results list, highlight the document that contains a version you want to delete.

2. From the Document menu, select Versions & Attachments. You can also right-click the highlighted document to bring up the short-cut document menu.

3. The Select Version dialog box appears, displaying all existing versions of the document. Highlight the version you want to delete and then select Delete from the Action menu or right-click to access the shortcut menu.

Figure 4.6

Action shortcut menu



4. The following question box appears. If you are certain that you want to delete the selected version, click Yes. PowerDOCS deletes the version and returns you to the Version Selection window. The

version numbers of the document's other versions will be immediately updated.

Figure 4.7

Confirm Delete question box

5. Click Close to return to your original document list.

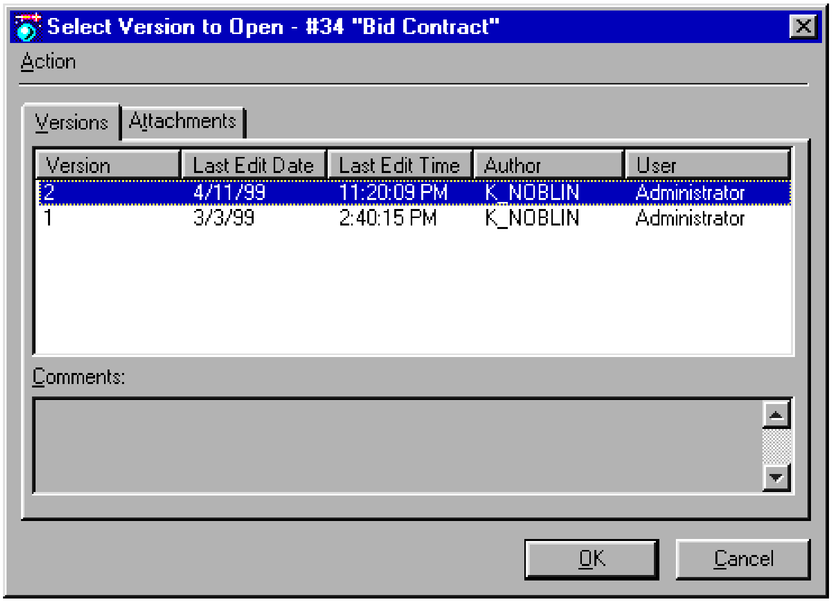
The Version Selection Dialog Box

Any time you select a document from a document list, and then select an option from the Document menu (for example, Open, View, or Check-out), you will be presented with the Select Version dialog box.

NOTE You will not see the Version Selection dialog box if you have enabled the Auto-select Last Version option from Options>Defaults>General tab.

Figure 4.8

Select Version dialog box for Document #34 "BidContract"



From this dialog box, you can right-click a version to bring up a shortcut Action menu or access the Action menu across the top of the dialog box.

The Action Menu

Any time you select a version of a document, the Version Selection dialog box appears. From this dialog box, the Action menu is always available, presenting the following options:

- **New Version:** This option allows you to create a new version of a document. Refer to the section titled, "Creating and Replacing Versions" for details.
- **New Sub-Version:** You can create a sub-version from any version of a document. Refer to the section called, "Creating a Sub-Version" for details.

- **Import Version from File:** Selecting this option will present you with a Open dialog box, where you must select the document you want to import as a new version. After you have made your document selection, the Version Properties dialog box appears, where you enter a new Author, Typist, and Version Comments. Refer to the section called, "Importing a Version or Sub-version from an External File" for details.
- **Import Sub-Version from File:** Selecting this option will present you with an Open dialog box, where you must select the document you want to import as a sub-version. After you have made your document selection, the Version Properties dialog box appears where you may enter a new Author, Typist, and Version Comments. Refer to the section called, "Importing a Version or Sub-version from an External File" for details.
- **Open:** Selecting this option will open the highlighted document version.
- **View:** Selecting View will open the highlighted version in the PowerDOCS viewer.
- **Delete:** Selecting this option will delete the highlighted version. Refer to the section titled, "Deleting a Document Version" for details.
- **Version Properties:** This option presents you with the Version Properties dialog box for the highlighted version. These properties include the version author, typist and version comments. Refer to the section titled, "Editing the Version Properties" for details.

Auto-Select Last Version

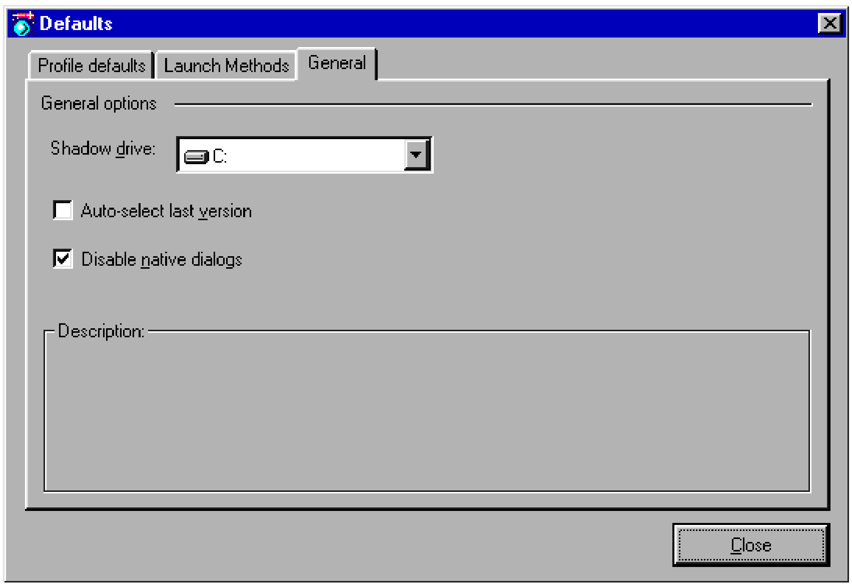
PowerDOCS will default to the last version of a document, without presenting the Version Selection dialog box, if you have enabled this option.

To default to the last version of all documents:

1. From the PowerDOCS Desktop or Explorer, select Options>Defaults. The Options dialog box appears with the Profile defaults tab activated. Click the General tab to display the following.

Figure 4.9

General tab active from the Defaults dialog box



2. Check the Auto-select last version option from this window and then click Close. Your changes will take effect immediately. The next time you open or view a document, PowerDOCS will automatically select the last version without prompting you.

Creating and Replacing Versions

This section describes the procedures for creating and editing versions in PowerDOCS. Use the table below for a quick reference for the rules of using document versions.

Table 4.2 Rules for Document Version Usage

Function:	From Latest Version:	From Previous Version:
Create a New Version	Yes Command - Save As	Administrator determined. If Yes, Command - Save As
Create a Sub-Version	Yes Command - Save As	Yes Command - Save As
Create a New Document	Yes Command - Save As	Yes Command - Save As
Replace a Version	Yes Command - Save As, or Save	Administrator determined. If Yes, Command - Save As

Creating a New Document with Version Tracking

The number of maximum allowable versions for a document is determined by either the Document Type or your Primary Group. As each Document Type is set up by your DOCS administrator, a maximum number of versions is defined. If the maximum number of versions allowed for a specified Document Type is 1, then you cannot create additional versions of documents created with this Document Type. Edits to the document replace the existing version.

Each PowerDOCS group also has a defined version limitation. The lower number of allowable versions takes precedence when determining how many versions can be created. For example, let's suppose you are a member of the DOCS Open Group, ASSISTANTS, and you are working on a research project in your organization using a Document Type called RESEARCH. Your administrator has set the maximum number of versions for the RESEARCH Document Type at 99. However, the maximum number of versions allowed for members of the ASSISTANTS group is 10. You will not be able to create version 11 of this research document, because your group is set at 10 versions. Check with your PowerDOCS administrator if this becomes an issue for you.

To create a new document with version tracking:

1. Create a document using the procedures outlined in "Creating Documents in PowerDOCS" on page 69.

2. When you are filling out the Document Profile of the new document, select a Document Type that allows multiple versions. This allows new versions of the current document to be created later.

   For a listing of Document Types, click the table lookup button (…) from the Document Type field.

3. After selecting the desired Document Type, continue filling out the profile as described in "Profiling Documents in PowerDOCS" on page 77.

Creating a New Version

You can create a new version or sub-version from any version of a document.

NOTE Your PowerDOCS administrator may have set up your system to allow you to create a new version by editing a previous version as well. Check with your PowerDOCS administrator to see if this option is available to you.

There are several ways to create a new version of the latest document version:

- You can create a new version by double-clicking a document to bring up the Select Version dialog box. You can then highlight a specific version of the document, right-click and select New Version
- You can create a new version by selecting the Versions & Attachments option from the Document menu.
- You can create a new version by editing an existing document and choosing New Version when you save the document edits.

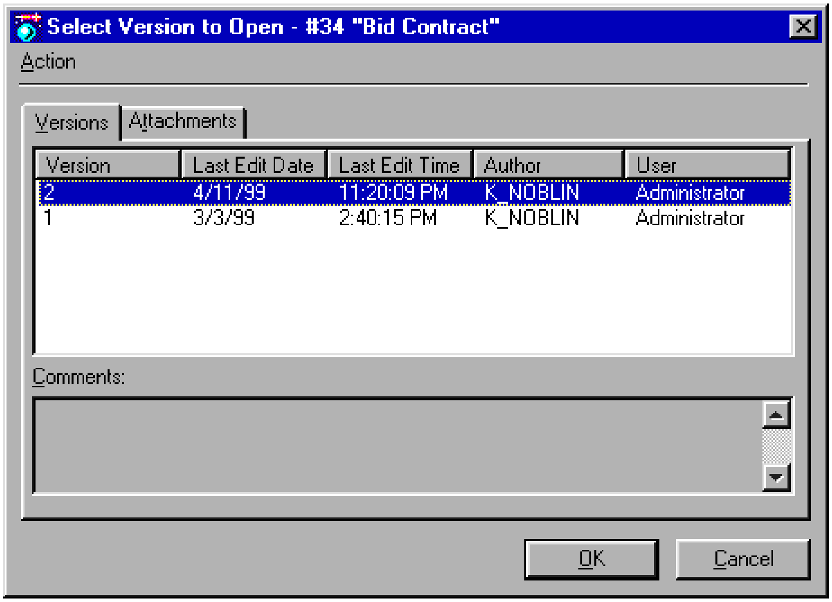
Creating a New Version from a Search Results List

To create a new version of a document using the Select Versions dialog box:

1. Double-click the document of which you want to make a new version. The Select Version to Open dialog box is displayed.

Figure 4.10

The Select Version to Open dialog box



If you marked multiple documents for retrieval, you are presented with a Select Version dialog box for each document you highlighted.

Note If you enabled Auto-select last version, the Select Version to Open dialog box will not appear. The document's last version will be automatically opened for you. To enable or disable this feature, refer to "Auto-Select Last Version" on page 113.

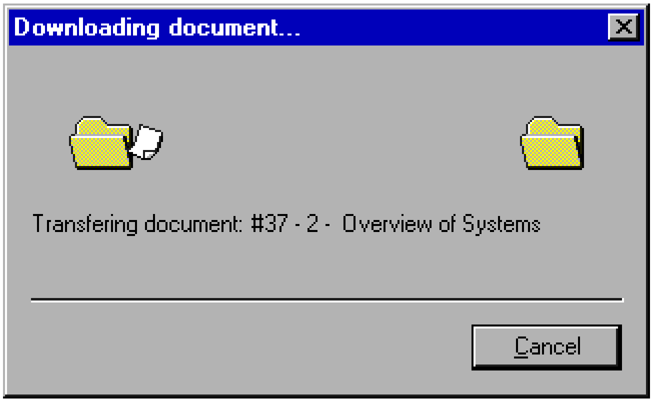
2. Select the version you want to retrieve (the latest version is selected by default).

3. From the Action menu, select New Version. The Version Properties dialog box appears, where you can select the appropriate author, and typist, and enter any version comments. These comments should apply to the version now being saved. This information helps you distinguish between the various versions of the document.

4. Click OK to have PowerDOCS add the version to the Version Selection dialog box. A status window is displayed while PowerDOCS downloads the document from the DOCSFusion server.

Figure 4.11

Downloading document status window



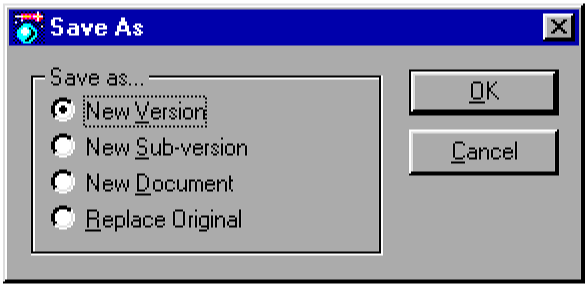
5. You can then edit this version as you would any other document.

6. If you decide at any point in your edit session to save the document as a version, sub-version, a new document, or to

replace the original, choose Save As from the File menu. The Save As dialog box is displayed.

Figure 4.12

Save As dialog box



NOTE Depending on your system's setup, your screen may not appear exactly as shown above. If you are using Passive Integration for Microsoft Word, Excel, Project 98, and Acrobat 4.0, the Save As dialog box appears when you select the Save As option from the DOCS menu.

7. Select the desired option and click OK. The version displayed will be saved according to your instructions, and you will be returned to your document.

There are several other tasks you can perform from the Action menu of the Version Selection dialog box. For more information on these actions, refer to the section titled, "The Action Menu."

Creating a New Version from the Document Menu

To create a new version of a document from the Document menu:

1. From a document list, such as Recently Edited Documents, highlight the document you want to update.

2. Select Document>Versions & Attachments. The Select Version to Open dialog box will appear. If there is more than one document version, select the version you want to work with.

3. From the Action menu, select New Version. The Version Properties dialog box appears, from which you can add version comments or change the version author or typist. Click OK when

you are satisfied with the Version Properties. PowerDOCS adds the new version to the Version Selection dialog box.

4. Double-click the new version to open or edit it.

   There are several other tasks you can perform from the Action menu of the Version Selection dialog box. For more information on these actions, refer to the section titled, "The Action Menu."

Creating a New Version by Editing an Existing Version

PowerDOCS allows you to save edits that you have made to a document as a new version or sub-version.

To save document edits as a new version:

1. From a document list, such as Recently Edited Documents, double-click the document you want to update. A Version Selection dialog box appears, as shown in Figure 4.10.
2. Select the version you want to edit and click OK.
3. Select the appropriate launch method and click OK.

NOTE If you have set up default launch methods for certain applications, you will bypass the Choose Launch Method dialog box.

4. PowerDOCS will open the document in the associated application.
5. Once you have edited the version, select File>Save As. The Save As dialog box appears, as shown in Figure 4.11.

NOTE If you are using Passive Integration for Microsoft Word, Excel, Project 98, or Acrobat 4.0x, the Save As dialog box appears when you select the Save As option from the DOCS menu.

6. Select New Version and click OK. The Version Properties dialog box appears, from which you can add version comments or change the version author or typist. Click OK when you are

satisfied with the Version Properties. PowerDOCS opens the new version.

Creating a Sub-Version

You can create sub-versions by editing any version of a document.

Creating a Sub-Version from a Search Results List

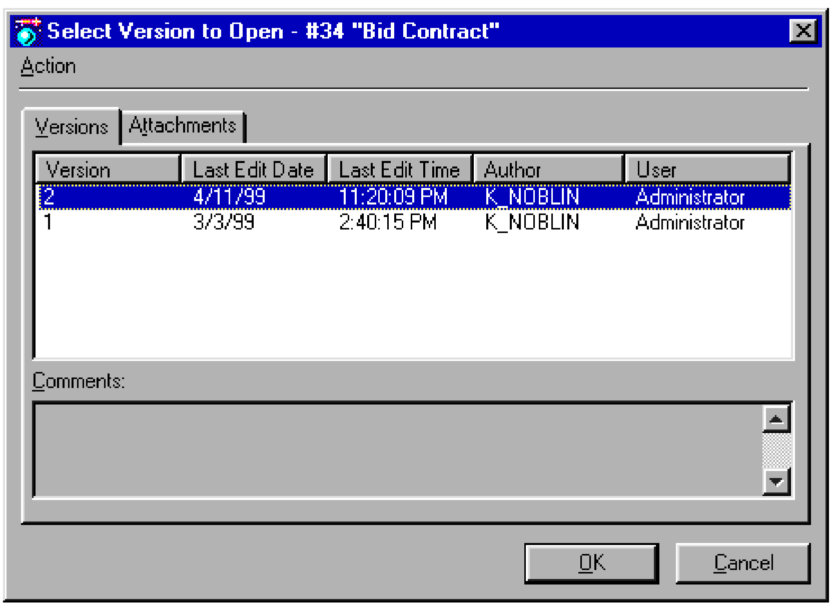
To create a sub-version of a document:

1. From a document list, such as Recently Edited Documents, select the document you want to make a sub-version of.

2. Right-click and select Open, or simply select Open from the Document menu. The Select Version dialog box is displayed.

Figure 4.13

Select Version dialog box



If you marked multiple documents for retrieval, you are presented with a Select Version dialog box for each document you highlighted.

3. Highlight a version and select New Sub-Version from the Action menu. The Version Properties dialog box appears, from which you can add version comments or change the version author or typist.

4. Click OK when you are satisfied with the Version Properties. PowerDOCS adds the sub-version to the Version Selection dialog box and opens the document.

Creating a Sub-Version by Editing an Existing Version

PowerDOCS allows you to save edits that you have made to a document as a new version or sub-version.

To save document edits as a new sub-version:

1. From a document list, such as Recently Edited Documents, double-click the document you want to update. A Version Selection dialog box appears, as shown in Figure 4.13.

2. Select the version you want to edit and click OK.

3. Select the appropriate launch method and click OK.

NOTE If you have set up default launch methods for certain applications, you will bypass the Choose Launch Method dialog box.

4. PowerDOCS will open the version of the document in the associated application.

5. Once you have edited the version, select File>Save As. The Save As dialog box appears, as shown in Figure 4.11.

NOTE Depending on your system's setup, your screen may not appear exactly as shown above. If you are using Passive Integration for Microsoft Word, Excel, Project 98, and Acrobat 4.0, the Save As dialog box appears when you select the Save As option from the DOCS menu.

6. Select Sub-Version and click OK. The Version Properties dialog box appears, from which you can add version comments or change the version author or typist. Click OK when you are

satisfied with the Version Properties. PowerDOCS adds the new sub-version to the Version Selection dialog box.

Saving Your Edits as a New Document

You can always save any edits you make—to any version or sub-version—as a new document.

To save an edited version of a document as a new document:

1. Highlight the document you want to edit.
2. Right-click and select Open, or simply select Open from the Document menu. The Select Version to Open dialog box is displayed.

   If you marked multiple documents for retrieval, you are presented with a Select Version dialog box for each document you highlighted.

3. Select the desired version or sub-version and click OK.
4. When you finish editing the document, choose Save As from the File menu. The Save As dialog box is displayed.

NOTE If you are using Passive Integration for Microsoft Word, Excel, Project 98, and Acrobat 4.0, the Save As dialog box appears when you select the Save As option from the DOCS menu.

5. Select New Document and click OK. The Document Profile dialog box is displayed.

NOTE If more than one profile is available to you, you will be given a list of profiles to choose from.

6. Fill out the Document Profile dialog box as described in Chapter 3, the section titled “Filling Out the Document Profile."
7. Now that you have profiled the new document, you will be returned to your original document. Close the document using the application's normal closing procedure.

Chapter

5

Searching and Retrieving

In This Chapter

This chapter explains how to search for and open documents in PowerDOCS. It also details the search options available in PowerDOCS and provides steps to make your searching more efficient.

Introduction

A distinguishing aspect of PowerDOCS is the wide range of available search options. Substantial research went into determining how users access their documents and how searching efficiency could be optimized, resulting in the development of a "hierarchy" of searching options.

The Hierarchy of Search Options

Searching options in PowerDOCS range from simple searches to extended searches. The basic search options are Quick Searches, Profile Searching, and Content Searching. Quick Searches provides a number of convenient ways to locate and retrieve documents. Profile Searching is the best choice when you know only profile information, such as the application a document was created in or the author.

Content Searching, performed from the Search Form dialog box, is perhaps the most powerful search feature. By knowing very little about a document, such as a word or phrase within the text of the document or profile, you can obtain a list of documents ranked by relevance. You can, so to speak, "find the needle in the haystack." When combined with Profile Searching, Content Searching provides an even more focused Search Results list.

Quick Searches, Profile Searching, and Content Searching are described in detail in this chapter.

Quick Searches

A Quick Search is the quickest way to retrieve your document if any of the following conditions is true:

- You know the Document Number.
- You know the Document Name (if using unique Document Names – ask your PowerDOCS administrator to be sure).
- The document is one of the last 30 documents you have edited.
- You have saved Profile Search criteria for a “canned” Quick Search (Profile Searches are discussed later in this chapter).
- The document is checked out. Read Chapter 6, “The Document Menu,” for information on the document Check-Out feature,
- The document is a Template document. Template documents are discussed in Chapter 3, “Creating and Profiling Documents.”

Accessing Quick Searches

There are a few different ways that you can access Quick Searches:

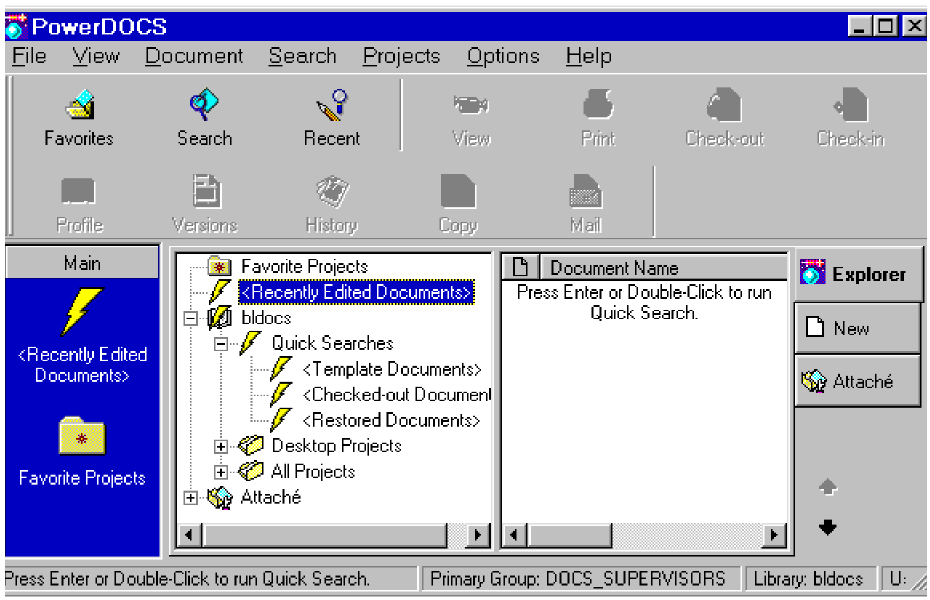
- The Quick Searches option on the Explorer tab tree view on the PowerDOCS Desktop,
- The Quick Searches option from within the PowerDOCS Explorer,
- The Search Results dialog box displayed when you select File>Open from within an integrated application,
- Any shortcuts you have created, on your PowerDOCS Desktop or Windows desktop, to one of the default or saved Quick Searches.

Accessing Quick Searches from the PowerDOCS Desktop

When you launch the PowerDOCS Desktop, click the Explorer tab. In the middle pane of the PowerDOCS Desktop, your libraries will be listed as nodes in the tree. If you have multiple libraries, the library that you logged in to is listed first. When you expand your library node (click on the "+"), the Quick Searches, Desktop Projects, and All Projects options are displayed. Expand the Quick Searches option and a list of all the default Quick Searches is displayed along with any searches you may have saved as Quick Searches. Quick Searches are indicated by the lightning bolt icon.

Figure 5.1

Default Quick Searches

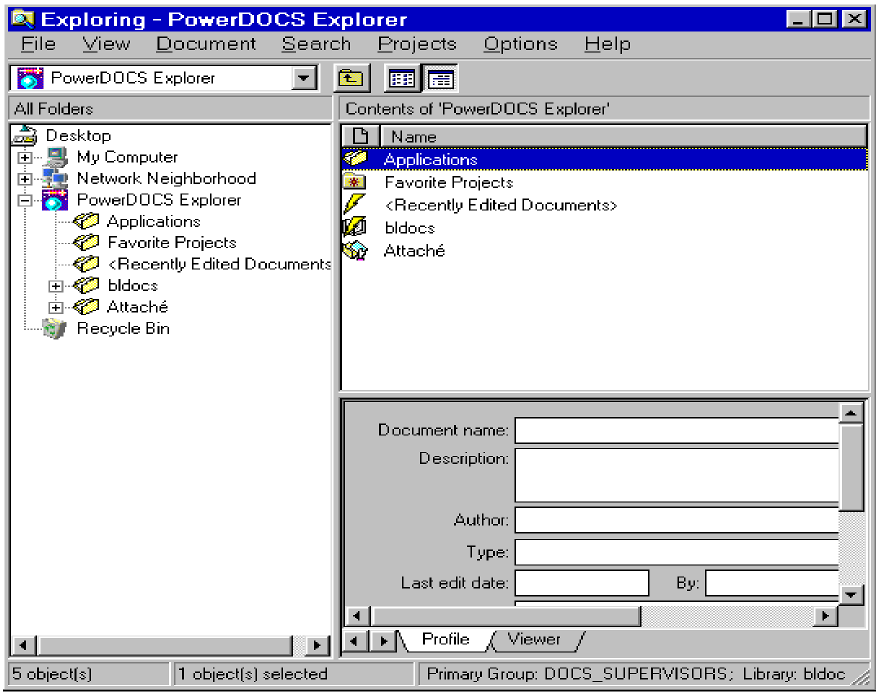


From the PowerDOCS Explorer

When you first start the PowerDOCS Explorer, the dialog box in Figure 5.2 is displayed. If you have more than one library available to you, double-click the library you want to access. Double-click Quick Searches to expand the list of available Quick Searches. A list of available Quick Searches is displayed. To start a search, double-click the desired search. The results will be displayed in the same window.

Figure 5.2

PowerDOCS Explorer main window. Your PowerDOCS Explorer window may be different from the one shown.

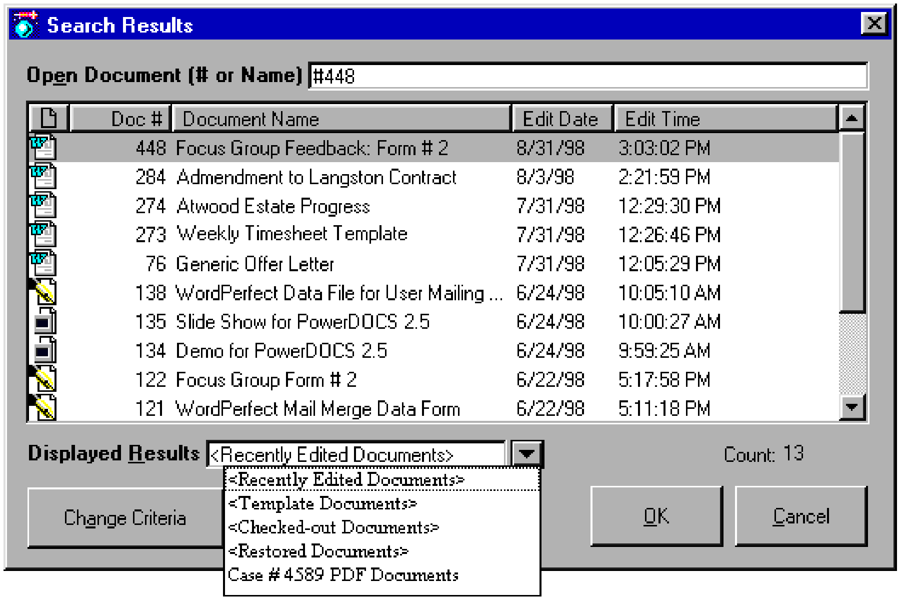


From the Search Results List

From the Search Results screen, click the down arrow of the Displayed Results combo box to display a list of other document listings you can choose from. The default Quick Searches are displayed along with any searches you may have saved as Quick Searches. In the example below, “Case #4589 PDF Documents” was a search that was saved as a Quick Search. For information on saving your search criteria as a Quick Search, see the topic “Saving Search Criteria” later in this chapter.

Figure 5.3

Search Results dialog box



Shortcuts to Quick Searches

Quick Searches can also be placed on the Favorites bar for easy access. The Recent Edits document list is a default icon on the Main Favorites bar, although others can be added easily. See Chapter 2, “Getting Started with PowerDOCS” for instructions on adding buttons to the Favorites bar.

You can also create shortcuts to Quick Searches by selecting a Quick Search from the PowerDOCS Desktop and dragging it where you want it for easy access (for example, the Windows desktop).

Finding a Document Using Quick Searches

1. Access a Quick Search using any one of the methods described in the section "Accessing Quick Searches" above.

2. If you accessed a Quick Search using the method in "From the Search Results List" and you know the Document Name or Document Number, type it in the Open Document edit box and click OK to retrieve the document. Up to 240 characters can be used.

3. If the document is one of the last 30 documents you edited, it is displayed in the Recently Edited Documents list. Double-click the document you want to retrieve or select the document and then select Open from the Document menu. Documents are listed in order of edit date, with the most recent listed first.

4. If you have defined any personal Quick Searches, click the Displayed Results combo box. Double-click a Quick Search to invoke that search. Personal Quick Searches are discussed later in this chapter in the section "Saving Search Criteria".

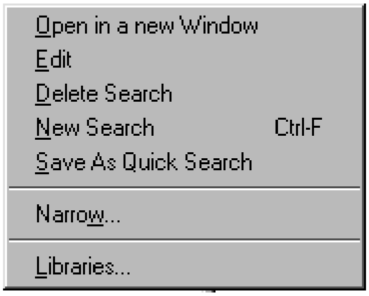
If the document you want to retrieve is neither on the Recently Edited Documents nor on the Quick Search lists, is neither a Template document nor on the Checked-out document list, and you do not know the Document Name or Number, you must use a Profile Search, a Content Search, or a combination of the two. Remember, Content Searches are launched from the Search Form dialog box. Follow the procedures outlined in the section "Profile Searching" to perform Profile Searches. See the topic "Content Searching" for instructions on searching for text within documents.

Quick Search Shortcut Menu

To make searching more efficient, a shortcut menu is available when you right-click any Quick Search, including Quick Searches that you have created. The menu is displayed in Figure 5.4. This menu is also available from within the PowerDOCS Explorer.

Figure 5.4

Quick Search shortcut menu



The menu options are described below:

- **Open in a new Window:** Select this option to run the Quick Search and display the results in the top pane of the PowerDOCS Desktop. For instance, if you right-click the Recently Edited Documents Quick Search, the 30 most recent documents will be displayed in the top pane of the PowerDOCS Desktop. If you select this option from within the PowerDOCS Explorer, another window is opened and the search results displayed.

- **Edit:** This option is only available when you right-click a Quick Search that you have created or one you have rights to edit. Select this option to edit your saved search criteria. For more information on creating or editing Quick Searches, see the topic "Saving Search Criteria."

- **Delete Search:** This option is only available when you right-click a Quick Search that you have created or one you have rights to delete. Select this option to delete a Quick Search.

- **New Search:** Select this option, or press Ctrl + F, to perform a new Profile Search. If you have more than one Search Form to choose from, you will be prompted to choose one. See the section "Profile Searching" for more information on performing a Profile Search.

- **Save As Quick Search:** This option is only available when you right-click a new search that was performed from the Search Form. When you perform a new search, a tab is created on your PowerDOCS Desktop, so you can easily return to the results, and an entry is placed under Quick Searches on the Explorer tab. Select this option to save the new search you just ran as a Quick Search. For more instructions, see the topic "Saving Search Criteria" later in this chapter.
- **Narrow:** Select this option to further narrow the search criteria within the Quick Search results list. When saving a search, all the criteria used to create the current viewed list of documents will be saved. For more instructions, see the topic "Narrowing Your Search" later in this chapter.
- **Libraries:** Select this option to change the libraries that PowerDOCS is performing your searches against. For more information, see the topic "Selecting Search Libraries" later in this chapter.

Profile Searching

The most powerful searches performed in PowerDOCS are from the Profile Search form. When you use the Profile Search, you simply give PowerDOCS what information you know about the document, and PowerDOCS locates the documents meeting all of the criteria you specify. The more detailed information you specify, the more refined your search results are. This type of search is known as a query-by-example (or QBE) search. For example, if you provide the Author name, all documents by that Author are retrieved. However, if you provide the Author name as well as a Document Type, only documents with both the specified Author and the specified Document Type are listed.

The Profile Search Form

To perform a Profile Search:

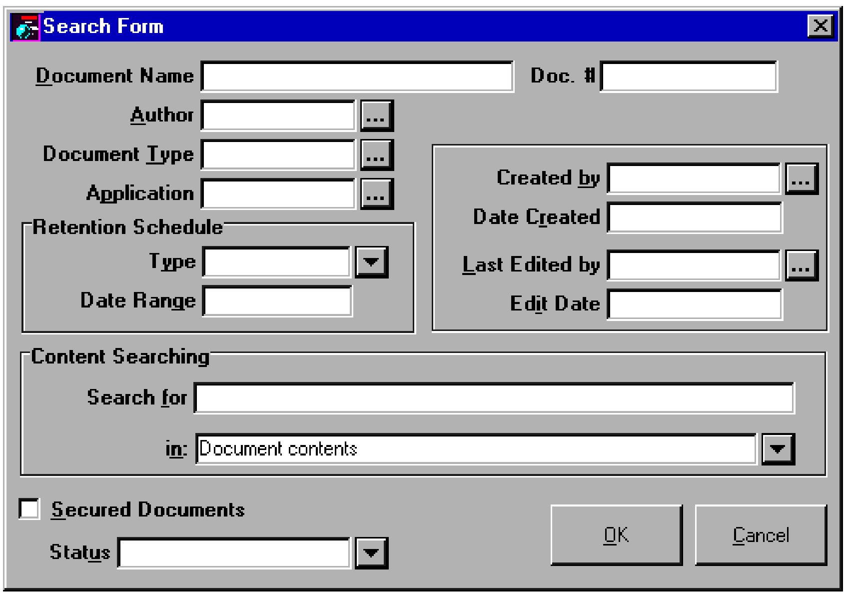
1. Select New Search from the Search menu. The search option may be a button on the toolbar. In this case, just click the Search button. You can also access the Search Form by selecting Find>PowerDOCS Documents from the Windows Start menu.

2. If multiple Profile Search forms are available, you will be prompted to choose which form you want to use.

   A dialog box similar to the one in Figure 5.5 is displayed.

Figure 5.5

Search Form dialog box



NOTE Since your PowerDOCS administrator has the option of creating customized profiles, your Profile Search form may be different.

3. Enter search criteria into any one or more of the fields as described in the following sections.

   "Entering Information in the Profile Search Fields"

   "The Profile Search Fields"

"Date Searching Syntax"

"Table Lookup"

4. When you have finished entering criteria, click OK to have PowerDOCS perform the search. Search results are discussed in the section "Search Results" later in this chapter.

Entering Information in the Profile Search Fields

When entering information in the Profile Search fields, be aware of the following conventions and procedures:

- Press TAB to move from one field to the next.
- Use the table lookup button, located beside applicable fields to find values if you are unsure of the spelling. Read the section "Table Lookup" for information on using this feature.
- The Profile Search fields are not case sensitive.
- You can enter multiple values in the search fields to have PowerDOCS retrieve documents meeting any one criterion. Separate multiple values in a field with a comma, semicolon, or ampersand. When using dates and times, however, separate multiple values with a semicolon.
- Use the asterisk (*) as a wildcard. The * can represent one or more characters.
- The question mark (?) can be used as a wildcard character. The ? represents only one character.

The Profile Search Fields

This section describes various fields on the Search Form dialog box. If you are not familiar with all of the profile fields, read Chapter 3, "Creating and Profiling Documents," for a detailed description of each field on the default forms. Please remember, your PowerDOCS administrator may have modified your Search Form dialog box, so many of these fields may not be available to you, they may be listed under different names, or you may have additional fields. If you are not sure, talk to your PowerDOCS administrator.

Listed below are the search fields on the PowerDOCS default Search From dialog box.

Field Name	Description
Document Name	The Document Name is the first field on the Profile Search screen. You can enter the full Document Name if you know it (up to 240 characters), but PowerDOCS also accepts wildcards and wild characters. For example, if you want to search for all documents with the word "Agreement" anywhere in the Document Name field, enter the following: *AGREEMENT*
Doc. #	Enter the Document Number in this field to have PowerDOCS locate the document. You can search on a range of document numbers, such as 1,3 or 10 to 25.
Author	Enter the Author's user ID in this field to have PowerDOCS find documents created by this Author. Table lookup is available.
Document Type	Enter the Document Type in this field to have PowerDOCS find documents of this Document Type. Table lookup is available.
Application	Enter the Application ID in this field to have PowerDOCS find documents created with this Application. Table lookup is available.

Retention Schedule - Type	Use this field to search by storage type. Choose from Archive, Delete, Keep, Template, and Optical. When you search by storage type, the status of the document is irrelevant. For example, if you searched for a document whose Profile was marked with the Archive storage type, the document would appear on the Search Results list, even if it had already been archived. The Paper type is only visible when profiling a paper document. See "Profiling Paper Documents" for more information.
Retention Schedule - Date Range	Enter the range of dates within which the document's storage type was processed. Syntax for this field is explained in the following section called "Date Searching Syntax."
Created By	Enter the User ID of the person who filled out the Document Profile when the document was created. Table lookup is available.
Date Created	You can enter a date or date range to have PowerDOCS retrieve documents created at or during that time. Syntax for this field is discussed in the following section called "Date Searching Syntax."
Last Edited By	Enter the user ID of the person who last edited the document to have PowerDOCS find documents last edited by this user. Table lookup is available.
Edit Date	You can enter a date to have PowerDOCS retrieve documents last edited on that date. Syntax for this field is discussed in the following section called "Date Searching Syntax."

Content Searching	Content Searching is discussed later in this chapter. While Content Searching is a different type of search from a Profile Search, the two can be combined for a focused Search Results list.
Secured Documents	This check box will be dimmed by default. The dimmed box indicates that documents are to be located regardless of whether they have secured access. If you want to perform a search only for documents that have limited access, click this box until a black check mark appears. Only documents that you created or have access to are displayed in the Search Results list. To search for unsecured documents, select the Secured Documents check box until the box is cleared.

Date Searching Syntax

Use the date format order (DMY, MDY, or YMD) that is set up in your Control Panel>Regional Settings in Windows. Your PowerDOCS administrator can help you get this information. Assuming MDY is used, any of the following date formats can be used (sample date is February 25, 1999):

- 2-25-99
- 2-25-1999
- 2/25/99
- 2/25/1999
- Feb 25, 99
- Feb 25, 1999
- February 25, 1999

PowerDOCS offers enhanced date searching capabilities. In the examples below, the following conventions are used:

- date represents the date you specify.
- **n** represents any integer.
- %TODAY is a variable designating the current date.
- MINUS allows you to subtract a number of days from the specified date. See examples below.
- TO allows you to specify a range of dates.

Examples:

To locate documents created between two dates, type:

```
date to date
```

To locate documents created on the date **n** days before a given date, type:

```
date minus n
```

To locate documents created between the specified date and the current date, type:

```
date to %TODAY
```

To locate all documents created in the last **n** days, type:

```
%TODAY minus n to %TODAY
```

Keywords

Your PowerDOCS administrator may have added the Keywords field to your Profile Search form. The Keywords field is a special field in that it allows an extra measure of refinement to your Profile Search. You may search for profiles containing Keywords the same as for any other validated field. Search values may include wildcards and multiple values may be separated by commas. Multiple values work as an implied "OR" search: if two keywords (separated by commas) are specified for a search, every document that has either of these words will be returned in the Search Results list. Table lookup can be used to select keywords for searching. Keywords may be selected in any sequence and are not case sensitive.

Table Lookup

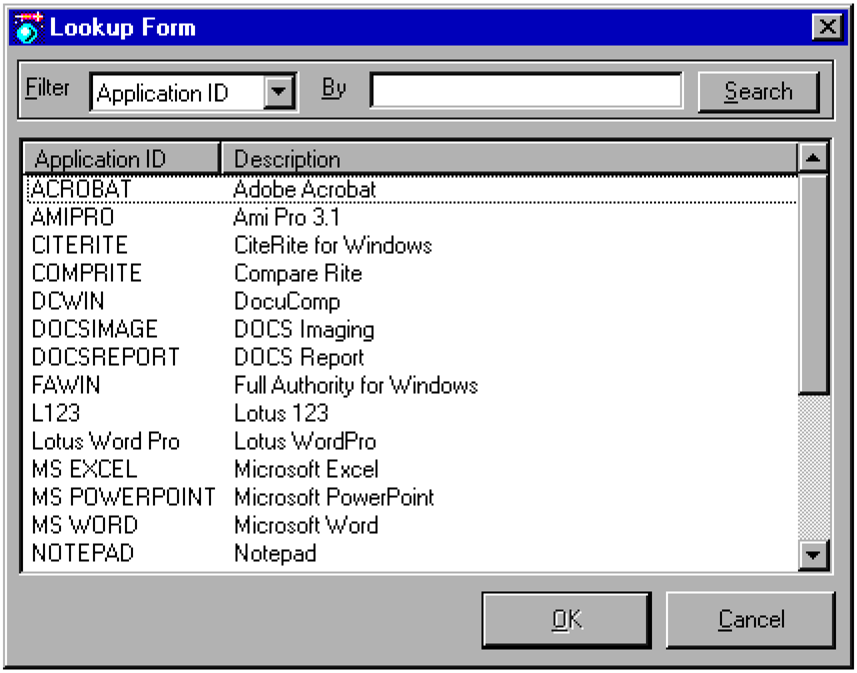
Fields on the Document Profile followed by table lookup button are validated against a predefined list of eligible entries set up by your PowerDOCS administrator. Each of these fields provides a *table lookup* to assist you in finding the correct values. If you are unsure of the spelling of a particular value, click the table lookup (ellipsis) button beside the field. A table lookup list for that field appears. If you want to search by a column other than the first column displayed, select a different column from the Filter field. Then, in the By field, type the first letter(s) of the value you are looking for and click Search.

NOTE To narrow your search, enter as many search characters as possible before you press Enter or click Search.

In the example below, the table lookup button beside the Application search field was clicked.

Figure 5.6

Lookup Form filtered for the field Application ID



From table lookup, you can:

- Scroll up and down to find the value for which you are looking,
- Enter additional characters in the By field to narrow the list of lookup values.
- Click on the desired entry and click OK or double-click an entry to have that value entered into the search field.

Column Sorting

You can change the sort order of your columns with a simple mouse click. If you want your listing to be sorted by a different column, simply click that column. By default, PowerDOCS sorts in ascending order. Click the sorted column again to have the column sorted in descending order.

If you change sort columns, the new column will be the primary sort column and the previous column will be the secondary sort column. For example, if your Document Type list originally sorted by Type ID, and you clicked the Storage Type column, the list would be sorted by Storage Type, then by Type ID.

Using Wildcards in Your Table Lookup Search

SQL wildcards can be used to perform a table lookup. The following items are examples that when entered into the table lookup Search field will produce the described results when the Search button is clicked.

```
_ones%
```

would show all values containing the string "ones" preceded by a single character. The results might be Jones Hartsfield, Tones Music, and so on.

```
[M-Z]inger%
```

would show Minger and Sons, Ringer Phones, Singer Sewing Machines, and so on from M-Z.

```
M[^a]%
```

would display all data beginning with M but not having an A as the second character.

```
[MR]idge%
```

would return Midge and Ridge.

Searching for Documents Using Multiple Values

PowerDOCS allows you to enter multiple values in the search fields to retrieve documents meeting any one criterion. You can manually type criteria, separating multiple values in a field with a comma, semicolon, or ampersand, or you can enter multiple values automatically using a table lookup (ellipsis) button. When using dates and times, however, separate multiple values with a semicolon.

To enter multiple values manually:

1. Click the Search button from the PowerDOCS toolbar. A Search form appears.

2. Enter the values you want to search for in a field that accepts multiple values. Refer to the section titled “Search Operators for Multi-Valued Fields” for correct search syntax.

3. When you have entered multiple search items, click OK. PowerDOCS will search for documents meeting those criteria and return a Search Results list.

To enter multiple values using a table lookup:

1. Click the Search button from the PowerDOCS toolbar. A Search form appears.

2. Click the table lookup button for the field you want to search.

3. From the table lookup list, select multiple values by pressing the Ctrl key while selecting entries.

4. When you have selected the desired entries, click OK to return to the Search form.

5. The values you selected will appear in the appropriate field, separated by a comma.

6. Click OK to initiate the search. PowerDOCS will search for documents meeting those criteria and return a Search Results list.

Search Operators for Multi-Valued Fields

PowerDOCS accepts the following operators when searching multi-valued fields.

- **Performing an "or" search.** Entering M_Garvin, L_Skywalker in the Author field causes PowerDOCS to search for any documents that were authored by Missy Garvin OR by Lyle Skywalker. "Or" searches can be performed using a comma or semicolon. The following list contains valid search syntax for "or" searches:

```
L_SKYWALKER, M_GARVIN
L_SKYWALKER; M_GARVIN
```

- **Performing an "and" search.** "And" searches are only valid when searching on fields that were specifically created by your administrator for multiple values. For example, in a field called WRITERS, entering M_GARVIN & L_SKYWALKER causes PowerDOCS to search for any document that BOTH Missy Garvin and Lyle Skywalker wrote. The following list contains valid search syntax for "and" searches:

```
L_SKYWALKER & M_GARVIN
L_SKYWALKER and M_GARVIN
L_SKYWALKER | M_GARVIN
```

- **Combining "and" searches with "or" searches.** This search combination is only successful when your administrator has created fields specifically for multiple values. If these fields are available to you, the following combinations can be used to search:

```
(L_SKYWALKER & M_GARVIN), J_SMITH
(L_SKYWALKER & M_GARVIN) or J_SMITH
(L_SKYWALKER & M_GARVIN); J_SMITH
(L_SKYWALKER) & (M_GARVIN, J_SMITH)
(L_SKYWALKER) & (M_GARVIN or J_SMITH)
(L_SKYWALKER) & (M_GARVIN; J_SMITH)
```

Personal Profile Search Defaults

To facilitate the process of completing Profile Search forms, PowerDOCS allows you to set up your own default entries to appear in the profile fields each time you search for a document. For example, if the documents you generally search for are documents authored by you, you can set the Author field to default to yourself. You can assign personal profile form settings for each of the Profile Search forms available to you.

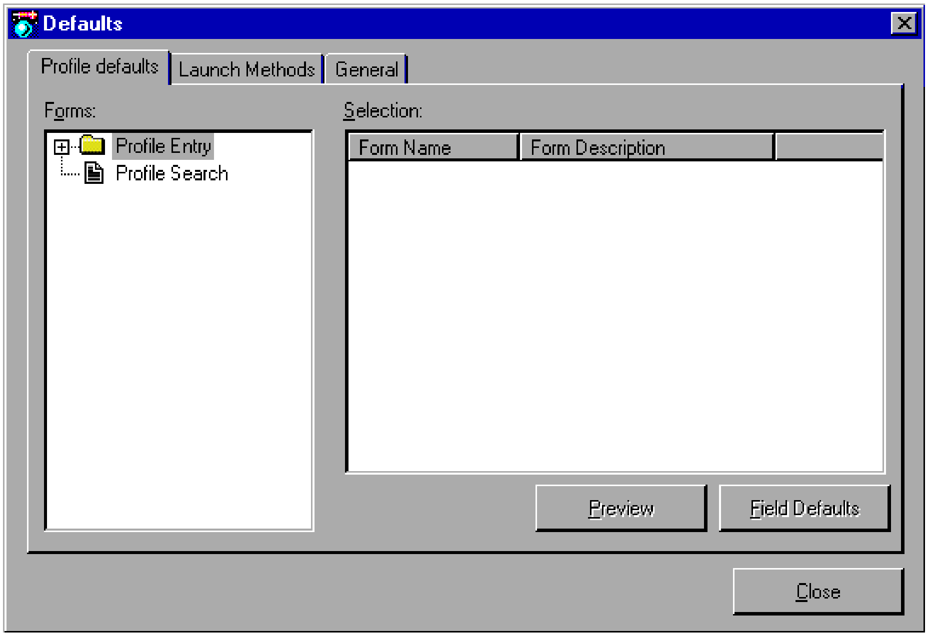
If multiple Profile Search forms are available to you, but you normally use only one of the forms, you can select one to override the others. This would eliminate a step in the search process, in that you would not be prompted to select a certain form each time you initiate a search. Clearing the override is very simple to do when you need to use a different Profile Search form.

To set up personal profile form settings:

1. From the PowerDOCS Options menu, select Personal Profile Form Settings. The following dialog box appears.

Figure 5.7

Defaults dialog box, Profile Defaults tab



2. Double-click Profile Search in the left pane of this dialog box. All of your Profile Search Forms will be displayed in the Form Name column in the right pane. You can only Preview the search forms available to you. Check the form you want to use as your default form.

3. To enter default settings for a Profile form, double-click the Profile Entry folder. Select the desired form, then the Form Name column.

4. Click the Field Defaults button. The Search Form will be displayed. You can click the Preview button to view the form before you open it.

5. Complete the profile fields with the default information you want to automatically appear each time you profiler a document. You

can use the table lookup button to browse and select default values.

6. When you have completed your personal profile defaults for the desired fields, click OK.

NOTE You can modify your Personal Profile Form Settings at any time. You are not required to fill in all of the fields.

Content Searching

Prior to beginning a Content Search, your Libraries must be indexed by either the DOCS Open Indexer or the DOCSFusion Indexer. Your PowerDOCS administrator can tell you which indexing method has been selected.

Although Content Searching is performed from the Search form, it is a different type of search. Profile Searching and Content Searching are included together on the same form because when used together, they form the most powerful search offered by PowerDOCS.

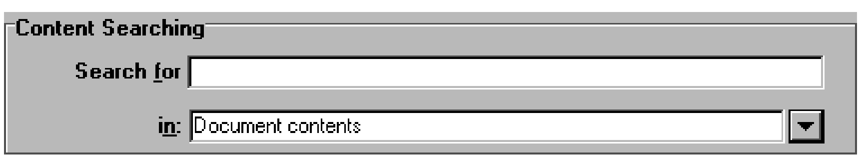
Content Searching allows you to search the contents of documents and profiles stored in PowerDOCS. Again, while documents can be located by a Content Search alone, you can decrease search time by providing additional criteria on the Profile Search form.

To perform a search for text:

1. The Content Search fields are located on the Search form. On the PowerDOCS default search form, they appear as follows:

Figure 5.8

The Content Searching section of the Search form



2. In the Search for field, enter the text you want PowerDOCS to find. In addition to single words, you can also enter multiple-word terms and expressions using search operators. See "Basic Content Search Rules" and "Search Operators" for a description of the search-syntax rules and how to use them to find the documents you want.

3. In the In: field, indicate whether you want PowerDOCS to search the contents of documents only, the profile fields only, or the document contents and profile fields. If you select to search profile fields, the search engine will search textual fields, such as Document Name or Description, on the profiles in the specified library.

4. Enter additional search criteria on the Profile Search screen, if desired.

5. Click OK to invoke the search. Search results are discussed in the section titled "Search Results" later in this chapter.

Basic Content Search Rules

You can state a query expression in simple or explicit syntax. The syntax you use determines whether the search words you enter will be stemmed (such as “great, greater, greatest”), and whether the words that are found will contribute to relevance-ranked scoring.

Simple Syntax - DOCS Open Indexer

When you use simple syntax, the DOCS Open Indexer calculates each document's score based on the word density it finds; the more often a word occurs in a document, the higher the document's score.

As a result, the DOCS Open Indexer engine ranks search results by relevance, according to word frequency as well as words that have the same stem. For example, “generator” and “generation” are stems of the word “generate.” To search for documents containing the word “generate” and its stemmed variations, you would simply enter the word “generate” (without quotation marks) in the Profile Search form’s Content Search field:

```
generate
```

Simple Syntax - DOCSFusion Indexer

When using the DOCSFusion Indexer, simple syntax is supported but instead of using strict word frequency, relevance is strict Boolean with critical terms ordered. This means that terms that occur in fewer documents will have a higher priority, making documents containing these terms have a higher relevance. This is equivalent to the <ACCRUE> concept operator in the DOCS Open Indexer.

When documents are relevance-ranked, they are listed in an order based on their importance to your search criteria. Relevance-ranked results are presented with the most relevant documents at the top of the list.

Explicit Syntax

When you enclose individual words in double quotation marks, the Indexer interprets those words literally. For example, by entering the word "generator" in double quotation marks, the words "generate" and "generation" will not be considered in the search. To retrieve documents containing the word "generator" without searching for its stemmed variations, enter the word "generator" using explicit syntax:

"generator"

Search Operators

Operators represent logic to be applied to a search element. This logic defines the qualifications a document must meet to be retrieved. The following sections list the search operators, a brief description, and an example of their use.

AND Operator

Searches for documents that contain all of the search elements you specify. Documents retrieved using the AND operator are relevance-ranked.

To search for documents that contain the phrase "pharmaceutical companies" and the word "stock":

```
pharmaceutical companies AND stock
```

To search for documents that contain both the words "data" and "security":

```
data AND security
```

OR Operator

Searches for documents that show evidence of at least one of your search elements. Using the OR operator produces relevance-ranked results.

To search for all documents that contain one or more of the words and phrases "election," "national elections," and "senatorial race":

```
election OR national elections OR senatorial race
```

To search for documents that contain either the word "computer" or the word "security":

```
computer OR security
```

WILDCARD Operator

Wildcard searches are searches for documents that contain matches to a character string containing variables. Using the DOCSFusion Indexer, wildcards are always recognized and translated.

To search for documents that contain words such as "pharmaceutical," "pharmacology," and "pharmacodynamics":

```
pharmac*
```

Wildcard Characters

You can use the following wildcard characters to represent variable portions of search strings.

Table 5.9 WILDCARD Operator

Character	Function
?	Specifies one of any alphanumeric character, as in ?an, which locates "ran," "pan," "can," and "ban."
*	Specifies zero or more of any alphanumeric characters, as in corp*, which locates "corporate," "corporation," "corporal," and "corpulent." Note that you should not use an asterisk (*) to specify the first character of a wildcard string.

Precedence Expressions

The language used for composing search terms has a set of rules that determine the precedence for evaluation. An Indexer query expression is processed using explicit precedence rules applying to the operators used. While a query expression is read from left to right, some operators carry more weight than others, and this will affect the interpretation of the expression. For example, an AND operator takes precedence over an OR operator. For this reason, the following example is interpreted to mean, "Look for documents that contain a and b, or documents that contain c."

```
a AND b OR c
```

To ensure that the OR operator is interpreted first, use parentheses as follows:

```
(a OR b) AND c
```

Parentheses in Expressions

Parentheses indicate the order in which the directions are to be carried out. Information within parentheses is read first; then information outside parentheses is read next. Note that there must be at least one space between operators and words used in the expression. The following example means, "Look for documents that contain a and b, or documents that contain c."

```
(a OR b) OR c
```

If there are nested parentheses, start with the innermost level. The following example means, "Look for documents that contain b or c as well as a, or that contain d."

```
(a AND (b OR c)) OR d
```

Prefix and Infix Notation

Prefix notation is a format that specifies the operator comes before the words to be used with that operator. The following example means, "Look for documents that contain a and b."

```
AND (a,b)
```

When prefix notation is used, precedence is explicit within the expression. The following example means, “Look for documents that contain b and c first, then documents that contain a.”

```
OR (a, AND (b,c))
```

Infix notation is a format that specifies the operator is to be specified between each element within the expression. The following example means “Look for documents that contain a, or b, or c.”

```
a AND b OR c
```

When infix notation is used, precedence is implicit within the expression; for example, the AND operator takes precedence over the OR operator.

If you are using the DOCSFusion Indexer, infix notation should not be combined with prefix notation in the same query.

Commas in Expressions

If an expression includes two or more words within parentheses, as is used in prefix notation, a comma is required as a separator between each element enclosed within the parentheses.

The following example means, “Look for documents that contain any combination of a and b together.” Note that the OR operator is enclosed in angle brackets (< >).

```
<OR> (a, b)
```

Delimiters in Expressions

Angle brackets (< >) and double quotation marks (“ “) are used in expressions as described below.

Angle Brackets in Expressions

Left and right angle brackets (< >) are reserved for designating operators and modifiers. Their use is optional. As the following examples show, you can enter expressions with or without angle brackets:

```
future <AND> trends

future AND trends
```

Both expressions mean, "Look for documents that contain the word 'future' and the word 'trends.'"

Double Quotation Marks for Reserved Words

To search for a word that is reserved as an operator ("and," "or," and "not"), enclose the word in double quotation marks. For example, to search for the phrase "black and white TV":

```
black "and" white TV
```

Enclosing the word "and" in double quotation marks signifies that "and" should be considered as a word, not an operator.

Content Searching Hints

Because of the volume of documents a Content Search must handle, some searches are faster than others. The following paragraphs offer help in determining the best search method for your particular task.

- If you are performing a search for a word that contains a period at the end, such as Mr. or U.S.A., the Indexer will assume that the final period is the end of a sentence and will not search for it properly. Rather, use Mr or U.S.A—without the final period—to locate the word.
- Special characters, such as those used as wildcards and precedence expressions, are not indexed; therefore, you cannot search for them. In these cases, simply enter your search term without the characters. For example, to search for the phone number (850) 942-5000, enter the number without the characters:

  ```
  850 942 5000
  ```

- A common problem is searching for a broad topic. If your Search Results list is too long for you to find the document you want, narrow your search. Include more operators, or select Profile fields (Author, Entered by) for a more specific search. A search for a specific document containing the term

  ```
  Alimony
  ```

is more easily found if you include other terms to narrow the search. For example:

```
Alimony and Caldwell and December
```

finds a more focused Search Results list.

- Give extra criteria. Your search will be faster if you include an Author, Application, and so forth, as search limits. A smaller Search Results list is more functional, because it is more specific to your needs.

Stop Words

Often PowerDOCS administrators will create a *stop word* list, including common words such as "and," "the," or "from" to conserve disk space. Words included on the stop word list are not full-text indexed. Your PowerDOCS administrator can let you know if your library has a stop word list.

Stop words, which can be used to speed up searching, work differently with the DOCSFusion Indexer than with DOCS Open Indexer. With DOCS Open, when users perform searches against phrases containing stop words, the Indexer returns an empty search results list. With DOCSFusion, the Indexer does not search against the stop words, but it does search against the other words in the search phrase and returns a hit list of the matches against the non-stop words.

Search Term Highlighting

When you perform a Content Search, the built-in PowerDOCS Viewer application will highlight all words in the document that match the criteria. These highlighted words will be visible in both the Viewer add-on window and in the Viewer application. For information about Viewer Add-on options, refer to "Viewer Add-on" in Chapter 2 of this guide. For more information about the View option, refer to "View" in Chapter 6 of this guide.

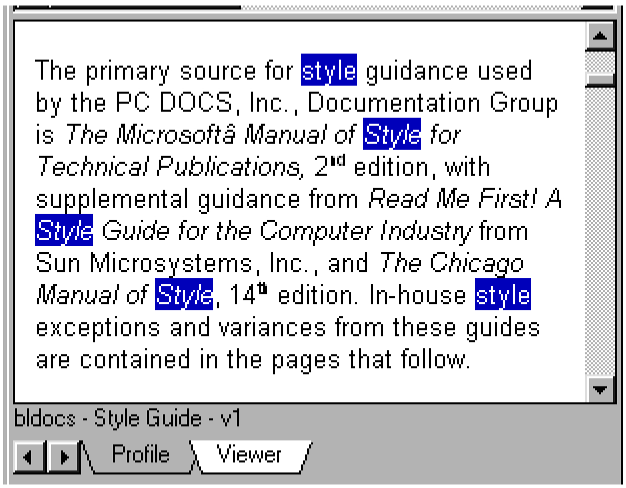
Viewer Add-on

1. Perform a Quick Search or Content Search. The search results will be displayed.
2. Select a document.
3. Select Add-ons from the View menu. The right-hand pane will split horizontally, and the Viewer and Profile tabs will be displayed. If it is not already selected, click the Viewer tab.
4. The document will be previewed in the pane. Use the vertical scroll bar to view the contents of the document.

NOTE Password-protected documents cannot be viewed in the Viewer add-on.

Figure 5.10

Viewer Add-on pane showing the highlighted search terms



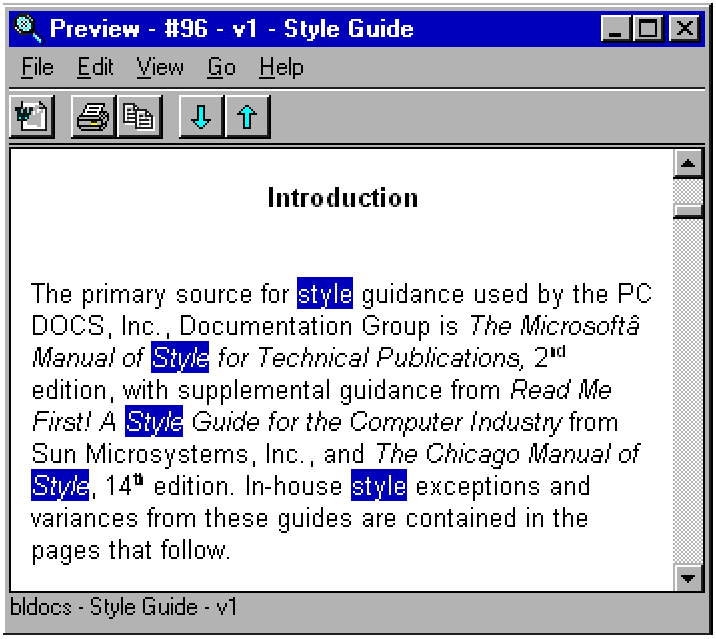
Viewer Application

1. Perform a Quick Search or Content Search. The search results will be displayed.
2. Select a document. Select the Document>View.
3. The Select Version to View dialog box will appear. Select the correct version and click OK.

4. The Preview window will appear on your screen. The text that matches the Content Search criteria will be highlighted.

Figure 5.11

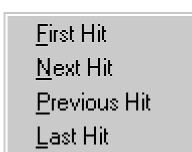
Viewer application showing highlighted search terms



5. Use the vertical and horizontal scroll bars to view the document. To navigate through the highlighted terms, select the Go menu and select the desired navigation command.

Figure 5.12

Viewer application Go menu



6. To close the Viewer application, select File and Close.

Selecting Search Libraries

NOTE If your site has only one library defined, this section does not apply to you.

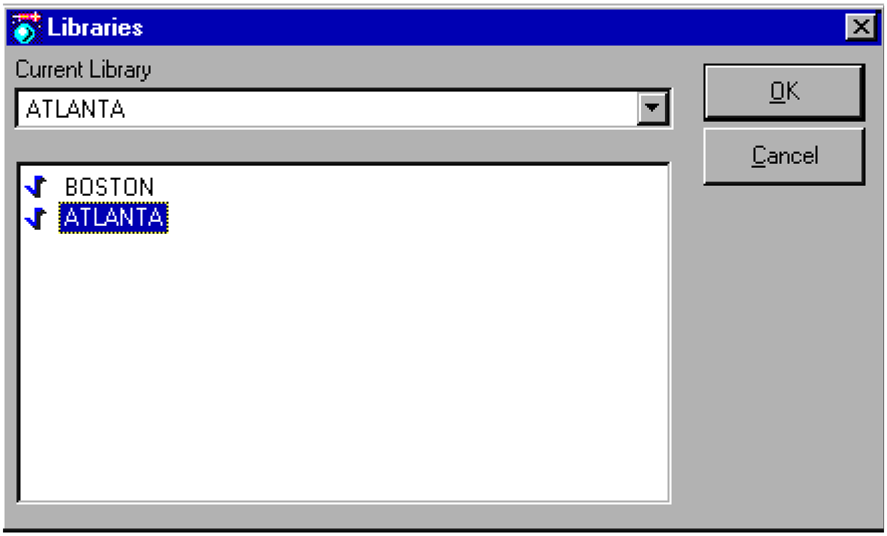
A *library* is a collection of Document Profiles. The Document Profiles contain the information necessary to retrieve your documents. If your network setup has multiple libraries, you must select the libraries you want to have PowerDOCS search. All searches, saved or new, are based on your search libraries. For instance, suppose your system has two libraries, and you select the Recently Edited Documents search. If you have both Library 1 and Library 2 selected as search libraries, then the search will return documents from both libraries. Your search results will return documents from the libraries you have selected to be searched.

To select search libraries:

1. On the Search menu, click Libraries. The following screen is displayed.

Figure 5.13

Libraries dialog box



2. The Current Library field displays the library that you log in to when you launch PowerDOCS.
3. Click each library you want PowerDOCS to search for documents meeting your criteria. A check mark appears beside each selected library. If you do not want PowerDOCS to search a library, double-click that library to uncheck it. The libraries you select remain throughout the current PowerDOCS session or until you change them, whichever comes first.
4. Click OK to complete the process.

Search Results

When you perform a Profile or Content search, PowerDOCS compiles a list of all documents meeting the search criteria you defined. This list of documents, referred to as the *Search Results list,* is displayed in different panes or windows in PowerDOCS depending on how you performed the search. The table below explains where the listing will be displayed based on how you performed a search.

If you performed a search by...	Then your results will be located...
Entering search criteria into a Search Form from the PowerDOCS Desktop	In the top pane of the PowerDOCS Desktop
Double-clicking a Quick Search from the Explorer tab of the PowerDOCS Desktop	In the top right pane of the PowerDOCS Desktop
Double-clicking a Quick Search from the PowerDOCS Explorer	In the same main window of the PowerDOCS Explorer
Changing the criteria from the Search Results form that is displayed when you selected File>Open from within an application	In the Search Results dialog box
Using the Find>PowerDOCS Documents command from the Start menu	In the Search Results dialog box

When you are performing a search from within the PowerDOCS Desktop or PowerDOCS Explorer, you have the option of opening the search in a new window.

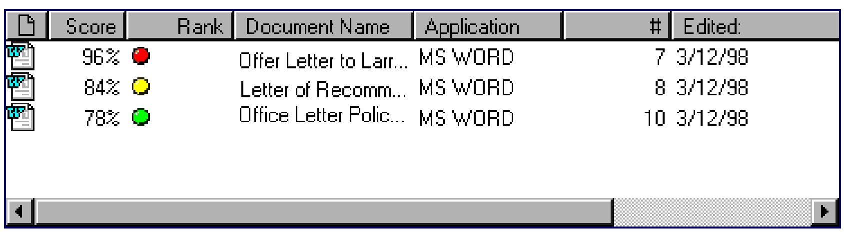
Search Results Organization

If your search was strictly a Profile Search, with no content searching, by default the files in the Search Results screen are sorted by the Document Number, with the Document Name, Number, Application, and Author ID also displayed. Your PowerDOCS administrator has the option of customizing the Search Results list, so your Search Results list may be set up differently. You have the option of adding or removing columns to the search results list. For details, refer to the section titled "Customizing the Columns" in Chapter 2 of this guide.

If your search contained a Content Search, however, the Search Results list will be ranked and scored. The score tells you how relevant a document is compared to other documents returned from the search. The higher the number, the more relevant the document. A document's relevance is determined by many factors, such as how many times the search term appears in the document's contents. The relevance score alone is not important, but the document's relevance score compared to other document scores is. A document's score can be from 1 to 100, so the score is expressed as a percentage.

Figure 5.14

A Content Search results listing



Column Sorting

You can change the sort order of your columns with a simple mouse click. If you want your listing to be sorted by a different column, simply click that column. By default, PowerDOCS sorts in ascending order. Click the sorted column again to have the column sorted in descending order.

If you change sort columns, the new column will be the primary sort column, and the previous column will be the secondary sort column. For example, if your list originally sorted by Document Number, and you clicked the Application column, the list would be sorted by Application, then by Document Number.

NOTE If there are more than 500 documents in your Search Results List and you re-sort the list by clicking on the column headings before the search is complete, the search will be reissued and the resulting 500 documents will not meet the original search criteria.

If you believe there may be 500 or more documents that meet your criteria, wait for the search to finish before sorting columns.

How to Use the Search Results List

From the Search Results list, you can select the document you want to retrieve, narrow your search if too many documents were found, or expand your search if not enough documents were found. You can save your search criteria for use in a Quick Search (discussed later in this chapter). You can also open a new search window (by choosing New Search Window from the Search menu) and perform another Profile Search while keeping the current Search Results list available for comparison. All of these actions are described in subsequent sections of this chapter.

NOTE You can view the Document, the Document Profile, or Document History as well as perform various other functions, such as printing, on the documents in the Search Results list. To do so, read Chapter 6, "The Document Menu."

Retrieving documents is discussed later in this chapter in the section titled "Retrieving Documents."

Narrowing Your Search

In some cases, your Search Results list may contain too many documents for you to readily identify the ones in which you are interested. For example, if your only search criterion was an Author ID, you might find hundreds of documents. To obtain a more succinct Search Results list, you must define more specific search criteria. There are two ways to narrow search criteria.

To narrow your search using the shortcut menu:

1. From the Explorer tab, click Quick Searches under the library from which the original search ran. You will see the original search listed under the default Quick Searches. Your original search is titled according to the criteria entered in the Search Form. For example, if you searched for all the documents with the author Charles Lewis, the search would be named "C_LEWIS."

2. Once you have located your original search, right-click it and select Narrow. A dialog box similar to the one in Figure 5.5 is displayed.

3. Enter search criteria into any one or more of the fields as described in the following sections.

   "Entering Information in the Profile Search Fields"

   "The Profile Search Fields"

   "Date Searching Syntax"

   "Table Lookup"

4. When you have finished entering criteria, click OK to have PowerDOCS perform the search. Search results are discussed in the section "Search Results" later in this chapter.

When saving a search, all the criteria used to create the current viewed list of documents will be saved.

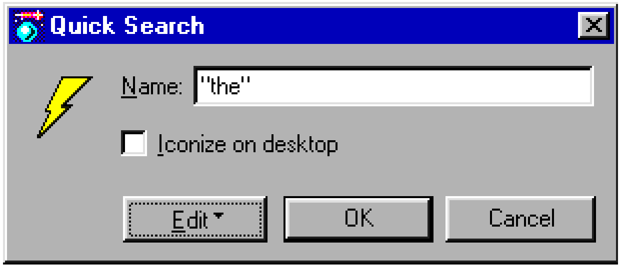
To narrow your search:

1. From the Explorer tab, click Quick Searches under the library from which the original search ran. You will see the original search listed under the default Quick Searches. Your original search is titled according to the criteria entered in the Search Form. For example, if you searched for all the documents with the author Charles Lewis, the search would be named "C_LEWIS."

2. Once you have located your original search, right-click it and select Edit. A dialog box, like the one below, is displayed.

Figure 5.15

Quick Search Options dialog box



3. Click Edit and select Criteria. PowerDOCS returns you to the Profile Search screen with your original criteria displayed.

NOTE If you have access to additional Search Forms, select Form from the Edit button drop-down menu. Select the desired Search Form and click OK.

4. Enter additional search criteria, such as Document Type or Application. You can also delete the original criteria and give new criteria. Click OK.

5. Click OK to close the Quick Search dialog box. PowerDOCS will compile a revised Search Results list.

NOTE If you ant to make this search available in CyberDOCS, click Iconize on Desktop.

"Narrow" essentially performs a Boolean "and" search, meaning documents must meet multiple criteria.

Expanding Your Search

In some cases, your Search Results list may not include all of the documents you want to work with. For example, suppose you wanted to see all of the letters written by a certain author. You used the Author name and the Document Type LTR as your only criteria. When your Search Results list was displayed, however, you realized that several of the letters you wanted to see were written in memo format, with the MEM Document Type. To expand your search, define additional search criteria.

To expand your search:

1. From the Explorer tab, click Quick Searches under the library from which the original search ran. You will see the original search listed under the default Quick Searches. Your original search is titled according to the criteria entered in the Search Form.

2. Once you have located your original search, right-click it and select Edit. A dialog box, like the one pictured in Figure 5.15, is displayed.

3. Click Criteria. PowerDOCS returns you to the Profile Search screen with your original criteria displayed.

4. Enter additional criteria.

NOTE Do not reenter the original search criteria. You only need to enter the new criteria by which you want to search.

5. Click OK to have PowerDOCS compile an updated Search Results list. Documents found as a result of the additional search criteria are combined with those originally displayed, creating a new, more comprehensive list. "Expand" is essentially a Boolean "or" search, meaning documents must meet either one set of criteria *or* another.

NOTE If you choose to save your search criteria for a Quick Search (as described below), only the additional criteria, not the original criteria, will be saved in the Quick Search.

Saving Search Criteria

PowerDOCS allows you to save search criteria for future use. The capability of saving search criteria is a PowerDOCS feature known as Quick Search. This feature is especially helpful for searches you perform often. The section in this chapter called "Quick Searches" explains how to use this feature once you have saved the search criteria.

To save search criteria:

1. Define search criteria on a Search Form dialog box. Click OK to invoke the search.

2. After your Search Results list is displayed, return to the Explorer tab. Click Quick Searches under the library from which the original search ran. You will see the original search listed under the default Quick Searches. Your original search is titled according to the criteria entered in the Search form.

3. Once you have located your original search, right-click it and select Save as Quick Search. The dialog box in Figure 5.15 is displayed.

4. Fill out the Quick Search Options screen as described below.

Description	Enter a description for the search criteria you want to save. For example: Beth's Press Releases Company Policy Memos Exxon Documents JPS Correspondence Trusts Form Agreements
Access	Click Access to determine which users other than yourself should have access to this Quick Search. For details on setting access, read the section below titled “Setting Access to Quick Searches.”
Form	Click Form to change the Profile Search form associated with the Quick Search.
Criteria	Click Criteria to edit your search criteria.

5. Click OK to complete the process.

NOTE The Quick Search feature saves the search criteria - not the Search Results list. When you perform a Quick Search, a search based on the saved criteria is executed. The Search Results list is compiled at that time.

If you save search criteria that expanded an original search, only the expanded criteria (excluding the original criteria) will be saved.

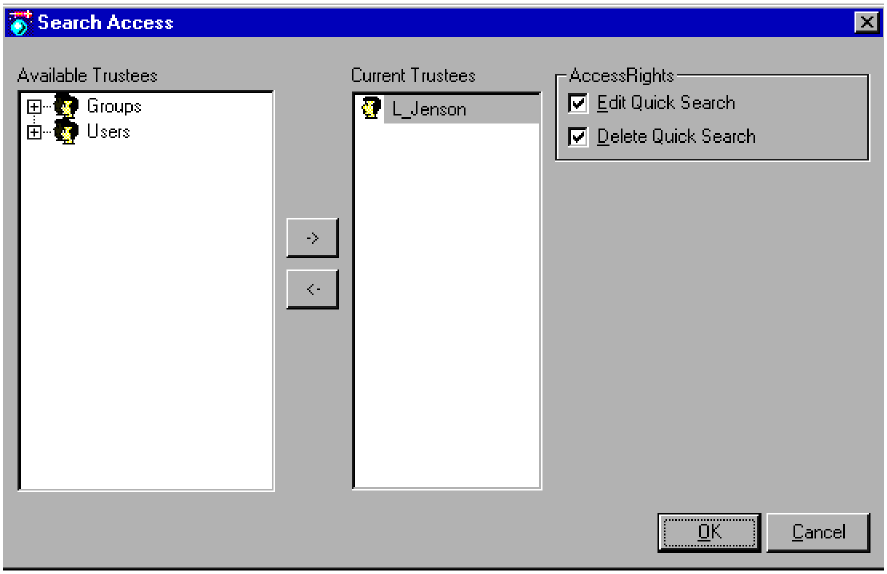
Setting Access to Quick Searches

To allow other users to access your Quick Search:

1. From the Quick Search options screen, click Access. The following screen, listing your name and any others you may have previously added, is displayed.

Figure 5.16

Search Access dialog box



The Access Rights are explained below:

- **Edit Quick Search:** Users with Edit rights can edit the search criteria.
- **Delete Quick Search:** Users with Delete rights will be able to delete the Quick Search. A user cannot have Delete rights without Edit rights.

Assigning Rights

As is shown on the Quick Search Access screen above, the user who entered the Quick Search has all rights by default. Other users and groups can be easily assigned access rights to the Quick Search.

To assign rights for a particular user or group:

1. From the Available Trustees list, double-click users and/or groups. Listings of all valid users/groups are then displayed.

2. Click the desired users or groups for which you want to grant access and click the right arrow button.

   All users and groups that have been added appear on the Current Trustees list with both Edit and Delete rights granted by default. To change the rights for any user or group on the Current Trustees list, click that user or group and select only the access rights you want them to have.

   All users/groups selected through the above process will have the Quick Search appear under their Quick Searches option on the PowerDOCS Desktop.

Removing Rights

To remove the access rights of a particular user or group:

1. From the Quick Search Access screen, click the user or group from which you want to remove access in the Current Trustees listing.

2. Click the left arrow button. The rights of the user/group to this Quick Search are revoked.

NOTE You cannot delete your own rights to a Quick Search.

Editing Quick Search Criteria

To edit your Quick Search criteria:

1. Right-click the desired Quick Search and select Edit.
2. Click the Criteria button.
3. Make the desired changes.
4. Click OK to save changes, and click Close to return to the desktop.

Printing the Search Results List

If you want to print out the Search Results list as shown in the PowerDOCS Search tab, select the File menu and Print List. The list will be output to the printer selected in the Print dialog box.

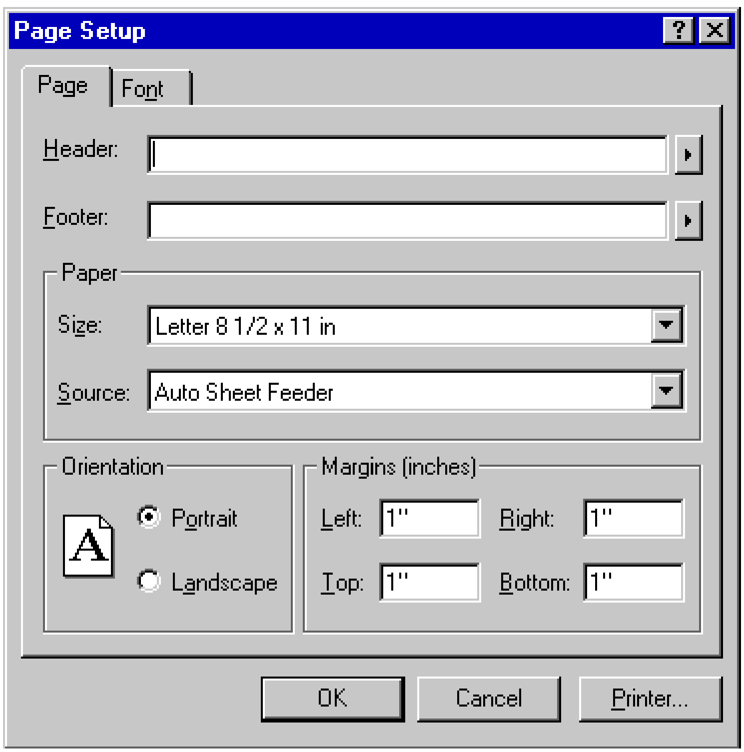
Page Setup

If you want to format the output generated by the Print List command, a Page Setup dialog box is available.

1. Select the File menu, Page Setup. The Page Setup dialog box appears. There are two tabs at the top of the dialog box, Page and Font.

Figure 5.17

Page Setup dialog box



2. On the Page tab you can:

    - Add Header and Footer information that will be added to the printed page. Use the button to the right of the field to select Page Number, Current Time, Current Date and Left, Center, or Right alignment.

      Making each of these selections will add format sequences to the field. You can also add the format sequences manually. See the table below for a listing of format sequences.

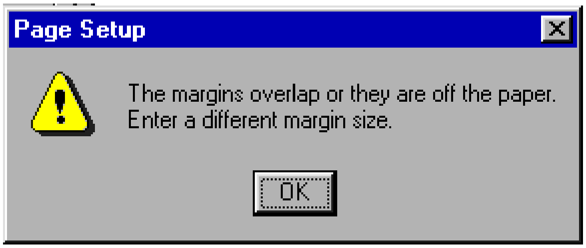
If you selected this command...	This format sequence is displayed...
Current Page Number	&P
Current Time	&T
Current Date	&D
Left Alignment	&L
Center Alignment	&C
Right Alignment	&R

- Paper Size
- Paper Source
- Page Orientation
- Page Margins

If you type incorrect values in the Margin fields, an error message will appear, asking you to change the settings.

Figure 5.18

Margin Error Message



3. From the Font tab you can change:

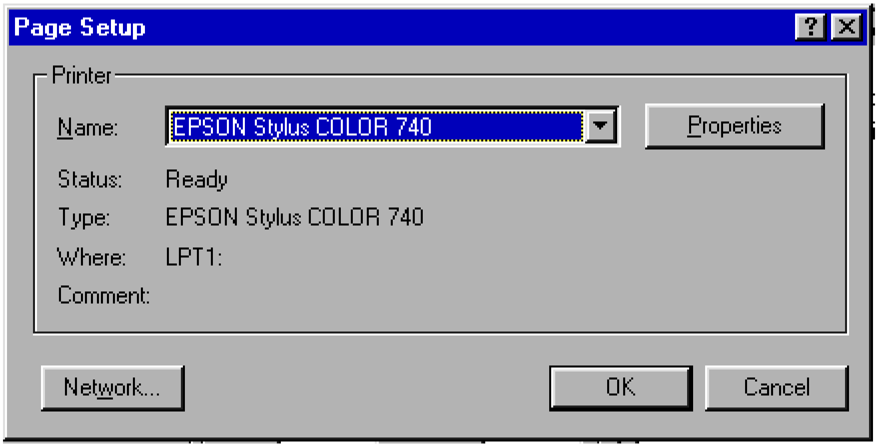
- Header / footer font
- Column Headings font
- Row font

Click the Font button. The Font dialog box will appear. Select the desired font and click OK.

4. To make changes to Printer settings, click Printer. A dialog box will appear.

Figure 5.19

Printer Setup dialog box



5. Select another printer or modify the Properties for the current printer. Click OK.

6. Click OK to close the Page Setup dialog box.

Retrieving Documents

To retrieve a document from a Search Results list, from a Project list, or any other document list, simply double-click the document. With the document highlighted, you can also choose Open from the Document menu. PowerDOCS then launches the application in which the document was created and retrieves the document. To select multiple documents for retrieval, use SHIFT-CLICK to highlight consecutive documents or CTRL-CLICK to highlight non-consecutive documents.

Retrieving Documents with Multiple Versions

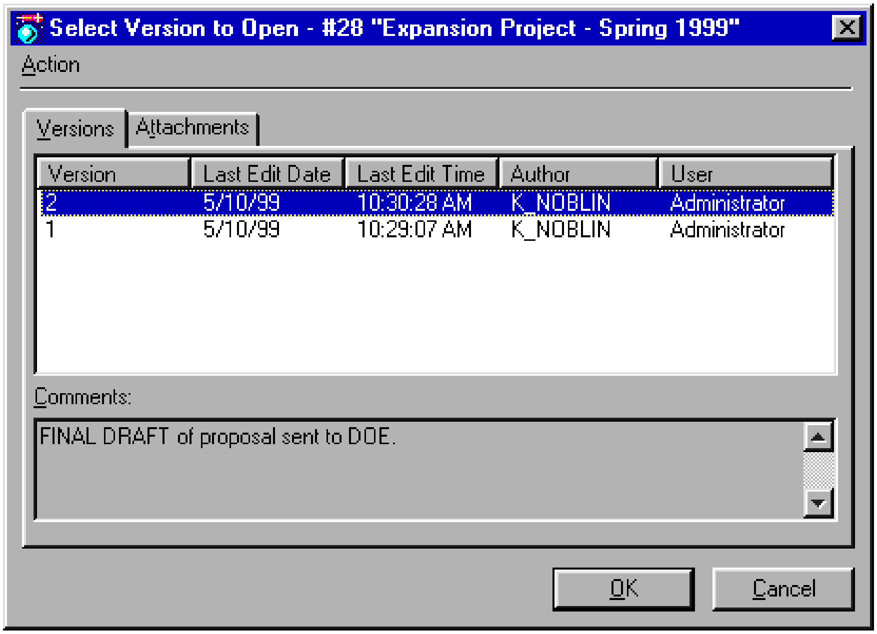
To open documents that have multiple versions:

1. From any document listing, click the document you want to retrieve. To select multiple documents for retrieval, use SHIFT-CLICK to highlight consecutive documents or CTRL-CLICK to highlight non-consecutive documents. The Select Version dialog box is displayed.

If you selected multiple documents, a Select Version dialog box for each document you selected is displayed.

Figure 5.20

Select Version dialog box



2. Select the version you want to retrieve and click OK.

   The Comments field will help you determine which version you want to retrieve. You may also want to view the document contents before retrieving it. For instructions on viewing a document, read the section titled "View" in Chapter 6.

   PowerDOCS will then launch the document's application and retrieve the appropriate version of the document(s).

NOTE Chapter 4, "Working with Document Versions," gives a detailed overview of multiple-version documents and their use.

3. In an integrated application, when you have finished editing your documents, choose File>Save to save your edits over the existing

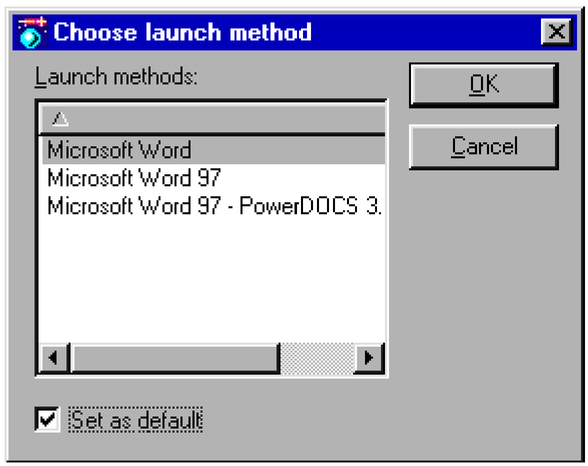
version. If you want to save your edited document as a new version, as a new sub-version, or as a new document, choose File>Save As. For details on document versions, refer to Chapter 4.

Setting Default Launch Methods when Retrieving Documents

Your PowerDOCS administrator may have set up several launch methods for each application. If more than one launch method is available to you, the Choose Launch Method dialog box will appear each time you retrieve a document.

Figure 5.21

Choose Launch Method dialog box



If you check the “Set as default” option at the bottom of this window, PowerDOCS will use the highlighted launch method and will bypass this dialog box when opening the associated application.

You can set launch method defaults prior to opening a document. Select Options>Defaults and the Launch Methods tab. Select each application in turn and select the check box next to the preferred launch method.

Retrieving a Document Template

Your PowerDOCS administrator may have set up some standard forms, contracts, or other boilerplate materials that serve as the genesis for a certain type of document. These documents are called *Templates.*

When you retrieve a template, other than from the New tab, you are not actually retrieving the original template itself, but rather a copy of it.

Your PowerDOCS administrator may have designated a group of users that can edit the actual Templates. When members of this group retrieve a template, they are given the opportunity to retrieve the template itself rather than a copy.

To retrieve a document template (copy):

1. From the PowerDOCS Desktop, click the New tab. A list of available templates is listed in the Templates window.
2. Double-click the template from the desired application. If there is more than one version of a template, the Select Version dialog box is displayed. If more than one profile form is available to you, you are asked to select one.
3. You are presented with a Document Profile dialog box to fill out. When finished, click OK.
4. The application associated with the template is launched, and the template opened.

Retrieving a Document Created in a Compatible Application

Compatible applications are defined by your PowerDOCS administrator. “Compatible” simply means that the applications “talk” to one another. In some cases, files can be converted to another format; in other cases, an application will be able to simply read a file created in another application. Detailed descriptions of compatible applications are given in Chapter 6, “The Document Menu.”

From Within an Application

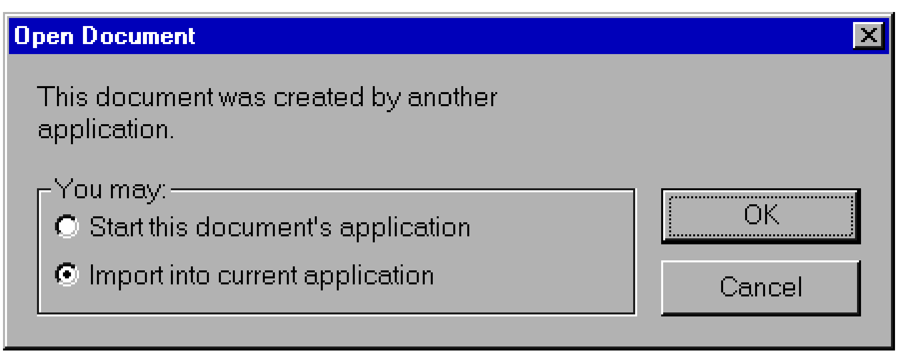
At times, you may want to convert a document from one application to another. All applications integrated with PowerDOCS have conversion utilities. Other times, however, you might want to open two documents created in different applications. You would want PowerDOCS to launch the second application rather than automatically convert the file to the format of the first.

Your PowerDOCS administrator can make applications compatible with each other. The compatible applications feature allows you to choose whether to convert the document into a new file format or to launch the document's application.

For example, assume you are in WordPerfect and attempt to open a document that was created in Word. The following dialog box is presented:

Figure 5.22

The Open Document dialog box



If you select the first option, Word is launched, and the document is retrieved.

If you check the second option, the WordPerfect conversion utility will be initiated, and the Word document will be converted to a WordPerfect document. When you save the WordPerfect document, you will be asked in which format you want to save the document. If you save the document in WordPerfect format, the profile will be updated to reflect the new application. You can choose Save As and select Save As a New Document to preserve the original Word document and save the changed document in the new application (WordPerfect).

From the Desktop

If you want to open a document in an application other than that in which the document was created, you can do so from the PowerDOCS Desktop. Your PowerDOCS administrator must first have defined the applications as compatible.

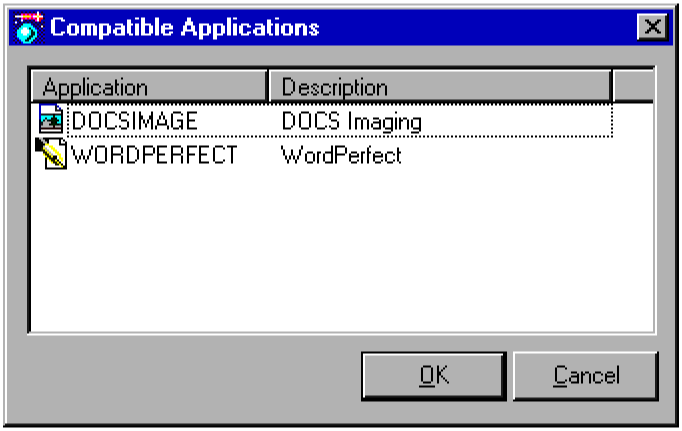
To convert a document to another format from the Desktop:

1. Perform a search for the document using any of the methods described in this chapter.
2. From any document list, including Projects and any Search Results lists, select the document you want to convert.
3. Choose Compatible Applications from the Document menu. The Select Version dialog box is displayed. Select the version you want

to convert and click OK. A list of Compatible Applications is displayed.

Figure 5.23

Compatible Applications dialog box



4. Select the application in which you want to convert the document. The application will be launched and the document converted.

   When you save the document, a Document Profile dialog box is displayed with the Application field updated to reflect the new application. Fill out the profile as described in Chapter 3, "Creating and Profiling Documents." To preserve the original document, choose Save As, then Save as a New Document to cause the original to remain as it was before being converted.

C h a p t e r

6

The Document Menu

In This Chapter

Document Management with PowerDOCS goes further than just creating, saving, and locating documents. Although those tasks are integral to PowerDOCS, this product has much more to offer.

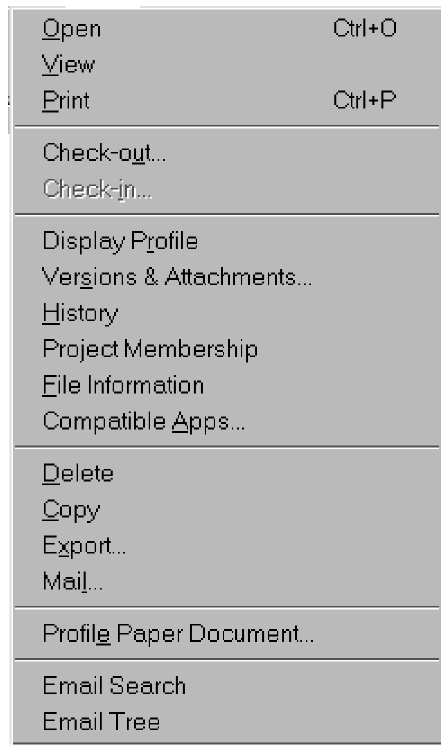
This chapter discusses the additional features of PowerDOCS Document Management, which include view, copy, and print capability, as well as document statistics recording and document check-in and check-out.

The Document Menu

The Document menu, shown below, is a menu available from the PowerDOCS Desktop and from the Search Results dialog box when you are in an application. This menu lists most of the actions that can be performed on a document.

Figure 6.1

PowerDOCS Document menu



NOTE Email Search and Email Tree may not be available to you. These document options are associated with Enhanced Email Integration. For more information, refer to "Email Search Option" and "Email Tree Option".

You can access the Document menu by selecting it from the menu bar or you can access the Document shortcut menu when a document is selected. To access the Document shortcut menu, highlight a document and right-click it. The Document menu appears at the mouse pointer location, and you can select the menu option you want.

Open

Use the Open command to retrieve documents from any document list. You can also open a document by double-clicking it from a document list, such as Recently Edited Documents. If you double-click a paper document that has been profiled, PowerDOCS displays its profile. Retrieving documents is discussed in detail in Chapter 5, "Searching and Retrieving," the section titled "Retrieving Documents."

View

PowerDOCS allows you to view the contents of a document before or instead of retrieving it. The document must be retrieved if edits are to be made. The viewer, however, allows you to search for text, copy all or parts of the document to the Windows clipboard for use in other documents, zoom in or out on an image file, and print while the document is being viewed.

To view a document:

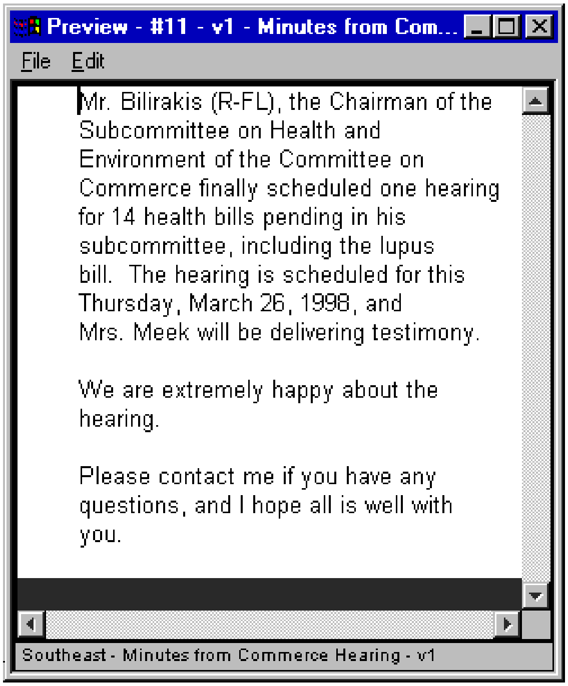
1. Select the document you want from any document listing, such as a Search Results list, Recently Edited Documents list, or Project Components list.
2. Choose View from the Document menu. The Select Version window appears. Select the version you want to view.

NOTE Right-click your mouse to bring up a shortcut Document menu at the mouse pointer location when a document is selected from a document list.

3. A Preview window appears, displaying the document name and number in the Title bar and the document content within the window. Below is a sample of a document displayed in the viewer window.

Figure 6.2

Document displayed through the PowerDOCS viewer



You can use the vertical and horizontal scroll arrows to view other portions of the document. To make the viewer display full screen rather than in a window, click the maximize button (the middle button in the upper right corner of the viewer window).

NOTE Performing a Content Search will return documents meeting your search criteria, and will highlight the search words. See the topic “Search Term Highlighting“ in Chapter 5 of this guide.

4. To close the viewer, choose File>Exit.

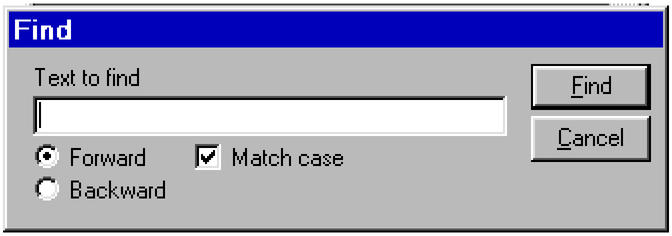
Searching for Text with the Viewer

To search for text using the document viewer:

1. With your document displayed in the viewer window, click Edit>Find. The following dialog box is displayed:

Figure 6.3

The Find dialog box



2. Type in the text you want to find. Select Forward (the default choice) to search from the cursor position forward in the document. Select Backward to search from the cursor position backward. Select Match case if you want your search to be case sensitive.

3. Click Find when you are ready to search. The found text will be highlighted.

4. To find the next occurrence of the text, select Edit>Find Next or press F3.

Copying a Document from the Viewer to the Clipboard

To copy a document to the Windows clipboard:

1. With your document displayed in the Preview window and the cursor blinking (no text selected), choose Select All from the Edit menu.

2. Select Edit>Copy. The entire document (not just the portion shown in the viewer window) is placed in the Windows clipboard, where you can paste it into another document.

3. To close the Preview window, choose Close from the viewer window's File menu.

To copy selected text of a document to the Windows clipboard:

1. With your document displayed in the Preview window, highlight the text you want to copy. Highlight text by holding the mouse button down and dragging the pointer over the text. To highlight text using the keyboard, hold down the shift key and use the arrow keys to highlight the desired text.

2. Choose Copy (CTRL+C) from the Edit menu. The selected text is placed in the Windows clipboard, where you can paste it into another document.

The Shortcut Menu

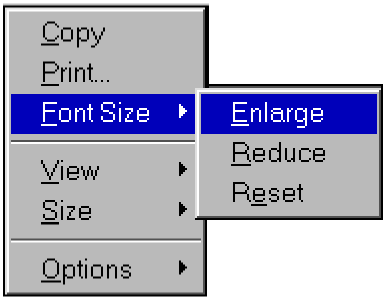
The viewer used by PowerDOCS has an additional shortcut menu available with a right mouse click. The options on the viewer change according to the type of document being viewed.

The shortcut menu contains the following commands:

- **Copy:** Copies selected text, data, or image to the Windows clipboard.
- **Print:** Prints the viewed file or selection.
- **Font Size**: Allows you to increase or decrease the font used to display the document. This function does not change the font size of the original document.

Figure 6.4

Font Size submenu



- **View:** Produces a submenu of Draft, Normal, or Preview. Draft mode displays all text in Arial font, 10 point, normal, as set by the default Display in Options of this shortcut menu. Normal mode displays text using the font in which the document was originally typed. Preview zooms out on the document to display it the way it looks on paper.
- **Size.** Produces a submenu of Full Size, Fit to Window, and Fit Window to Width. You can select the page size that best fits your needs as you view a document's contents.
- **Options:** Contains the following three submenus:
  — **Display:** Sets the default font, options for unknown files, and special options for spreadsheets and databases.

— **Print:** Allows you to set print options for the file type currently being viewed (text, database, graphics, and spreadsheet files).

— **Clipboard:** Allows you to set options that determine how data is copied to the clipboard for the file type currently being viewed (text, database, graphics, and spreadsheet files).

Image Options

Additional options are on the Viewer's shortcut menu when viewing an image file.

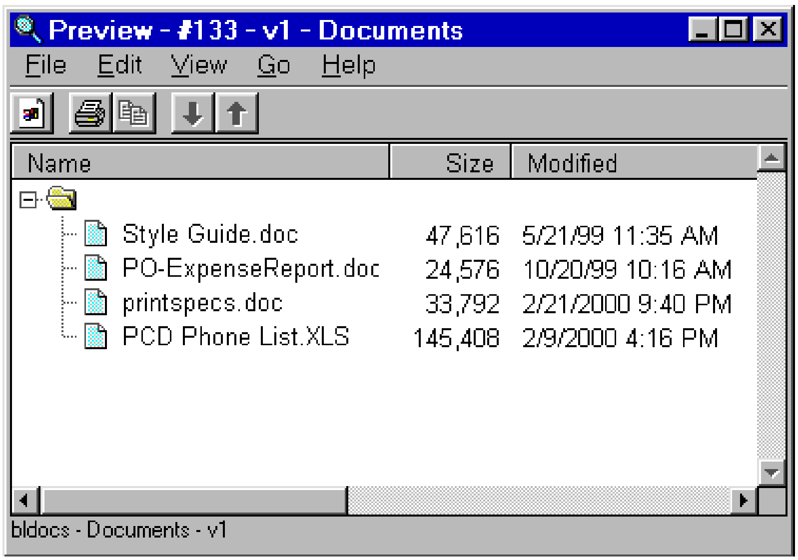
- **Show Full Screen:** Fills your screen with the graphic. Right mouse click again to return to the viewer window.
- **Size:** Resizes the graphic to fit in the window, fit the window height, fit the window width, or return to its original size. Drawings can be stretched to fit in the entire viewing window.
- **Rotation:** Allows you to rotate the displayed graphic 90, 180, or 270 degrees. You can also reset to the original view.
- **Zoom:** Zooms in or out on the entire graphic or a selection of the graphic, or resets to the original view.

Archive Options

The Archive options allow you to set options for saving zipped files to an unzipped format Zipped files appear in the Viewer in a hierarchal manner as shown below.

Figure 6.5

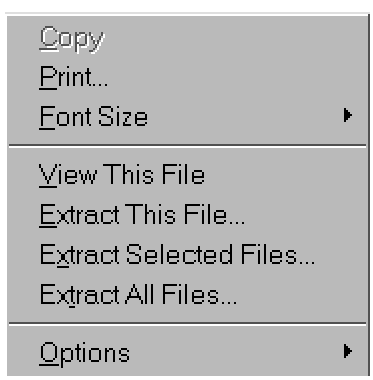
Viewing a zipped file



The archive shortcut menu options only appear when .ZIP files are loaded for viewing.

Figure 6.6

Archived file options

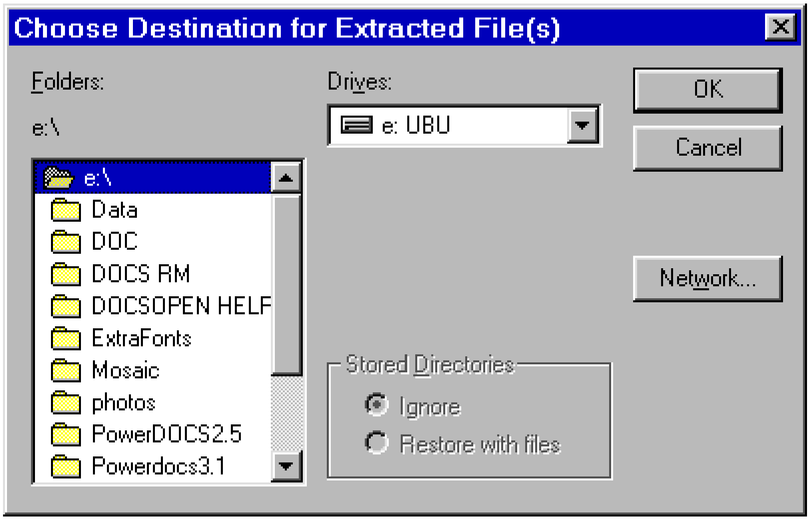


There are four options specific to .ZIP files:

- View This File: Allows you to view the contents of the file.
- Extract This File: Saves the selected file, unzipped, to a location of your choosing.

Figure 6.7

Choose Destination for Extracted File(s) dialog box



- **Extract Selected Files:** Saves the selected files, unzipped, to a location of your choosing.
- **Extract All Files:** Saves all the files, unzipped, to a location of your choosing.

Spreadsheet/Database Options

- **Draft View:** When selected, this option removes gridlines from the display if the Show Gridlines option is not selected. If Show Gridlines is selected, limited gridlines will be visible.
- **Show Gridlines:** Controls whether formatted gridlines and font formatting are displayed. The default setting is “on” (checked).

Adobe Acrobat Options

- **Show Full Screen:** When selected, this option will enlarge the page so that it fills the entire screen. Click or press any key to return to PowerDOCS.

- **Size and Zoom:** When selected, these options allow you to adjust how much of the screen is used to view the page or to enlarge the view in a sequentialmanner.

Print

You can print a document or series of documents from any listing, such as a Search Results list or Recently Edited Documents list, or while the document is on the screen.

To print a document from the PowerDOCS Desktop:

1. Select the documents you want to print from a document list.

2. Choose Print from the Document menu. If you are on the PowerDOCS Desktop, this option can be set up as a button on the button bar. In this case, just click the button.

3. PowerDOCS will proceed directly to the print process.

From within an application, you can either print from the application's File menu or from the Document menu.To print a document from within an application:

1. From within your application, click Open from the File menu. This invokes the Search Results list.

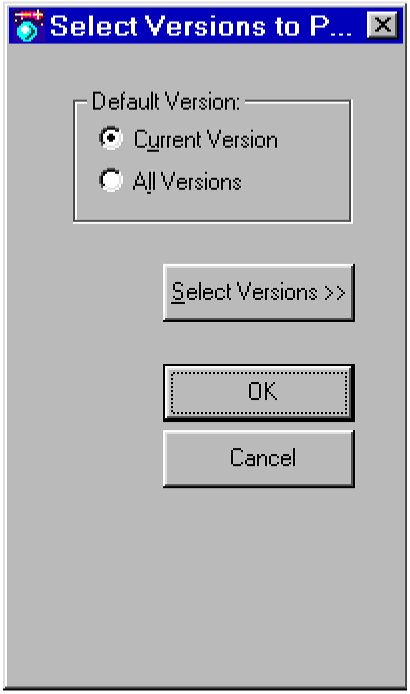
2. Select your document from the list.

3. Choose Print from the Document menu (ALT+D,P).

4. Select the version to be printed. If the document has more than one version or sub-version, the dialog box shown below will be displayed.

Figure 6.8

Select Version to Print dialog box



- To print the Current Version, click OK.
- To print all versions, select the All Versions button and click OK.
- To select a specific version to be printed, click the Select Ver-

sions button. The dialog box expands as shown below.

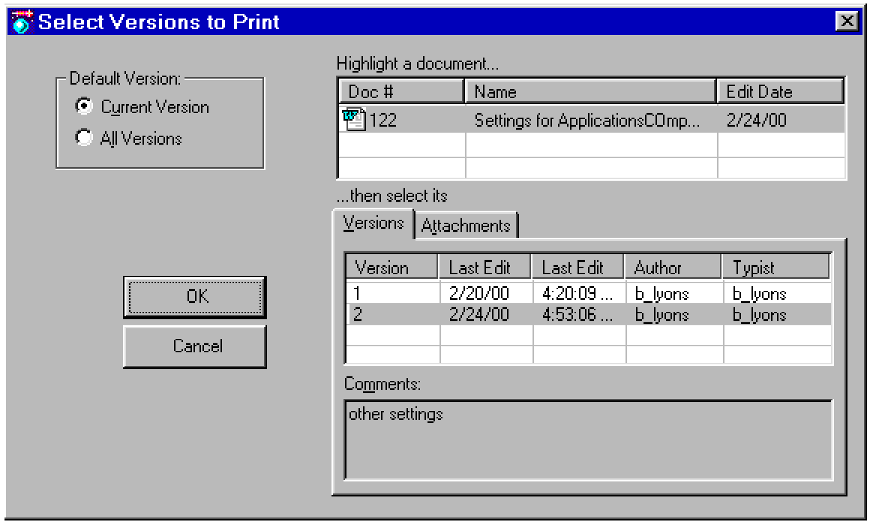


Figure 6.9

Select Versions to Print dialog box, expanded

5. Select the document to be printed and the version(s) you want to have printed. Use the Ctrl-Click key to select more than one version.

NOTE If you select more than one document, you can select each document and version separately. All selected documents will print.

6. Click OK. The applications associated with the document will open. If a Printer dialog box is displayed, select the correct printer options and click Print or OK as appropriate for the dialog box.

NOTE You can also print documents from the viewer.

Check-out

If you want to work on a document while not connected to the network, or want to temporarily prevent other users from editing a document, you can "check out" the document until your editing is completed. The Check-out feature allows you to do the following:

- Check out a copy of the document to take offline, leaving it available for others to access,
- Check out and lock the file, preventing other users from opening it,
- Check out multiple documents at one time.

NOTE Your PowerDOCS administrator may have disabled the Check-out feature.

To check out documents:

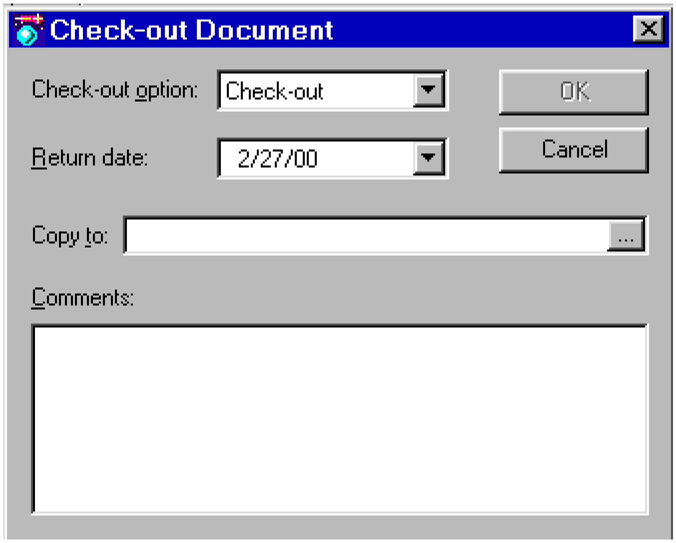
1. Perform a search for a document using any of the PowerDOCS search methods. For more information on searching for documents, refer to Chapter 5, "Searching and Retrieving."
2. Select the document(s) you want to check out and choose Check-out from the Document menu (ALT+D, U). If you have set up this option as a button on the PowerDOCS toolbar, you can click the button. For more information about customizing your toolbar, refer to the section titled, "Customizing Your PowerDOCS Desktop" in Chapter 2.

NOTE To select multiple documents for retrieval, use SHIFT-CLICK to highlight consecutive documents or CTRL-CLICK to highlight non-consecutive documents.

3. The Check-out Document(s) dialog box is displayed. Fill out the form as described below.

Figure 6.10

Dialog box for checking out PowerDOCS documents.



- Check-out Options: PowerDOCS allows you to choose whether or not the checked-out document will be available or locked on the network.

  — **Check-out:** Checks out the document and locks the file, preventing other users from opening it. You must specify a Copy to location, otherwise the file will just be locked.

  — **Lock:** If you choose Lock, "locks" the original document on the server until you check the document in. You do not have to take the document offline, however. You may simply want to lock the document.

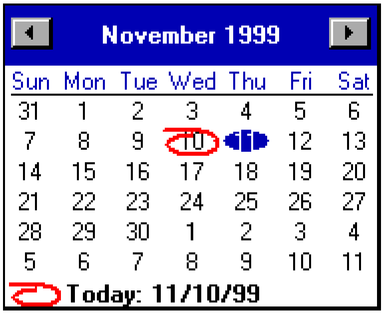
  — **Copy:** If you choose Copy, PowerDOCS places a copy of the document in the location you specify, but leaves the original available for other users to access and edit. Documents checked out by Copy *cannot* be checked back in.

NOTE If you attempt to access a document that is locked, you will receive a message that the document is unavailable. Although you cannot retrieve a document that is locked, you can view, print, or copy it. Read the sections in this chapter on View, Print, and Copy for instructions.

  — **Return Date:** Enter the date you plan to return the documents. The next day's date is shown by default. To select another date, click the drop-down arrow to access the calendar. Click to select the desired date. Use the right- and left-facing arrows to select the desired month.

Figure 6.11

Return Date Selection Calendar



- **Copy To:** Enter the drive and path where you want to copy the document(s). Click the lookup button (the ellipses button in the Copy To field) to browse for the correct directory. You are not required to make a copy of the document(s). See the Copy/Lock option for more information.

WARNING Documents are checked out using file names that are automatically selected by PowerDOCS. The file names are based on the current library, document number, version number, and document name. If you rename a checked-out document on your local drive, PowerDOCS will not be able to automatically locate the document to check it back in. In this case, you will be prompted to manually browse for and select the document to check in. If you want to make a copy of the document and change the file name, you can use the Document>Export command discussed later in this chapter.

- **Comments:** Enter any comments you want to include, such as purpose or time-frame for the check-out. The comments are visible to users who might try to retrieve the documents for editing.

4. If you choose to lock the documents without copying them to a check-out destination, simply leave the Copy To field blank and click OK.

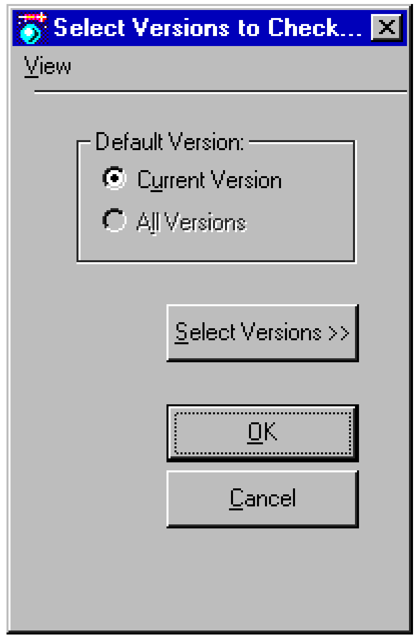
NOTE If you leave the Copy To field blank, you are not physically checking out the document. You are simply “locking” it on the network so that other users cannot access it. You must complete the Copy To field to physically check out.

5. If you are checking out a single document, the Select Versions to Check-out dialog box appears. Select the correct version and click OK to complete the check-out process.

If you are checking out multiple documents to a destination, and any of the documents have multiple versions, the following dialog box will be displayed.

Figure 6.12

PowerDOCS Select Versions to Checkout dialog box



Click the Select Versions button to expand the dialog box to a window similar to the one shown in Figure 6.13.

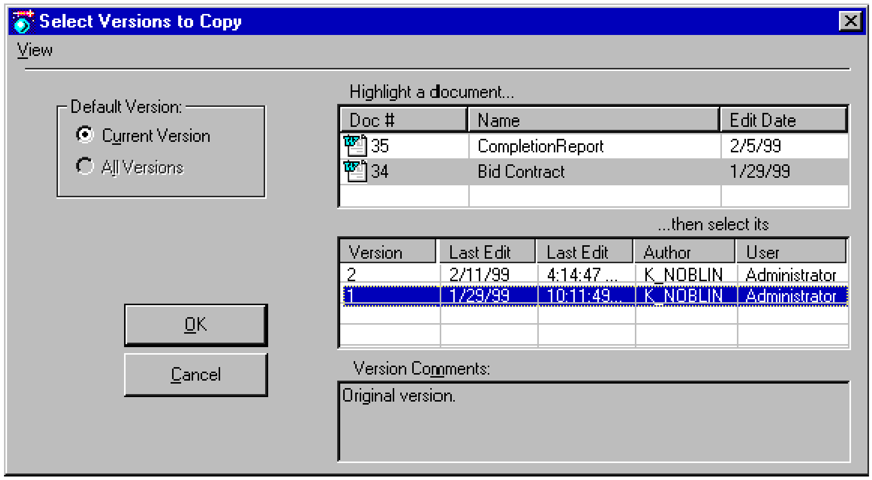
NOTE If you are not checking out multiple documents concurrently with multiple versions, you will bypass these dialog boxes.

6. If you want to copy the current version of the documents, select the Current Version option and click OK. The documents will be copied to the destination you specified and will remain available on the server. Your Check-out procedure is completed. To select

a previous version, click the Select Versions button. The following dialog box is displayed:

Figure 6.13

If you clicked the Select Versions button in the previous dialog box, the Select Versions to Copy dialog box expands and shows you the available options.



When you check out documents by copying, the Document>History feature will display a Check-out/Copy document entry.

The listing at the top of the Select Versions to Copy dialog box contains each of the documents you selected for Check-out. The list at the bottom shows the versions for the highlighted document. For each document, select the version you want to check out. The Version Comment field will help you find the version you are looking for.

Check-in

When you have finished editing your locked documents, you must check them in.

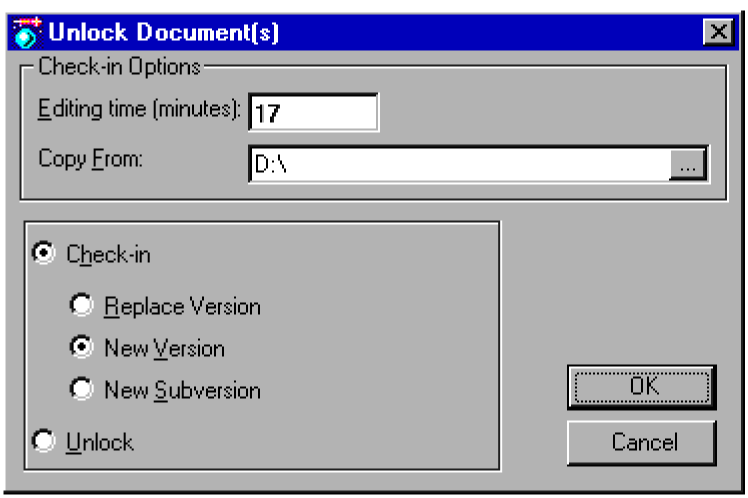
NOTE If you did not lock a document to check it out, you cannot check it back in. PowerDOCS only checks in documents that were locked on the network.

To check in documents:

1. From the Search menu, select Checked-Out Documents. You can also double-click the Checked-out Documents quick search. PowerDOCS will display a list of all documents that are currently checked-out.
2. Highlight the documents you want to check in.
3. Choose Document>Check-in. Check-in can also be set up as a button on the button bar. The following dialog box is displayed:

Figure 6.14

Unlock Document(s) dialog box for checking in PowerDOCS documents



4. Fill out the dialog box as described below.

- **Editing Time:** This field will be disabled if you choose Unlock. Enter the approximate editing time spent on the documents in minutes. The Editing Time entry will be subtracted from the time of Check-in and will be listed as the Total Time on the document's History properties box.
- **Copy From:** This option is disabled if you choose Unlock. If you made edits to the documents while they were checked out, you can indicate the path where PowerDOCS can find the edited copies you want to check in.
- **Check-in:** If you checked out a copy of the documents and made edits you want to check in, choose Check-in. Under this option, designate whether you want your edits to replace the version, to become a new version, or to become a new sub-version of the document.
- **Unlock:** If you simply locked the documents on the network and now want to unlock them, choose Unlock.

NOTE The Document History feature shows both a "check-out" and a "check-in" activity. If you entered a value in the Editing Time field on the Check-in Document(s) dialog box, an edit session is listed between them to record the time.

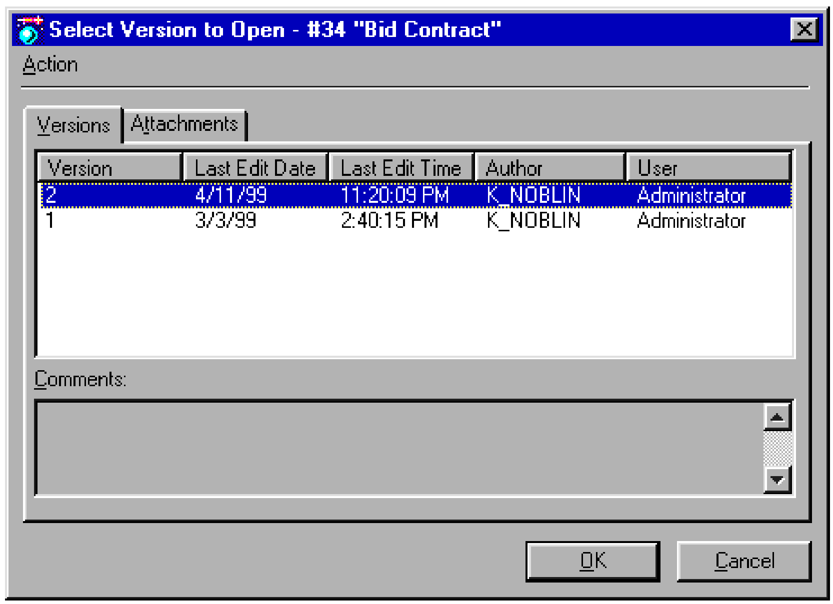
Versions

The Versions menu option is available from the Document menu for any electronic file that has been profiled. This option is disabled if you have selected a paper document or multiple documents.

When you select Document>Versions and Attachments, a dialog box, similar to the following, appears.

Figure 6.15

Versions and Attachments dialog for document #34, "Bid Contract"



The Versions box displays all existing versions for the selected document, and the Comments box displays any version or attachment comments associated with the document.

You can perform any of the following actions from the Versions dialog box:

- **Open the selected version or attachment:** If you have Edit Content rights for the selected version, you can double-click it to open it or open it by selecting Actions>Open. The version will open within the application in which it was created. For more information on Access rights, refer to the section called "Access Control" in Chapter 3.

- **Close the Versions dialog box:** Click Close to exit the Versions dialog box.

- **Create a New Version:** You can create a new version from the currently highlighted version by selecting Actions>New Version. The Version Properties dialog box appears, allowing you to specify the new version's author, typist, and comments. After you have entered the appropriate information into the Version Properties dialog box, the new version is opened within the application in which it was created. For more information on creating new versions, refer to Chapter 4, "Working with Document Versions."

- **Create a New Sub-version:** You can create a new sub-version from the currently highlighted version by selecting Actions>New Sub-Version. You cannot create a new sub-version from the last version of a document. This option will be disabled if you highlight the last version of a document. For more information about creating sub-versions, refer to Chapter 4, "Working with Document Versions."

- **Import Version from File:** You can create a new version of a document from a file outside PowerDOCS by selecting Actions>Import Version from File. This command displays the Open dialog box, allowing you to choose the document you want to import. The Version Properties dialog box is then displayed, where you can enter the version author, typist, and comments. For more information on this feature, refer to Chapter 4, "Working with Document Versions."

- **Import Sub-Version from File:** You can create a new sub-version of a document from a file outside PowerDOCS by selecting Actions>Import Sub-Version from File. This command displays the Open dialog box, allowing you to choose the document you want to import. The Version Properties dialog box is then displayed, where you can enter the version author, typist, and comments. For more information on this feature, refer to Chapter 4, "Working with Document Versions."

- **View a Selected Version:** You can view a document version by selecting Actions>View. This displays the currently highlighted version in the PowerDOCS viewer.
- **Version Properties:** You can view and change version properties such as Author, Typist, and comments. For more information on this feature, refer to Chapter 4, "Working with Document Versions."
- **Other Viewing Options:** The View menu option from the Versions dialog box allows you to control what is displayed in this dialog box. If you select Versions, the Versions box displays all document versions for the highlighted document. If you select Attachments, the Versions box displays any document attachments that exist for a highlighted document. For more information on document attachments, refer to Chapter 8.

Display Profile

This Document menu option allows you to view or edit the Document Profile for the selected or displayed document.

Displaying the Document Profile

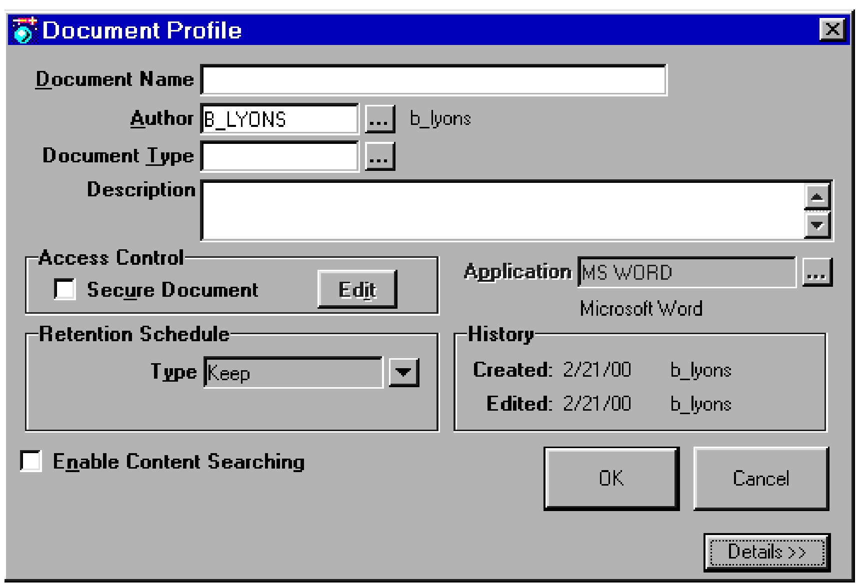
You can view the Document Profile from a document list, such as the Search Results list or the Recently Edited Documents list.

To view a Document Profile from a document list:

1. Select a document.
2. Choose the Display Profile command from the Document menu (ALT+D, R). If you are at the PowerDOCS Desktop, this option can be set up as a button on the PowerDOCS toolbar. In this case, just click the button.
3. Click Close on the Document Profile dialog box to return to the document list. The following is a sample Document Profile:

Figure 6.16

Sample PowerDOCS Document Profile



At times, you may want to view the profile for the document on which you are working.

To view a Document Profile with the document on the screen:

1. From within your application, select Open from the File menu.
2. Select your document from the Search Results dialog box.
3. Right-click to display the Document menu and choose Display Profile. The Document Profile is displayed.
4. Click OK or Cancel to close the profile.

Editing the Document Profile

Authorized users can edit the Document Profile.

To edit the Document Profile:

1. Access the Document Profile you want to edit from File>Open or the Search Results dialog box, according to instructions in the previous section.
2. With the Document Profile dialog box displayed, make the changes you want. Use the table lookup buttons if needed.
3. Click OK to save the changes.

History

The Document History feature records activity information about a document. This information consists of the document's author, date created, last edit date statistics for each activity, and a listing of the activities that have been performed on the document or its profile. The Billable field records if your organization uses a legal database with PowerDOCS.

Each activity listed on the History properties box is labeled. The following is a list of activities that might be listed on a document's History box:

Table 6.1 Activities Listed in Document History

Access	Import
Copy To	Copy From
Create	Check-out
Edit	Edit Profile
Check-in	New Version
New Sub-Version	Print
Look	

The version number, date, time each activity was performed, and user who performed the activity are also listed.

Viewing the History

You can view the History properties box from any document list, such as the Search Results list or Recently Edited Documents list, or with the document displayed on the screen.

To view the History from a document listing:

1. Point to the document whose history you want to view and click to select it.

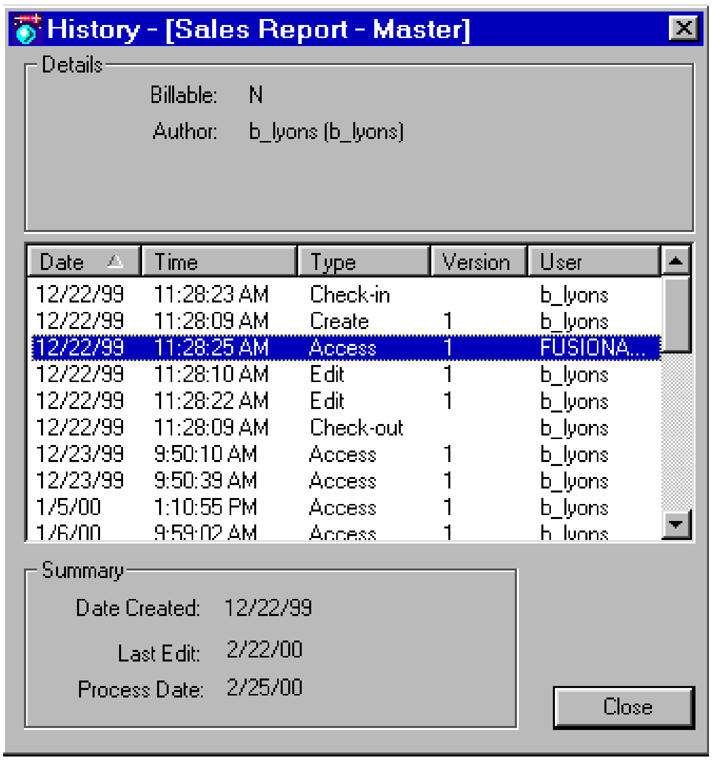
2. Choose the History command from the Document menu. If you are on the PowerDOCS Desktop, this option can be set up as a button on the button bar. In this case, just click the button. The History is displayed.

NOTE Executing a right-click will display the Document menu at the mouse pointer location when the Search Results dialog box is displayed.

The following is a sample document History:

Figure 6.17

Sample document History properties box



3. Click the column headers to sort the list by Date, Time, Type, Version, or User.

4. Click and drag the column headers to change the column order.

5. Click Close on the History properties box to return to the list.

To view a document's History while the document is on the screen:

1. From within your application, click Open from the File menu.
2. Select your document from the Search Results dialog box.
3. Choose the History command from the Document menu (ALT+D, H). The document's History is displayed.
4. Click Close return to the document.

Project Membership

Projects are collections of related documents. They allow you to logically group documents that are used for the same effort. A single document can be included in multiple projects. A whole project can even be included in a larger project, thus becoming a sub-project to the larger one. Read Chapter 7, *Projects,* for a detailed discussion of the Projects feature.

NOTE Your PowerDOCS administrator may have renamed the Projects feature to a name more meaningful in your organization, such as "Folders" or "Cases."

Since a single document might be included in multiple projects, you may want a list of the projects to which a particular document belongs. The Project Membership option gives you that information.

You can view the Project Membership properties box from any document listing, such as the Search Results or Recently Edited Documents list, or with the document displayed on the screen.

To view a list of projects that a document is associated with:

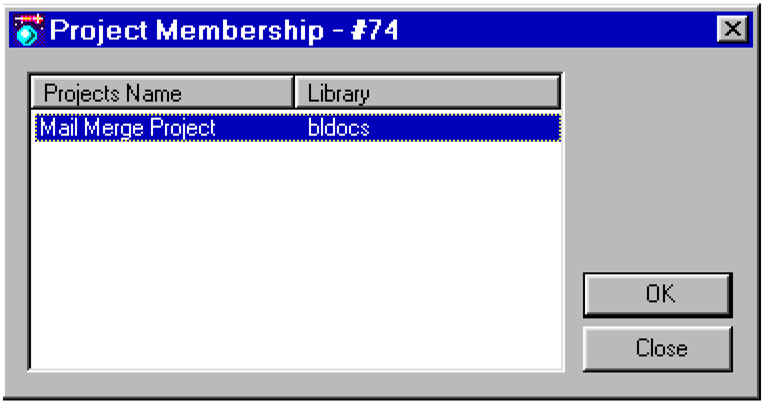
1. Select the document for which you want to know the Project Membership.

2. Choose the Project Membership command from the Document menu. If you are on the PowerDOCS Desktop, this option can be set up as a button on the button bar. In this case, just click the button.

   The Project Membership properties box is displayed:

Figure 6.18

Project Membership properties box for document #74

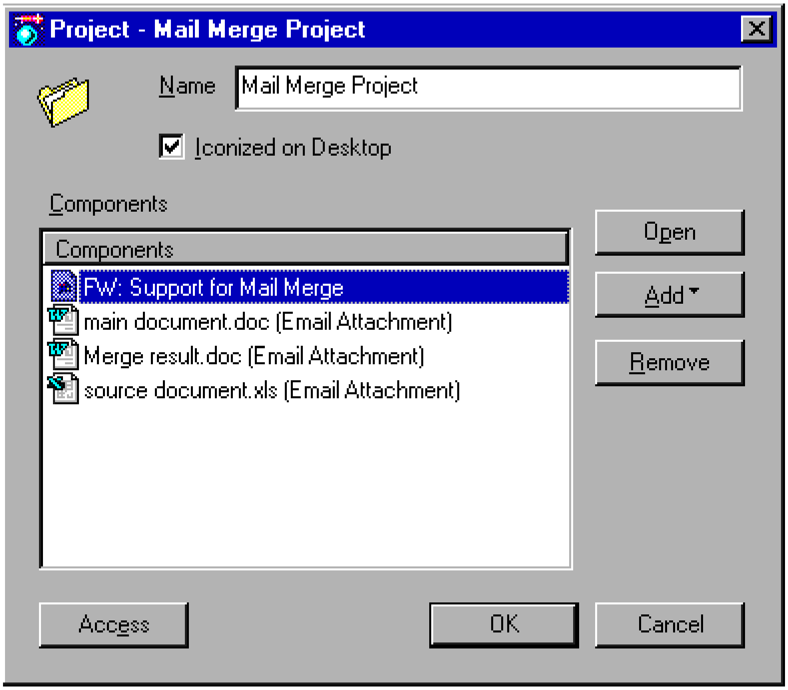


3. You can highlight a project and click OK to display that project's documents. You can open a document, add a document or sub-project, or remove a document. In addition, you can change the

access rights for the project. Click OK to close the window. Read Chapter 7, *Projects,* for a detailed discussion of the Projects feature.

Figure 6.19

Project Mail Merge Project document listing



4. Click Close on the Project Membership properties box to return to the document list.

To view the Project Membership properties box while the document is on the screen:

1. From within your application, click Open from the File menu.

2. Select your document from the Search Results dialog box.

3. From the Document menu, click Project Membership. The Project Membership properties box is displayed, as shown in Figure 6.19.

NOTE Right-click to display the Document menu at the mouse pointer location when the Search Results dialog box is displayed.

4. Click Close on the Project Membership properties box to return to the document.

File Information

In addition to History and Profile options, PowerDOCS has the option to view File Information for a given document. Using File Information, you can view:

- Size of each version
- Date of last edit
- Time of last edit

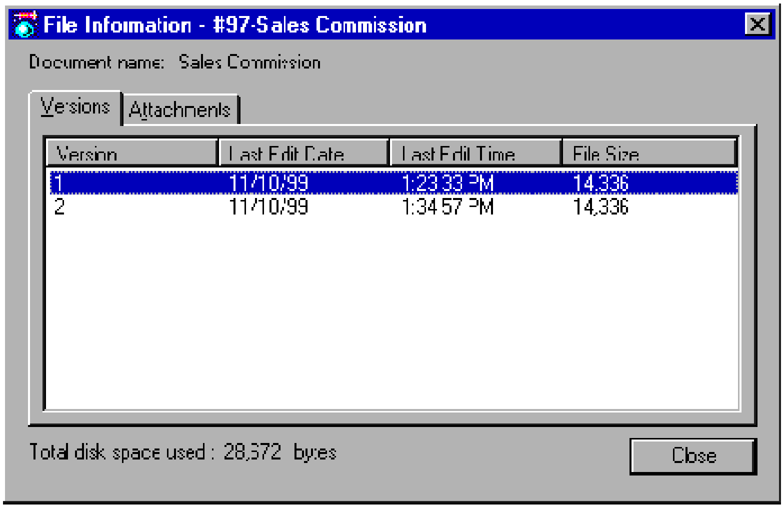
To view File Information:

1. Select the document for which you want to view File Information.

2. Select File Information from the Document menu. If you are on the PowerDOCS Desktop, this option can be set up as a button on the button bar. In this case, just click the button.

Figure 6.20

File Information window



3. The Version, Edit Date, Edit Time, and File Size in bytes are displayed. Click Close.

Compatible Applications

Compatible Applications are typically software utilities that process files produced by some other application. For example, if the Application field on the Document Profile dialog box is WordPerfect, then a compatible application might be a grammar checker or redlining application.

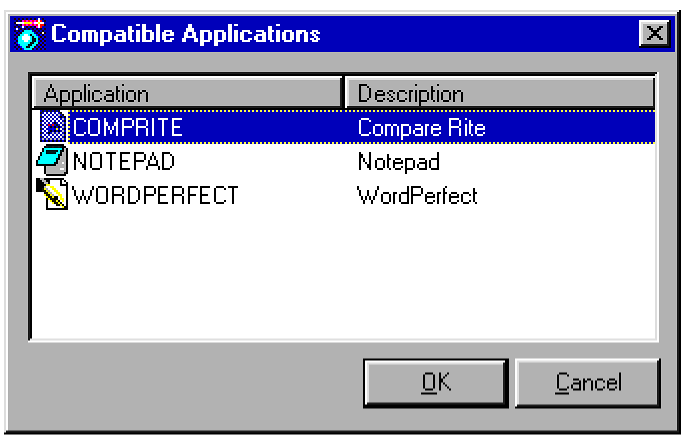
To run a compatible application against one of your documents:

1. Point to the document you want to run the compatible application against and click to select it.

2. Choose the Compatible Applications command from the Document menu (ALT+D, A). If you are at the PowerDOCS Desktop, this option can be set up as a button on the button bar. In this case, just click the button. The following properties box appears, which lists all applications that have been set up by your PowerDOCS administrator as compatible with the selected document:

Figure 6.21

Compatible Applications dialog box.



NOTE Right-click to display the Document menu at the mouse pointer location when the Search Results dialog box is displayed.

3. Choose the application you want to run. Your PowerDOCS administrator may have set up different methods for launching the application. If so, you may be asked to select a method. Check with your PowerDOCS administrator for details about the launch methods.

4. The application is then launched with the selected document.

5. Once you exit the compatible application, you may be asked for some billing information. You may also be asked whether you want to profile any documents created during the work session or save them as attachments. If you save the files as attachments, they will be listed along with the document's versions listing.

Since Compatible Applications listings are site specific, your PowerDOCS administrator must give you information about which applications are available to you and how to run them.

Delete

Your PowerDOCS administrator has already determined whether or not you are allowed to delete documents, so you may not be able to perform this function.

To delete a document from PowerDOCS:

1. From the Recently Edited Documents list or a Search Results dialog box, select the document(s) you want to delete.

2. Choose Delete from the Document menu. A question dialog box asks you to confirm that you want to delete this document. Click Yes to delete the document(s) from PowerDOCS. Click No to return to the document list.

Copy

If you want to make a copy of a document, you can do so from the PowerDOCS Desktop.

To make a copy of a document from a document listing:

1. Point to the document you want to copy and click to select it.

2. Choose Copy from the Document menu (ALT+D,C). If you are on the PowerDOCS Desktop, this option can be set up as a button on the button bar. In this case, just click the button. A Document Profile dialog box will be displayed. Information from the original profile will be displayed in the profile fields, with the exception of Document Name.

NOTE Right-click to display the Document menu at the mouse pointer location when the Search Results dialog box is displayed.

3. Enter a new name in the Document Name field.

4. Click OK to complete the process.

To copy a document while the document is on the screen:

1. From within your application, click Open from the File menu.

2. Select your document from the Search Results list.

3. Choose Copy from the Document menu. A Document Profile dialog box will be displayed. Information from the original profile will be displayed in the profile fields, with the exception of Document Name.

4. Enter a new name in the Document Name field.

5. Click OK to complete the process.

NOTE If you want to make a copy of the document to use outside of PowerDOCS, you should use either the Check-out via Copy or Export features. The difference is that with Check-out, you cannot change the document's file name if you want to check the document back in. Export allows you to change the document's name. Both of these features are discussed in this chapter.

Export

PowerDOCS allows you to export documents and save them with DOS path names.

To export documents from PowerDOCS:

1. Select the document you want to export from any of the available document listings. You may want to perform a Profile or Content Search to locate the documents.
2. Choose Export from the Document menu. You will be prompted to select a version for export.
3. The Save As dialog box is displayed.
4. Select the DOS directory and path name you want and click OK. The original of the document will remain in PowerDOCS, but a copy will have been exported.

NOTE This feature is different from Check-out via Copy in that you can change the document's file name.

Mail

You have the capability of attaching a PowerDOCS document to a mail message.

Instructions for attaching PowerDOCS documents to your mail messages are given in the section titled "Linking PowerDOCS Documents to Mail Messages" in Chapter 9 of this guide.

NOTE If you use Lotus Notes as your e-mail client, you will be unable to use the Mail feature from PowerDOCS. This is because Lotus Notes does not support Simple MAPI.

Profile Paper Document

The Profile Paper Document option allows users to profile documents that are not stored electronically, such as maps, charts, and other reference materials. This feature is described completely in "Profiling Paper Documents" in Chapter 3.

Email Search Option and Email Tree

If Enhanced Microsoft Outlook e-mail integration is enabled, you have the ability to search for e-mail documents related to a PowerDOCS document. In most cases this will be file attachments saved separately to PowerDOCS. More information about enhanced integration can be found in the section titled "PowerDOCS Integration for Microsoft Outlook" in Chapter 9 of this guide.

Email Search Option

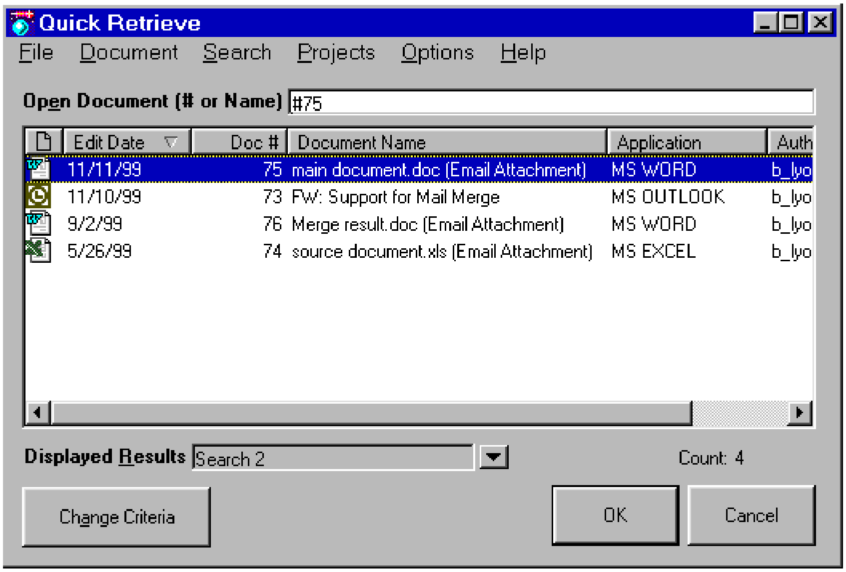
To search for e-mail:

1. Select the document in which you want to search for e-mail components.

2. Select Email Search from the Document menu. If you are on the PowerDOCS Desktop, this option can be set up as a button on the button bar. In this case, just click the button.

Figure 6.22

Quick Retrieve window showing Email Search results



3. You can use the Quick Retrieve window to work with the document or click OK to close the window.

NOTE If you do not save attachments separately, the embedded attachment files will not appear in the Quick Retrieve window.

Email Tree Option

If Enhanced Microsoft Outlook e-mail integration is enabled, you have the ability to display an e-mail tree showing related threads and attachments. More information about enhanced integration can be found in the section titled “PowerDOCS Integration for Microsoft Outlook “ in Chapter 9 of this guide.

NOTE If you do not save attachments separately, the embedded attachment files will not appear in the Show Email Tree window.

To search for e-mail:

1. Select the document for which you want to see e-mail threads and attachments.
2. Select Email Tree from the Document menu. If you are on the PowerDOCS Desktop, this option can be set up as a button on the button bar. In this case, just click the button.

3. The Show Email Tree window will appear.

Figure 6.23

Show Email Tree, e-mail thread with Attachments

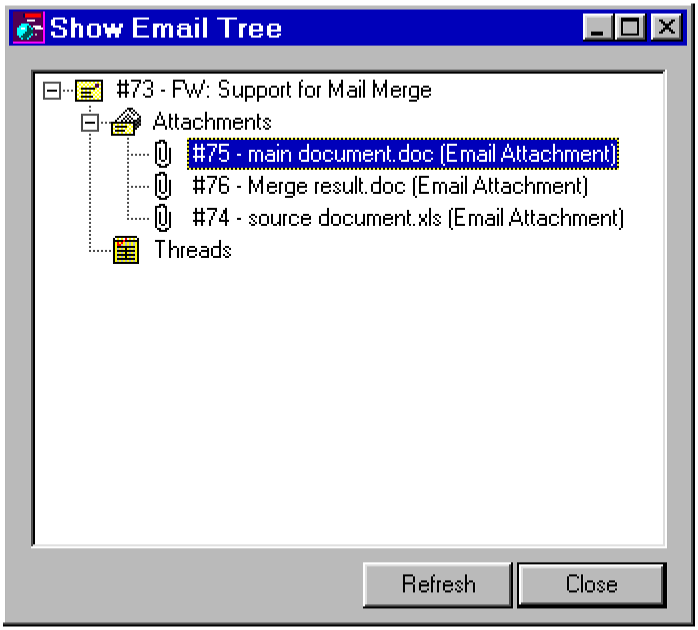
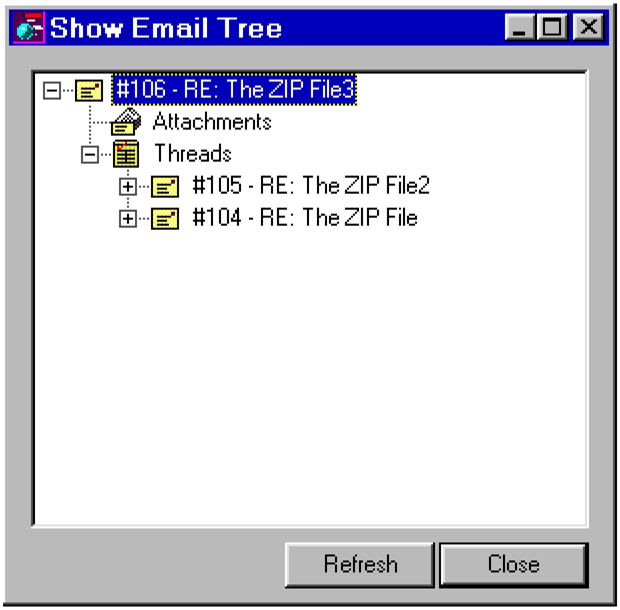


Figure 6.24

Show Email Tree, e-mail thread without attachments



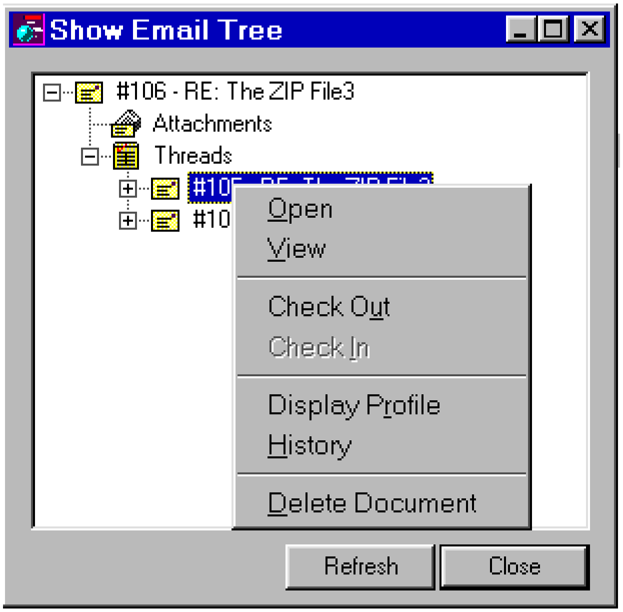
4. Expand and contract the tree by clicking the plus and minus signs.

5. To open a message or attachment, select the message in the tree and right-click to view the shortcut menu.

6. Click to select the desired command.

Figure 6.25

Show Email Tree - Shortcut menu



- **Open**: Selecting this command will open the document. The Versions window will appear. Select the desired document version and click OK.
- **View**: Selecting this command will allow you to preview the document. The Versions window will appear. Select the desired document version and click OK. Select File>Close to close the Preview window.
- **Check Out**: Selecting this command will cause the Check Out Document dialog box to appear. Enter the necessary information and click OK.
- **Check In**: Selecting this command will check in the document.
- **Display Profile**: This command displays the Document Profile. Make any desired edits and click OK. Click Cancel to close the window and discard edits.

- **History**: This command displays the History window, detailing the activity related to this document. Click Close when you have finished viewing the history.
- **Delete Document**: This command will delete the document from the library. A message window will appear, asking you to confirm the deletion. Select Yes to delete, No to cancel.

7. To close the Show Email Tree window, click Close.

Chapter

7

Projects

In This Chapter

This chapter explains the use of the Project feature. It also details creating projects and adding documents to your projects, along with explaining how to use shortcuts on the PowerDOCS Desktop to create and access your projects more efficiently.

Introduction

"Projects" are collections of related documents. They allow you to group documents used for the same effort. A single document can be included in multiple projects. A project can even be included in a larger project, becoming a sub-project to the larger one.

Like Quick Search, Projects is a convenient feature allowing you to quickly obtain a list of documents. Unlike Quick Search, however, the Projects feature is not a search. It is, rather, a static list of related documents. Assigning a document to a Project created with this feature does not change the path name or physical location of the document; it simply adds the document to a logical grouping of documents.

NOTE Your PowerDOCS administrator has the option of renaming the Projects feature to something more meaningful in your organization, such as "Folders." If this is the case, please substitute the appropriate word when necessary while reading this chapter.

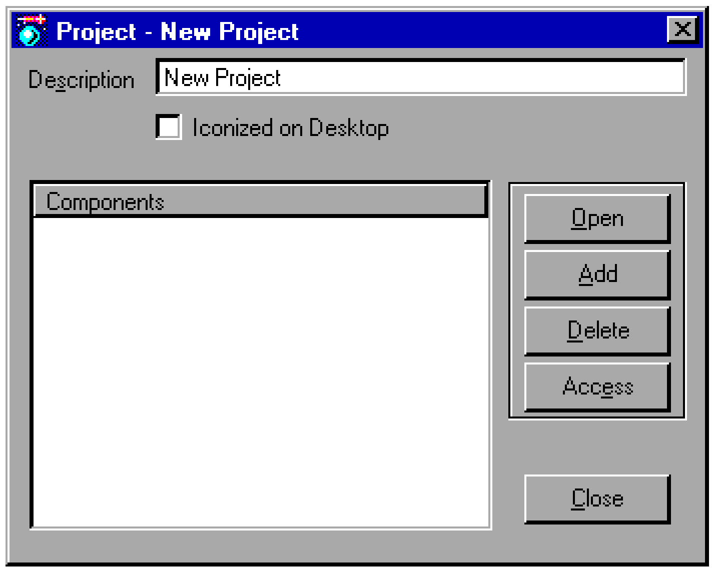
Creating a Project

To create a project:

1. Choose New from the Projects menu. You can also select Project from the shortcut menu that is displayed when you right-click an existing project. The following dialog box is displayed.

Figure 7.1

Project dialog box



2. Fill out the fields as described below.

- **Description:** This field contains the project name. Provide a name descriptive of the project, such as "1996 Annual Shareholder Conference," or "FY98 Budget."

- **Iconized on Desktop:** If you check this box, the project is displayed under Desktop Projects in the PowerDOCS Explorer. The Projects icon looks like a file folder. It is easily distinguished from the Quick Search icon, which is depicted by a lightning bolt.

If you do not choose for your projects to be iconized on the desktop, they will still show up under All Projects in the PowerDOCS Explorer.

Read the sections below for instructions on adding components to your projects, determining project access, opening projects, and opening documents grouped in a project.

Adding Components to a Project

Once a project is created, you can assign components to that project. Components might be documents (such as word processing files, spreadsheets, or images) or sub-projects.

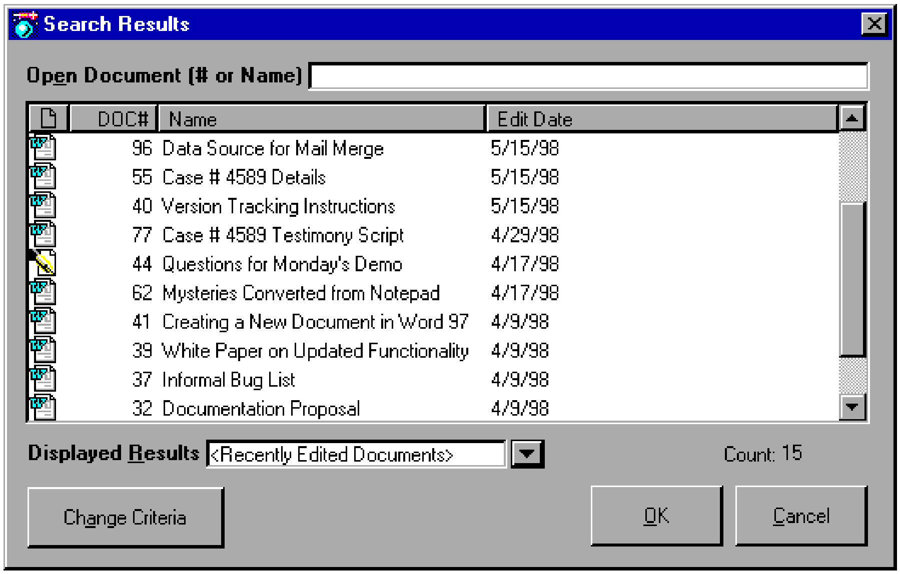
To add a component to a project:

1. Click Add on the Project dialog box. Select Document or Sub-project.
2. Select either Document or Sub-Project, depending on which you want to add, then click OK.

If you choose Document, your Recently Edited Documents list is displayed in the Search Results dialog box. If you choose Sub-Project, skip to step 4.

Figure 7.2

Search Results dialog box

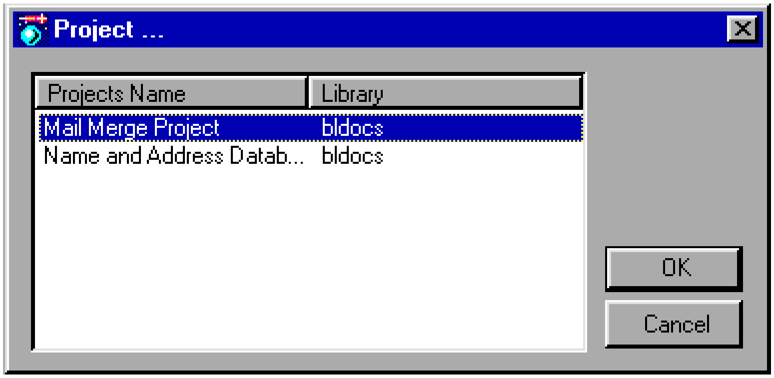


3. Double-click any documents listed to have them added to the project. If you want to add documents not included on the Recently Edited Documents listing, you can perform any search (for example, Quick Search, Profile Search, Content Search) and add the documents to the project in this same manner.

4. If you choose Sub-Project from the Add to Project dialog box, a listing of all available projects is displayed. Select the project you want to add as a sub-project, then click OK.

Figure 7.3

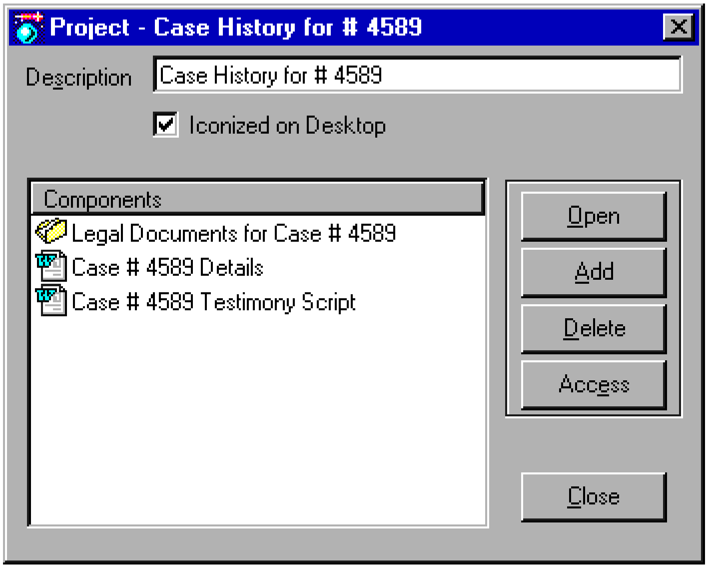
Adding a sub- project to a project



5. The documents/sub-projects you selected are displayed in the Components listing.

Figure 7.4

Project listing components



Dragging Documents and Sub-Projects

To speed the process of adding documents and sub-projects, you can drag components from a listing in the right pane of the PowerDOCS Explorer to the desired project under Desktop Projects or All Projects.

1. Select the document to be added to the project.

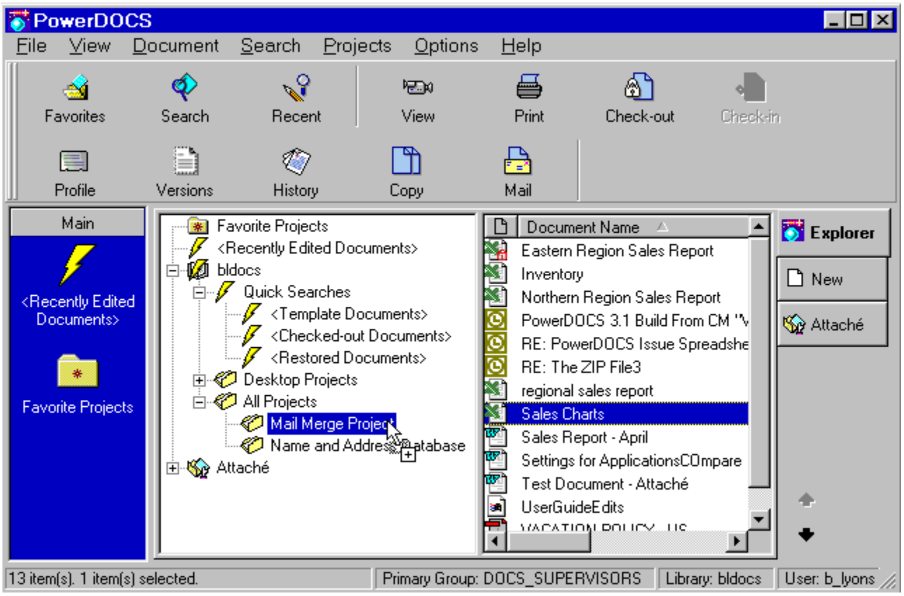
NOTE You can also add multiple documents to a project simultaneously. To do so, just use shift-click to select multiple consecutive documents and CTRL-click to select multiple non-consecutive documents.

2. Place your cursor on one of the selected documents, click and hold. Drag the document to the project.

The figure below shows document number 73 being dragged to the Project, "Name and Address Database", under All Projects.

Figure 7.5

Dragging a document to a project



Project Access

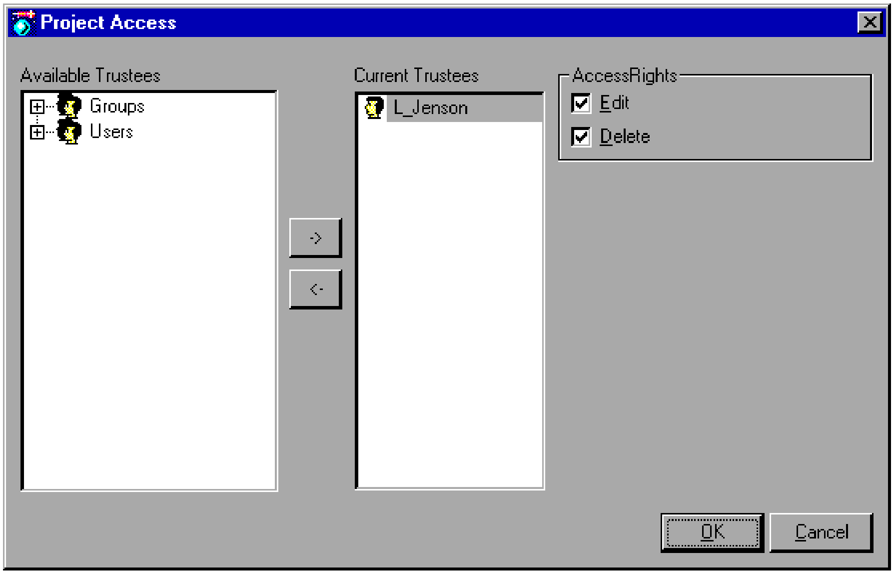
PowerDOCS allows you to determine which users have the rights to edit or delete your projects.

To determine access rights to a project:

From the Project dialog box, click Access. The following dialog box, listing your User ID and any other users/groups you previously added in the Current Trustees column, is displayed.

Figure 7.6

Project Access dialog box



NOTE If your administrator has associated your libraries with NetWare Directory Service (NDS), you have the option of viewing the Available Trustees in Flat or NDS view. Refer to "Hierarchical Directory Lookup " in Chapter 3 of this guide.

- **Edit:** Users with Edit rights can add and remove documents to and from the project.
- **Delete:** Users with Delete rights will be able to delete the project. A user cannot have Delete rights without Edit rights.

Assigning Rights

As shown on the Project Access dialog box above, the user who entered the project has all rights by default. Other users and groups can be easily assigned access rights to the project.

To assign rights for a particular user or group:

1. From the Available Trustees listing, click + to expand the listings under users or groups depending on whether you want to grant rights to individuals or to entire groups.
2. Select the users or groups for which you want to grant access and click the right-pointing arrow to add the name(s) to the Current Trustees list.
3. All users and groups that have been added appear on the Current Trustees listing with both Edit and Delete rights granted by default. To change the rights for any user or group on the Current Trustees listing, click that user or group and select only the access rights you want them to have.
4. Click OK to close the dialog box.

All users/groups selected through the above process will have the project appear on their PowerDOCS Explorer, depending on whether it is marked as Iconized on Desktop or not. If the project was marked to be Iconized on Desktop, the iconized project will appear under both Desktop Projects and All Projects.

NOTE If you want this project available to CyberDOCS users that share the library, you must select Iconized on Desktop.

Removing Rights

To remove the access rights of a particular user/group:

1. From the Project Access screen, click the user or group from which you want to remove access in the Current Trustees listing.
2. Click the left-pointing arrow to remove names from the Current Trustees list. The rights of the user/group to this project are revoked.

NOTE You cannot delete your own Edit rights to a project.

Opening a Project

Opening a project will display the associated documents and sub-projects of that project. Each project that you have created is located under All Projects on your PowerDOCS Desktop.

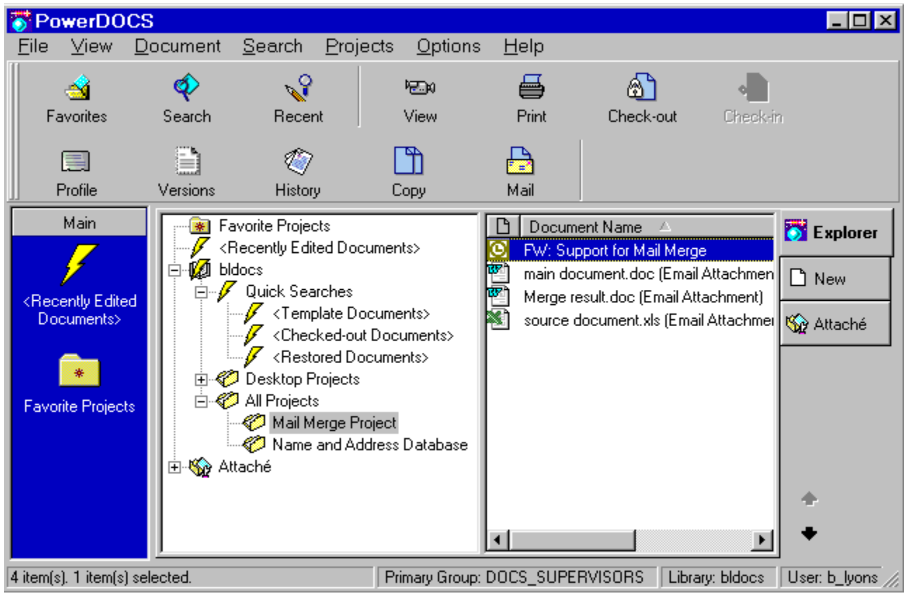
To open a project:

1. From your PowerDOCS Explorer, double-click All Projects under the library in which your project was created. Only those projects marked as Iconized on Desktop will appear under Desktop Projects.

2. Double-click the project you want to open. As shown in Figure 7.7, the project components are listed in the upper-right pane of the PowerDOCS Desktop.

Figure 7.7

Viewing project components



Opening a Project Component

Once the project components have been displayed in the upper-right panel of the PowerDOCS Desktop, you can open any component (document or sub-project) listed for that project.

To open a project component:

1. Double-click the component (document or sub-project) you want to open.
2. If you choose a document, the application in which the document was created is launched and the document is retrieved.

   If you choose a sub-project, the components listing of the sub-project is displayed.

Project Membership

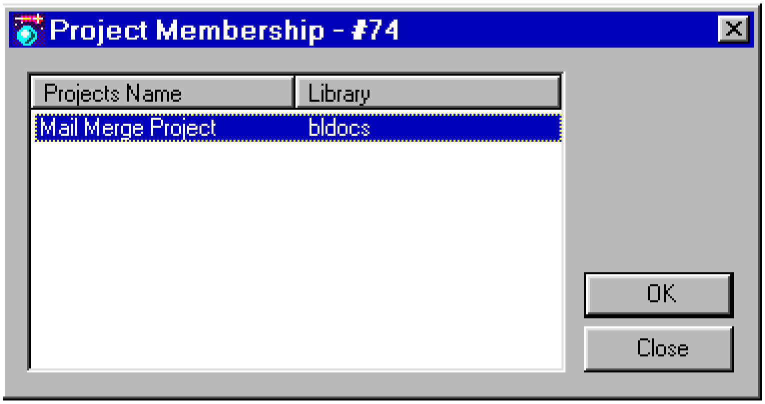
Since a single document can be included in multiple projects, you might want to know a list of the projects to which a particular document belongs.

To view a list of projects that a document belongs to:

1. Highlight the particular document that you want to learn about.
2. Select Project Membership from the Document menu. A dialog box, like the one shown below, is displayed.

Figure 7.8

Project Membership dialog box



3. Click Close to return to the PowerDOCS Desktop. Click OK to open the selected project.

Favorite Projects

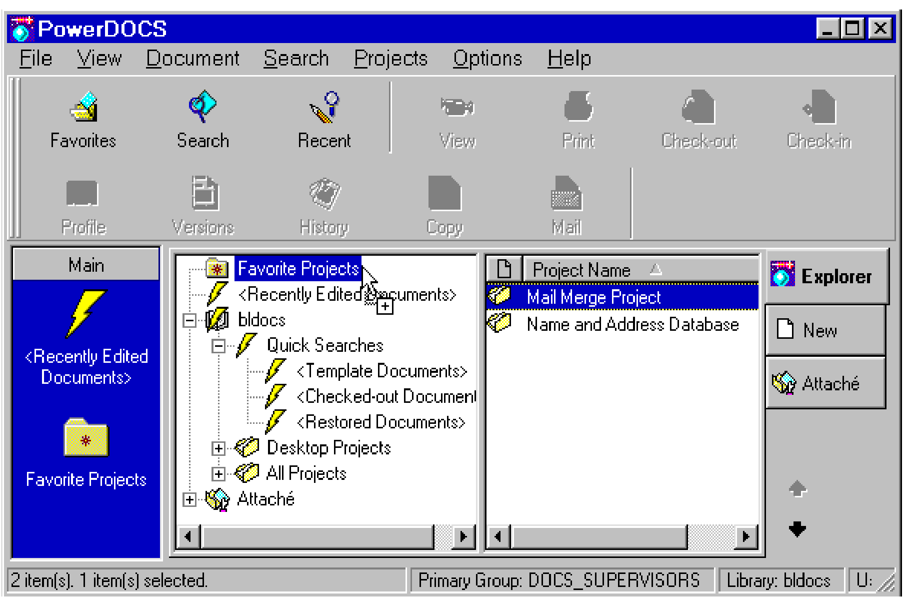
Since projects contain the documents you work with most often, PowerDOCS allows you even quicker access to those documents. You can place Projects that you work with often and want easy access to in the Favorite Projects folder on the desktop. The folder is located in the Main group of the Favorites bar and at the top of the tree view on your PowerDOCS Desktop when the Explorer tab is active.

To add a project to the Favorite Projects folder:

1. From the PowerDOCS Desktop, click the Explorer tab.
2. From any project listing, such as Desktop Projects or All Projects, click the desired project to select it.
3. Drag the project to the Favorite Projects folder in the tree view on the PowerDOCS Desktop.

Figure 7.9

Dragging project "Mail Merge Project" to the Favorite Projects folder



Note You must drag the project to the Favorite Projects folder in the tree view. You cannot drag the project to the folder on the Main Favorites bar.

4. Your project is now available from both the Favorite Projects folder on the Favorites bar and in the tree view in the middle pane of the PowerDOCS Desktop.

Removing a Document from a Project

When a document no longer applies to a particular project, you may remove it from the project.

To remove a document from a project:

1. Select the project from which you want to remove a document. Right-click to access the shortcut menu. Select Edit Project.

Note You can also select the document and access Project Membership. Open the project from which you want to remove the document. See Project Membership for more information.

2. Select the document you want to remove from the project and click Remove.

3. A question box will appear, asking you to confirm that you want to remove the document from the project. Click Yes to proceed or No to cancel

4. Click OK to close the dialog box.

Note Do not select a document from within a project and delete it using Document>Delete. This will delete the document from the project and the library.

Deleting a Project

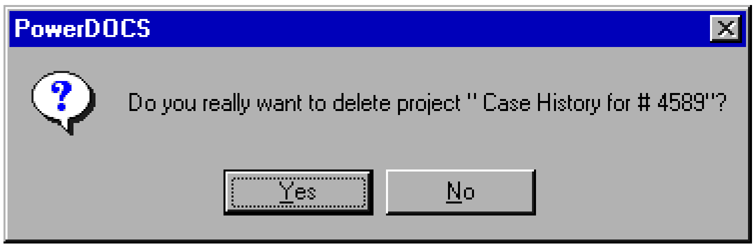
When you delete a project, only the project itself is deleted. The documents associated with that project are not deleted.

To delete a project:

1. Right-click the project that you want to delete.
2. Select Delete Project from the shortcut menu. A confirmation dialog box, like the one shown below, is displayed.

Figure 7.10

Delete confirmation dialog box



3. Click Yes to delete the project. Click No to cancel.

Chapter

8

Using Applications with PowerDOCS

In This Chapter

PowerDOCS functions with many types of applications. This chapter discusses the ways in which tested applications are integrated with PowerDOCS. This chapter will also detail the behavior of each group of applications with PowerDOCS.

This chapter includes information on:

Using Desktop Applications

There are four ways your applications are integrated with PowerDOCS:

- Interceptor, an integration method that monitors when Open and Save commands are issued,
- Passive Integration, an integration method that maintains native document functions in an application and adds separate menu items for PowerDOCS functions,
- ODMA, a Document Management integration method that is built into individual applications by their vendors, and
- Directory Monitoring.

The table below lists the applications that will use Interceptor, Passive Integration, and ODMA as the method for integration. For information on using directory monitored applications, see Chapter 3, "*Creating and Profiling Documents.*"

Table 8.1 Tested Applications - Interceptor

Integrated Using Interceptor
Adobe Acrobat Exchange 3.0.x
AutoCad
Microsoft Excel
Corel WordPerfect versions 8.0 & 9.0 on Windows 2000 systems
Corel Presentations versions 8.0 & 9.0 on Windows 2000 systems
Corel Quattro Pro versions 8.0 & 9.0 on Windows 2000 systems
Corel Presentations 9.0 on Windows 98 & Windows NT systems
Corel Quattro Pro 9.0 on Windows 98 & Windows NT systems

NOTE If you plan on intercepting Corel Presentation 9.0 and Quattro Pro 9.0, please refer to Appendix A of the *PowerDOCS Installation Guide* for specific integration requirements.

If you are running Windows 98, Windows 2000, or Windows NT, some additional setup is required for versions 8.0 and 9.0 Corel Suite applications. Instructions for this can also be found in Appendix A of the *PowerDOCS Installation Guide*.

Interceptor allows you to use a broader range of applications. You also have the ability to turn on and off integration with any application you are using on your workstation.

NOTE 16-bit applications are not tested and may not work with Interceptor.

Table 8.2 Tested Applications - Passive Integration

Integrated Using Passive Integration
Microsoft Word
Microsoft Excel
Microsoft Project 98
Adobe Acrobat 4.0x

Table 8.3 Tested Applications - ODMA

Integrated Using ODMA
Corel Presentations 8.0 on Windows 98 & Windows NT systems
Corel Quattro Pro 8.0 on Windows 98 & Windows NT systems
Corel WordPerfect versions 8.0 & 9.0 on Windows 98 & Windows NT systems
Microsoft PowerPoint
Microsoft Word

Applications Integrated Using Interceptor

Using Applications with Interceptor

Interceptor works by monitoring when a particular dialog box is called in an integrated application.

When you choose to Open a file, the PowerDOCS Search Results dialog box is displayed. From this list you can access other default Quick Searches and any other Quick Searches you may have created. For instructions on retrieving documents from the Search Results dialog box, see Chapter 5, “Searching and Retrieving.”

When you choose to save a new file, the PowerDOCS Document Profile window is displayed. For instructions on filling out the Document Profile, refer to the section titled, “Filling Out the Document Profile” in Chapter 3 of this guide.

Important Information About Using Interceptor

If you open a document natively, for instance, by double-clicking a document in the Windows Explorer, Interceptor will not monitor any activity on that document. If you select Save while editing a document you opened natively, your edits will be saved to the original native file.

You need to select Save As in order to profile the document in PowerDOCS.

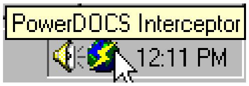
NOTE Your system administrator may have disabled native functionality. See your administrator for additional menu options that may have been integrated with PowerDOCS.

The Task Bar Icon

Interceptor is launched when you log in to PowerDOCS. The Interceptor icon is then displayed on the task bar.

Figure 8.4

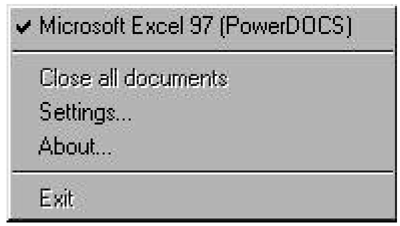
Interceptor task bar icon



When you right-click the icon on the task bar, a list of applications that you are monitoring is displayed. A check mark appears next to the application when it is being monitored.

Figure 8.5

Interceptor task bar menu



Toggling On and Off Monitoring

Interceptor gives you the option of "turning off" or disabling integration on a per application basis.

WARNING When you elect to turn off integration with an application, any activity performed on a document will not be tracked by PowerDOCS. Your administrator may have disabled your access to this function.

To turn off monitoring of an application:

1. Right-click the Interceptor task bar icon. A menu listing all monitored applications is displayed, as shown in Figure 8.5.

2. Click the application you do not want to monitor. When you next begin working in that application, PowerDOCS will not intercept any open and save commands. You will see the native dialog boxes instead.

Close All Documents Feature

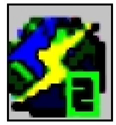
Interceptor gives you the option of breaking a document's connection to PowerDOCS. Any changes made to the document will not be saved to PowerDOCS. To close all documents, you must first have one or more documents open.

NOTE Only applications monitored with Interceptor use the Close All Documents feature.

1. From the PowerDOCS Desktop, open one or more documents. The number of open documents appears on the Interceptor task bar icon.

Figure 8.6

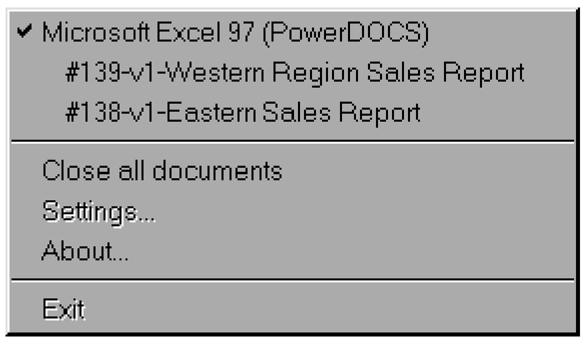
Interceptor task bar icon showing the number of open documents



2. Place your cursor on the Interceptor icon located on the task bar. Right-click to open the Interceptor menu. The open documents appear on the menu.

Figure 8.7

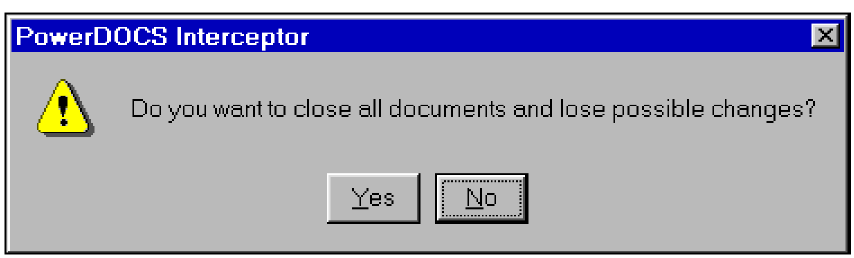
Close All Documents



3. Select Close All Documents. A warning message will appear.

Figure 8.8

Close All Documents Warning



4. Select Yes. The document's connection with PowerDOCS will be severed. Any changes made to the document will not be saved in PowerDOCS.

Configuring New Applications for Interceptor

Steps Necessary to Set Up Application Integration with Interceptor

1. Use DOCSAdmin Tools>Library Maintenance>Applications to add launch methods for applications that will use new DDE settings with PowerDOCS. See Appendix A for information on which applications need new launch methods for use with PowerDOCS.

NOTE Your administrator may have restricted you from creating launch methods in Library Maintenance.

2. If you want to integrate applications from within Interceptor, see the section titled, "Configuring New Applications from Interceptor."
3. If you want to integrate applications using the Interceptor Learning Tool, see the section titled, "Integrating Applications with the Interceptor Learning Tool."
4. Enable the application in Interceptor.

Configuring New Applications from Interceptor

To configure a new application from Interceptor:

1. With PowerDOCS active on your desktop, double-click the Interceptor icon in your task bar. The PowerDOCS Interceptor window appears, displaying all applications that are currently configured to work with Interceptor. The application you are now configuring will not appear in the applications lists until you complete the subsequent steps and restart Interceptor.

2. Click the Application Settings tab. A list of currently configured applications displays in the active window. Click Add to add a new application to this list.

3. With the Common Properties tab selected, complete the following fields:

- **Application ID.** Enter the Application ID you chose when creating this application's launch method. If these IDs do not match, PowerDOCS may have trouble reconciling the application with its launch method.

- **Description.** Enter the application name in this field.

- **Keyword.** Enter the Application ID you chose when creating this application's launch method. If these IDs do not match, PowerDOCS may have trouble reconciling the application with its launch method.

4. Click the Window Properties tab. This tab has two Autodetect check boxes that are selected by default. It is highly recommended that you leave these boxes checked.

5. Click the Application Dialogs tab to display the Dialogs window. This window will be empty until you add commands to be integrated with Interceptor.

6. Click Add to display the Dialogs window. Fill out the fields as described below.

- **Dialog Type.** Select the dialog type that most closely matches the nature of the dialog box you are integrating.

  — **Open**. Select this type if you want the Search Results dialog box presented and the selected document opened.

  — **Save As.**Select this type if you want the Document Profile form displayed so the user can profile and save the open document.

— **Import**.Select this type if you want the Search Results dialog box presented and the selected document opened into the current document.

— **Export**.Select this type if you want to export the selected document.

- **Dialog Caption.** Enter the title of the dialog box.
- **Not full caption.** Select this check box if you want to use the same settings for several dialog boxes with equal functionality and similar headings. In the Dialog Caption field, you enter the common part of the headings and select Not full caption.
- **Autodetect.** This check box is selected by default, and it is strongly recommended that you leave it selected.

7. Click OK to save your settings. The dialog box you configured appears in the Dialogs window. You can repeat step 6 to configure other commands in this application.
8. When you have finished integrating commands, click OK and close the Application Settings dialog box.
9. Close the PowerDOCS Interceptor. Your new application will be listed from the Launch Methods tab the next time you launch PowerDOCS.
10. In order for Interceptor to begin monitoring this application, you must enable the application. For instructions, refer to the section titled, "Enabling the Newly Configured Application."

Integrating Applications with the Interceptor Learning Tool

The Interceptor Learning Tool is a separate application that is automatically installed to the PowerDOCS directory when you install PowerDOCS on a workstation. This tool is designed to help you configure Interceptor to accept other applications not currently listed in the Application Settings tab of Interceptor.

NOTE Your PowerDOCS administrator may have restricted your access to the Interceptor Learning Tool. Check with your administrator if you are uncertain of your access to this feature.

Integrating an Application

The Interceptor Learning Tool is configured similarly to other application wizards. The tool is designed to guide you through the entire process of configuring the desired application. In the following instructions, the Interceptor Learning Tool will be referred to as the ILT Wizard.

The example shown below will integrate the graphics program Paint Shop Pro version 5.01.

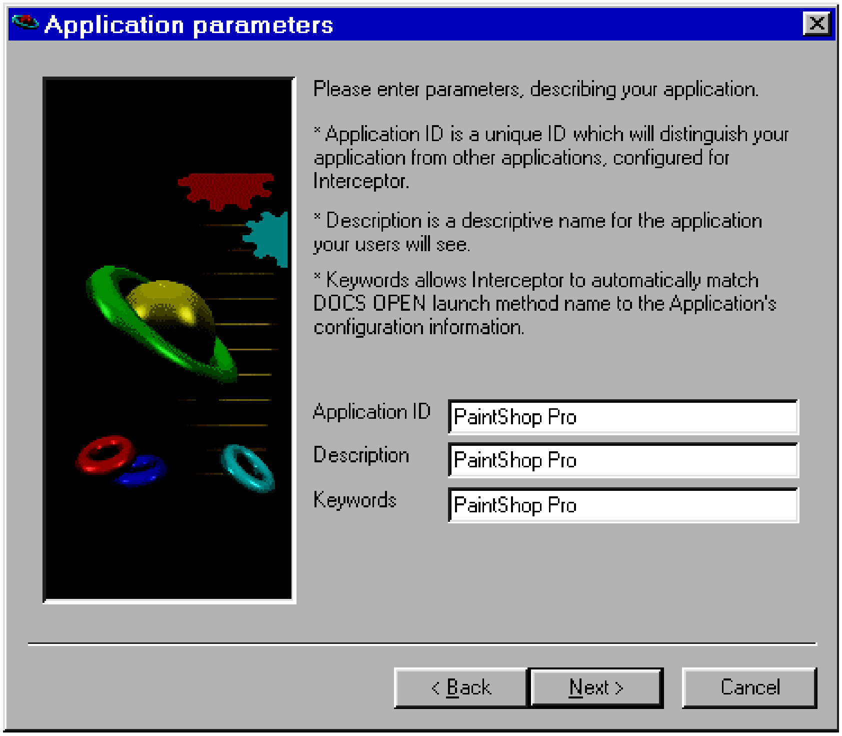
NOTE Prior to setting up applications using the ILT Wizard, a Launch Method must be created in DOCSAdmin Tools>Library Maintenance>Applications. The Launch Method must use Full Integration. Please see Appendix A of the *PowerDOCS Installation Guide* or check with your PowerDOCS administrator. Your administrator may have restricted you from creating launch methods in Library Maintenance.

1. Using My Computer, locate the PowerDOCS directory, (`..\Program Files\Pcdocs\PowerDOCS`, by default). Double-click the file `ILTWizard.exe`. The Welcome dialog box appears.

2. From the Welcome dialog box, click Next. The Application Parameters dialog box will appear.

Figure 8.9

Application Parameter dialog box



3. Following the on-screen instructions, complete the Application ID, Name, and Keywords fields.

- **Application ID.** Type the Application ID you chose when creating this application's launch method. If these Application IDs do not match, PowerDOCS may have trouble reconciling the application with its launch method.
- **Description.** Type the application name in this field.
- **Keyword.** Specify the Application ID you chose when creating this application's launch method. PowerDOCS will attempt to match the value(s) in the Keyword field to words in the Launch Methods.

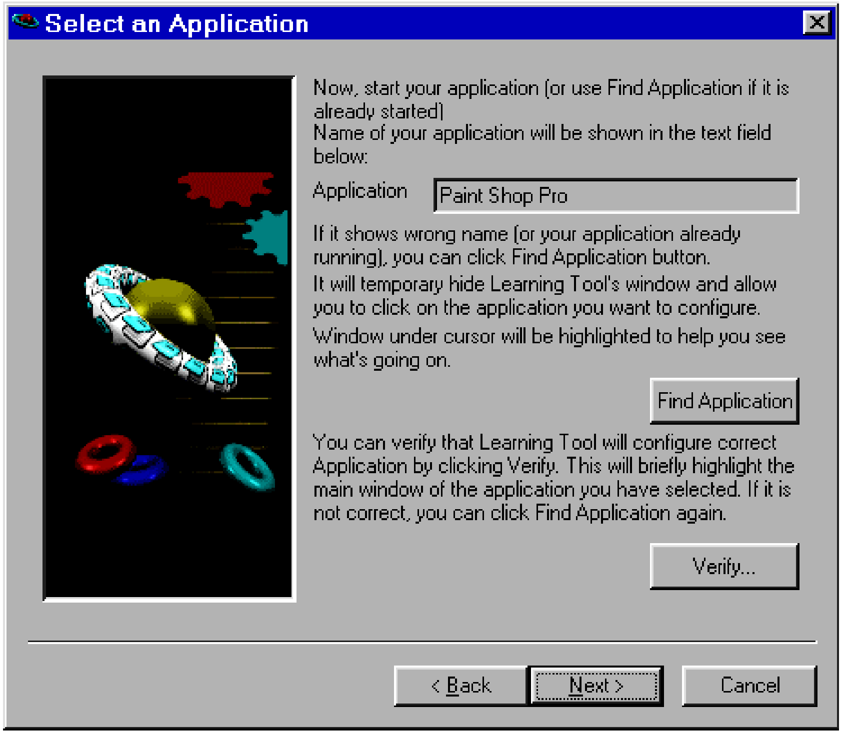
Click Next.

4. The Select an Application dialog box will appear. If you have not already started Paint Shop Pro and opened a file, you must do so now. The Paint Shop Pro window should be maximized in the background.

NOTE Paint Shop Pro is a Multiple Document Interface (MDI) application. The ILT Wizard requires MDI applications to have at least one file open during the configuration process.

Figure 8.10

Select an Application dialog box



If the application name does not appear in the Application field, click Find Application. ILT Wizard will minimize and a special cursor will be shown. Click the Paint Shop Pro window.

NOTE You may receive a message asking you to open one document in the MDI application before continuing. If you receive this message, press Alt+Tab and select your application. Then click File>New or File>Open and open a file into your application. Then press Alt+Tab to select the ILT Wizard and click Find Application again.

The Select an Application dialog box will reappear. Paint Shop Pro should be listed in the Application field.

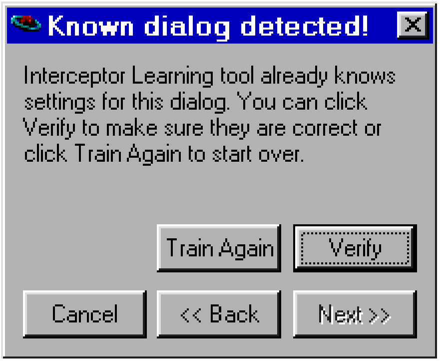
5. Confirm that the correct application is selected by clicking Verify. The ILT Wizard window will minimize, and the Paint Shop Pro window will be flashing. You will be asked if this is the correct application. Click Yes if the correct application is flashing.
6. From the Select an Application dialog box, click Next.
7. The Dialog Configuration screen will appear. From this dialog box, you will specify application dialog boxes and commands you want to configure for interception. File>Open and File>Save As are common commands to integrate with PowerDOCS, along with File>Import and File>Export. File>Open will be used in this example. Press Alt + Tab to select Paint Shop Pro. Click File>Open.
8. Press Alt + Tab again and select the Interceptor Learning Tool Wizard. “Open” should appear in the text field of the Dialog Configuration window. If it does not appear, click Find Dialog. The ILT Wizard will minimize, and a special cursor will appear. Click the Open dialog box. The ILT Wizard will reappear, and Open should be displaying in the text field.
9. You must confirm that the correct dialog box was selected by clicking Verify. You will be asked if the correct dialog box is flashing. Click Yes if this is correct. Click Next to continue. The Known Dialog detected window appears in the upper-right corner

of your screen, shown below. It will indicate if the dialog window you have configured is recognized by the Interceptor Learning Tool.

10. Click Verify to confirm that the correct command will be intercepted. The ILT Wizard will highlight the appropriate fields of the dialog box you configured. You will be asked if these fields are correct. If you agree, click Yes. Click Next to continue and proceed to step 12. If the fields are not correct, click No and proceed to step 11.

Figure 8.11

Known Dialog detected



11. If the dialog box is not known to the Interceptor Learning Tool, click Train Again. The Configure Dialog window will appear. You will be instructed to click in the File Name field of the dialog box you are attempting to configure.

    The next step is to click OK. Some applications do not have an OK button. In this case, the Open button represents the OK command.

    The last step is to click Cancel to return to the Dialog Configuration window. Click Verify from the Configure Dialog window. You will be asked if this is correct. Click Yes if you agree. Now click Next to continue.

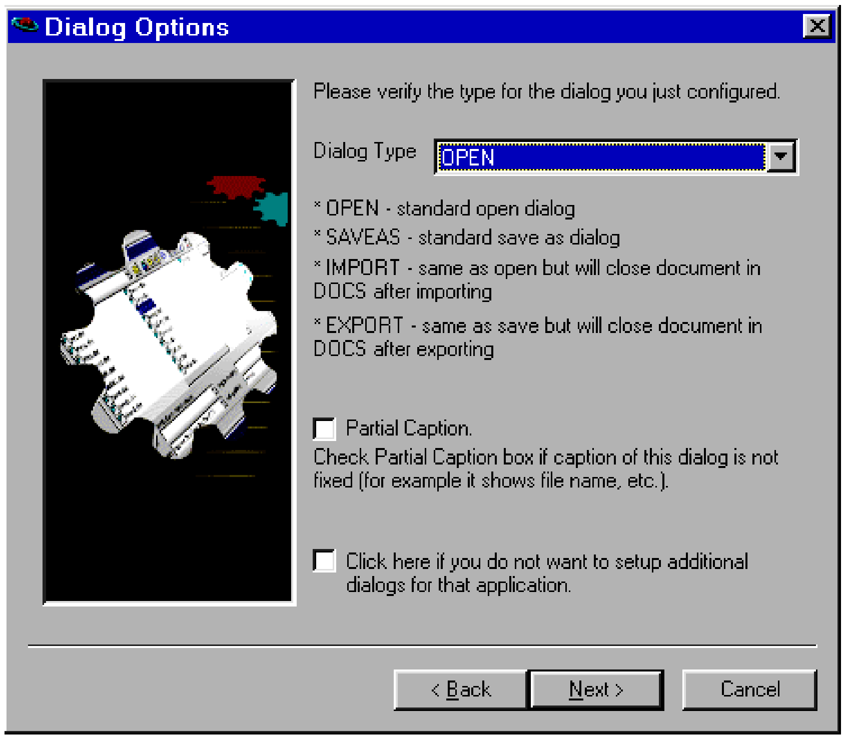
12. The Dialog Options screen appears. Make sure that the command you just configured is being displayed in the Dialog Type field. In

this case, the Open command should appear. If the caption of the dialog box is not fixed, for example, it may show a file name in addition to the dialog box title; click the Partial Caption check box.

If you do not want to set up additional dialog windows, click the second check box. If you will be configuring additional dialog boxes, leave this check box unmarked and click Next.

Figure 8.12

Dialog Options dialog box

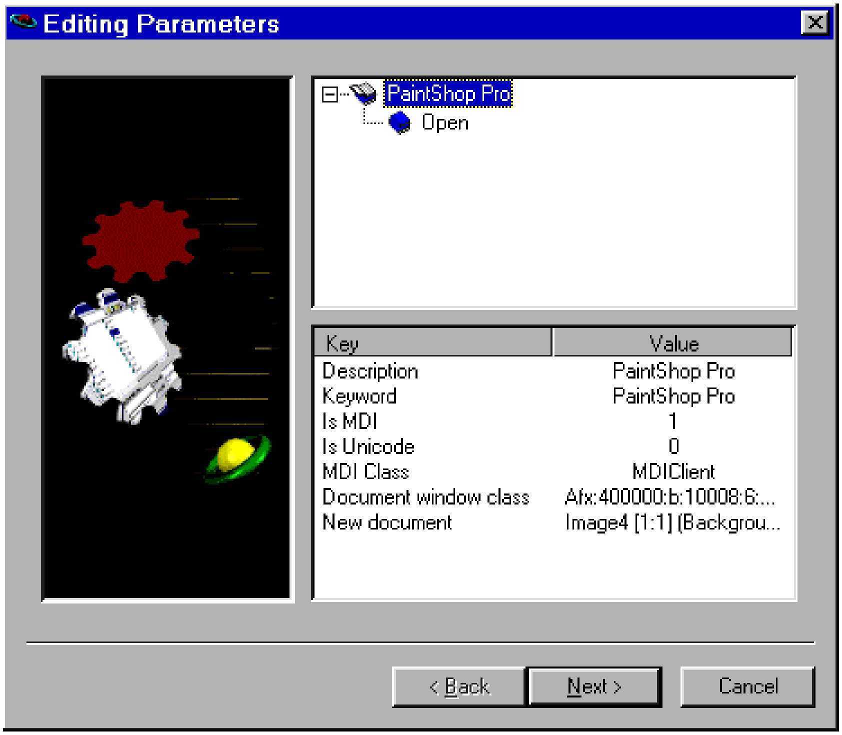


13. If you have finished integrating dialog boxes for this application, check the second check box and click Next.

14. An ILT Wizard message box will ask you if you want to view the application parameters that you just configured. Click Yes to view these. Otherwise, click No.

Figure 8.13

Editing Parameters dialog box



15. To edit any of the parameters, double-click the desired key. Edit the shown value and click OK. Click Next.

WARNING We strongly recommend that you not change the parameters that you configured through the ILT Wizard.

16. The final ILT Wizard dialog box appears, confirming that your application is configured. If you want to configure another application, click the check box at the bottom of this dialog box

and then click Next. If you do not want to configure another application, click Finish to close the ILT Wizard.

NOTE To use the new integrated application, you must enable the application. Refer to "Enabling the Newly Configured Application" on page 260. Close and restart PowerDOCS Interceptor before using this integrated application.

17. Close Paint Shop Pro.

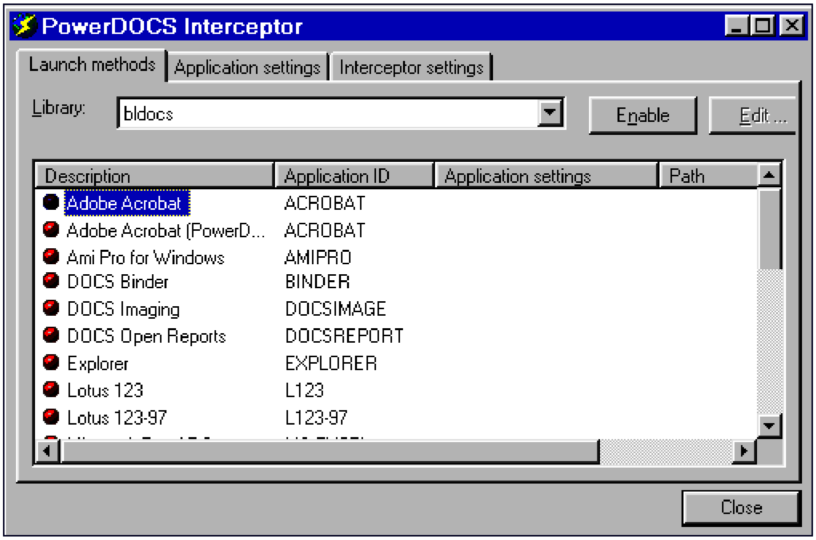
Enabling the Newly Configured Application

After the application has been configured with the Interceptor Learning Tool, you must enable it in Interceptor.

1. Launch the PowerDOCS Desktop and log in. The Interceptor icon will appear on the task bar.
2. Double-click the Interceptor icon. The application will open.

Figure 8.14

PowerDOCS Interceptor - Launch Methods dialog box

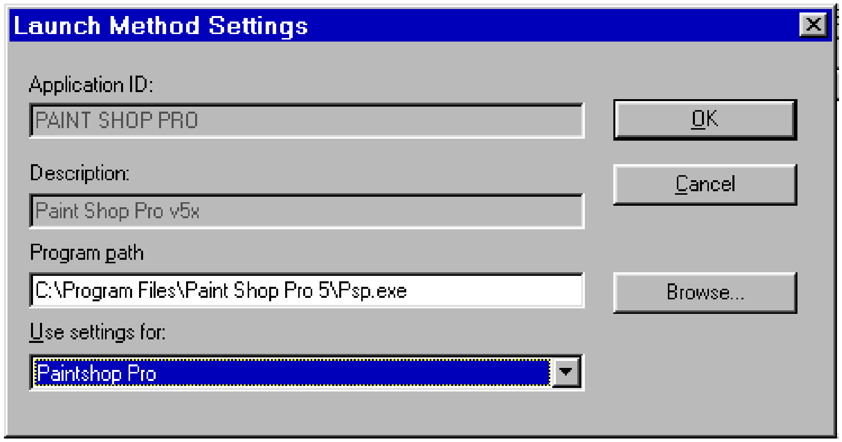


3. Using the scroll bar, locate the Paint Shop Pro launch method. Select the launch method. Click Enable. The Launch Method Setting dialog box will appear.

4. Verify that the correct path is displayed in the Program Path field and the correct Description is displayed in the field labeled Use Settings for.

Figure 8.15

Launch Method Settings dialog box



If necessary, Browse for the correct Program path.

5. Click OK. A green dot is then displayed next to the application, indicating that the application is set to be monitored by Interceptor.

6. Click Close.

7. To test the configuration, close the PowerDOCS Desktop by selecting File>Exit.

8. Restart your computer and launch the PowerDOCS Desktop.

9. Open Paint Shop Pro from the PowerDOCS Desktop. Select File>Open. The Quick Search dialog box will appear. Click Cancel.

Applications Integrated Using ODMA

ODMA is the Open Document Management API. ODMA provides applications with a consistent method to integrate seamlessly with clients from document management systems (DMS).

ODMA integration in PowerDOCS will cause a PowerDOCS Search Results list to be displayed each time a file needs to be selected and opened, and displays a Profile Form dialog box on the first instance a document is saved. Both the File>Save command and the File>Save As command display the Profile Form dialog box.

The tables below list the integrated menu options that display either a PowerDOCS Search Results list, a Document Profile, a Profile Form, or any other integrated menu option.

NOTE When PowerDOCS Passive Integration is installed, ODMA applications do not integrate using ODMA.

Table 8.16 Corel Presentations Integrated Menu Options

Presents the Search Results dialog box	Presents the Profile Form dialog box
File>Open	File>Save
Insert>File	File>Save As
Insert>Graphics>From File...	

NOTE Do not have items selected in your Presentations document when saving the document to PowerDOCS.

Table 8.17 Corel Quattro Pro Integrated Menu Options

Presents the Search Results dialog box	Presents the Profile Form dialog box
File>Open	File>Save
Insert>File	File>Save As
Insert>External Data>Import Database File	

Table 8.18 Corel WordPerfect Integrated Menu Options

Presents the Search Results dialog box	Presents the Profile Form dialog box
File>Open	File>Save
Insert>Spreadsheet>Import	File>Save As
Insert>File	
Insert>Graphics>From File	
Tools>Merge	

Additional Macro Enabled Commands

WordPerfect Footer Macro. Using this macro will automatically insert PowerDOCS profile information into the footer of a WordPerfect document.

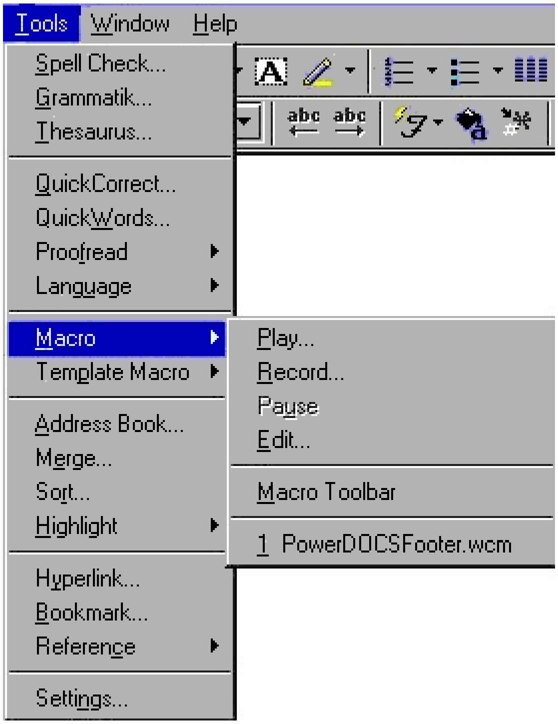
1. From the PowerDOCS Desktop, open WordPerfect. Create your document.
2. Select File>Save. Complete the Document Profile and select OK.

3. Select Tools>Macro>`PowerDOCSFooter.wcm`.

NOTE Your administrator should have added this macro to your WordPerfect document template. If the macro is not loaded on the Tools>Macro menu, contact your administrator for assistance in locating and loading the macro file.

Figure 8.19

WordPerfect Tools menu



4. Once the macro has successfully processed, a confirmation message will appear.

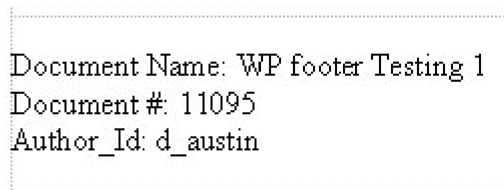
Figure 8.20

Macro Creation Successful message box

5. Scroll down to see the footer. It will show the Document Name, Document number, and Author ID.

Figure 8.21

WordPerfect PowerDOCS footer



NOTE Your PowerDOCS administrator can modify this macro to include additional document information.

Performing a Merge in Corel WordPerfect

There are three main steps, outlined below, to performing Merge in integrated Corel WordPerfect:

1. Creating and saving a Data File as a PowerDOCS document.
2. Creating and saving a Form File as a PowerDOCS document.
3. Performing a Merge.

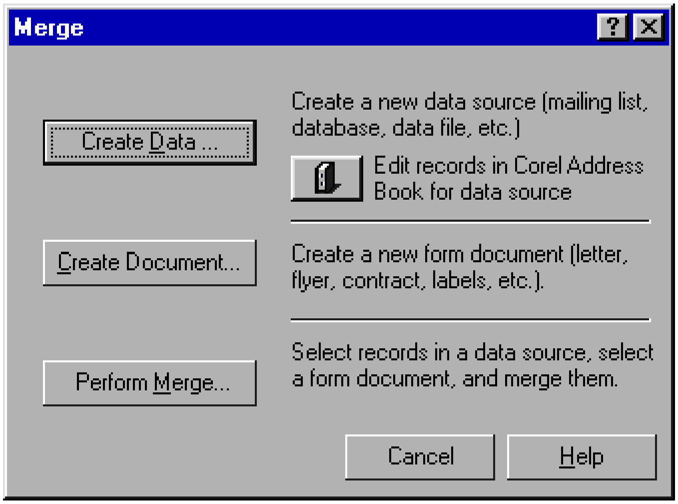
Modifying an Existing Data File is also explained below.

Creating a Data File

1. Launch WordPerfect from your PowerDOCS Desktop. A new WordPerfect document is displayed. Select Tools>Merge. The following dialog box is presented.

Figure 8.22

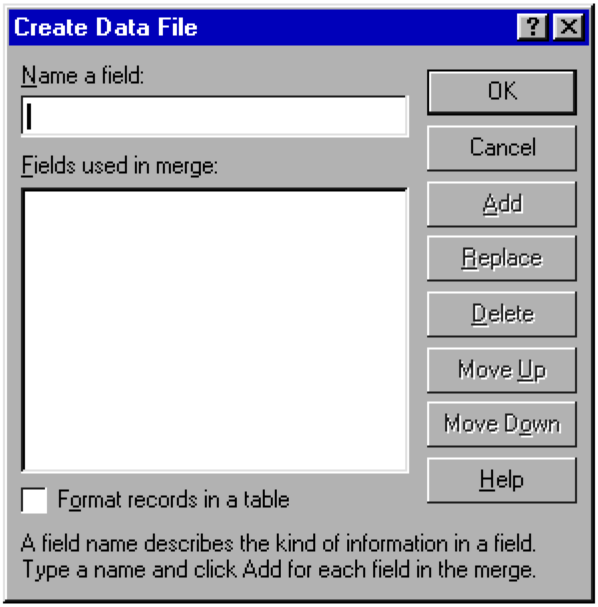
WordPerfect Merge dialog box



2. From the main Merge dialog box, select Create Data File. The Create Data file dialog box is presented.

Figure 8.23

Create Data File dialog box

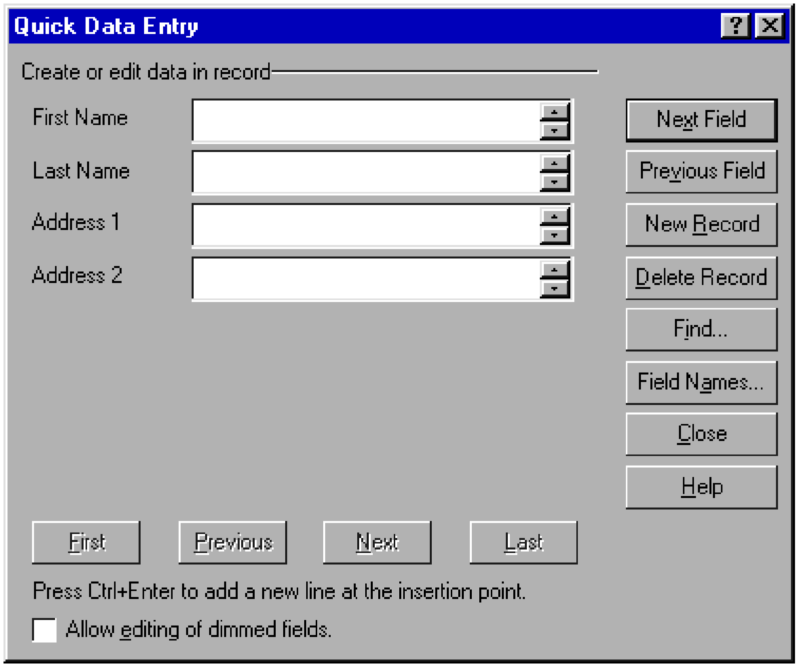


Create the fields you want to insert in your data file and click Add. When you have finished entering fields, click OK.

3. The Quick Data Entry dialog box is presented. Enter data for each field. Click New Record after each entry. Click Close when you have finished entering data.

Figure 8.24

Quick Data Entry dialog box



4. You are then asked if you want to save the changes to disk. Choose Yes and select the appropriate document format. A Document Profile dialog box is presented for you to complete. Click OK when you are finished.

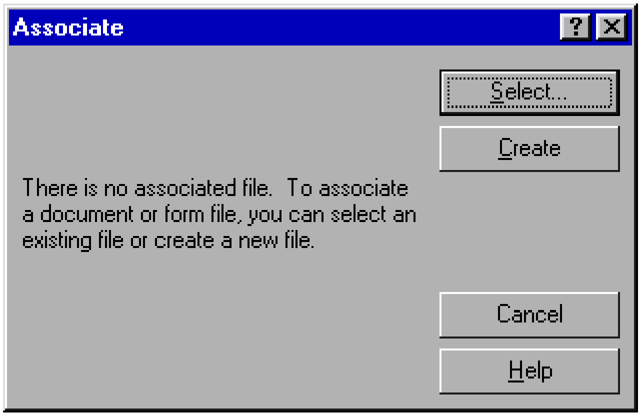
5. You are returned to WordPerfect to create your Form File.

Creating a Form File

1. From the Merge toolbar, select Go to Form. The Associate dialog box is displayed.

Figure 8.25

Associate dialog box



2. Select Create to create a form to merge with your data file, or select an existing Form file. If you select an existing Form file, you will receive a Search Results dialog box. If you select Create, a New Document dialog box is displayed with the Merge toolbar present.

3. As you create your form, click Insert Field from the Merge toolbar. Select the desired merge field and click Insert.

4. Click Close when you have completed your Form file.

5. Select File>Save once you have completed your Form file. A Document Profile dialog box is presented. Complete the profile and click OK.

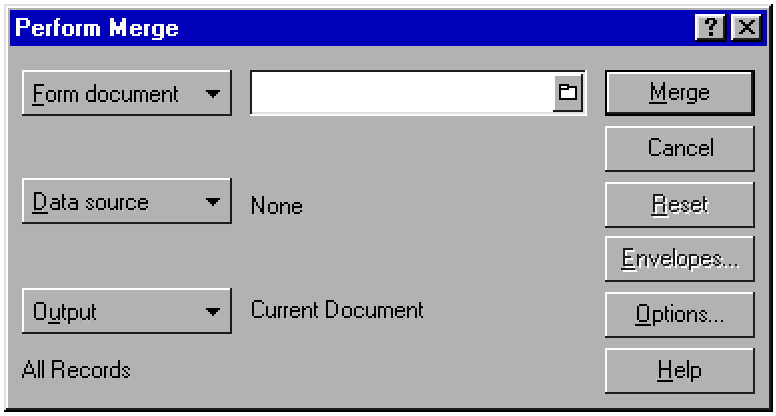
6. Select File>Close to close your Form file and Data file when you are done.

Performing a Merge

1. Select Tools>Merge. From the Merge dialog box, select Perform Merge. The dialog box below is presented.

Figure 8.26

Perform Merge dialog box



To select your Form document, Data source, and Output file, click each option box and select File on Disk.

2. A Search Results dialog box is presented. After you have selected the appropriate documents, you are returned to the Perform Merge dialog box. Select Current Document for your Output document.

3. Click Merge.

4. When your Merge is complete, your output is displayed in the current document window. You can profile your document to PowerDOCS by selecting File>Save.

Modifying an Existing Data File

1. To modify an existing Data Source, launch WordPerfect from the PowerDOCS Desktop and select File>Open. A Search Results dialog box is displayed.
2. Select the data source you want to modify and click OK.
3. In WordPerfect, select Quick Data Entry from the Merge toolbar. A list of available fields is displayed. To add a new record, click New Record and type in the new data in the available fields.
4. To delete a record, click First, Previous, Next, or Last to locate the record you want to delete and click Delete Record.
5. Select Close when you have finished adding or deleting records in your data file. You are then returned to the modified data file. You can select File>Save to save the revisions to PowerDOCS.

Table 8.27 Microsoft PowerPoint Integrated Menu Options

Presents the Search Results dialog box	Presents the Document Profile	Presents the Profile Form dialog box
File>Open	File>Properties	File>Save
		File>Save As

Table 8.28 Microsoft Word Integrated Menu Options

Presents the Search Results dialog box	Presents the Document Profile	Presents the Profile Form dialog box
File>Open	File>Properties	File>Save
		File>Save As

Additional Macro-Enabled Commands

If you installed the PowerDOCSFooter.dot macro integration template, you will have the following commands integrated with Word.

NOTE For more information on installing the macro integration for Word, refer to Appendix A of the *PowerDOCS Installation Guide*.

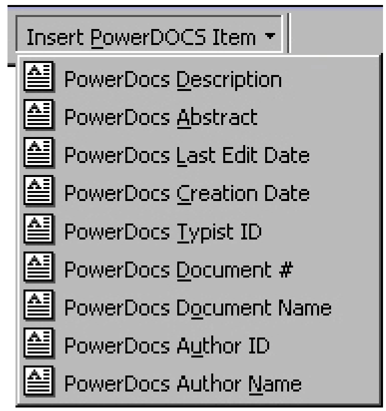
- **Insert>PowerDOCS File.** This option enables you to insert a file that has been profiled in PowerDOCS.
- **Insert>PowerDOCS Picture.** This option enables you to insert a graphic file that has been profiled in PowerDOCS.
- **Insert>PowerDOCS Footer.** This option creates a footer for a profiled document in the active document window, populated with information from the Document Profile: Document Name, Document #, and Author_ID. Selecting Insert>PowerDOCS Footer a subsequent time in the same document will replace the previous footer information.

  Once the footer is inserted into the document, it can be edited in the normal fashion by selecting View>Header and Footer. Additional PowerDOCS document information can be inserted in the header or the footer. On the Header and Footer toolbar, click the Insert PowerDOCS Item button. Click to select the

PowerDOCS item you would like inserted in the header or the footer.

Figure 8.29

Insert PowerDOCS Item menu



- **File>Save with Options.** This option allows you to password protect access to the document either by restricting access to the document itself or to the ability to modify and save the document. In addition, the ability to mark a document as read only is allowed.

1. Create and profile a new document or open an existing document from the PowerDOCS Desktop.

2. Select File>Save With Options.

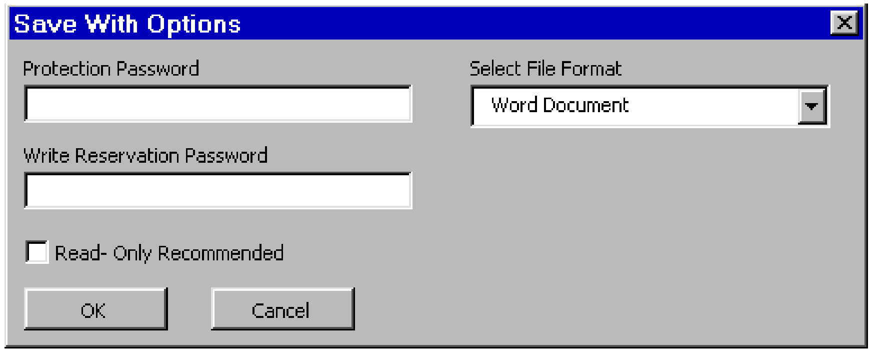
Figure 8.30

File>Save With Options menu item

3. The Save with Options dialog box will be presented.

Figure 8.31

Save With Options dialog box

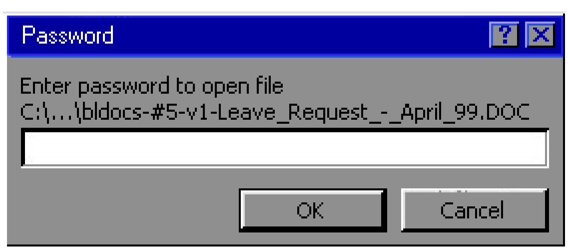


- To completely protect the document, enter a password in the Protection Password field. Select File Format and click OK.
- To protect the ability to modify the document, enter a password in the Write Reservation Password field. Select File Format and click OK.
- To make the document Read Only, select the Read Only Recommended check box. Select File Format and click OK.

When you or another user attempts to access this document, a password dialog box will present itself. Enter the password and click OK.

Figure 8.32

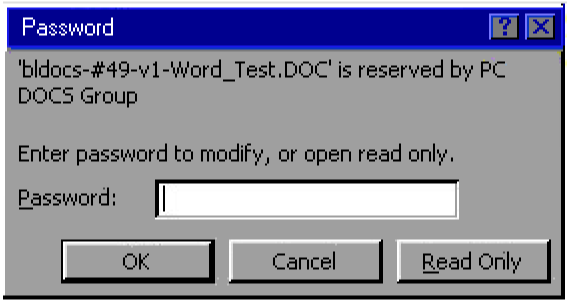
Protection Password dialog box



For documents saved with write protection, the user has the option to enter a password or open the document as Read Only.

Figure 8.33

Write Reservation Password dialog box



A document saved as Read Only will not require a password. Documents opened with Read Only status can be modified, but changes can only be saved to new documents or versions.

- **Tools**>**PowerDOCS Mail Merge.** This option, used in conjunction with the Tools>Mail Merge command, enables you to create a main document (the document containing the merge fields) and data source (a table of orderly information that you want to merge into your main document). See "Performing a Mail Merge in Microsoft Word" below for instructions on merging PowerDOCS documents.

Performing a Mail Merge in Microsoft Word

Performing a mail merge in Word involves four steps:

1. Creating the main document.
2. Creating a data source.
3. Editing the main document.
4. Performing the merge.

These steps are expanded in the following pages.

If you have already created the main document and data source and saved them as PowerDOCS documents, see "Step 4: Performing the Merge" for instructions.

If your document server uses DOCS Open Document Sentry Agent (DSA), see "Merging Word Files in the DSA Environment" for special instructions.

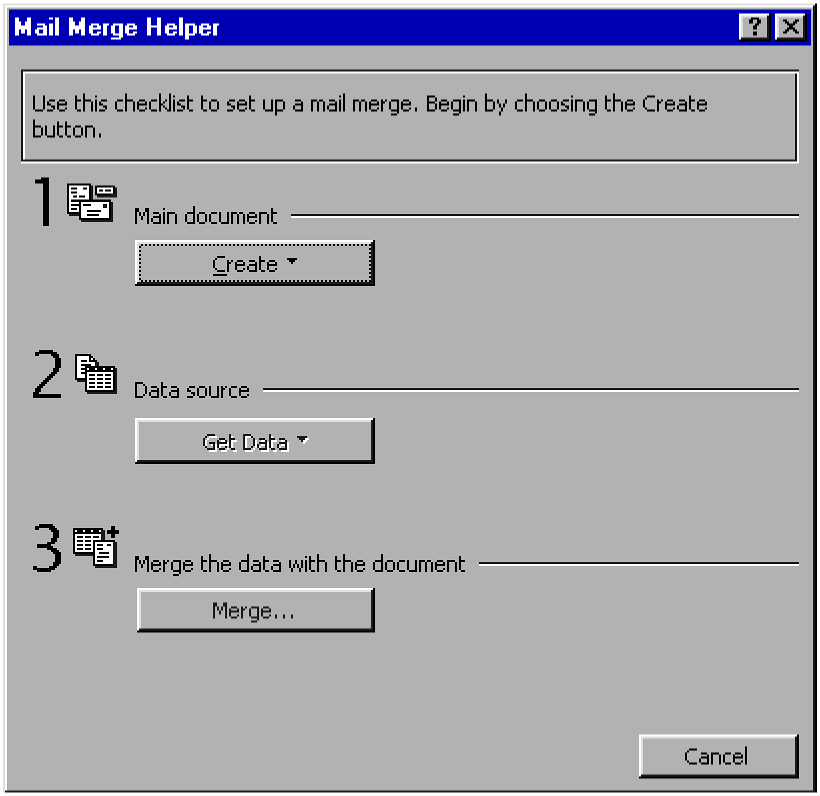
Step 1: Creating the Main Document

1. Start Word. From the menu bar, select File>New to create a new Word document.

2. Select Tools>Mail Merge to invoke Mail Merge Helper.

Figure 8.34

Word Mail Merge Helper dialog box



3. Under Main Document, click Create. Choose one of the following options:

- Form Letters
- Mailing Labels
- Envelopes
- Catalog

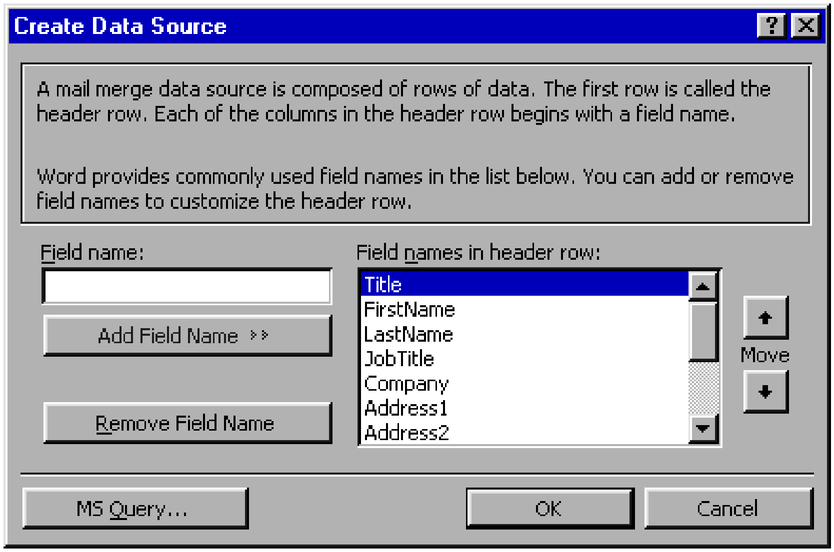
4. When Word asks whether to create the main document using the Active Window or a New Main Document, click Active Window.

Step 2: Creating the Data Source

1. Under Data Source, click Get Data>Create Data Source.

Figure 8.35

Word Create Data Source dialog box



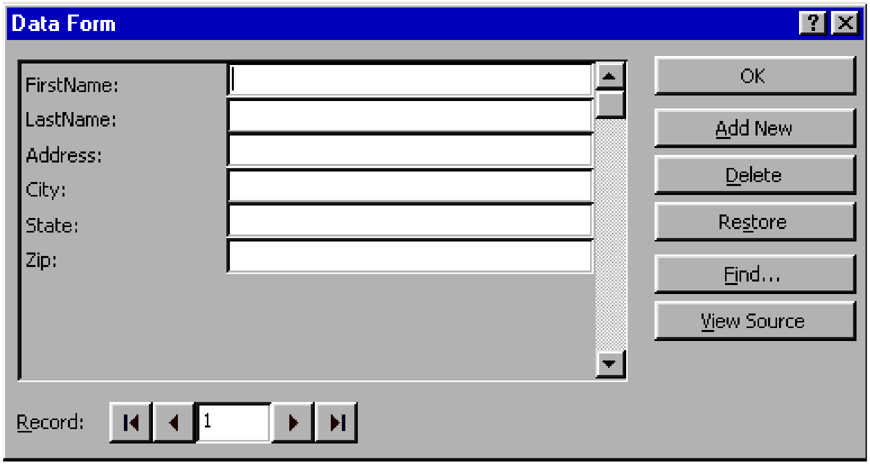
2. Specify the fields you want included in the data source. When you have selected the fields, click OK.

3. In the Save As dialog box, type a file name for the data source and click Save to save the file outside PowerDOCS. Instructions for profiling the data source are outlined below.

4. When Word asks whether to Edit Data Source or Edit Main Document, click Edit Data Source.

Figure 8.36

Word Data Form dialog box

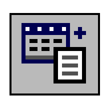


5. In the Data Form dialog box, click Add New to add each record you want to display in the merged document. Then click View Source to display the records in the data source.

6. With the data source displayed, click the Mail Merge Main Document button on the Merge toolbar.

Figure 8.37

Mail Merge Main Document icon



Step 3: Editing the Main Document

You should now have a main document and a data source open in Word.

1. Switch to the main document and click the Insert Merge Field button on the Merge toolbar to insert the merge fields into the main document.

2. Make any edits you want to the main document. Then select File>Save As to bring up a Document Profile dialog box. Complete the profile and click OK to return to Word.

3. Close the main document.

4. With the data source document active, click Save As to bring up a Document Profile dialog box. Complete the profile and click OK to return to Word.

5. Close the data source document.

Step 4: Performing the Merge

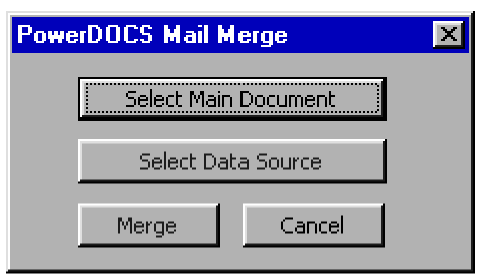
Now you are ready to merge the main document with the data source and output the results to a new document.

1. If the main document and the data source are open, close them both.

2. From the menu bar, select Tools>PowerDOCS Mail Merge. The PowerDOCS Mail Merge dialog box is displayed.

Figure 8.38

PowerDOCS Mail Merge dialog box



3. Click Select Main Document.

4. Select the main document from the Search Results <Recently Edited Documents> dialog box and click OK.

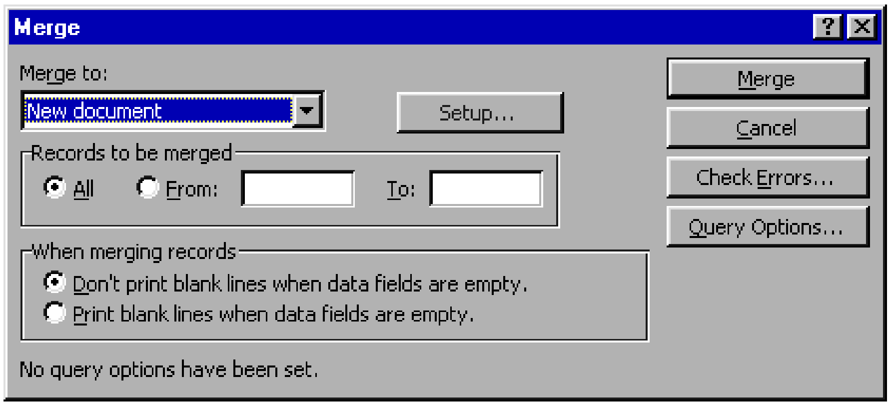
5. On the PowerDOCS Mail Merge dialog box, click Select Data Source.

6. Select the data source from the Search Results <Recently Edited Documents> dialog box and click OK.

7. On the PowerDOCS Mail Merge dialog box, click Merge.

Figure 8.39

Merge dialog box



8. Under Merge To, select New Document. Click Merge to start the merge process. The main document and data source are merged, and an output document is created. To save the new document to PowerDOCS, select File>Save from the menu bar.

Editing a Profiled Data Source

Once a data source has been profiled in PowerDOCS, any updates must be made during a normal edit session in Word, not via Mail Merge Helper. If you go through Mail Merge Helper, a new Document Profile dialog box will appear when you try to save the changes.

To update a profiled data source:

1. From the menu bar, select File>Open. Highlight the data source document and click OK to open it.

2. Make the changes. Then select File>Save to save the changes and close the document.

Merging Word Files in the DSA Environment

If the document server where the Word files are stored uses PowerDOCS Document Sentry Agent (DSA) file security, you must open the data source before you open the main document. The reason for this is that the DSA prevents the opening of files from outside of PowerDOCS. Once a main document and a data source have been created, the main document contains a link to the data source. If you open the main document first, Word then tries to open the linked data-source file. Since this File>Open attempt occurs outside of PowerDOCS, the DSA prevents the opening of the data source.

Using Passive Integration with Microsoft Word, Excel, Project 98, and Acrobat 4.0x

PowerDOCS now allows you to control integration when working within Word, Excel, Project 98, and Acrobat 4.0x. Passive Integration is a new integration method that allows you to profile Word, Excel, Project 98, and Acrobat 4.0x documents in PowerDOCS, or bypass PowerDOCS and save documents to their native application.

NOTE Passive Integration is available if you chose to install the module when you installed PowerDOCS on your workstation. If you did not install this option at that time, you can run the installation again and select Passive Integration. If you have questions about this, contact your PowerDOCS administrator.

There may be occasions when a document does not need to be profiled in PowerDOCS, and Passive Integration solves this problem. For example, you may need to create a one-time use document, such as an event sign-up sheet or fax cover sheet.

Passive Integration with Word

Passive Integration installs a DOCS menu, between the File and Edit menus. Using the DOCS menu, you can:

- Open documents that have been profiled in PowerDOCS.
- Save and profile new documents.

- Insert profiled documents and objects into the current document.

Figure 8.40

DOCS menu

There are three DOCS menu choices:

- DOCS>Open
- DOCS> Save As
- DOCS> Insert

Detailed instructions on using each option are shown below.

Opening a DOCS File

1. Open Microsoft Word . Select DOCS>Open. The PowerDOCS Search Results dialog box appears.

NOTE It may be necessary to log in to PowerDOCS.

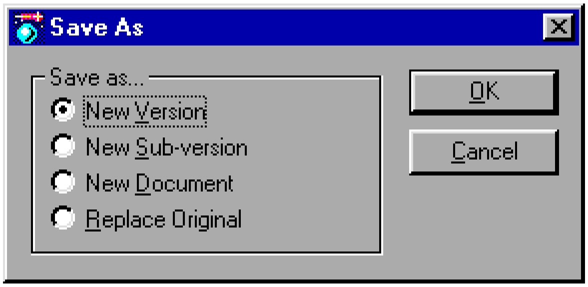
2. Select the appropriate document and click OK. The Version dialog box will appear.
3. Select the correct document version and click OK.

Saving a DOCS File

1. Select DOCS>Save As.
2. If the document has never been profiled, the Document Profile will appear. Complete the profile as outlined in "Profiling Documents in PowerDOCS", located in Chapter 3.
3. If the document was profiled in a previous PowerDOCS session, the Save As dialog box will appear.
4. Select the appropriate option button and click OK.

Figure 8.41

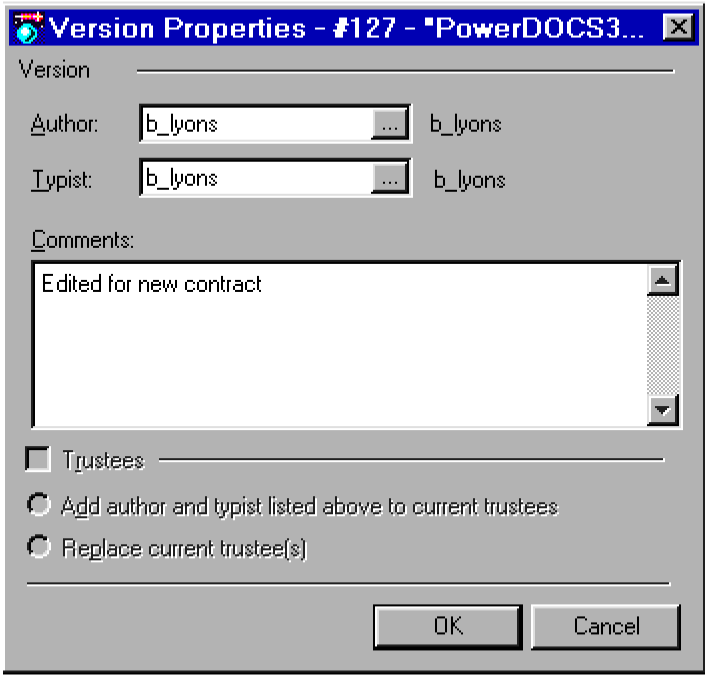
Save As dialog box



5. If you select New Version or New Sub-version, the Version Properties dialog box will appear. Complete the Comments and click OK.

Figure 8.42

Version Properties dialog box



Note For additional information about versions, refer to Chapter 4, "Working with Document Versions."

6. Selecting New Document will cause the Document Profile dialog box to appear. Complete the profile and click OK.
7. Selecting Replace Original will save the document, using its current version and profile information.

It is possible to save a PowerDOCS document using the Microsoft Word native dialog box.

1. Select File>Save As. The Save As dialog box will appear.

2. Select the appropriate directory and modify the file name if desired.

3. Click Save.

NOTE Saving a PowerDOCS profiled document using Microsoft Word native commands will release the document from PowerDOCS. Edits made to the document will not be reflected in the profiled document stored in the PowerDOCS database.

Inserting a DOCS File or Object

1. Select DOCS>Insert.

2. Select the appropriate document and click OK. The Version dialog box will appear.

3. Select the correct document version and click OK.

Saving and Opening Word Files Using Native Dialog Boxes

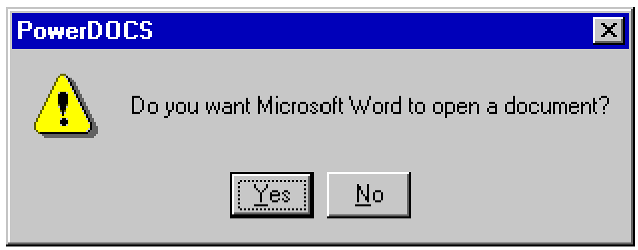
To save or open a Word file natively when Passive Integration is on:

1. Select DOCS>Save As or DOCS>Open. The Document Profile, Save As, or Quick Retrieve dialog box appears.

2. Press ESC. A message window appears, asking if you want to select the native system dialog box.

Figure 8.43

PowerDOCS native Save As and Open message boxes



3. Select Yes. The native Save As or Open dialog box appears.
4. If saving the document, modify the file name and select the appropriate directory into which the file should be saved. Click Save.
5. If opening a document, locate the desired document and click Open.

Passive Integration with Excel

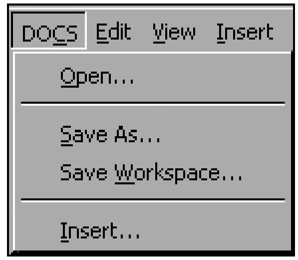
Passive Integration installs the DOCS menu between the File and Edit menus. Using the DOCS menu, you can:

- Open documents that have been profiled in PowerDOCS.
- Save and profile new documents.
- Save an open workspace.

- Insert profiled documents and objects into the current document.

Figure 8.44

DOCS Excel menu



There are four DOCS menu choices:

- DOCS>Open
- DOCS> Save As
- DOCS>Save Workspace
- DOCS> Insert

Detailed instructions on using each option are shown below.

Opening a DOCS File

1. Open Microsoft Excel. Select DOCS>Open. The PowerDOCS Search Results dialog box appears.

NOTE It may be necessary to log in to PowerDOCS.

2. Select the appropriate document and click OK. The Version dialog box will appear.
3. Select the correct document version and click OK.

Saving a DOCS File

1. Select DOCS>Save As.

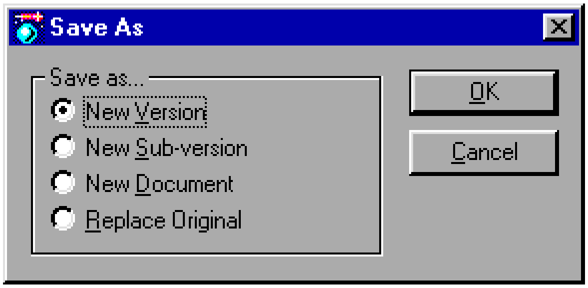
2. If the document has never been profiled, the Document Profile will appear. Complete the profile as outlined in "Profiling Documents in PowerDOCS", located in Chapter 3.

3. If the document was profiled in a previous PowerDOCS session, the Save As dialog box will appear.

4. Select the appropriate option button and click OK.

Figure 8.45

Save As Dialog Box



5. If you select New Version or New Sub-version, the Version Properties dialog box will appear. Complete the Comments and click OK.

NOTE For additional information about versions, refer to Chapter 4, "Working with Document Versions."

6. Selecting New Document will cause the Document Profile dialog box to appear. Complete the profile and click OK.

7. Selecting Replace Original will save the document, using its current version and profile information.

It is possible to save a PowerDOCS document using the Microsoft Excel native dialog box.

1. Select File>Save As. The Save As dialog box will appear.

2. Select the appropriate directory and modify the file name if desired.

3. Click Save.

NOTE Saving a PowerDOCS profiled document using Microsoft Excel native commands will release the document from PowerDOCS. Edits made to the document will not be reflected in the profiled document stored in the PowerDOCS database.

Inserting a DOCS File or Object

1. Select DOCS>Insert.

2. Select the appropriate document and click OK. The Version dialog box will appear.

3. Select the correct document version and click OK.

Saving a Workspace

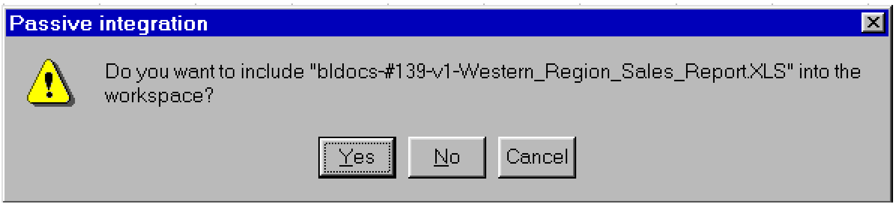
1. Using the DOCS>Open command, open the workbooks you want to include in the workspace. If the workbooks have not been created, create them at this time.

2. Select DOCS>Save Workspace.

3. Each workbook will be saved separately, and you will be required to verify its inclusion in the workspace. Click Yes to include the file.

Figure 8.46

Save Workspace dialog box



4. After the workbook documents have been transferred to PowerDOCS, the Document Profile dialog box will appear. Enter the profile for the workspace. Click OK.

Saving and Opening Excel Files Using Native Dialog Boxes

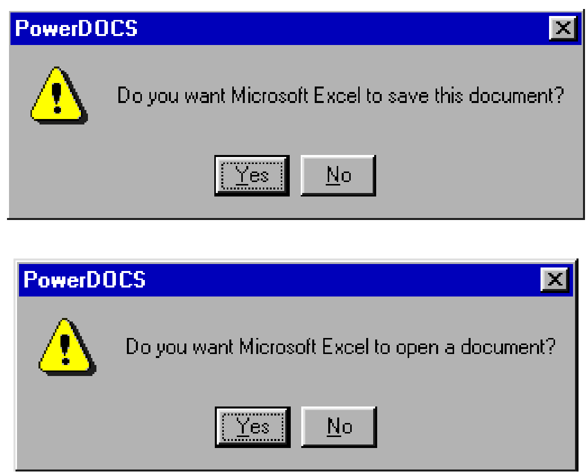
To save or open an Excel file natively when Passive Integration is on:

1. Select DOCS>Save As or DOCS>Open. The Document Profile, Save As or Quick Retrieve dialog box appears.

2. Press ESC. A message window appears, asking if you want to select the native system dialog box.

Figure 8.47

PowerDOCS native Save As and Open message boxes



3. Select Yes. The native Save As or Open dialog box appears.

4. If saving the document, modify the file name and select the appropriate directory into which the file should be saved. Click Save.

   If opening a document, locate the desired document and click Open.

Inserting a DOCS File or Object

1. Select DOCS>Insert.
2. Select the appropriate document and click OK. The Version dialog box will appear.
3. Select the correct document version and click OK.

Passive Integration with Microsoft Project 98

Passive Integration installs the DOCS menu between the File and Edit menus. Using the DOCS menu, you can:

- Open documents that have been profiled in PowerDOCS.
- Save and profile new documents.

Figure 8.48

DOCS Project menu

There are two DOCS menu choices:

- DOCS>Open
- DOCS> Save As

Detailed instructions on using each option are shown below.

Opening a DOCS File

1. Open Microsoft Project 98. Select DOCS>Open. The PowerDOCS Search Results dialog box appears.

NOTE It may be necessary to log in to PowerDOCS.

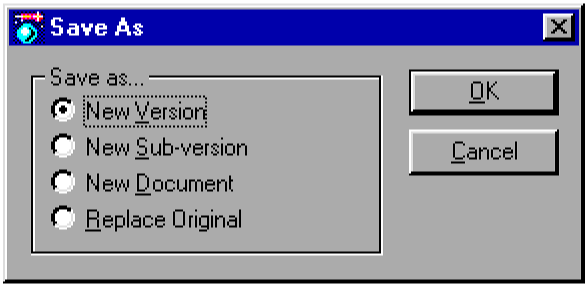
2. Select the appropriate document and click OK. The Version dialog box will appear.
3. Select the correct document version and click OK.

Saving a DOCS File

1. Select DOCS>Save As.
2. If the document has never been profiled, the Document Profile dialog box will appear. Complete the profile and click OK.
3. If the document was profiled in a previous PowerDOCS session, the Save As dialog box will appear.
4. Select the appropriate option button and click OK.

Figure 8.49

Save As dialog box

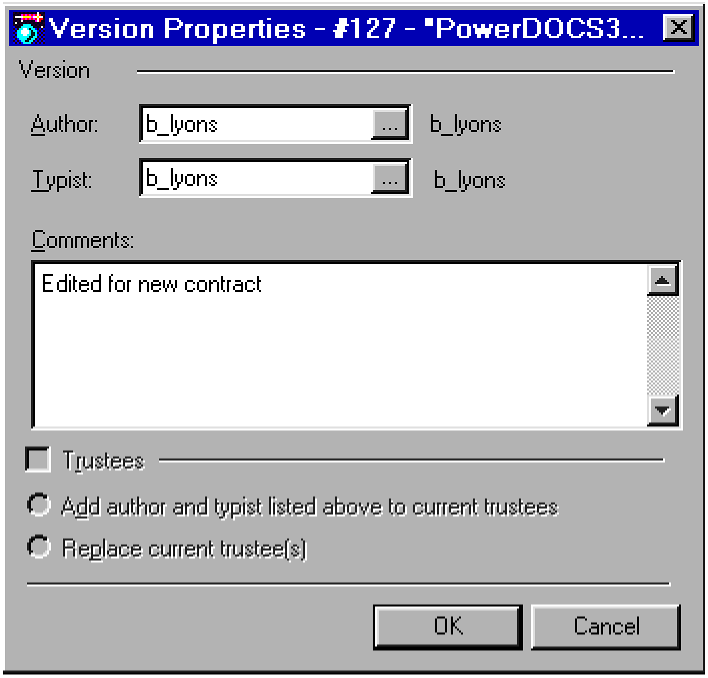


NOTE For additional information about versions, please refer to Chapter 4, "Working with Document Versions."

5. If you select New Version or New Sub-version, the Version Properties dialog box will appear. Complete the Comments and click OK.

Figure 8.50

Version Properties dialog box



6. Selecting New Document will present the Document Profile dialog box. Complete the profile and click OK.

7. Selecting Replace Original will save the document, using its current version and profile information.

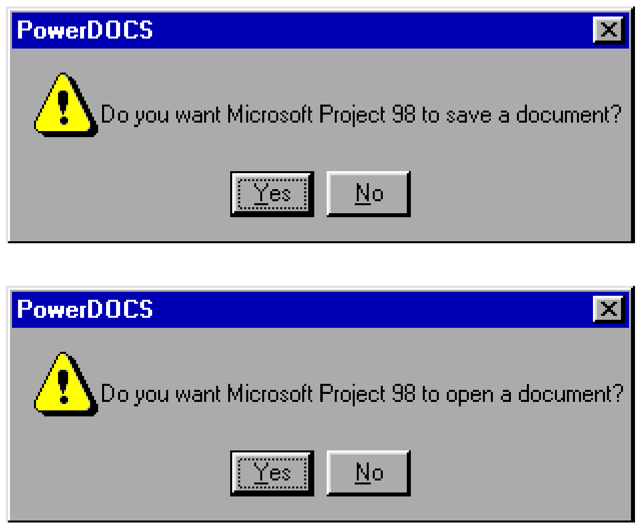
Saving and Opening Files Using Native Dialog Boxes

To save or open a Project file natively when Passive Integration is on:

1. Select DOCS>Save As or DOCS>Open. The Document Profile, Save As, or Quick Retrieve dialog box appears.
2. Press ESC. A message window appears, asking if you want to select the native system dialog box.

Figure 8.51

PowerDOCS native Save As and Open message boxes



3. Select Yes. The native Save As or Open dialog box appears.
4. If saving the document, modify the file name and select the appropriate directory into which the file should be saved. Click Save.
5. If opening a document, locate the desired document and click Open.

Passive Integration with Acrobat 4.0

Passive Integration installs the DOCS menu between the File and Edit menus. Using the DOCS menu, you can:

- Open documents that have been profiled in PowerDOCS.
- Save and profile new documents.

Figure 8.52

DOCS Project menu

There are two DOCS menu choices:

- DOCS>Open
- DOCS> Save As

Detailed instructions on using each option are shown below.

Opening a DOCS File

1. Open Adobe Acrobat 4.0. Select DOCS>Open. The PowerDOCS Search Results dialog box appears.

NOTE It may be necessary to log in to PowerDOCS.

2. Select the appropriate document and click OK. The Version dialog box will appear.
3. Select the correct document version and click OK.

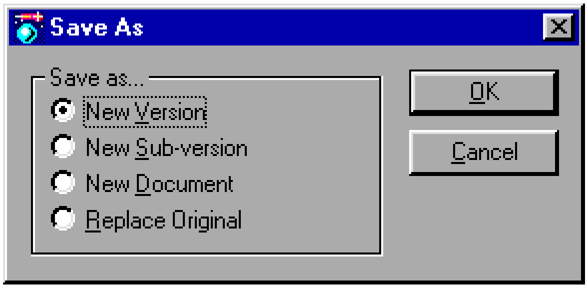
Saving a DOCS File

1. Select DOCS>Save As.
2. If the document has never been profiled, the Document Profile dialog box will appear. Complete the profile and click OK.
3. If the document was profiled in a previous PowerDOCS session, the Save As dialog box will appear.

Select the appropriate option button and click OK.

Figure 8.53

Save As dialog box



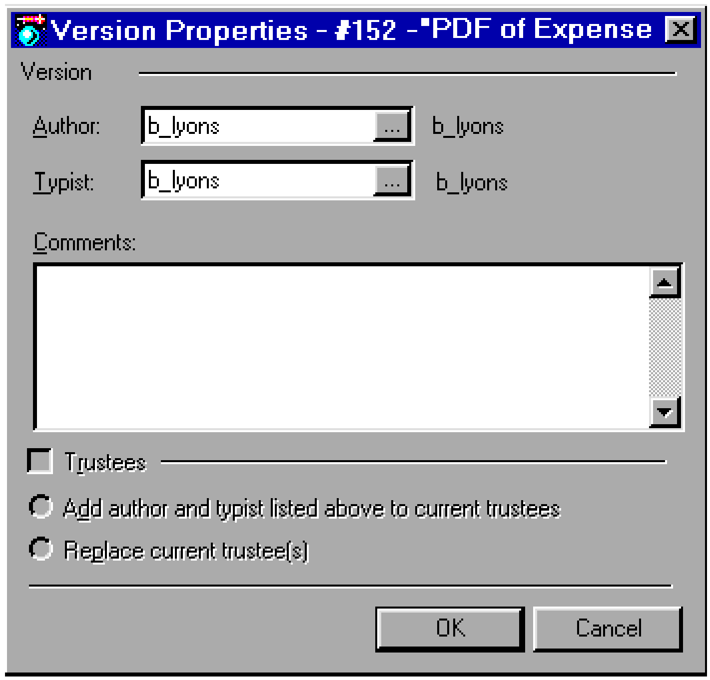
NOTE For additional information about versions, please refer to Chapter 4, "Working with Document Versions."

4. If you select New Version or New Sub-version, the Version Properties dialog box will appear.

Complete the Comments and click OK.

Figure 8.54

Version Properties dialog box



5. Selecting New Document will present the Document Profile dialog box. Complete the profile and click OK.

6. Selecting Replace Original will save the document, using its current version and profile information.

Saving and Opening Files Using Native Dialog Boxes

To save or open an Acrobat file natively when Passive Integration is on:

1. Select DOCS>Save As or DOCS>Open. The Document Profile, Save As, or Quick Retrieve dialog box appears.

2. Press ESC. A message window appears, asking if you want to select the native system dialog box.

Figure 8.55

PowerDOCS native Save As and Open message boxes

3. Select Yes. The native Save As or Open dialog box appears.

4. If saving the document, modify the file name and select the appropriate directory into which the file should be saved. Click Save.

5. If opening a document, locate the desired document and click Open.

Using Compatible Applications

A compatible application is an application that manipulates documents created by another application. For example, if the Application field on the Document Profile is WordPerfect, then a compatible application might be a grammar checker or redlining application. The compatible applications tested for use with PowerDOCS are:

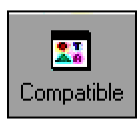
- CiteRite 7.1.1
- CompareRite 7.1.1
- Full Authority 7.1.1

To run a compatible application against one of your documents:

1. Launch PowerDOCS and log in. Select a document from the Recently Edited Documents list or use the Search feature to locate the desired document. Select Document>Compatible Applications. This option may be set up as a button on the button bar. In this case, click the appropriate button.

Figure 8.56

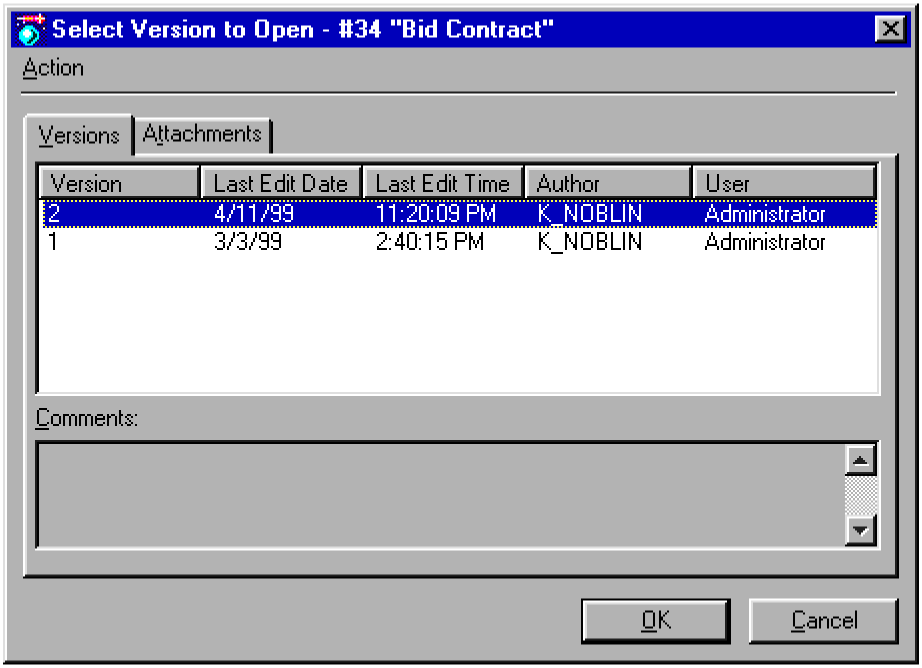
Open Compatible Applications button



2. Select the appropriate document version and click OK.

Figure 8.57

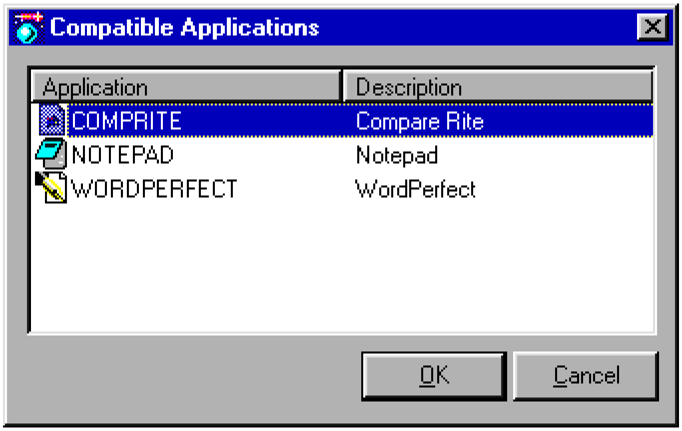
Version dialog box



3. The Compatible Applications dialog box is displayed. Select the application you want to run and click OK.

Figure 8.58

Compatible Applications dialog box



NOTE Your PowerDOCS administrator may have set up different launch methods for the application. If so, you will be asked to select a method. Check with your PowerDOCS administrator for details about the launch methods that have been preset for you.

4. The application is then started and the selected document opened.

NOTE If you launch a redlining application, you will be asked which document or version should be compared to the document you just opened. Select another document or version and click OK.

The document's History will reflect the session as an edit session. Any printed pages will be entered as an Access session. Essentially, launching a compatible application is identical to retrieving the document with an alternate application.

Since the Compatible Applications feature preferences and option sets are site specific, your PowerDOCS administrator must give you information on which applications are available to you and how to run them.

Other Uses for Compatible Applications

When a document created in one integrated application can be opened in another integrated application, they are also referred to as Compatible Applications. For example, if you choose File>Open in WordPerfect and select a Microsoft Word document from the Search Results dialog box, PowerDOCS will display the following dialog box:

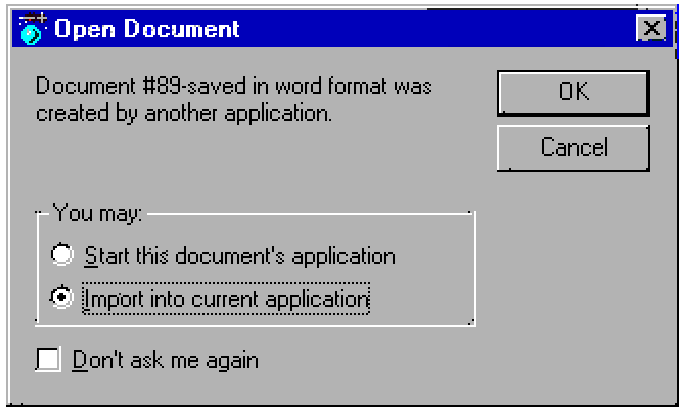


Figure 8.59

Open Document dialog box

Click the appropriate option button and click OK. If you open several documents at a time and need to set a default for this document session, select the 'Don't ask me again' check box.

NOTE If you choose Import into the current application, the Document Profile will be updated to reflect the new Application ID when you save the document.

CiteRite 7.1.1

CiteRite 7.1.1 is a program that uses Harvard Bluebook or California citation format as a standard against which a working document is checked for proper format. The program checks the working document, then lists any citations it finds with improper format in a separate report file. When used with PowerDOCS, the output report can be saved as a version of the original document.

To use CiteRite:

1. Select a document from the Search Results dialog box or from a document listing.

2. Select Document>Compatible Applications.
3. Select the version and click OK. The Compatible Applications dialog box will appear.
4. Select CITERITE and click OK.
5. If required, select the Launch Method and click OK.
6. CiteRite is launched. Press Enter or click OK to begin the checking process.

You are returned to the Search Results dialog box and can select the document from the Recently Edited Documents list or view the version created by CiteRite.

Note CiteRite 7.1.1 saves the output file in RTF (Rich Text Format), which is compatible with most word processing applications.

CiteRite 7.1.1 can only compare an original version of a document. Do not attempt to use CiteRite on the result of a previous execution of CiteRite.

CompareRite 7.1.1

CompareRite is a program for document comparison and redlining. CompareRite can be used to compare two versions of a document, or two documents prepared by the same or different applications, and mark all deletions, insertions, moved text, and replaced text. The differences are reported in a composite file. In PowerDOCS, the composite file can be saved as a version or saved as an attachment.

To use CompareRite:

1. Select a document from the Search Results dialog box or from a document listing.
2. Select Document>Compatible Applications.
3. Select the version and click OK. The Compatible Applications dialog box will appear.
4. Select COMPRITE and click OK.

5. Select the Launch Method based on the output you want: Save Output as Version or Save Output as Attachment.
6. At the Compare To Document prompt, click the ellipsis (table lookup) button and select another document from the Search Results dialog box. Another version of the first document can also be selected.
7. The CompareRite window appears. Verify that the option set and files are correct, then click Compare. When the comparison is complete, click Exit.
8. Depending on which Launch Method was chosen, PowerDOCS will create a new version to the original document or create an attachment to the original document.

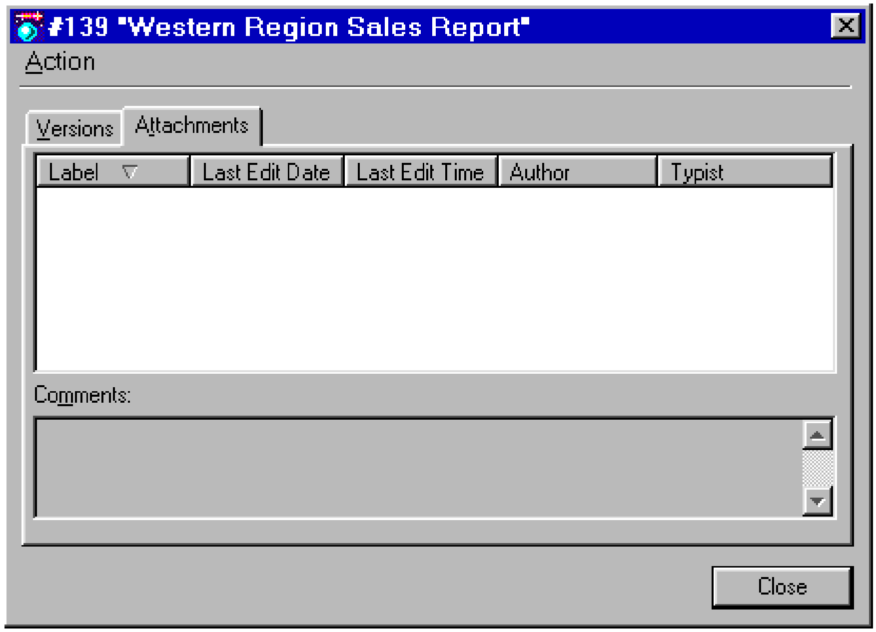
When you select to Output as Attachment, PowerDOCS associates the Attachment file with the original document you opened. To view this attachment, perform the following steps.

1. Select the document you just compared and select Document>Versions and Attachments. The Versions and Attachments window will appear.

2. Click the Attachments tab.

Figure 8.60

Attachments tab, Versions and Attachments window



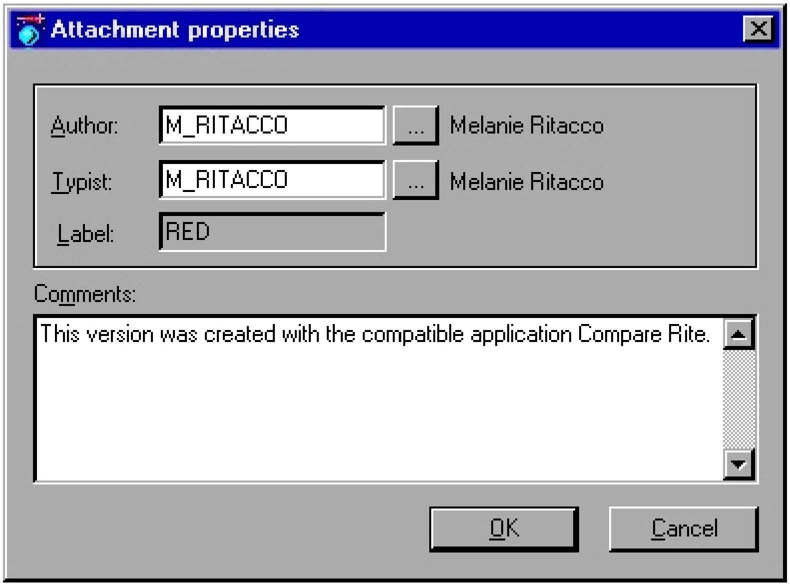
3. Select the desired attachment. From the Action menu, you can select the following commands:

- **Open.** Selecting this command will open the document. The Versions window will appear. Select the desired document version and click OK.
- **View.** Selecting this command will allow you to preview the document. The Versions window will appear. Select the desired document version and click OK. Select File>Close to close the Preview window.
- **Delete.** This feature is currently unavailable.
- **Attachment Properties.** This opens the Attachment properties window. The window displays the Author, Typist, Label, and any associated Comments. You can edit the comments. Click OK to

close the window.

Figure 8.61

Attachment Properties window



4. To close the Versions and Attachments window, click Close.

Full Authority 7.1.1

Full Authority 7.1.1 for Windows is a program that automatically reads any brief or legal document; locates, alphabetizes, organizes, and edits each citation; corrects common citation errors; and produces a fully formatted draft table of authorities. When used with PowerDOCS, the output report can be saved as a version of the original document.

To use Full Authority:

1. Select a document from the Search Results dialog box or from a document listing.
2. Select Document>Compatible Applications.
3. Select the version and click OK. The Compatible Applications dialog box will appear.
4. Select FAWIN.

5. If required, select the Launch Method and click OK.
6. Full Authority is launched. Press Enter or click OK to begin the table of authorities process.
7. As the table of authorities output file is being created, a status window is displayed.
8. You are returned to the Search Results dialog box and can select the version created by Full Authority.

NOTE Full Authority 7.1.1 saves the output file in RTF (Rich Text Format), which is compatible with most word processing applications.

Full Authority 7.1.1 can only compare an original version of a document. Do not attempt to use Full Authority on the result of a previous execution of Full Authority.

Chapter

9

PowerDOCS E-mail Integration

In This Chapter

PowerDOCS integrates with 3 different e-mail applications. This chapter discusses the ways in which tested e-mail applications are integrated with PowerDOCS. This chapter includes information on:

Using Mail Applications

PowerDOCS gives you the capability of attaching to a mail message either a copy of a PowerDOCS document or a reference to the document. You can check out the copy at the time you send it. The Mail option on the Document menu is visible when the system is able to locate a MAPI-compliant package in your search path.

NOTE If you use Lotus Notes as your e-mail client you will be unable to use the Mail feature from PowerDOCS. This is because Lotus Notes does not support Simple MAPI.

Linking PowerDOCS Documents to Mail Messages

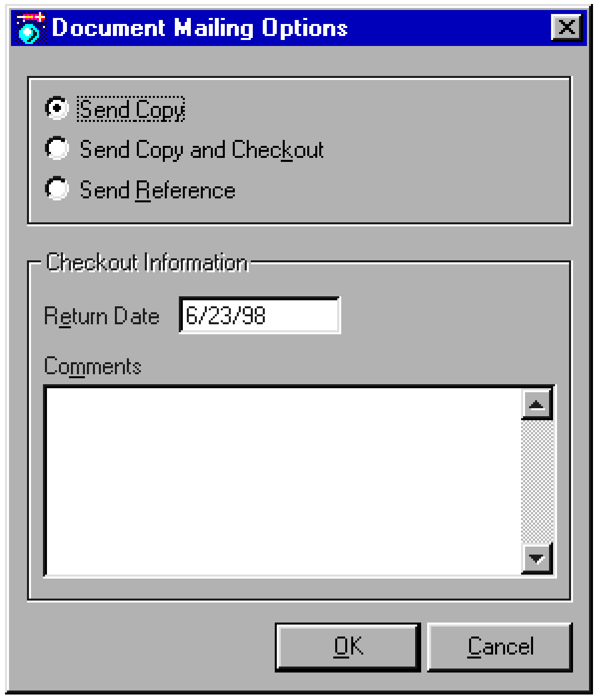
To link a PowerDOCS document to a mail message:

1. In PowerDOCS, access the Recently Edited Documents list or execute a Profile or Content Search.
2. A list of documents meeting your search criteria will be displayed. Select one or more documents to be mailed from PowerDOCS.

   Use Shift-Click to select consecutive documents, Ctrl-Click to select adjacent documents.
3. Choose Mail from the Document menu. If the Mail toolbar button is available, click the button. The dialog box shown in Figure 9.1 will be displayed.

Figure 9.1

Document Mailing Options dialog box



- **Send Copy.** If you choose this option, a copy of the document will be attached to your mail message. The original document will remain available to other users.

- **Send Copy and Checkout.** If you choose this option, a copy of the document will be attached to your mail message, and the document will not be available to other users. If the document has multiple versions, you will be prompted to select a version, and you must also supply checkout information: a return date is required and comments are optional. The document is checked out to you, not to the recipient.

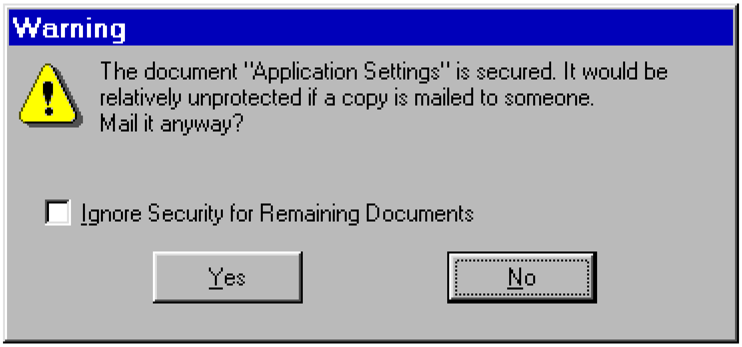
- **Send Reference.** If you choose this option, a reference to the document will be attached to your mail message. The recipient will be able to access the original document through the database for such actions as view, print, or open.

NOTE If you are sending a Reference, the recipient must have access to PowerDOCS and to the Library on which the document resides.

4. Select the Send type and click OK. You will be prompted to select the version you want to send.
5. If any of the documents you are sending are secured, you will be notified with the following warning.

Figure 9.2

Mailing Secured document Warning



Yes. If you choose Yes, a copy of your document will be mailed, but it will not be secured.

No. If you choose No, the document copy will not be mailed, and you will return to the PowerDOCS Desktop.

Ignore Security for Remaining Documents. If you selected multiple secured documents and want to mail them all, disregarding security, check this box. Otherwise, this warning will appear for each secured document you selected.

6. Your mail program will be started. It may be necessary to supply your password. A blank message form is displayed with the documents or references shown as attachments. Address and type type your message.

7. Send the message.

8. When the mail message is sent, you are returned to the PowerDOCS Desktop.

Saving Attached PowerDOCS Files as New Dcouments

Upon receipt, a document copy attachment can be processed like a regular file attachment. The attachment can be opened or saved for later use. Document reference attachments should be opened from within the mail application. Upon opening a reference attachment, the Search Results dialog box will appear. The recipient may choose a version to view, print, open, and so forth.

To save a PowerDOCS document you receive through electronic mail as a new document in your library:

1. Open the attachment from the mail application.

NOTE In the e-mail message, double-click the attachment to launch the document. Selecting an attachment in some e-mail packages launches a viewer rather than the application. Consult the e-mail package documentation for further information.

2. Edit the document.

3. Click File>Save in the document's application. A new PowerDOCS profile is displayed. Complete the Document Profile and click OK. The document is saved as a new document.

4. You can then mail the document, or perform any other PowerDOCS functions, upon it.

Checking In Mail Attachments

To check in an attachment that was checked out, mailed, edited, and then returned:

NOTE These instructions assume you selected Send Copy and Checkout, and mailed a document. The recipient has edited the document without changing its name and mailed it back to you.

1. In the Mail package, select File>Save Attachment. Change the save location to a directory on your local drive. Do not change the file name.

2. In PowerDOCS, select the document from the PowerDOCS Search Results dialog box, and select Document>Check-in.

   Indicate the location of the file as the local drive and directory you saved it to from the mail package. You will probably want to check it in as a new version. The checked-in document will show the edits saved by the user to whom the document was mailed.

PowerDOCS Integration for Microsoft Outlook

PowerDOCS Integration for Microsoft Outlook gives users the ability to store e-mail messages and attachments into PowerDOCS and attach PowerDOCS documents to outgoing mail messages. There are three integration types:

- **None.** No integration
- **Normal.** E-mail integration is used only for messages and attachments saved in PowerDOCS
- **Enhanced.** E-mail integration saves additional information such as Message ID, Attachment Number, Message Item, and Delivery recipients. In addition, the Search Email and Email Tree options are made available in PowerDOCS through the document menu.

Outlook Integration is installed during the PowerDOCS Installation procedure. Integration strength and configuration is set up by your administrator in the Microsoft Management Console (MMC). See Appendix B of the *PowerDOCS Installation Guide* for additional information.

NOTE Your PowerDOCS administrator will determine your integration type and default settings.

Outlook Integration adds menu selections and toolbar buttons to the Outlook workspace.

- **File**>**Save to PowerDOCS.** This option is used to export messages to PowerDOCS.

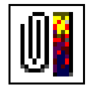
Figure 9.3

Export to PowerDOCS toolbar button

- **Insert>From PowerDOCS.** This option is used to attach files to a new mail message.

Figure 9.4

Insert File(s) from PowerDOCS toolbar button



Saving Outlook Mail Messages Without Attachments

Saving Outlook Messages - Normal Integration

1. From the Microsoft Outlook View window, select the mail message to be saved.
2. Select File>Save to PowerDOCS or click the Export to PowerDOCS toolbar button. If required, log in to PowerDOCS.

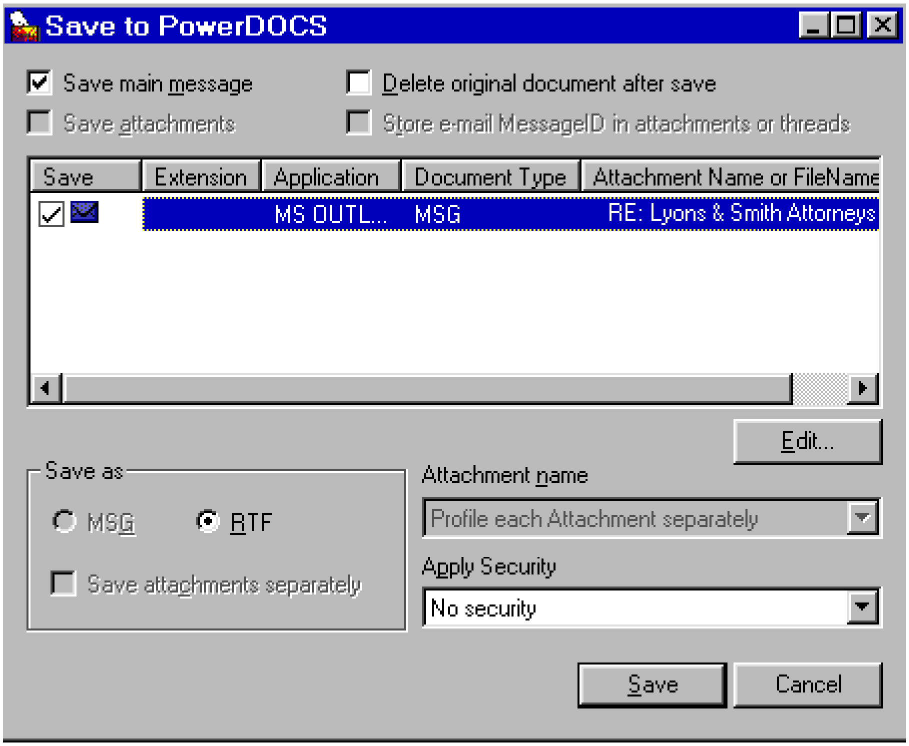
   The Save Email to PowerDOCS dialog box will appear.
3. The dialog box allows you to:

- Save the e-mail as a PowerDOCS document.
- Modify the document format and type. This is useful when document file extensions do not match the application type set as the default.
- Delete the original e-mail after saving it to PowerDOCS.

- Apply Security to limit future access to the document.

Figure 9.5

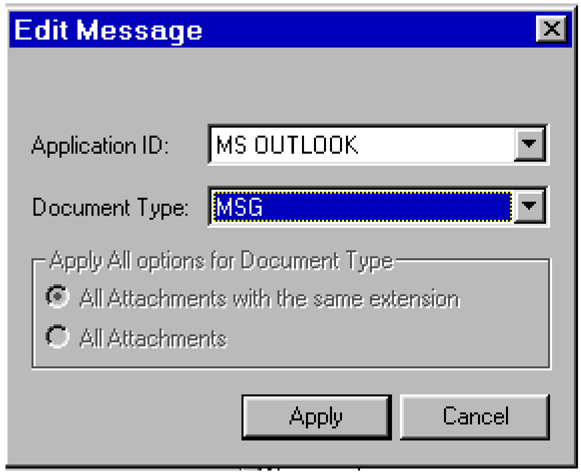
Save to PowerDOCS dialog box, normal integration



To change the document format and type, select the message and click Edit. The Edit Message dialog box will appear.

Figure 9.6

Edit Message dialog box



4. To change either the Application ID or the Document Type, click the drop-down arrow to the right of each field. Click to select the desired Application ID or Document Type.
5. Click Apply. The Edit Message window will close.
6. To delete the original message, select the check box labeled "Delete original Email after save."
7. By default, access is limited to the No security option. To apply a different security, click the drop-down arrow next to the Apply security field. Select the new security.

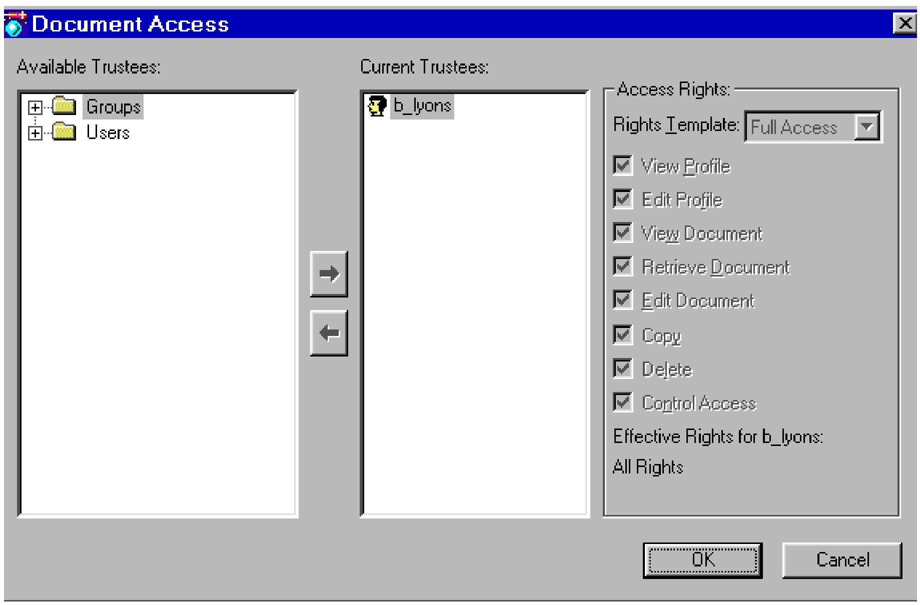
- **Grant Access to Current User.** Allows document access to the person who originally created the Document Profile.
- **Grant Access to All Recipients.** All recipients of the message will be able to view the document.
- **Grant Access to Email Users Group.** Only the users from the PowerDOCS Email Users Group will have access to the document.

- **Customize Security and Apply to All.** Allows you to select specific users to whom you want to give document access.

NOTE Access to this feature may have been limited by your PowerDOCS administrator

Figure 9.7

Document Access dialog box



8. Your PowerDOCS administrator may have set you integration to accept either MSG or RTF format. If this is the case, select the desired option button. RTF messages can be read by any word processing package. MSG format messages can only be read by Outlook.

9. Click Save. If you selected Customize Security and Apply to All, you will be required to set security access. Click OK.

10. A Document Profile window will appear. Complete the profile and click OK.

Saving Outlook Messages - Enhanced Integration

1. From the Microsoft Outlook View window, select the e-mail message to be saved.

2. Select the File menu, Save to PowerDOCS. If required, log on to PowerDOCS.

   The Save Email to PowerDOCS dialog box will appear.

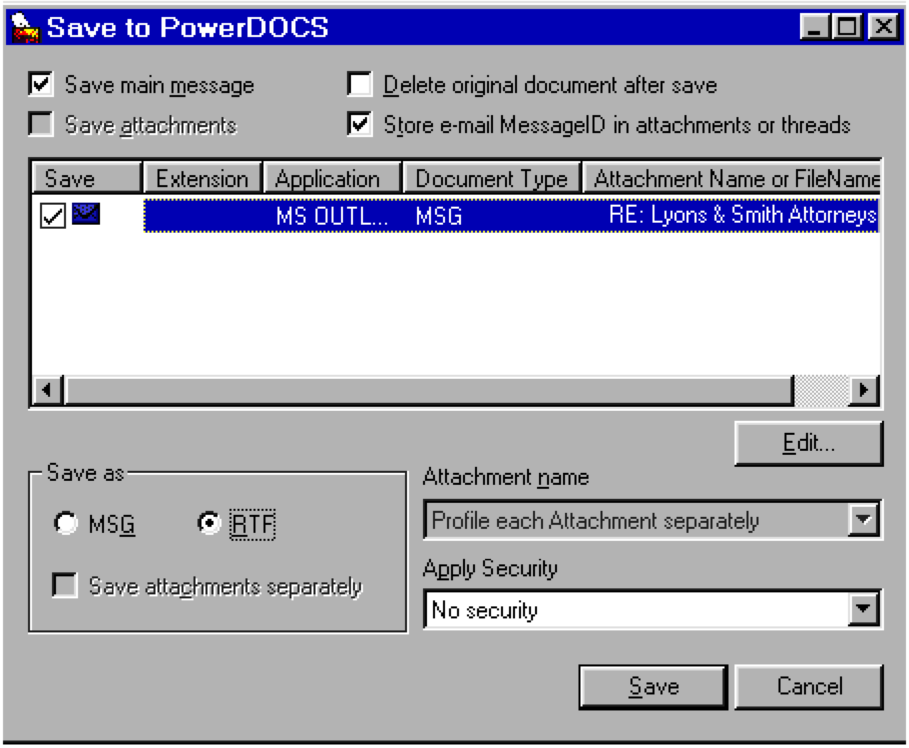
3. The dialog box allows you to:

   - Save the e-mail as a PowerDOCS document and specify RTF or MSG format.
   - Store e-mail message IDs for search and threading purposes
   - Modify the document format and type. This is useful when document file extensions do not match the application type set as the default.
   - Delete the original e-mail after saving it to PowerDOCS.

- Apply Security to limit future access to the document.

Figure 9.8

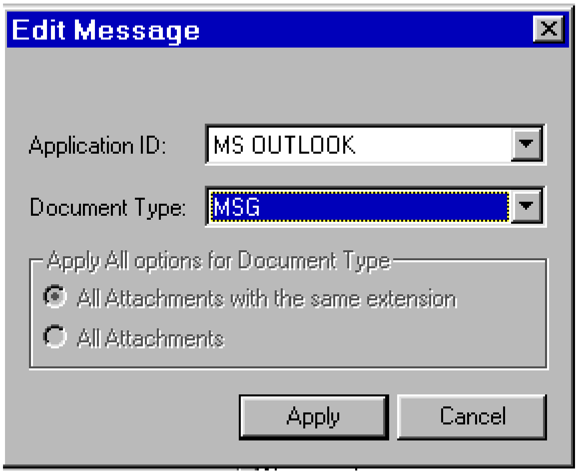
Save to PowerDOCS dialog box, enhanced integration



To change the document format and type, select the message and click Edit. The Edit Message dialog box will appear.

Figure 9.9

Edit Message dialog box



4. To change either the Application ID or the Document Type, click the drop-down arrow to the right of each field. Click to select the desired Application ID or Document Type.

NOTE When Enhanced Integration is employed, the e-mail client application is configured as the default Application ID. The default Document Type is set to match the e-mail client. See Appendix B of the *PowerDOCS Installation Guide* for additional information.

5. Click Apply. The Edit Message window will close.

6. To delete the original message, select the check box labeled "Delete original Email after save."

7. If you do not want to select Store Email Message ID in Attachments or Threads, unchecked this box.

NOTE This option allows supplementary information, such as Message ID, Attachment Number, and so forth to be saved in a Document Profile. This information may not be visible on the Document Profile and is used to track e-mail threads by way of the Email Search Option and Email Tree Option features.

8. If you want to save the document in RTF format, click the RTF option button.

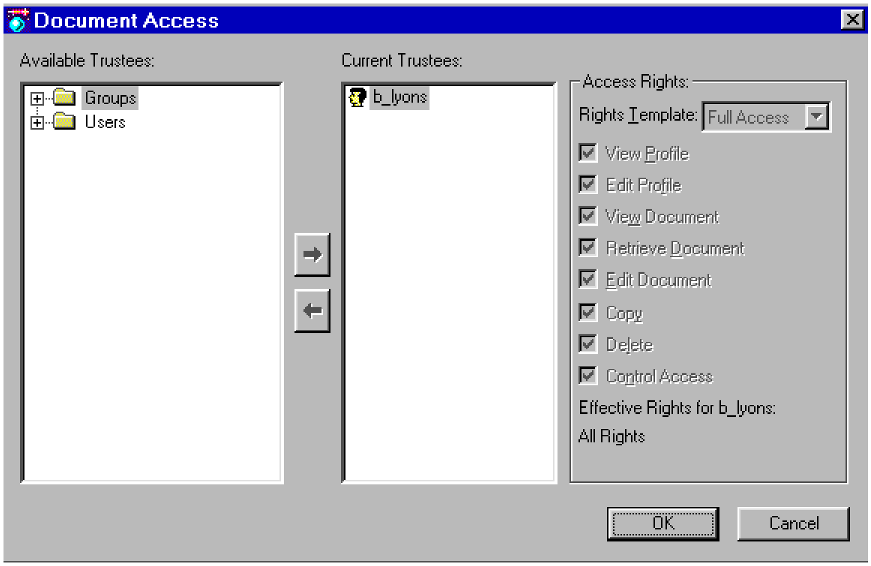
9. By default, access is limited to the No security option. To apply a different security, click the drop-down arrow next to the Apply security field. Select the new security.

   - **Grant Access to Current User.** Allows document access to the person who originally created the Document Profile
   - **Grant Access to All Recipients.** All recipients of the message will be able to view the document.
   - **Grant Access to Email Users Group.** Only the users from the PowerDOCS Email Users Group will have access to the document.
   - **Customize Security and Apply to All.** Allows you to select specific users to whom you want to give document access. Access to this feature may have been limited by your Power-

DOCS administrator.

Figure 9.10

Document Access dialog box



10. Click Save. If you selected Customize Security and Apply to All, you will be required to set security access. Click OK. A Document Profile window will appear.

11. Complete the profile and click OK.

Saving Outlook Mail Messages with Attachments

Saving Messages with Attachments

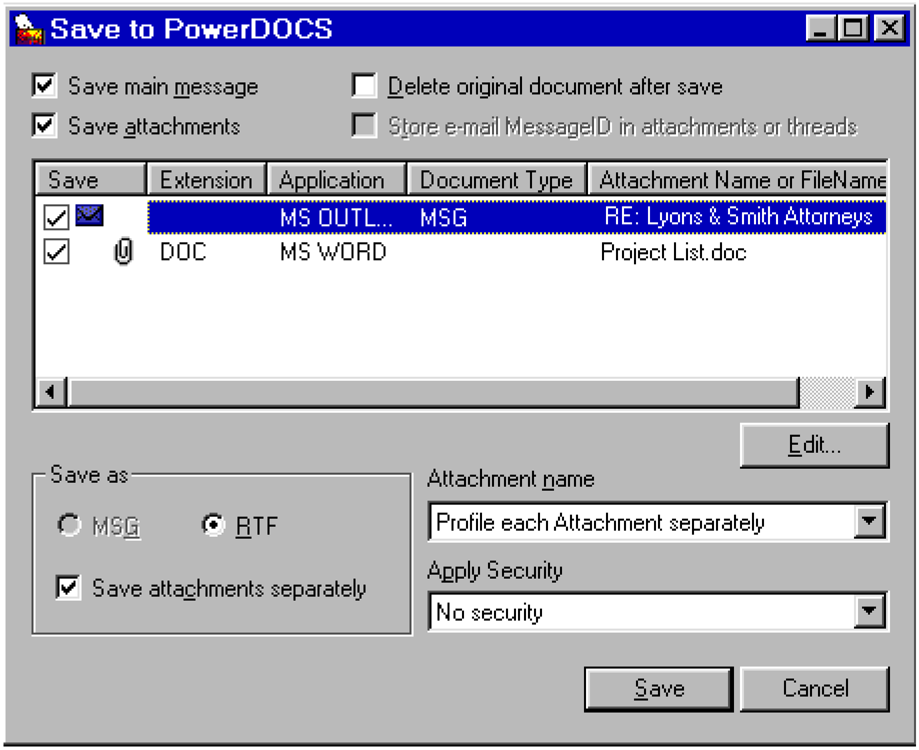
From the Microsoft Outlook View window, select the e-mail message to be saved.

1. Select File>Save to PowerDOCS or click the Export to PowerDOCS toolbar button. If required, log on to PowerDOCS.

The Save to PowerDOCS dialog box will appear.

Figure 9.11

Save to PowerDOCS dialog box



Note that there are additional options available: Save attachments, Attachment name, and Save attachments separately.

2. If desired, modify the mail message document format and type.

NOTE If you do not want to save the attachment, deselect the check box labeled Save Attachments and save the message as you would any other file being exported to PowerDOCS.

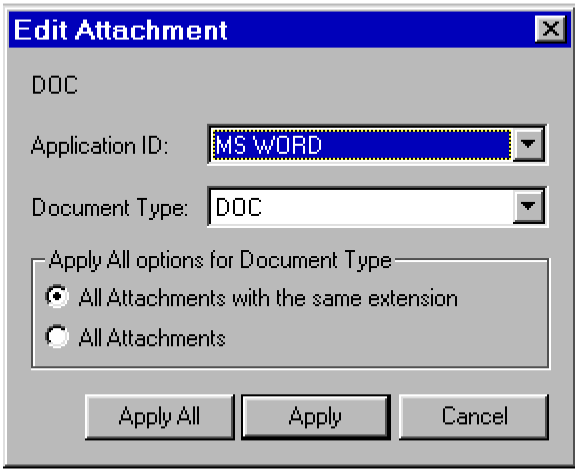
3. PowerDOCS should associate the file attachment with the correct launch method. If the attachment's file extension is not known to PowerDOCS, modify the file attachment's format and document type.

Document formats and types can be modified for individual attachments, for all attachments with a specific file extension, or for all attachments in the message.

Select the attachment and click Edit. The Edit Attachment dialog box will appears. Make the desired changes.

Figure 9.12

Edit Attachment dialog box



- **Apply.** Clicking this option will apply the change to the previously highlighted attachment.
- **Apply All.** Clicking this option will apply the change to all attachment files associated with this mail message. There are two options for Apply All:

— To apply the change to all attachments that have the same file extension, select the All Attachments with the same extension option button.

— To apply the change to all attachment files regardless of file extension, select the All Attachments option.

4. There are three options listed in the Attachment Name field:

   - Profile each Attachment separately

- Use Filename as Doc Name
- Use Email Subject as Doc Name

Using the drop-down list provided, click to select the preferred Attachment Name option.

5. If you want to delete the original mail message, select the check box labeled Delete original Email after save.
6. If desired, change the Apply Security setting.
7. If the option is available to you, select MSG or RTF format.
8. If you are using Enhanced Outlook integration and do not want to save the MessageID in attachments or threads, deselect the check box.
9. Click Save. Complete a Document Profile for the message. If you selected Profile each Attachment separately, you will also need to complete a Document Profile for each attachment. Click OK after completing each Document Profile.

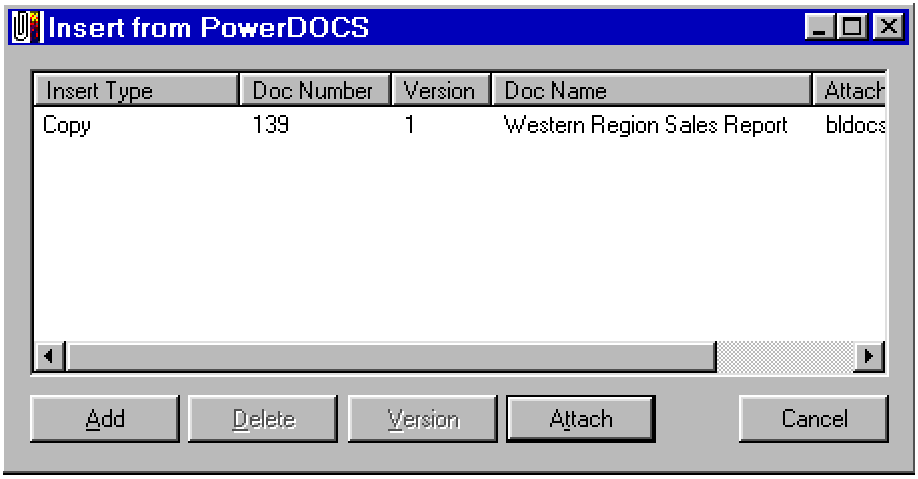
Inserting PowerDOCS Files into Outlook Mail Messages

1. Start a new mail message by selecting File>New>Mail Message.
2. Address the message and add a subject and body text.
3. Select Insert>From PowerDOCS. If necessary, log in to PowerDOCS. A Search Results dialog box will appear.

4. Select the file(s) to be inserted into the message. Click OK. The Insert from PowerDOCS dialog box will appear.

Figure 9.13

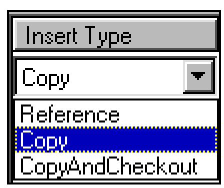
Insert from PowerDOCS dialog box



5. The Insert from PowerDOCS dialog box appears. Select the Insert Type by clicking in the column, then click the drop-down arrow to view the list. Click to select the desired option.

Figure 9.14

Insert Type field



There are three Insert Types:

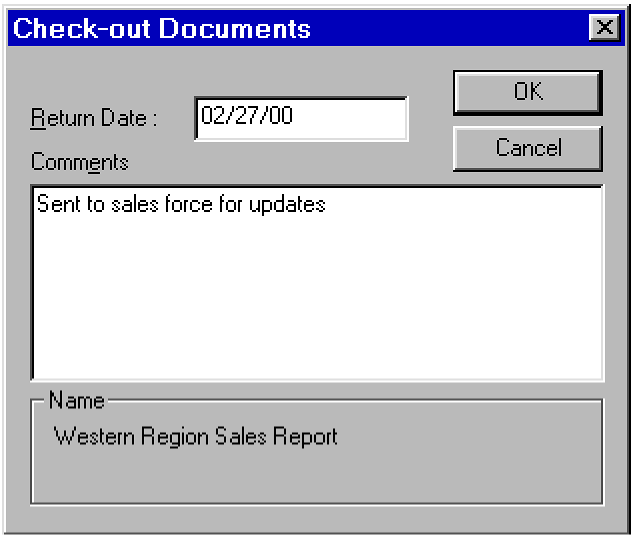
- **Copy.** This option inserts a copy of the original document as a file attachment.
- **Reference.** This option inserts a PowerDOCS reference to the original document as a file attachment. When the recipient double-clicks a reference attachment, PowerDOCS will launch. A Search tab will display the document information,

and the original file can be opened. The recipient must have access to the library on which the document resides.

- **Copy and Checkout.** This option inserts a copy of the original document and checks it out of the PowerDOCS library. After clicking Attach, the Check-out Documents window will appear. Change the Return Date and add Comments, if desired. Click OK.

Figure 9.15

Check-out Documents dialog box



6. To select a specific version, click Version. Select the desired version and click OK.

7. To change the name of the attachment, click in the Attachment Name column. It will open as an editable field. Edit the name and press Enter.

Figure 9.16

Edit Attachment Name field

8. To add additional files to the list of possible attachments, click Add. Select the desired documents and click OK.

9. To delete one or more documents from the list, select the desired document. Click Delete.

10. Click Attach. The file(s) will be inserted into the body of the message.

11. Send the message.

Special Features Using Enhanced Integration

Configuring Enhanced Integration for PowerDOCS and Microsoft Outlook enables two PowerDOCS features:

- **Search for Email.** This features displays a Search Results window, cataloging e-mail messages and related atttachments saved to PowerDOCS.

- **Show Email Tree.** This feature displays the Show Email Tree window, listing an e-mail message and related replies and attachments. This feature is helpful when tracking several related e-mail messages.

NOTE Attachments embedded in e-mail documents will not appear in the Search for Email or Show Email Tree windows.

For more information, refer to the topic "Email Search Option" and "Email Tree Option" in Chapter 6 of this Guide.

PowerDOCS Integration for GroupWise

PowerDOCS integration for GroupWise is identical to Normal integration for Microsoft Outlook. You have the ability to save messages and attachments and insert PowerDOCS documents into your outgoing messages. Please refer to the sections in this chapter titled "Linking PowerDOCS Documents to Mail Messages", "Saving Outlook Messages - Normal Integration", "Saving Messages with Attachments", and "Inserting PowerDOCS Files into Outlook Mail Messages."

NOTE Only RTF format is supported when saving GroupWise messages.

PowerDOCS Integration for Lotus Notes

PowerDOCS integration for Lotus Notes is almost identical to Normal integration for Microsoft Outlook with these few exceptions:

- You cannot mail a PowerDOCS document from PowerDOCS using the Document>Mail command. This is due to Lotus Notes' lack of support for Simple MAPI.
- The Save to PowerDOCS and Insert from PowerDOCS toolbar buttons are not available. These commands are found on the Actions menu, as shown in Figure 9.17 and Figure 9.18.

Figure 9.17

Lotus Notes, Save to PowerDOCS menu command

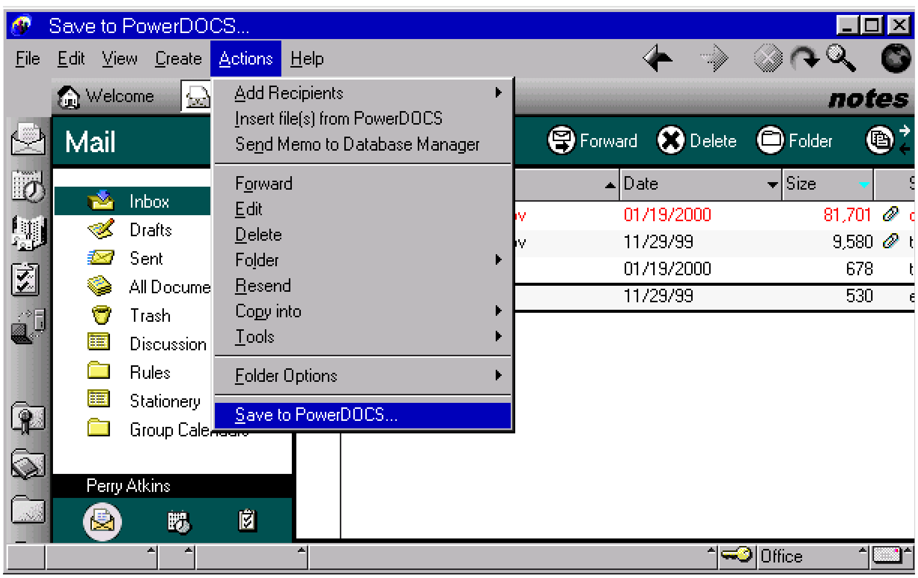
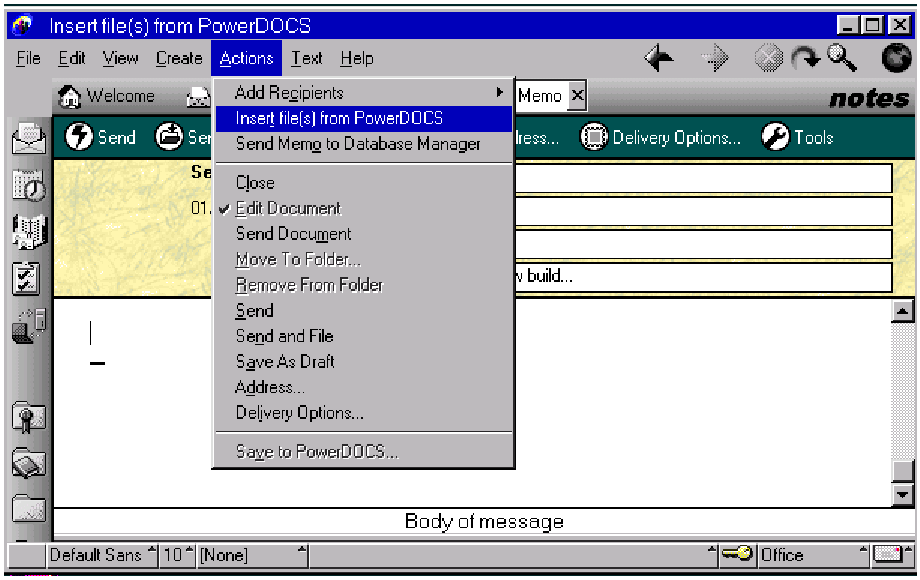


Figure 9.18

Lotus Notes, Insert file(s) from PowerDOCS menu command



- You can only attach one document at a time and attached files will be inserted at the start of the message.

Please refer to the sections in this chapter titled "Saving Outlook Messages - Normal Integration", "Saving Messages with Attachments" and "Inserting PowerDOCS Files into Outlook Mail Messages."

NOTE Only RTF format is supported when saving Lotus Notes messages.

Microsoft Outlook Client

The Microsoft Outlook Client for PowerDOCS allows PowerDOCS users to access their document libraries while using Microsoft Outlook.

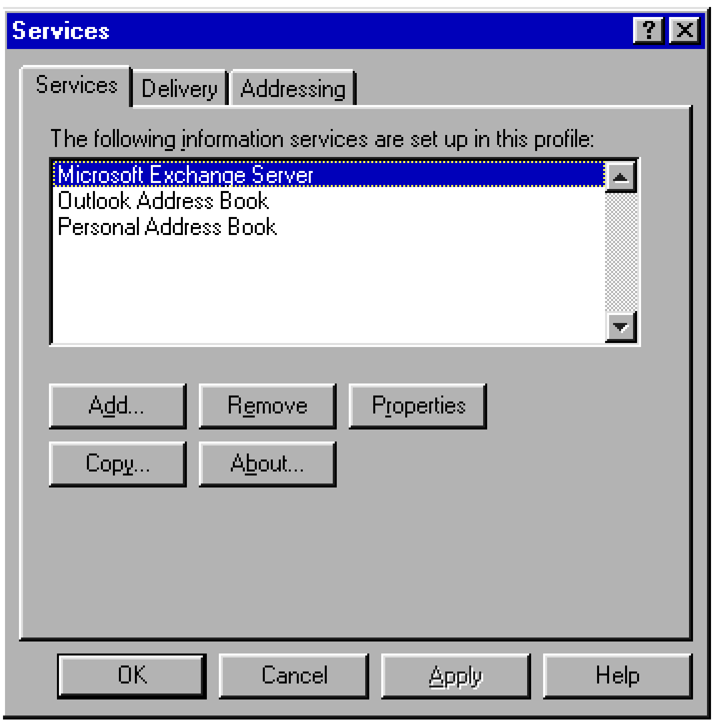
NOTE Check with your PowerDOCS administrator to verify if this option has been installed for you.

The first time you access Outlook after the PowerDOCS client has been installed, you need to install the PowerDOCS service to enable the client.

1. Launch Microsoft Outlook. If necessary, log in to PowerDOCS.
2. Select Tools>Services. The Services dialog box will appear.

Figure 9.19

Services dialog box

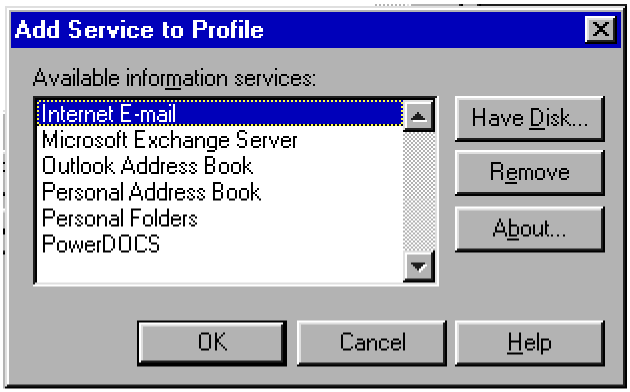


If PowerDOCS is not listed as a service, click Add.

3. The Add Service to Profile dialog box will appear. Select PowerDOCS and click OK.

Figure 9.20

Add Service to Profile dialog box



4. Click OK to close the Services dialog box. The PowerDOCS folder will appear in the Folder list.

To use the PowerDOCS client:

1. Launch Microsoft Outlook. If necessary, log in to PowerDOCS.

NOTE If you do not log in to PowerDOCS when launching Microsoft Outlook, you will not have access to the PowerDOCS client. If you decide to use the PowerDOCS client, you will need to close Outlook and restart the application.

2. In the Folder List you will see a PowerDOCS folder. Click the plus sign to the left of the folder to view the folder contents. If desired,

expand the library folder to view Projects and Quick Search folders.

Figure 9.21

The PowerDOCS Outlook Folder list

3. To view Recently Edited Documents, click the folder. The document list will appear in the right-hand pane.

4. To view Projects or Quick Searches, expand the folder by clicking the plus sign, then select the document, project or Quick Search you want to view.

5. PowerDOCS menu commands are available by selecting the PowerDOCS menu.

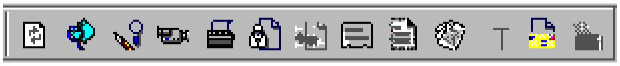
Figure 9.22

PowerDOCS menu - Outlook

6. In addition to the PowerDOCS menu, a PowerDOCS toolbar will be visible above the Outlook view panes. As you pass your cursor over the buttons, tool tips show you the commands assigned to button.

Figure 9.23

PowerDOCS toolbar - Outlook



The commands from left to right are:

- Refresh Contents
- New Search
- Recently Edited Documents
- View
- Print
- Check-out
- Check-in
- Display Document Profile
- Display Versions & Attachments
- Display Document History
- Copy Document
- Mail Document
- Export Messages to PowerDOCS (disabled when viewing the PowerDOCS folder).

You may add Outlook messages to PowerDOCS by dragging them to the PowerDOCS library in Microsoft Outlook.

1. Launch Microsoft Outlook. If necessary, log in to PowerDOCS.
2. In the Folder list you will see a PowerDOCS folder. Click the plus sign to the left of the folder to view the folder contents. If desired, expand the library folder to view Projects and Quick Search folders.
3. Click the Microsoft Outlook folder that contains the messages you want to save to PowerDOCS.
4. Select the message and drag it to the desired PowerDOCS library.

NOTE Dragging the message to a PowerDOCS library will automatically delete it from Outlook. To place a copy of the message in PowerDOCS, hold the Ctrl key as you drag the message to the selected folder.

5. The Save to PowerDOCS dialog box will appear, followed by the Document Profile form. Enter the necessary information in both dialog boxes and click OK after each addition.

   The document will be transferred to PowerDOCS and will be accessible from the Recently Edited Documents list.

Appendix

B

Content Searching with Verity

In This Appendix

This appendix describes the Verity Query Language and provides examples for creating query expressions. The information in this appendix includes the following:

- Simple and Explicit Syntax
- Precedence Rules
- Delimiters in Expressions
- Verity Query Language Operator Reference, including operator descriptions and usage examples
- Verity Query Language Modifier Reference, including descriptions and usage examples

Verity Query Language

DOCS Open uses Verity for its Full Text engine. Verity builds the Full Text Index which allows you to perform Content Searches on the documents and profiles stored by DOCS Open. Verity is extremely powerful in that it allows you to perform quite complex searches using very simple syntax. For additional information on searching using DOCSFusion, refer to Chapter 12 of *the DOCSFusion Setup and Administration Guide.*

Query Interpretation

A query expression is a query that you want to be interpreted and processed. The words and operators you use in a query expression comprise its elements.

Simple and Explicit Syntax

You can state a query expression in simple or explicit syntax. The syntax you use determines whether the search words you enter will be stemmed (such as great, greater, greatest), and whether the words that are found will contribute to relevance-ranked scoring.

Simple Syntax

When you use simple syntax, the Verity engine implicitly interprets single words you enter as if they were preceded by the MANY modifier and the STEM operator. By implicitly applying the MANY modifier, the Verity engine calculates each document's score based on the word density it finds; the more often a word occurs in a document, the higher the document's score.

As a result, the Verity engine relevance-ranks retrieval results according to word frequency as it searches for the word you specify, as well as words that have the same stem. For example, "generator" and "generation" are stems of the word "generate." To search for documents containing the word "generate" and its stemmed variations, you would simply enter the word "generate" (without quotes) in the Profile Search form's Content Search field:

```
generate
```

When documents are relevance-ranked they are listed in an order based on their importance to your search criteria. Relevance-ranked results are presented with the most relevant documents at the top of the list.

Explicit Syntax

When you enclose individual words in double-quotes, the Verity engine interprets those words literally. For example, by entering the word "generator" explicitly in double-quotes, the words "generate" and "generation" will not be considered in the search. To retrieve documents containing the word "generator" without searching for its stemmed variations, you enter the word "generator" using explicit syntax:

```
"generator"
```

Documents retrieved for a literal word search are not relevance-ranked, they are all assigned a score of 100 to indicate only that the word was found in the document. Results are not listed in any particular order.

However, by adding the MANY modifier, you can search for literal words and get relevance-ranked results. For example, to retrieve relevance-ranked documents containing the word "generator" without searching for the stemmed words of "generator," you enter the following:

```
<MANY>"generator"
```

The MANY modifier cannot be used with AND, OR, or ACCRUE.

Operator Summary

Operators represent logic to be applied to a search element. This logic defines the qualifications a document must meet to be retrieved. Operators are classified by their type, as follows

- Evidence operators
- Proximity operators
- Concept operators

Evidence Operators

Evidence operators expand a search word into a list of related words which are then searched for as well. When you perform a search using an evidence operator, documents containing one or more occurrences of the words in the expanded word list are retrieved. A listing of all evidence operators is provided below.

Table B.1 Evidence Operators

Operator Name	Description
WORD	The WORD operator is used to search for a word.
STEM	The STEM operator is used to search for a specified word along with all of its stemmed variations.
WILDCARD	The WILDCARD operator is used to search for wildcard expressions.
SOUNDEX	The SOUNDEX operator is used to search for words that sound like a given word.

Proximity Operators

Proximity operators specify the relative location of specific words in the document; that is, specified words must be in the same phrase in a document to be retrieved. When proximity operators are nested, the ones with the broadest scope should be used first. A complete listing of the proximity operators is provided below.

Table B.2 Proximity Operators

Operator Name	Description
PHRASE	The PHRASE operator is used to search for information containing two or more words in the same phrase.
NEAR	The NEAR operator is used to search for information containing two or more words in close proximity to each other.
NEAR/n	The NEAR/n operator is used to search for information containing two or more words within n number of words of each other, where n is an integer.

Concept Operators

Concept operators combine the meaning of search elements to search for the concepts represented by a query expression. The three concept operators are listed below.

Table B.3 Concept Operators

Operator	Description
AND	The AND operator is used to search for documents containing all of two or more search terms, and provides relevance-ranked results.
OR	The OR operator is used to search for documents containing at least one of two or more search terms, and provides relevance-ranked results.
ACCRUE	The ACCRUE operator is used to search for documents containing at least one of two or more search terms, and provides relevance-ranked results. A query using this operator assigns the highest scores to documents containing the most instances of the search terms.

Composing Query Expressions

Following is a summary of how to use the Verity Query Language to compose query expressions. An overview of the use of general operator types, and optional syntax such as parentheses and delimiters is provided.

Using Operators

To specify a concept, proximity, or evidence operator in an expression, type the operator and then the word or phrase you want it to act upon, as in:

```
<OPERATOR>word
<OPERATOR>(word)
```

In the examples above, word represents the word or phrase entered as a search element.

Using Shorthand Syntax

The Verity Query Language provides a few alternatives you can use to specify evidence operators, as described below. In the examples below, "word" represents the word to be located.

Table B.4 Shorthand Syntax

Standard Query Equivalent Format	Expression
<WORD>word	“word”
<STEM>word	word
<SOUNDEX>word	@word@

Evaluation Rules

The language used for composing search statements has the following rules which determine the precedence for evaluation. The rules below refer to Verity Query Language operators. Refer to the section "Operator Summary" for complete information about the operators mentioned below.

Precedence Rules

A Verity query expression is read using explicit precedence rules applying to the operators which are used. While a query expression is read from left to right, some operators carry more weight than others and this will affect the interpretation of the expression. For example, an AND operator takes precedence over an OR operator. For this reason, the following example is interpreted to mean "Look for documents that contain a and b, or documents that contain c."

```
a AND b OR c
```

To ensure that the OR operator is interpreted first, you can use parentheses as follows:

```
(a OR b) AND c
```

In general, the appropriate use of parentheses in query expressions, especially complex ones, will ensure that the query expression is interpreted as intended.

Parentheses in Expressions

Parentheses indicate the order the directions are to be carried out; information within parentheses is read first, then information outside parentheses is read next. Note that there must be at least one space between operators and words used in the expression. The following example means "Look for documents that contain a and b, or documents that contain c."

```
(a AND b) OR c
```

If there are nested parentheses, start with the innermost level. The following example means "Look for documents that contain b or c as well as a, or that contain d."

```
(a AND (b OR c)) OR d
```

Prefix and Infix Notation

Words which use any operator except evidence operators (SOUNDEX, STEM, WILDCARD, and WORD) can be defined in prefix notation or in infix notation.

Prefix notation is a format that specifies the operator comes before the words to be used with that operator. The following example means "Look for documents that contain a and b."

```
AND (a,b)
```

When prefix notation is used, precedence is explicit within the expression. The following example means “Look for documents that contain b and c first, then documents that contain a.”

```
OR (a, AND (b,c))
```

Infix notation is a format which specifies that the operator is to be specified between each element within the expression. The following example means “Look for documents that contain a, or b, or c.”

```
a AND b OR c
```

When infix notation is used, precedence is implicit within the expression; for example, the AND operator takes precedence over the OR operator.

Commas in Expressions

If an expression includes two or more words within parentheses, as is used in prefix notation, a comma is required as a separator between each element enclosed within the parentheses.

The following example means “Look for documents that contain any combination of a and b together.” Note that the OR operator is enclosed in angle brackets (< >), as described in "Angle Brackets in Expressions" in this appendix.

```
<OR> (a, b)
```

Delimiters in Expressions

Angle brackets (< >), and double quotation marks (") are used in expressions as described below.

Angle Brackets in Expressions

Left and right angle brackets (< >) are reserved for designating operators and modifiers. However, you do not have to use them. Some examples in this guide show operators with angle brackets, and some operators are shown without. Either way is fine. As the following simple syntax examples show, you can enter expressions with or without angle brackets:

```
future <AND> trends

future AND trends
```

Both expressions mean "Look for documents that contain the word 'future' and the word 'trends.'"

Double Quotes for Reserved Words

To search for a word that is reserved as an operator ("and," "or," and "not"), enclose the word in double quotation marks. For example, to search for the phrase "black and white TV," you can enter the following simple syntax:

```
black "and" white TV
```

Enclosing the word "and" in double quotation marks signifies that "and" should be considered as a word, not an operator.

Operator Reference

This section describes each Verity Query Language operator in detail. Where appropriate, each description includes an example of simple syntax and explicit syntax. Operators are listed alphabetically.

ACCRUE Operator

Searches for documents that include at least one of the search elements you specify. Valid search elements are two or more words or phrases. Retrieved documents are relevance-ranked.

The ACCRUE operator scores retrieved documents according to the presence of each search element in the document using "the more, the better" approach the more search elements found in the document, the better the document's score. Following are examples of search syntax.

Simple Syntax

To search for documents that are most relevant to the words "computers" and "laptops," you can enter the following:

```
computers <ACCRUE> laptops
```

Explicit Syntax

To search for documents that are most relevant to the words "IBM," "Apple," and "Sun," you can enter the following:

```
<ACCRUE>(ibm,apple,sun)
```

AND Operator

Searches for documents that contain all of the search elements you specify. Documents retrieved using the AND operator are relevance-ranked. Following are examples of search syntax.

Simple Syntax

To search for documents that contain the phrase "pharmaceutical companies" and the word "stock," you can enter the following:

```
pharmaceutical companies AND stock
```

Only those documents that contain both search words are retrieved and ranked according to their score.

Explicit Syntax

To search for documents that contain both the words "data" and "security," you can enter the following:

```
data AND security
```

CONTAINS Operator

Selects documents by matching the word or phrase you specify with the values stored in a specific document field. Documents are selected only if the search elements specified appear in the same sequential and contiguous order in the field value.

NEAR Operator

Searches for documents containing specified search terms within close proximity to each other. Documents matching a query using NEAR are relevance-ranked.

Document scores are calculated based on the proportion of instances found in relation to the size of the region containing the words. For example, if the search expression includes two words, and those words occur next to each other in a document (so that the region size is two words long), then the score assigned to that document is 1.0.

Thus, the document with the smallest region containing all search terms always receives the highest score. Documents scoring less than .75 will not be retrieved, since that score indicates that the search terms are too far apart to be meaningful within the context of the document.

The NEAR operator is similar to the other proximity operators in the sense that the search words you enter must be found within close proximity to each other. However, unlike proximity operators, the NEAR operator calculates relative proximity and assigns scores based on its calculations.

Syntax

To search for relevance-ranked documents within close proximity to each other, you can use the following syntax.

Table B.5 NEAR Operator

Syntax Type	Query Expression Syntax
Simple	wordA <NEAR> wordB <NEAR> wordC ...
Explicit	<NEAR> (wordA, wordB, wordC, ...)

Examples

To search for relevance-ranked documents that contain the search terms "war" and "peace" within close proximity to each other, you can enter the following query expressions.

Table B.6 NEAR Operator Examples

Syntax Type	Query Expression
Simple	war <NEAR> peace
Explicit	<NEAR> (war, peace)

NEAR/N Operator

Searches for documents containing a search term within N words of a second search term. Documents matching a query using NEAR/N are relevance-ranked.

The Verity search engine will assign document scores based on the relative distance of search terms, when the terms are separated by N words or less; words separated by more than N words will not be assigned scores and will not be retrieved. For example if NEAR/5 is used to find two terms within five words of each other, a document that has the two terms within two words of each other scores higher than a document that has the two terms within five words of each other.

The N variable can be an integer between 1 and 1,024, where NEAR/1 searches for terms that are next to each other. If N is 1,000 or above, the N value must be given without a comma.

The NEAR/N operator can be used with the ORDER modifier to perform ordered searches. An ordered search finds documents containing a search term within N terms of a second search term when the order of the terms matches the order provided in the query expression.

Syntax

To search for relevance-ranked documents that contain search terms within N words of each other, the following syntax can be used.

Table B.7 NEAR/N Operator

Syntax Type	Query Expression Syntax
Simple	wordA <NEAR/N> wordB <NEAR/N> wordC ...
Explicit	<NEAR/N> (wordA, wordB, wordC, ...)

Note that if simple syntax is used and multiple search terms are given, the value of N in NEAR/N must be the same each time you enter the operator name. In this situation, the search engine looks for a cluster of the search terms, where the 2 words farthest apart in the cluster are a distance greater than or equal to N words. The minimum value of N is the total number of terms minus 1.

Examples

To search for the term ``air" within 10 words of the term "pollution," you can use one of the query expressions below.

Table B.8 NEAR/N Operator Examples

Syntax Type	Query Expression
Simple	air <NEAR/10> pollution
Explicit	<NEAR/10> (air, pollution)

Using the ORDER modifier with NEAR/N allows you to perform ordered searches. To search for the terms "air" and "pollution" within 2 words of each other, you can use one of the query expressions below.

Table B.9 Using ORDER and NEAR/N Examples

Simple Syntax	Query Expression
Simple	air <ORDER> <NEAR/2> pollution
Explicit	<ORDER> <NEAR/2> (air, pollution)

PARAGRAPH Operator

Selects documents that include all of the search elements you specify within the same paragraph.

OR Operator

Searches for documents that show evidence of at least one of your search elements. Using the OR operator produces relevance-ranked results. Following are examples of search syntax.

Simple Syntax

To search for all documents that contain one or more of the following words and phrases "election," "national elections," and "senatorial race," you can enter the following election OR national elections OR senatorial race

Explicit Syntax

To search for documents that contain either the word "computer" or the word "security," you can enter the following:

```
computer OR security
```

PHRASE Operator

Searches for documents that include a phrase you specify. A phrase is a grouping of two or more words that occur in a specific order. Following are examples of search syntax.

Simple Syntax

By default, two or more words separated by a space are considered to be a phrase in simple syntax. To search for relevance-ranked documents that contain the phrase "mission oak," you can enter any of the following:

```
mission oak
```

```
mission <PHRASE> oak
```

Explicit Syntax

To search for documents containing the phrase "black and white" you can enter the following:

```
<PHRASE>(black, "and", white)
```

Documents are not relevance-ranked with explicit syntax unless you use the MANY modifier, as in:

```
<MANY><PHRASE>(black, "and", white)
```

SENTENCE Operator

Selects documents that include all of the words you specify within the same sentence.

SOUNDEX Operator

Searches for documents that include one or more words that "sound like" the word specified. For example, to search for documents containing a word that sounds like "capital," you can enter the following:

```
<SOUNDEX> capital
```

The documents found will include words such as, "capitalism," "capitalization," and "capitalize." Documents are not relevance-ranked unless the MANY modifier is used, as in:

```
<MANY><SOUNDEX> capital
```

STEM Operator

Searches for documents that include one or more variations of the search word you specify. For example, to search for documents containing a variation of the word "assert," you can enter the following:

```
<STEM> assert
```

The documents found will include stemmed variations of the word "assert" that exist in your documents. For example, stemmed variations of this word may include "assertion," "asserts," "asserting," "asserted." Documents are not relevance-ranked unless the MANY modifier is used, as in:

```
<MANY><STEM> assert
```

THESAURUS Operator

Expands the search to include the word you enter and its synonyms. To make this operator available to users, you must first make modifications to the search form. Contact PC DOCS Technical Support at 850-942-5000 for instructions. The support line is open from 8:00 am to 8:00 pm EST. Or email us at support@pcdocs.com.

TYPO/N Operator

Expands the search to include the word you enter plus words that are similar to the query term. The optional N variable in the operator name expresses the maximum number of errors between the query term and a matched term, a value called the error distance. If N is not specified, an error distance of 2 is used.

WILDCARD Operator

Searches for documents that contain matches to a character string containing variables. The WILDCARD operator lets you define a search string with variables, which can be used to locate related word matches in documents. For example, to search for documents that contain words such as, "pharmaceutical," "pharmacology," and "pharmacodynamics," you can enter the following:

```
<WILDCARD> pharmac*
```

Documents are not relevance-ranked unless the MANY modifier is used, as in

```
<MANY><WILDCARD> pharmac*
```

Wildcard Characters

You can use the following wildcard characters to represent variable portions of search strings with the WILDCARD operator.

Table B.10 WILDCARD Operator

Character	Function	Considerations
?	Specifies one of any alphanumeric character, as in ?an, which locates "ran," "pan," "can," and "ban."	The question mark is not special in a set ([ ]) or in an alternative pattern ({}). For example, [?an] would literally try to locate "?an" and bank{?} would literally try to locate "bank?"
*	Specifies zero or more of any alphanumeric characters, as in corp*, which locates "corporate," "corporation," "corporal," and "corpulent." Note that you should not use an asterisk (*) to specify the first character of a wildcard string.	The asterisk is not special in a set ([ ]) or in an alternative pattern ({}). For example, [corp*] would literally try to locate "corp*" and bank{*} would literally try to locate "bank*."
[ ]	Specifies one of any character in a set, as in c[auo]t, which locates "cat," "cut," and "cot."	The left bracket ([) is special only to open a set. The right bracket (]) is special only to close a set.
{ }	Specifies one of each pattern separated by a comma, as in bank{s,er,ing}, which locates "banks," "banker," and "banking."	The left brace ({) is special only to open an alternative pattern. The right bracket (]) is special only to close an alternative pattern.

^	Specifies one of any character not in the set, as in micro[^chip], which excludes the word "microchip," but locates "micron" and "micros."	The caret (^) is special only if it is the first character after the left bracket ([) that introduces a set. Otherwise, it matches a caret (^).
-	Specifies a range of characters in a set, as in c[a-r]t, which locates every three-letter word from "cat" to "crt."	The dash (-) is special only within a set, unless the left or right range character is missing. Otherwise, [-] matches a single dash.

Searching for Wildcard Characters as Literals

The wildcard characters listed above are interpreted as wildcard characters, not literal characters, unless they are delimited by a backslash (\). If you want a wildcard character to be interpreted as a literal in a wildcard string, you must precede the character with a backslash. For example, to match the literal asterisk (*) in a wildcard string, you delimit the character as shown below

```
<WILDCARD> a\*
```

Searching for Special Characters as Literals

Certain non-alphanumeric characters perform special, internal Verity engine functions, and by default they are not treated as literals in a wildcard string. These special characters are:

- comma ,
- left and right parentheses ( )
- double quotation mark "
- backslash \
- at sign @
- left curly brace {
- left bracket [
- less than sign <
- backquote '

To specify that special characters should be interpreted as literals, you must surround the whole wildcard string in backquotes ('). For example, to search for the wildcard string "a{b", you surround the string with backquotes, as follows:

```
<WILDCARD> 'a{b'
```

Another search string might include a backquote literal, in which case you must enter two backquotes in order for one to be interpreted as a literal, as follows:

```
<WILDCARD> 'a''b'
```

WORD Operator

Searches for documents that include one or more instances of a word you specify. For example, to search for documents that contain the word "rhetoric," you can enter the following:

```
<WORD> rhetoric
```

Documents are not relevance-ranked unless the MANY modifier is used, as in

```
<MANY><WORD> rhetoric
```

Modifier Reference

Modifiers further specify the behavior of operators. For example, you can use the CASE modifier with an operator to specify that the case of the search word you enter be considered a search element as well.

Modifiers include CASE, MANY, NOT, and ORDER, each of which is described below.

CASE Modifier

Performs a case-sensitive search when used with the WORD or WILDCARD operator.

By default, documents containing any occurrences of a search word or phrase are found regardless of case. To use the CASE modifier, you simply enter the search word or phrase as you wish it to appear in retrieved documents in all uppercase letters, in mixed uppercase and lowercase letters, or in all lowercase letters.

For example, to find documents that contain the phrase "Apple Computer" in mixed uppercase and lowercase letters you can enter the following:

```
<CASE> <WORD> Apple Computer
```

Only those documents that contain "Apple Computer," will be retrieved. Occurrences of "apple computer" or "APPLE COMPUTER" will not be retrieved.

The CASE operator works only if the collection has been set up for it. You can use the CASE operator only with the WORD or WILDCARD operators.

MANY Modifier

Counts the density of words, stems, or phrases in a document, and produce a relevance-ranked score for retrieved documents. The more occurrences of a word, stem, or phrase proportional to the amount of document text, the higher the score of that document when retrieved.

Because the MANY modifier considers density in proportion to document text, a longer document that contains more occurrences of a word may score lower than a shorter document that contains fewer occurrences.

The MANY modifier cannot be used with AND, OR, ACCRUE, or relational operators.

For example, to find documents based on the density of stems of the word "apple," you can enter the following:

```
<MANY> <STEM> apple
```

To find documents based on the density of the phrase "mission oak," you can enter the following:

```
<MANY> mission oak
```

NOT Modifier

Searches for documents based on evidence not found in the documents. You can use the NOT modifier with a word or phrase to exclude documents that show evidence of that word or phrase. The NOT modifier can be used only with the operators AND and OR.

For example, to find only documents that contain the words "cat" and "mouse" but not the word "dog," you can enter the following:

```
cat, mouse <AND> <NOT> dog
```

You can ensure documents that contain words that have a different connotation from what you intend are not retrieved. For example, the word "coke" may refer to "Coca-Cola," as well as the interim product created during the coal-producing process. To retrieve documents that refer to "Coca-Cola" and not the coal interim product "coke," you can enter the following:

```
(coke <AND> <NOT> coal)
```

ORDER Modifier

Performs ordered searches that match search terms based on the order of those terms in the query expression. This modifier is used with certain operators to express the explicit order in which the search elements must occur within a certain phrase. This modifier can be used with the NEAR/N operator.

To compose a query expression using this modifier, you need to add the ORDER modifier before the operator name, as shown below.

Table B.11 Example of Order Modifier

Syntax Type	Query Expression Syntax
Simple	wordA <ORDER> <Operator> wordB <Operator> wordC
Explicit	<ORDER> <Operator> (wordA, wordB, wordC, ...)

For example, to search for the word "president" followed by the word "washington" in the same phrase, you can use the query expressions shown below.

Table B.12 Example of ORDER Modifier

Syntax Type	Query Expression Syntax
Simple	president <ORDER><PHRASE> washington
Explicit	<ORDER><PHRASE>(president, washington)

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