EXHIBIT 1

Part 3

EXHIBIT F

iMANAGE

iManage DeskSite 6.0

User Reference Manual

iManage DeskSite 6.0
User Reference Manual

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Introduction

Overview

This manual describes how to use the client software that is part of the iManage DeskSite product. For information on the administrative utilities provided with iManage DeskSite, please see the *iManage Server Administrative Manual*. For installation guidelines and instructions, see the *iManage Implementation Guide*.

The *iManage DeskSite User Reference Manual* is intended for end users of iManage DeskSite. It covers the functions and operation of the iManage DeskSite program and the operation of Windows applications that are integrated with iManage DeskSite. The manual also describes in detail the operation of the iManage View and Portable programs.

How to Use this Manual

Users new to iManage DeskSite should read Chapters 1-5 to gain an understanding of iManage DeskSite and how to use it. Users familiar with an earlier version of iManage DeskSite can skim Chapters 1 and 2, then review the sections of Chapters 3, 4 and 5 that describe new features or changes to the iManage DeskSite program.

Chapters 6, 7, 8, and 9 describe special topics relevant to users of iManage DeskSite. You should consult these chapters as their content becomes relevant to your work.

Summary of Chapters

Chapter 1 provides an introduction to document management systems and iMan-

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age DeskSite.

Chapter 2 describes iManage DeskSite's main program interface.

Chapter 3 describes iManage DeskSite's basic document management functions.

Chapter 4 describes how to perform searches in iManage DeskSite.

Chapter 5 describes how to use iManage DeskSite from within other Windows applications.

Chapter 6 describes the advanced features of iManage DeskSite.

Chapter 7 describes how to use the iManage View program.

Chapter 8 explains how to use the iManage Portable program.

Chapter 9 explains how to use the document echoing option in iManage DeskSite.

What is a DMS?

A document-management system (DMS) is software and/or hardware that manages repositories of millions of documents for hundreds or thousands of users. Document-management systems can provide the following benefits to your organization:

- Easily manage online repositories that store millions of documents
- Sophisticated tools for quickly finding documents without manually searching file servers
- Consistent, system-wide document security
- Ability to share documents with other users securely and easily
- Creation and tracking of multiple versions of a document
- Extensive document history and audit trails
- Automatic archiving and restoration

Who Needs a DMS?

At organizations that do not use a document management system, file storage and retrieval looks something like this:

- The most common way to identify a document is through document names. Despite efforts to enforce file naming conventions, document names still tend to be arbitrary and often do not reflect the contents of documents.

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Hence, it is often difficult to find necessary documents, once the file name and directory have been forgotten.

- Documents are scattered on the file server. A single file server may contain thousands of directories and tens of thousands of documents. For this same reason, it is difficult to find and to share documents among users.

- To create new versions of documents, users must rely on providing a different name for the existing document. It is not possible to generate a report describing when and which users revised a particular document. Applications do not keep track of document versions or who made changes to a particular document.

- The ever increasing number of documents prevents users from locating required documents. Staff members spend increasing amounts of time locating information, and documents have to be repeatedly generated because the original versions cannot be located.

- Document security is left to individual users. Unauthorized access is a common problem.

- It is difficult to determine which documents are ready for archiving or which ones are in use. Users do not delete old documents and thus end up wasting network resources.

- Users cannot locate needed documents once they are archived to secondary storage.

What Is iManage DeskSite?

iManage DeskSite is an enterprise-wide, mission-critical DMS. With iManage DeskSite, you can greatly simplify the task of managing repositories of millions of documents and making them available to thousands of users. iManage DeskSite provides users with the following kinds of functions:

1. Search repositories of millions of documents

2. Search for documents based on document content

3. Share documents with other users

4. Search for and open documents from within major windows applications

5. Checkin and checkout documents

6. Create new versions of documents

7. Track document usage and history

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1 Product Features

Document Profile Information

Each document in an iManage library has its own document profile record. The information included in a document's profile record can include:

- the author
- the operator who entered it into the library
- the date of creation
- the version number
- the user who last edited it
- a lengthy description of the document
- a short description of the document
- comments
- custom classifications used to identify, differentiate and group documents in the library.

The information contained in a document's profile record enables you to search quickly for documents that you need without having to remember obscure file names or where the documents are stored on the file server.

Table 1.1 lists the kinds of information that can be contained in the profile record for a document.

Table 1.1: Document Profile Information Fields and Descriptions

Profile Field	Description
Number	Unique number automatically assigned by iManage DeskSite
Version	Version number of the document (1—999)
Description	Textual description of document, up to 254 characters
Name	Short name of document, up to 16 characters
Type	Document Type is usually based on the application that was used to create it

Table 1.1: Document Profile Information Fields and Descriptions

Profile Field	Description
Author	Author of the document has maximum security rights, and is Novell Owner of the document
Operator	Operator of the document has read/write access, and can set document access rights
Class	General class of the document, defines default settings, user defined
Client	Client is a custom classification used to identify the document.
Matter	Matter is a custom subclassification used to identify documents. It is dependent on the entry for Client
Custom Fields	Captions of custom fields can be customized
Creation Date	Date document was created or installed
Last Edit Date	Most recent date when document was edited
Last Edit Time	Most recent time when document was edited
Last User	Name of the user who most recently edited the document
Size	Size of the document in number of bytes
Retain Days	Number of days before inactive document is archived
Index Flag	Marks whether the document should be full text indexed
Comment	Comment associated with the document, up to 8,000 characters, fully searchable

Note: The fields included in a document's profile record can be customized extensively, so some of the items listed here may not be included in your documents' profile records, or different fields may be included that do not appear here.

Document Security

Sharing your documents with other users becomes a secure and easy task with iManage DeskSite. Each document in an iManage library has a custom set of security settings that determine who can access the document and to what degree

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they can access it.

To share your documents using iManage DeskSite, you select which users should have access to them and select to what degree they should have access to them. Users can be granted **read-only** access, which allows them only to view the document, or **read-write** access, which allows them to view and edit the document. They can also be granted **no access** to the document, in which case they cannot even locate the document in the library. You also specify a **default security setting** for the document, which determines the level of access available to users not specifically granted or denied access.

Pages

If Pages have been created using the iManage WorkSite application, you can see the Page hierarchy in the folder tree, the integration dialog, and the browse for folders dialog. You cannot create Pages in iManage DeskSite.

Folders

With iManage DeskSite, you can create groups of documents that are related together and named as Folders. Folders can be made PRIVATE or PUBLIC, depending on who needs to access them. When you create a folder, you can set folder security to inherit security settings from the parent folder.

By grouping documents into folders, you can easily organize documents without having to physically move them around or store them in the same place. The list of documents included in the folder can be displayed at once by clicking on the folder icon for the folder.

Worklists

Each iManage server that you are logged into has a worklist icon associated with it. By clicking on the Worklist icon, you can redisplay the forty documents that you used most recently in the library. By clicking on your Worklist, you can quickly access the documents you need and use the most. By default, documents in the Worklist are sorted by the most recent date you accessed them.

Related Documents

In addition to grouping documents in Folders, you can create relations between

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documents to keep related materials together, such as a contract and an addenda. For example, a contract could be related with the addenda to the contract or to other documents used to create it.

You can create relationships between documents through an intuitive drag-and-drop user interface. An icon in the iManage DeskSite desktop indicates documents that are related to other documents.

Saved Searches

iManage DeskSite provides powerful searching capabilities to help you find your documents. You can search for documents according to document profile information, the full text of document comments, or the full text of documents themselves. After you perform a search, you can save your search results for later immediate reference by clicking on the icon for the saved search. You can also share your saved searches with other users by marking them PUBLIC.

1 iManage WorkSite's Middle Tier Server

Clients and Servers

With iManage DeskSite, users access documents by logging into a machine called a **WorkSite Middle Tier Server**, which in turn provides them with access to documents stored in iManage libraries. The **WorkSite Middle Tier Server** machine is called a "server" because it performs operations for other PCs. In this case, the WorkSite Middle Tier Server delivers documents to users' PCs and performs searches for documents across the network. PCs that are the recipients of services from the server machine are referred to as **Client PCs**. Client PCs have iManage DeskSite's user software installed on them, which enables them to connect to the WorkSite Middle Tier Server.

By connecting to remote libraries through the WorkSite Middle Tier Server, many users can access these libraries while minimizing the number of long-distance connections that need to be maintained between locations.
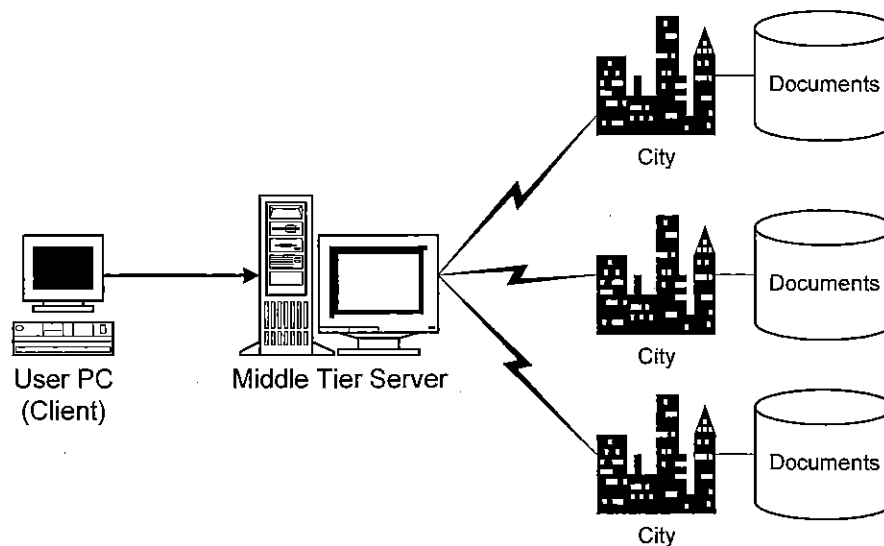
Figure 1.1: How a user accesses documents through iManage DeskSite.

What is an iManage Library?

When we refer to an iManage Database, or Library, we are actually talking about a library that includes three distinct entities. Each iManage library is actually composed of these three parts:

- a **fileserver**, which stores the actual documents
- a set of **information tables**, or **database**, that stores information about the documents
- a set of **index collections** of the full text of documents in the library, which is used for searching

These three components – the fileserver, the information tables, and the full text index – work together to organize and index your documents. From a user's standpoint, though, they operate as a single entity, or library, with a single name.

iManage DeskSite User Programs

There are three user programs provided with iManage DeskSite:

- **iManage DeskSite**, which is the main interface between users and iManage Libraries
- **iManage View**, which allows you to view multiple documents at once
- **iManage Portable**, which enables you to access documents while not connected to the library

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CHAPTER 2

Using the DeskSite Desktop Window

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Overview

The iManage DeskSite Desktop window is modeled on the Windows Explorer and Outlook user interfaces and contains several display frames, menus and toolbars:

- **Shortcut frame:** contains icons for shortcuts to important folders
- **Tree frame:** organizes and displays information about servers, libraries, folders and searches
- **Document grid:** displays a document list that is either the result of search or the contents of folders
- **Document Results frame:** displays various information in tabular display areas about a particular document
- **Menu Options and Toolbars:** provide the functionality to perform everyday tasks in iManage
- **Web Browser:** provides access to the web directly from the iManage DeskSite Desktop

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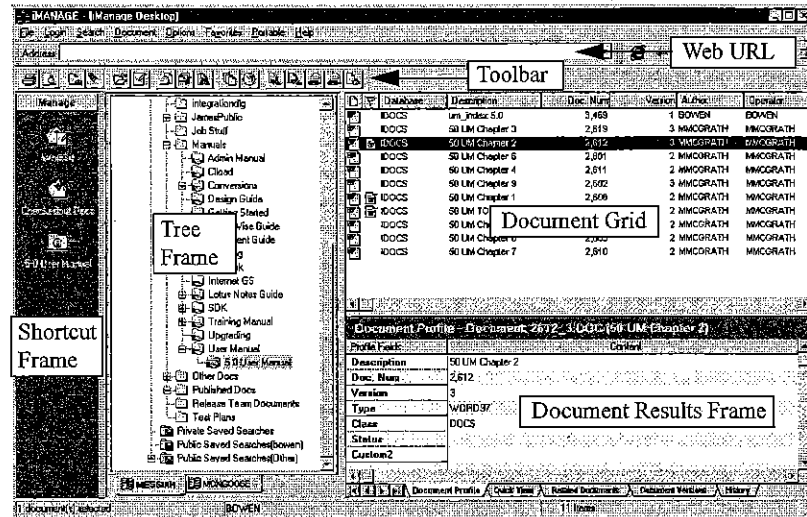
Figure 2.1: iManage DeskSite 5.0 Desktop Window

Shortcut Frame

The Shortcut frame contains shortcuts to frequently used folders. This provides fast navigation to your most frequently used folders and searches.

Two default shortcuts exist when you install the system:

- **Worklist shortcut:** Performs a search for the last forty documents that you used or edited.

- **Checkedout Documents shortcut:** A list of the documents you currently have checked out

To add a shortcut to the Shortcut frame:

Click the desired folder or saved search in the Tree frame and drag it to the Shortcut frame. Then you only need to double-click the shortcut icon to display the contents of the folder or search. This can eliminate significant folder navigation time.

To add a document to your shortcuts:

Click the desired document in the Document Grid and drag it to the desired folder in the Tree frame. The document appears in the Document Grid list when

you click the icon in the Shortcut frame.

Shortcut Groups

You can organize the shortcuts you setup into Shortcut Groups. Clicking on the Shortcut bar opens these groups. The top shortcut bar, named iManage, is a default group and cannot be removed.

To create a new Shortcut Group:

1. Right-mouse click the *iManage* shortcut bar

2. Select **Add Group** from the pop-up menu.

3. Type the name of the new group in the space provided. Press **Enter** when you are finished.

To remove a Shortcut Group:

Right-mouse click anywhere in the desired shortcut group and choose **Remove Group** from the pop-up menu.

Tree Frame

The Tree frame contains the organizational structure of all servers, libraries, iManage WorkSite pages if any, folders, worklists and saved searches.

The iManage Desktop window's Tree frame contains the following components:

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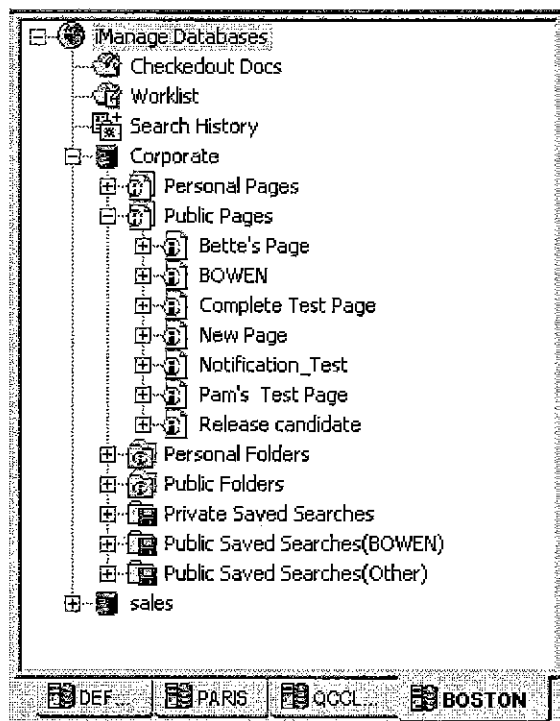
Figure 2.2: Tree Frame

Servers

In iManage DeskSite 6.0 and later you can log into more than one server at a time. Each connected server has its own Tree Frame of libraries, folders, search histories and worklists. Click the *server tabs* at the bottom of the Tree Frame to access each server.

Within the tree frame of each server are the following four components:

Checkedout Documents

Click on the Checkedout Documents icon to display a list of all documents currently checked out by the user. The documents appear in the Document Grid.

Worklist

The second icon in the tree frame is the Worklist. This is a shorthand way of performing a search for the forty documents you have most recently used or edited on a particular server. The documents appear in the Document Grid.

Search History

The third icon in the Tree frame is the Search History. You can quickly re-run searches recently performed in iManage DeskSite by clicking on the appropriate flashlight icon ⚲, displayed under the Search History branch of the tree frame. The Search History icon only retains searches performed during the current session. Clicking on a flashlight icon performs the search again using the same search criteria originally entered.

Library

One library icon appears for each library available to you in a particular Server tab. They may not all be visible at once in the Tree frame, so a vertical scroll bar along the border of the frame on the right lets you bring additional libraries and associated file folders into view.

Pages

If Pages were created in the iManage WorkSite application, you can see the page structure in iManage DeskSite. You can access documents from folders on these pages and perform all activities on them that you can perform to documents in other folders. The activities you can perform depend on your Role and the access rights you have to the Pages and Folders. You cannot create Pages in the iManage DeskSite application.

Folders and Sub-folders

Libraries contain folders, which are static groups of documents you can create or share with other users. Folders provide a method for organizing and sharing documents easily. To display the contents of a folder, click the icon for that folder and the documents within it appear in the Document Grid.

Creating a folder

To create a new folder, right click the icon for the library in which you want to create a folder. To create a sub-folder, right click the folder icon. You must have authority to create a sub-folder within that folder. The owner of the folder sets the security upon creation and can grant security options to other users. See "Folder security" on page 26. You can create sub-folders under other users' folders if you are given authority to do so. Your iManage administrator can disable the ability to create sub-folders under other users' folders. The *Create New Folder* dialog box appears requesting a folder name and folder description and naming the userid of the folder owner.
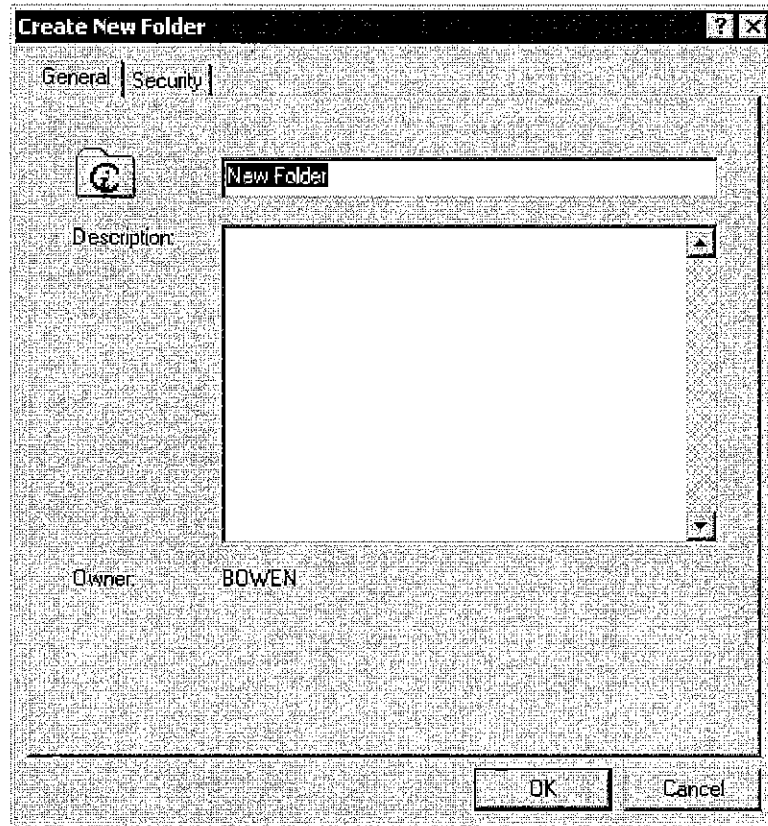
Figure 2.3: *Create New Folder* dialog -- *General* tab

Folder security

When you create a sub-folder, it has the same security settings as the parent folder by default. You can change these settings if you wish by deselecting the **Inherit permissions from parent** checkbox. If your role does not allow you to create public folders, you cannot access the security tab.
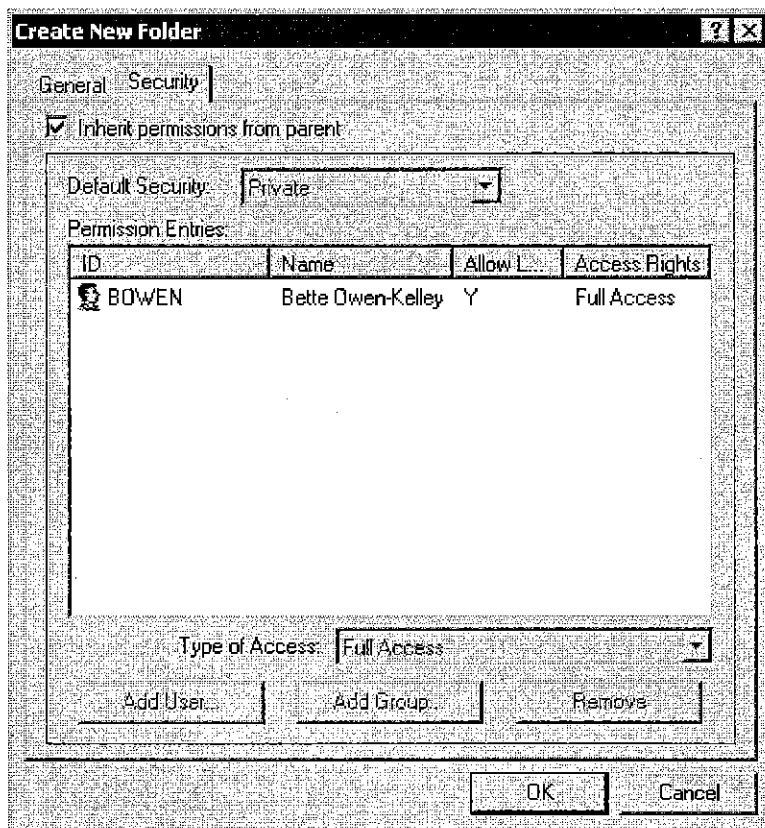
Figure 2.4: *Create New Folder* dialog -- *Security* tab

- If you select **Private** as your default security setting on the folder, then only you and other users or groups to whom you specifically grant access to the folder can see it.

- If you select **Public**, then all users, except those specifically denied access, can add documents to the folder or remove documents from the list of those contained in the Folder.

- If you select **View**, then all users, except those to whom you specifically grant Modify or No Access, can view the folders contents, but cannot add or remove documents from the folder, (i.e., view access restricts users from changing the list of documents that constitute the contents of the folder).

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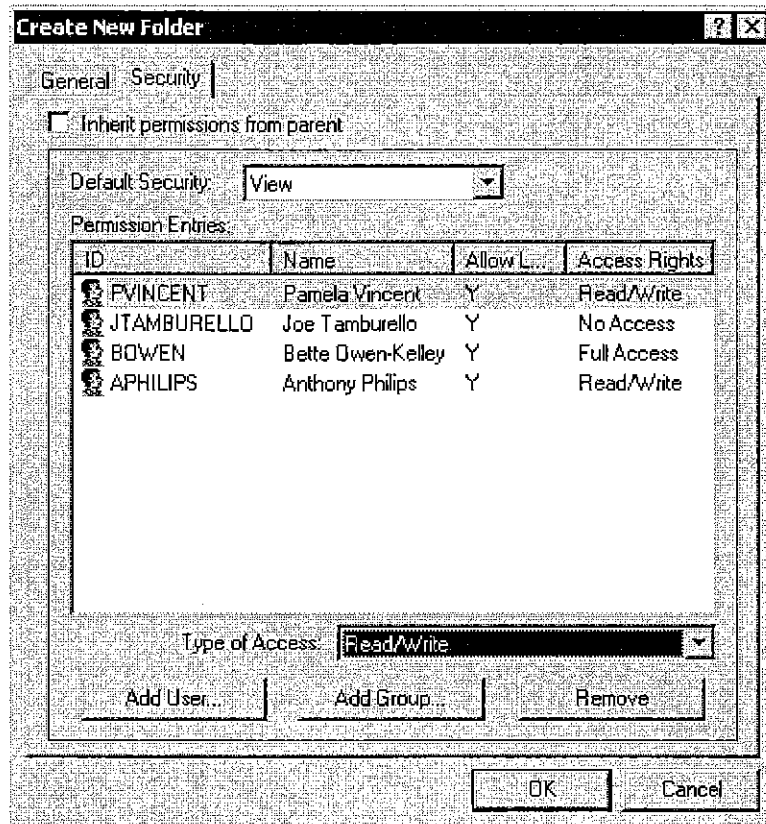
Figure 2.5: *Create New Folder* dialog -- *Security* tab -- Permissions not inherited from parent folder

You can also specify greater or lesser access privileges for specific users and groups by making a selction from the **Type of Access** drop down list. The access privileges that you grant to specific users and groups using the **Type of Access** drop down list are EXCEPTIONS to the general security settings you selected for this folder.

- **No Access**--Cannot see the folder.

- **Full Access**--Can set security on the folder, add or remove items from the folder, create subfolders, and delete the folder.

- **Read**--Can view documents in folder, but cannot add or remove them.

- **Read/Write**--Can add or remove documents from the folder and create subfolders, but cannot change folder security.

Note: The security settings on a folder only determine two things: (1) whether or not a user can see the folder; and (2) whether or not the user can add or remove documents from the folder. Whether or not a user can EDIT a document or only view it is determined by the security settings for the document, not those set on the folder. Depending on the access privileges set on the documents contained in a folder, a particular user may or may not see any documents contained in the folder, may have read-only access to the documents, yet be able to add documents to the folder, or may be able to edit documents contained in the Folder, but cannot add documents to the folder. For more information on document-level security, see "Setting Access Privileges" on page 55.

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Deleting a folder

To delete a folder that you created or have Full Access to, click the folder so that the folder name is highlighted, then press the **Delete** key. A *Confirm Delete* dialog box appears, asking you to confirm that you wish to delete the folder. Click on **OK** to delete the folder.

Note: Deleting a folder **does not** delete its contents, only the folder.

Adding Documents to a Folder

You can add documents to a folder that you created, or have Full Access or Read/Write access to. Use drag-and-drop technique to add documents already in the library:

1. In the Document Grid, highlight the document you want to add.

2. Click again on the document row, keeping the left mouse button depressed. The pointer becomes a document icon.

3. With the left mouse button depressed, move the pointer to the right of the appropriate folder icon in the Tree frame.

4. Release the mouse button. The document is added to the folder that you selected.

Importing Documents to a Folder

1. Highlight the folder where you want to import a document.

2. Select **Import** from the **File** menu.

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3. Navigate to the document you want to import and highlight it.

4. Click **Open**.

5. Complete the *New Document Profile* dialog.

6. Click **OK**.

Editing the Properties of a Folder

Once you create a folder, you can edit its properties — name, description, and security (i.e., whether it should be public or private). You can also edit folders created by others if you have been granted Full Access to those folders. To edit the attributes of the folder, right-click on the folder icon and select **Properties** from the popup menu. Only the owner of a folder or a user to whom the owner has granted Full Access can edit properties.

To change only the name of the folder, highlight the folder and press **F2**. Enter the new folder name and press **Enter**.

Saved Searches

A library may have saved search icons that contain search criteria that have been saved for later use. Saving searches allows you to perform routine searches of the library without having to reenter common search criteria. Clicking on a search icon causes the search to be performed again. The documents found during the search are displayed in the Document Grid. See Chapter 4 for specific instruction on creating a Saved Search.

Deleting a Saved Search

You can delete a Saved Search that you created in much the same way as you delete a folder that you created. Click on the icon for the Saved Search, then press the **Delete** key. Deleting the Saved Search does not delete the documents displayed in the search; it only deletes the search profile from the tree frame.

Opening and Closing Nodes in the Tree Frame

Nodes are the plus and minus symbols appearing throughout the tree structure wherever there is a branch. Clicking the minus symbol changes it to a plus and vice versa. When a minus sign appears in the node, you can see the tree structure beneath the icon to the right of the node; when a plus sign appears in the node, the tree structure is collapsed and you cannot see it. You can see the entire tree structure when all nodes are minuses.

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Note: The security settings on a folder only determine two things: (1) whether or not a user can see the folder; and (2) whether or not the user can add or remove documents from the folder. Whether or not a user can EDIT a document or only view it is determined by the security settings for the document, not those set on the folder. Depending on the access privileges set on the documents contained in a folder, any given user may or may not see any documents contained in the folder, may have read-only access to the documents, yet be able to add documents to the folder, or may be able to edit documents contained in the Folder, but cannot add documents to the folder. For more information on document-level security, see "Setting Access Privileges" on page 55.
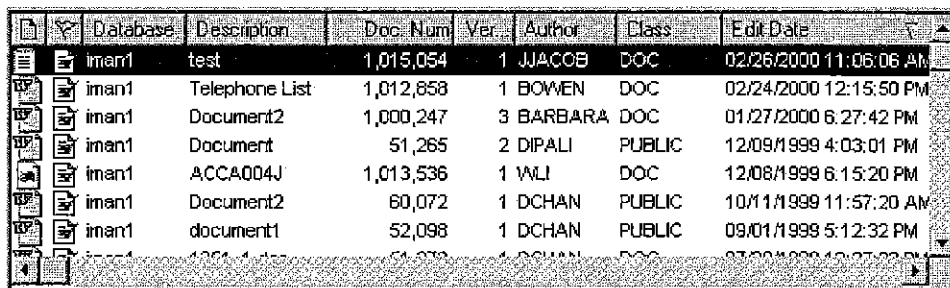
Navigating in the Tree Frame without a Mouse

- Up and **Down** arrow keys move cursor in up and down in tree
- **Left** and **Right** arrow keys function to open and close nodes in the tree
- **Enter** selects a Worklist, Folder, or Saved Search, as if you clicked on it.

Note: When you select a Worklist, Folder or Saved Search, focus automatically shifts to the Document Grid, enabling you to use keyboard shortcuts to navigate in that frame as well.

Document Grid

The Document Grid displays the results of an iManage DeskSite search, worklist or the contents of a folder.

		Database	Description	Doc. Num	Ver.	Author	Class	Edit Date	
		iman1	test	1,015,054	1	JJACOB	DOC	02/26/2000 11:06:06 AM	
		iman1	Telephone List	1,012,858	1	BOWEN	DOC	02/24/2000 12:15:50 PM	
		iman1	Document2	1,000,247	3	BARBARA	DOC	01/27/2000 6:27:42 PM	
		iman1	Document	51,265	2	DIPALI	PUBLIC	12/09/1999 4:03:01 PM	
		iman1	ACCA004J	1,013,536	1	WLI	DOC	12/08/1999 6:15:20 PM	
		iman1	Document2	60,072	1	DCHAN	PUBLIC	10/11/1999 11:57:20 AM	
		iman1	document1	52,098	1	DCHAN	PUBLIC	09/01/1999 5:12:32 PM	

Figure 2.6: The Document Grid

Sorting Documents in the Grid

To sort the contents of the Document Grid by any column, just click the desired column heading. To sort in reverse order—that is, from ascending order to descending or vice versa—click the heading again.

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Document column

The left most column in the Document Grid is the document icon column which displays an icon representing the document type. You cannot remove this column from the document grid.

Status column

This column displays icons to indicate the current status of the document. You cannot remove the status column from the document grid. The icons that may appear in this column are:

- The document is archived.

- The document is checked out.

- The document is locked.

- The document has other documents related to it.

Selecting Documents

Clicking on a document in the Document Grid highlights the document in blue. You can select multiple documents by keeping the **Ctrl** key depressed and left-clicking the desired documents. You can select a range by depressing the **Shift** key and then left click on two documents in the grid; those two documents and all those in between are selected. If you are unable to use the keyboard and mouse simultaneously, we recommend enabling **Sticky Keys**, which is available in Windows 98 and 2000 and Windows NT. Enable Sticky Keys from the *Accessibility Options Control Panel* which comes installed with your Windows 98 and 2000 and Windows NT operating system.

Performing Actions on Documents

With iManage DeskSite you can perform a variety of actions on the documents listed in the document grid. Execute these actions by:

- Highlighting the desired document(s) and clicking an icon in the toolbar icons at the top of the Desktop Window. (See "Menu Options and Toolbars" on page 38 for more information on the toolbar)

- Highlighting the desired document(s) and selecting an option from the Document menu (see Figure 2.6).

- Accessing the document menu with a right-mouse click on the desired document.

Customizing the Document Grid and Profile

You can configure the Document Grid in several ways so that it displays the information you want in the format you want. You can customize the Display Columns and the Profile Fields that appear in the Document Grid.

To Customize what columns appear:

1. To do this select **Options** from the **Options** menu. This launches the *Configure* dialog box (see Figure 2.7).
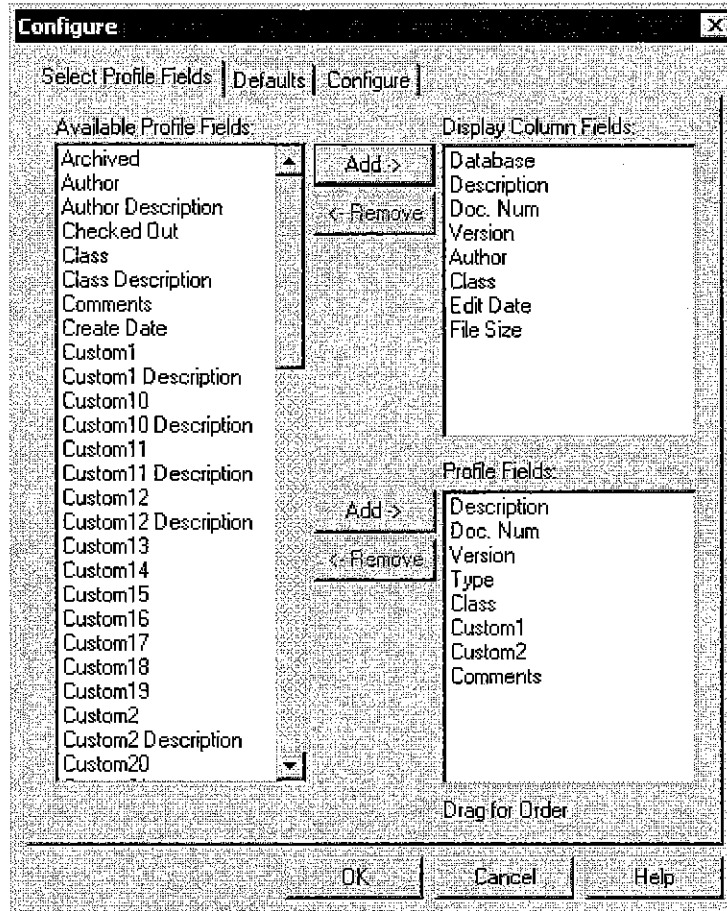
2

Figure 2.7: *Configure* dialog, *Select Profile Fields* tab

2. Choose the **Select Profile Fields** tab.

3. Add fields you want to see as column headers in the Document Grid from the Available Fields list to the Display Column Fields or the Profile Fields list.

4. Remove fields you do not want to see as column headers in the document grid from the Display Column Fields or the Profile Fields list to the Available Fields list.

Note: The **Profile Fields** list in the lower right corner of this dialog determines which profile fields display in the Document Profile tab of the Document Results Frame in the lower-right portion of the main desktop window.

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5.   Click **OK** when finished.

Customize Display Options Defaults:

Select **Options** from the **Options** menu. This launches the *Display Options* dialog (see Figure 2.8). Then choose the **Defaults** tab. There are two features to customize in the Document Grid:
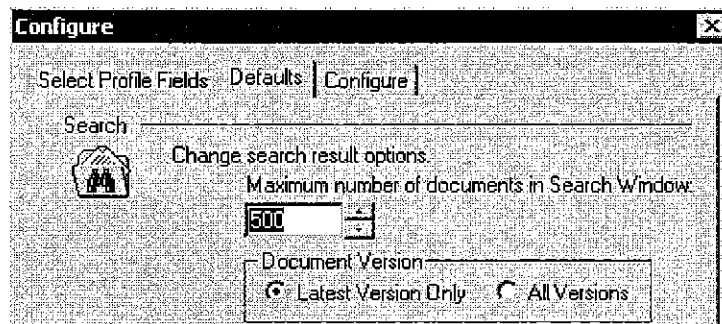
Figure 2.8: The top portion of the *Display Options* dialog, Defaults tab.

*   Select the maximum number of searches to appear in the Document Grid. This will prevent an overwhelmingly large search return impacting the performance of your system.

*   Select whether you want the Document Grid to contain only the latest version of each document or show all versions.

Navigating in the Document Grid without a Mouse

Up and **Down** arrow keys move the cursor up and down in the grid. The **Page Up** and **Page Down** keys also move the grid up or down.

Document Results Frame

The Document Results frame provides information about a particular document. There are five tabs:

| Document Profile | Quick View | Related Documents | Document Versions | History |

Figure 2.9: The Document Results Frame tabs

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Switching Tabs in the Bottom Pane of the Document Grid

Ctrl+Tab switches from tab to tab in the bottom pane of the Document Grid.

Document Profile Tab

You can view a document's profile by highlighting a document in the Document Grid and then clicking the Document Profile tab. You may not edit any of the fields appearing in this tab. To edit profile fields you must launch the *Edit Profile* dialog.

Which profile fields appear in this tab is determined by the settings of the Profile Fields list on the *Select Profile Fields* tab in the *Configure* dialog, launched from the **Options** menu.

Quickview Tab

To view a document without leaving the iManage Desktop, highlight the document and click the Quickview tab. You can also right-click the desired document and select **Quickview** from the pop-up menu or click the Quickview icon from the toolbar. A read only image of the document appears in the Quickview tab.

Related Documents Tab

To see a list of a document's relations, highlight the document and click the Related Documents tab. You can also right-click the desired document and select **Related Documents** from the pop-up menu or click the Related icon from the toolbar. A list of the document's relations appears in the Related Documents tab.

Document Versions Tab

To see a list of a document's versions, highlight the document and click the Document Versions tab. You can also right-click the desired document and select **Versions** from the pop-up menu or click the Version icon from the toolbar. A list of document's versions appears in the Document Versions tab.

History Tab

To see a list showing events in the document's history, highlight the document and click the History tab. You can also right-click the desired document and select **History** from the pop-up menu or click the Version icon from the tool-bar. A list of activities performed on the document appears in the Document History tab. The history tab shows such activities as Create, Checkout, Open, Checkin, Print, Modify, Location of the activity and comments about certain activities.

Document Results Frame PushPin

The PushPin allows you to control the relationship between the Document Grid Frame and the Document Results Frame. Depending on the PushPin state, the Document Results Frame behaves differently when you click on an item in the Document Grid Frame. You can set the PushPin separately for each tab in the Document Results Frame. Your iManage Administrator can set the default state and disable certain states.

PushPin	State	Tab Name	Tab Behavior
	Up	All tabs	Goes blank
	Down	All tabs	Automatically refreshes
	Locked	Related Documents	Stays the same as before you clicked on another item

Menu Options and Toolbars

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The following table shows the keyboard shortcuts and toolbar buttons for frequently used functions in iManage DeskSite. Menus are customizable by your system administrator, so some options may not appear or may have different names.

Table 2.1: iManage Toolbar

Menu Option	Keyboard Shortcut	Toolbar Icon
Search	Ctrl+F	
Refresh	F5	
Print Document List	---	
Print Preview	---	
Open	Ctrl+O	
Edit Profile	Ctrl+E	
Versions	Ctrl+S	
Quickview	Ctrl+Q	
View	---	
History	Ctrl+H	
Related Docs	Ctrl+R	
Checkout	---	
Checkin	---	
Send Document URL	---	
Unlock	---	

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Table 2.1: iManage Toolbar

Menu Option	Keyboard Shortcut	Toolbar Icon
Remove from Folder	---	
Import	---	
Export	---	
Purge	---	
Synchronize Echoed Documents	---	
Set New Document Default	---	
Setup Local Applications Table	---	
Security Template	---	
Set Security on Multiple Documents	---	
Change Password	---	
Send Document	---	
Send Link	---	
Copy Document	---	
Copy and Open Document	---	
Create New Version	---	
Create New Version and Open	---	
Print Selected Document	---	

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Table 2.1: iManage Toolbar

Menu Option	Keyboard Shortcut	Toolbar Icon
Checked Out Information	---	

Customizing Toolbars

iManage DeskSite allows users to both edit the default toolbar and customize new toolbars.

Select **Customize Toolbar** from the **Options** menu or right-mouse click on the toolbar you wish to customize and select **Customize...** from the pop-up menu. The *Customize* dialog will launch displaying a Toolbars tab and a Commands tab.

In the Toolbars tab of the *Customize* dialog you can:

- Activate or deactivate the toolbar on your desktop by highlighting the toolbar in the list and checking or unchecking the checkbox.

- Create a new toolbar by clicking on the **New** button. You are asked to give the toolbar a name.

- Delete a customized toolbar by highlighting the desired toolbar and clicking the **Delete** button. (You cannot delete the iManage toolbar)

- Reset the iManage toolbar back to its original state by highlighting it and clicking the **Reset** button.

- Activate the tool tips checkbox which will popup the button name when the mouse pointer hovers over a button.

- Activate the 'cool look' checkbox to display buttons in a different way.

In the Commands tab of the *Customize* dialog you can:

Select from various toolbar categories. iManage DeskSite has one default category called **iManage**. Your system may have others. When a category is highlighted, the available buttons appear to the right of the Categories list.

Build a toolbar by dragging and dropping button commands from this Commands tab to the desired toolbar on your desktop. Remove a button from the toolbar by dragging and dropping the button from the toolbar back to the Commands tab.

Web Browser

iManage DeskSite has a web browser utility to allow you to quickly access the web directly from the iManage Desktop. When launched, the browser takes over the space occupied by the Document Grid and Document Results Frame. To provide more web-browsing space, de-select **Shortcut Bar** option in the **Options** menu. You can also use standard mouse-based Windows re-sizing techniques to create a larger browsing space.

Web Browser Toolbar

Address Field:

Type in a standard web address, or select from a previously selected address by using the drop-down arrow, and the site launches.

Arrow Commands:

These commands help you navigate backwards and forwards. The forward button will only be available if you have navigated backward at some point during the current browsing session.

Reload Command:

This will refresh the currently loaded page and include any changes since the last time you loaded the page.

Stop Command:

If a page you are trying to load is taking too long to display, you can cancel it by clicking the **Stop** icon on the toolbar.

Home Command:

Your browser's home page is the page that first appears when you launch the web browser. You can return to this page at any time by clicking on this Home icon.

To change your home page in Microsoft Explorer launch the MS-Explorer application and select **Internet Options** from the **View** menu. Type in your home

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page address in the space provided in the General tab.

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Search Command:

This command will launch the Microsoft search engine at Microsoft's main web site.

Favorites Menu:

The favorites menu contains standard Explorer functionality to add and organize favorite web sites that you visit repeatedly.

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CHAPTER 3
iManage DeskSite: Basic Functions

Overview

This chapter describes the basic document management functions available in iManage DeskSite. These include:

- Connecting to WorkSite Middle Tier Servers
- Opening documents
- Viewing documents
- Searching for documents
- Checking out documents
- Checking in documents
- Relating documents to one another
- Working with multiple versions of documents
- Copying documents
- Sending documents and document attachments
- Importing documents
- Exporting documents
- Entering and Editing Profile Information
- Setting Access Privileges on a document
- Viewing document history
- Unlocking documents
- Deleting documents
- Restoring Archived Documents
- Changing passwords

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Note: For information on more advanced functions, see Chapter 6, 7 and 8 in this manual. For information on using iManage DeskSite from within an integrated application, see Chapter 5. The *iManage Integrated Desktop* window, which is available by selecting **Open** from the **File** menu in integrated applications, is described in detail in Chapter 5.

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Connecting to WorkSite Middle Tier Servers

Your first step in using iManage DeskSite is to register any WorkSite Middle Tier Servers you wish to connect to. The WorkSite Middle Tier Server is how you gain access to your documents and databases. To register and log into a WorkSite Middle Tier Server, you need a valid Login, Password and Server name:

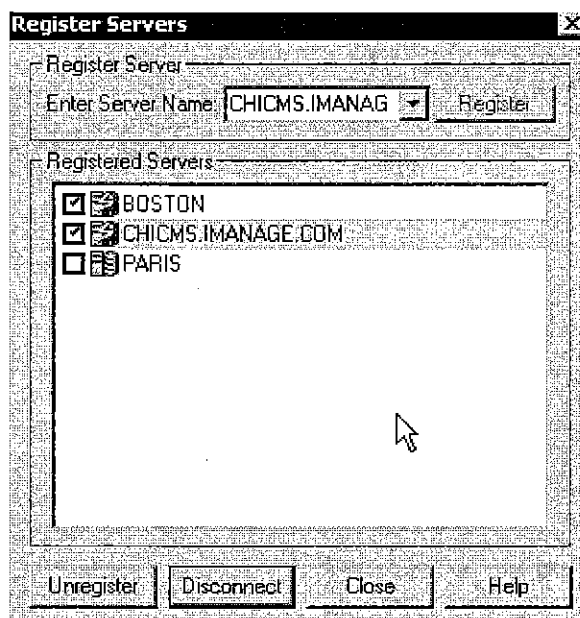1. Select **Register/UnRegister** from the **Login** menu. This launches the *Register Servers* dialog.

Figure 3.1: *Register Servers* dialog. The icons show which servers are connected. In this illustration, BOSTON and CHICMS.IMANAGE.COM are connected and PARIS is not.

The dialog shows a list of all the servers that are registered. A check in the

checkbox indicates that the server is set to log on automatically when you open iManage DeskSite. You can select which registered servers to log into by checking or unchecking them.

To disconnect from a server to which you are currently connected, highlight it and click **Disconnect**. You will not lose the login information you have already entered for that server.

To reconnect to a server to which you are not currently connected, highlight it and click **Reconnect**.

To change login information for a server, highlight it and click **Unregister**. Then register the server again.

2. Enter the name for the WorkSite Middle Tier Server or the Server Cluster in the **Enter Server Name:** field and click **Register**. This launches the server *Login* dialog.

Figure 3.2: *Login* dialog

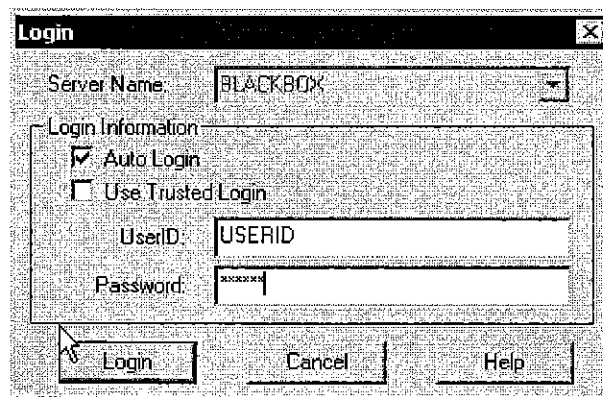**Note:** Your servers may be set up in a server cluster arrangement that includes multiple servers serving the same iManage libraries. The multiple servers provide additional fault tolerance in the event of a server failure and enhanced performance. You log into a cluster the same way you log into an individual server.

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3. Enter your userID and password in the **UserID** and **Password** fields.

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Note: For security reasons, you must enter your UserID and Password correctly in a limited number of attempts. Your iManage administrator sets the number of attempts you can make before the system locks you out. If this happens, contact your iManage administrator to reset your password.

4. If you want to log into this server automatically when you open iManage DeskSite, chekc **Auto Login**.

5. If Trusted Login is enabled by your Administrator and you want to use this feature, check **Use Trusted Login**. When you check this box **UserID** and **Password** are blanked out.

6. Then click **Login**. If you have entered authentic login information the Server appears in the list box of the *Register Servers* dialog.

Note: You can repeat these steps for as many Servers as you would like to Register for current or future use. From the *Register Servers* dialog you can connect to or disconnect from any of the registered servers. At the startup of the iManage application, only connected severs are automatically logged on.

Trusted Login Option

The *Login* dialog box also presents you with the option of using your network login ID to log into the WorkSite Middle Tier Server. To use this option, check the **Use Trusted Login** checkbox. The **User** and **Password** entry boxes are locked out if you check this box.

Note: Your administrator must specifically enable this option. If you try to use this option and receive an error message, try logging in without using the Trusted Login option.

Connecting to an Additional WorkSite Middle Tier Server

To connect to a different WorkSite Middle Tier Server, open the *Register/UnRegister Servers* dialog and select from the available registered servers (or register a new one) and click **Connect**. Click **OK** to complete the login. You can connect to several WorkSite Middle Tier servers at once.

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Auto Login on One or More WorkSite Middle Tier Servers

Once you have registered the WorkSite Middle Tier servers you need, you can select which ones you want to log into automatically when you launch iManage DeskSite. To select Auto Login servers, check the box next to the server name. To deselect a server uncheck the box. Deselecting a server does not unregister that server. See Figure 3.1.

Unregistering a Server

To unregister a WorkSite Middle Tier Server without exiting iManage DeskSite manually, open the *Register/UnRegister* dialog, highlight the desired server and click the **Unregister** button. Click **Yes** to confirm the unregister request.

Logging Out

You are automatically logged out of the WorkSite Middle Tier Server when you exit or close iManage DeskSite.

Autosynchronize/Checkin Alert

If you have edited any portable or echo documents since the last time you ran iManage DeskSite, the following alert message appears immediately when you open iManage DeskSite. This message indicates that there are portable or echo documents stored on your local drive that have been changed. To synchronize these documents back to the database or check them in, click the **Yes** button in the message box shown below. You have the option of copying them back as the original document, importing them as new versions of the original document, or importing them as new documents. If you click **No** and do not synchronize or check in the documents in question, this message box appears again the next time you launch iManage.
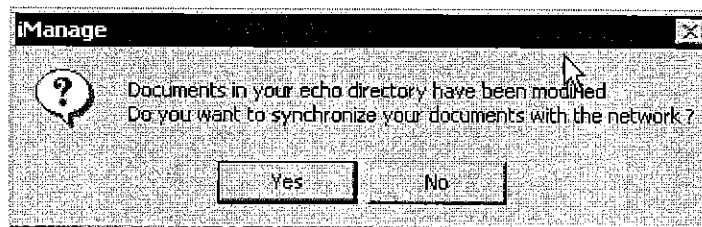

Figure 3.3: The Autosynchronize or checkin alert box appears to inform you that you have portable or echo documents stored locally that need to be synchronized back to the library.

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If you select **Yes** in the autosynchronize/checkin message box, then a dialog box appears that allows you to check in any portable documents that you have checked out or synchronize any echo documents that you edited. This dialog box is shown in Figure 3.4.

If you want to show only documents that have changed, check the **Show only echo modified** checkbox.
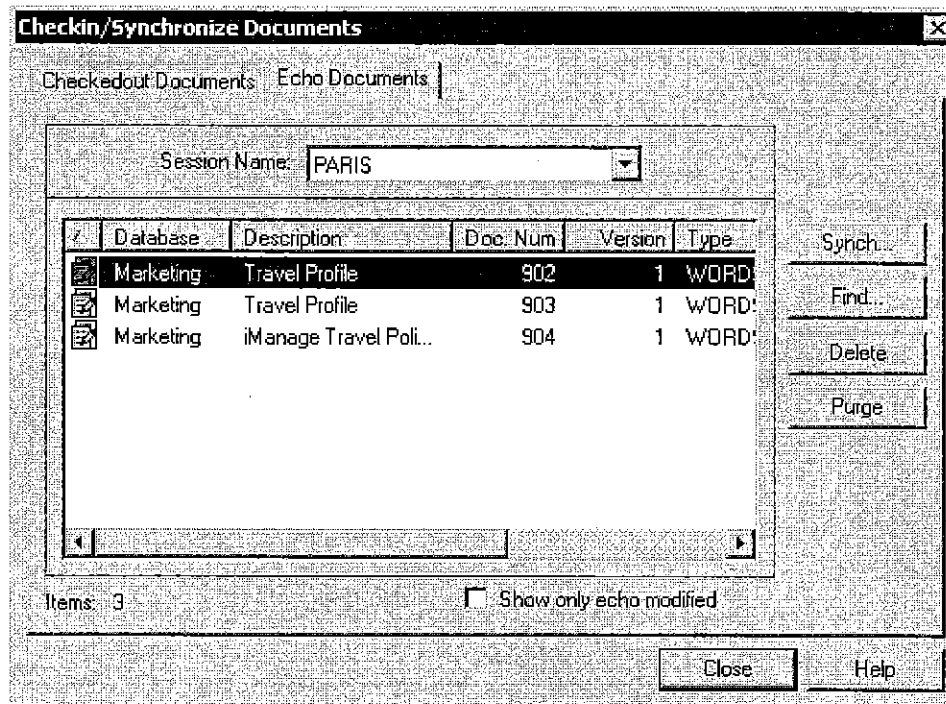

Figure 3.4: *Checkin/Synchronize Documents* dialog box

You can also access the *Checkin/Synchronize Documents* dialog box from the **Options** menu. From the *Checkin/Synchronize Documents* dialog box, you can check in documents that you currently have checked out for portable mode or synchronize echo documents that you edited off line.

To synchronize echo documents:

1. Click the **Echo Documents** tab.

2. Highlight the documents that you want to synchronize and click the **Synch** button.

To check in checked out documents:

1. Click the **Checkedout Documents** tab.

2. Highlight the portable documents that you want to checkin and click the **Checkin** button.
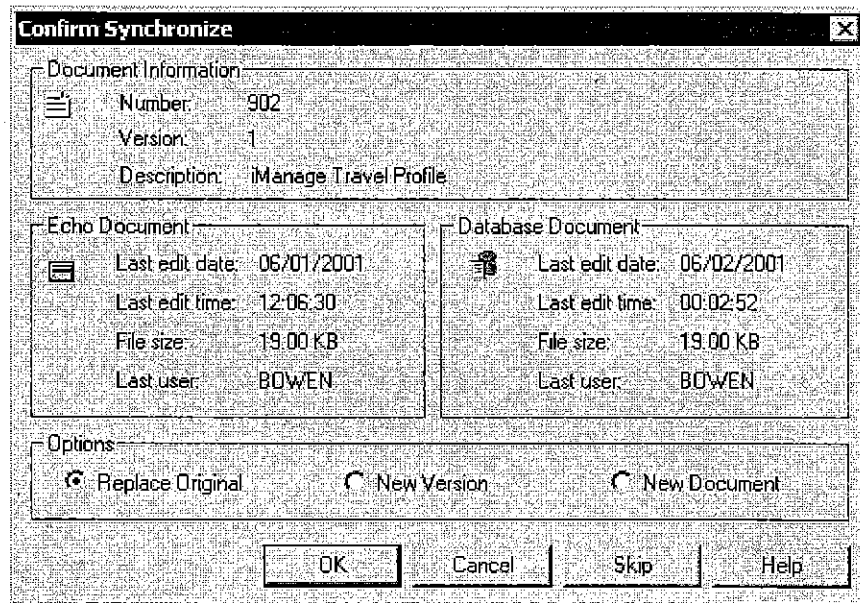
The Confirm Synchronize dialog opens.

Figure 3.5: *Confirm Synchronize* dialog

Choose the appropriate option: **Replace Original, New Version,** or **New Document** and click **OK** to synchronize the portable or echo document with the document in the iManage library.

Searching for Documents

One of your first tasks in using iManage DeskSite will be to locate documents that you want to work on. You can locate documents by:

*   Clicking the icon for a saved search ⊞ . This will perform the search again on the database and return documents that meet the search criteria.