





EXHIBIT 1

Part 4

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- Click the Worklist icon . This will display the last 40 documents that you have worked on.
- Click a Folder icon . This will display the documents contained in the folder.
- Click the Search icon  and entering new search criteria.

To perform a search:

Select **Search** from the **Search** pulldown menu or click the Search icon  and enter search criteria in the fields provided. Complete information on using iManage DeskSite's extensive searching capabilities is available in [Chapter 4](#).

Opening Documents

Once you locate documents that you want to work on in your Document Grid, you can open these documents by highlighting the documents and selecting **Open** from the **Document** pulldown or right-click popup menu. The keyboard shortcut for Open is **Ctrl-O**. iManage automatically opens the document in the primary application that was defined for this document type.

Note: If you set your left mouse button double click parameter to the Open command, you only have to highlight the document and double-click to open the document. To set this parameter, select **Options** from the **Options** menu and click the **Configure** tab. Select **Open** from the **Default Command** drop down menu.

Note: If you attempt to open a document that is currently in your Echo directory because you worked on it previously and made changes to it that are not reflected in the copy on the file server, iManage DeskSite will not let you open the document. Since iManage DeskSite copies a document to your Echo directory when you open it, this feature prevents you from overwriting changes that you made to the document. You must synchronize the document before you can open it. See [“Synchronizing Echo Documents into the Network”](#) on page 192 for more information.


Opening from an Integrated Application

If an application is integrated with iManage DeskSite, you can also open docu-

ments that are contained in an iManage database from inside the application by selecting **Open** from the application's **File** menu. If the application is integrated with iManage, the *iManage Integrated Desktop* appears and allows you to search for documents, display your worklist, or view the contents of a folder or saved search.

If your application is not integrated with iManage DeskSite

If you do not see the *iManage Integrated Desktop* when you select **Open** from an application's **File** menu, then the application is not integrated with iManage DeskSite. To open documents that are located on an iManage database in an application that is not integrated with iManage DeskSite:

1. Locate the document(s) in the database using iManage DeskSite.
2. Use iManage DeskSite's **Checkout**  function to save a local copy of the document(s) on your hard drive.
3. Open the document(s) from within the non-integrated application.
4. When you are finished working on the documents, save them again on your local hard drive.

IMPORTANT! Do not change the filename of the documents when you save them.

5. Use iManage DeskSite to check the documents back into the database using the **Checkin** function.

If you are using an application that you think should be integrated with iManage DeskSite, but you do not see the *iManage Integrated Desktop* when you select **Open** from the **File** menu in that application, consult your company's technical support department.

Viewing Documents


Instead of opening a document, you can view it with iManage View program or in the iManage Desktop's Quickview Frame. Documents that are merely being viewed are not locked or marked as being in use; instead, View or Quickview makes a temporary copy of the document. Thus, you can still view documents that are marked as busy (e.g. those that are in use or checked out), even though you cannot open them. You can view most word-processing, spreadsheet, and

graphics documents in the Quickview frame or iManage View program.


You can only view one document at a time in the Quickview frame. To view multiple documents simultaneously in read-only format, you must use the iManage View program. iManage launches this program automatically when you highlight the document and click the view icon or select **View** from the **Document** menu.

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To view a single document in the Quickview frame:

Highlight a document in the Document Grid and click the Quickview icon  or the **Quick View** tab or select **QuickView** from the **Document** menu or right-click pop-up menu.

To view multiple documents simultaneously:

Highlight multiple documents in the Document Grid and click on the View button  or select **View** from the **Document** menu. The documents open in read-only form in the iManage View program.

From iManage View, you can search the full text of documents displayed in the View frame, copy sections of documents to the clipboard, or print documents. See [Chapter 7](#) for more information about the View program.

Note: Documents are not locked in the database while you are viewing them. You can view documents whether or not they are in use or checked out of the database.

Printing Documents

You can print a copy of a document directly from iManage DeskSite. To print a document:

1. Highlight the document(s) in the Document Grid.
2. Select **Print** from the **Document** menu.

Note: Because this print routine uses the document's native application to print the document, it is not possible to change the printer setting directly from the iManage DeskSite application. It will print using the Windows default settings.

Note: Selecting **Print** from the **File** menu prints a list of documents currently displayed in the Document Grid (i.e. the contents of a folder or search).

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Entering Document Profile Information

Whenever you create a new document, a new version of a document, or a copy of a document, iManage DeskSite prompts you to enter profile information for that document. Profile information helps identify the document and enables you and/or others to find it easily when performing a search of the database. The dialog boxes used to enter profile information for a new document, new versions of documents, and copies of documents are all customizable by your database administrator. For that reason, the dialog boxes that appear in your version of iManage DeskSite may appear different from the default ones shown on the following pages. You may see fewer or more options, fields of profile information may be renamed, and the names of the dialog boxes may be different.

Table 3.1: Default Fields of Profile Information

Default Name of Field	Significance
Database	Name of the database in which the document is stored.
Type	This field usually indicates the application that should be used to open the document.
Class	This field classifies the document with a custom document classification.
Author	This field indicates who wrote the document.
Operator	This field indicates who edited or worked on the document (a typist or coauthor).
Security	This field lists the document's default security status: PUBLIC, PRIVATE, OR VIEW.

Table 3.1: Default Fields of Profile Information

Default Name of Field	Significance
User Access (button)	By clicking this button, you can specify access privileges for individual users.
Group Access (button)	By clicking on this button, you can specify access privileges for groups of users.

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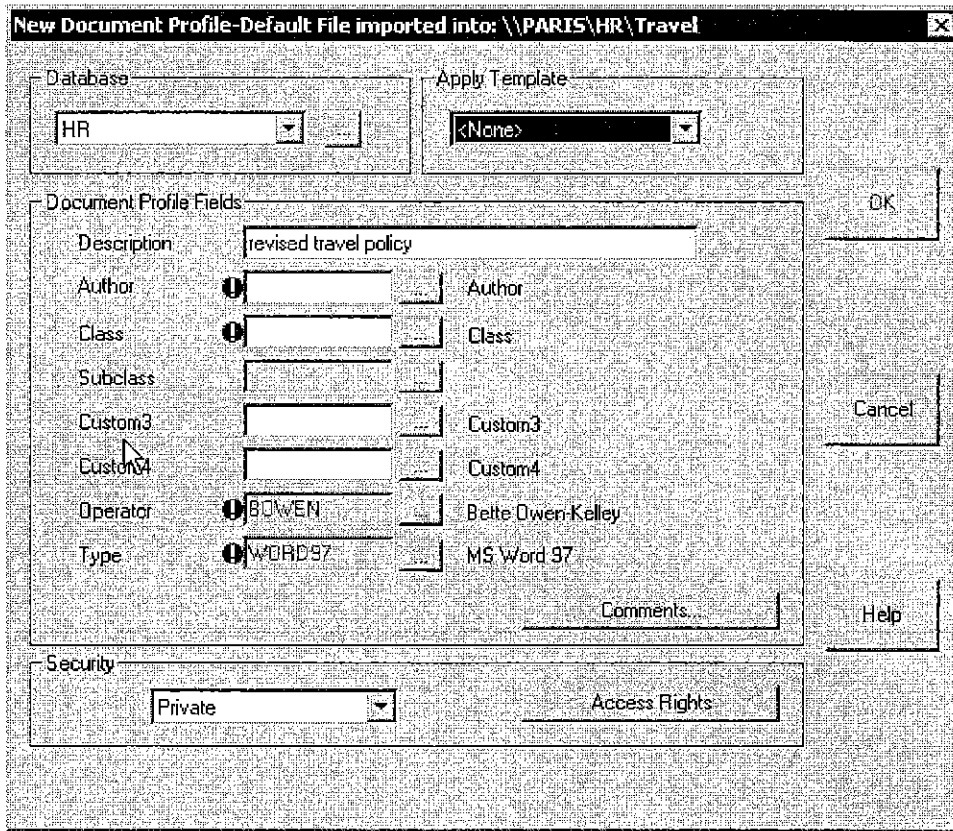


Figure 3.6: Default appearance of the *New Document Profile* dialog box, which is used to enter profile information for new documents in the database.



iManage DeskSite remembers the last five values you entered in each field in the New Profile, New Version, and Edit Profile dialog boxes.

If browse buttons appear next to the text-entry fields in your dialog box, use these

buttons to display selection boxes for each field of profile information. You can also press **F2** to display a selection box. These selection dialog boxes display lists of available options for each text-entry field. Select an option from within the dialog box and click **OK**.

iManage DeskSite offers a Type-ahead feature. When you edit profile information in a field, you can type the first few characters of the entry and then press Tab. iManage DeskSite fills in the entire entry if possible.

The icons to the left of the field indicate if the field is required or whether or not you have made a valid entry:

	The green exclamation point symbol indicates that profile information is required for this field.
	The red X symbol indicates that the information entered in this text-entry box is not a valid entry for this profile field.

If the entry is invalid, enter or select a valid entry. If the entry that you need is not available, your iManage administrator must create it.

Note: Your system administrator can enable your system to enter Child field information (such as Matter) without first entering Parent field information (such as Client).

Setting Access Privileges

If you have the ability to set the access privileges on your documents (when you create a new document or when you select **Edit Profile** from the **Document** menu), then you will notice that there are two basic kinds of settings available to you.

- You can select a default security setting for the document. This can be PUBLIC, PRIVATE, or VIEW.
- You can specify access privileges for individual users or groups.

Rules and Definitions:

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Public, Private, and View

- When the default security setting is set to PUBLIC, then all users who have access to the library will be able to view and edit the document and its profile information EXCEPT those users and groups of users to whom you specifically deny access.
- When the default security setting is set to PRIVATE, then no users have access to the document EXCEPT the Author and Operator named in the document's profile record AND those users and groups to whom you specifically grant access.
- When the default security setting is set to VIEW, then all users have read-only access to the document EXCEPT the Author and Operator named in the document's profile information AND those users and groups to whom you specifically grant full access, read-write access or no access.

Author and Operator Privileges

The Author and Operator named in the document's profile record ALWAYS have full access to the document. Only the Author and Operator can change the Author or Operator of the document or edit access privileges.

Group Access

When a group is granted access privileges to a document, all users who are a member of that group are granted the same access privileges to the document.

Conflicting Access Privileges

When there is any conflict in access privileges, such as when a user is granted greater privileges individually, then granted lesser privileges as a member of a group, the greater access privilege apply. Generally speaking, iManage DeskSite always seeks to MAXIMIZE users' access to documents.

Read-only access...

Means that the user can view the document in read-only form, but cannot make changes and save them to the library as the same document.

Read-write access...

Means that the user has full view and edit privileges to the document. Users with read-write access can change profile information for the document, but they cannot change the Author or Operator, or edit access privileges. Only the Author or Operator and those to whom they grant full access can edit these fields.

Full access...

Means that the user has full view and edit privileges to the document, plus they can change the security settings for the document. The Author and Operator have full access, and they can grant full access to others.

No Access...

Means that the user cannot access the document. If a user has no access to a document, the document does not show up in any search of the library that he or she performs. If the document is in a public project, users who have no access to the document do not see the document when they click on that project icon.

Editing Security on Multiple Documents

There may be times when you need to edit the security for a large group of documents at the same time, for example, if a new employee joins your group. You can edit the security settings on two or more documents in the same operation. This feature functions only on documents that are currently checked in; you cannot edit security on documents that are archived, locked or checked out.

To edit security settings on multiple documents:

1. Highlight the documents whose security you want to edit and select **Bulk security edit** from the **Document** menu.

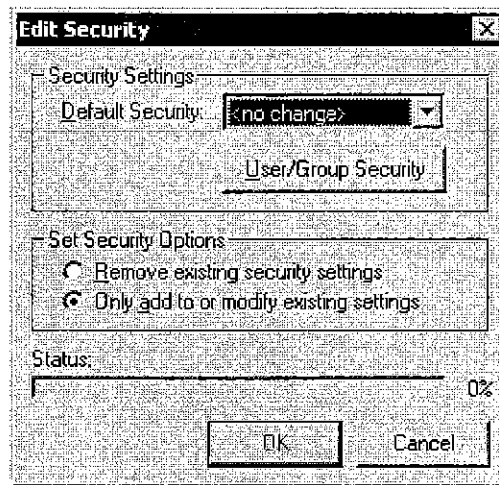


Figure 3.7: *Edit Security* dialog

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2. Select the Default Security for all the documents in the **Default Security** drop-down list. You can select **<no change>**, **Public**, **Private** or **View**.
3. Click **User/Group Security** to add Users and/or Groups who are exceptions to the default security
4. Choose an option in the **Set Security Options** group:
 - Choose **Remove existing security settings** if you want to replace the current setting in all documents with the new settings you are entering. The security you set will be the same on all the documents you select.
 - Choose **Only add to or modify existing settings** to keep the current settings on the documents, but add or change specific users or groups. The settings you select will change but all other settings will remain as they were.

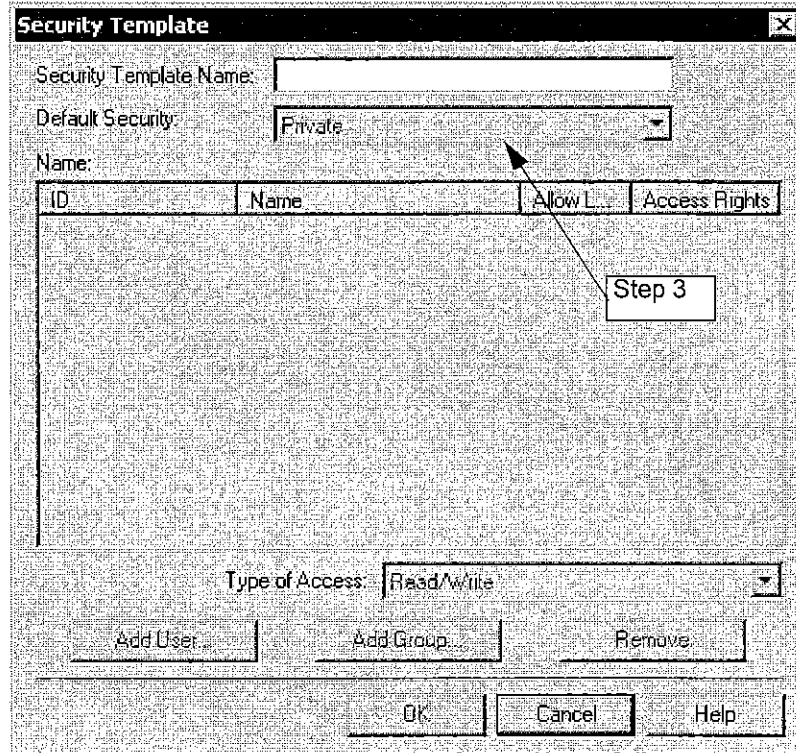
Creating and Applying Security Templates

When you add a new document to an iManage library, you have the option of entering custom security settings, including access/denial lists of users and groups, or you can apply a security template to the document that will determine the security settings to be applied to the document. You can only apply a security policy to a document when you add the document to an iManage library. Once you add the document to the library, changes to the security policy do not affect the document's individual security settings. If you want to make the document available to other users or change the security settings after adding it to the database, you must make these modifications to the document individually using the **Edit Profile** option.

You can optionally select a security policy that should be applied by default to all new documents in the *New Document Defaults* dialog box. If you select a default security policy to be applied to all new documents, that security policy is selected by default in the *New Document Profile* window each time you add a new document to the database. Like all values defined in the *New Document Defaults* dialog box, however, you always have the option of selecting a different security policy or custom security settings each time you add a new document to the database.

To Create a Security Template:

1. Select **Security Template** from the **Options** menu. This launches the *Security Template Management* dialog.
2. Click **New**. This launches the *Security Template* dialog.



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Figure 3.8: Security Template dialog box

3. Enter a name for the template in the **Security Template Name** text box. After you enter the template name the enterable fields are no longer grayed out.

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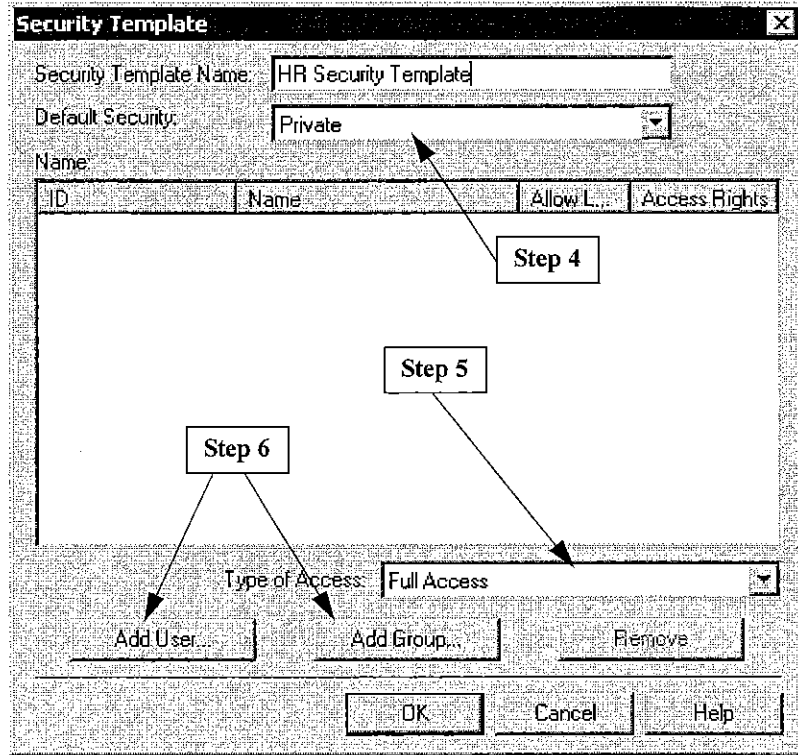
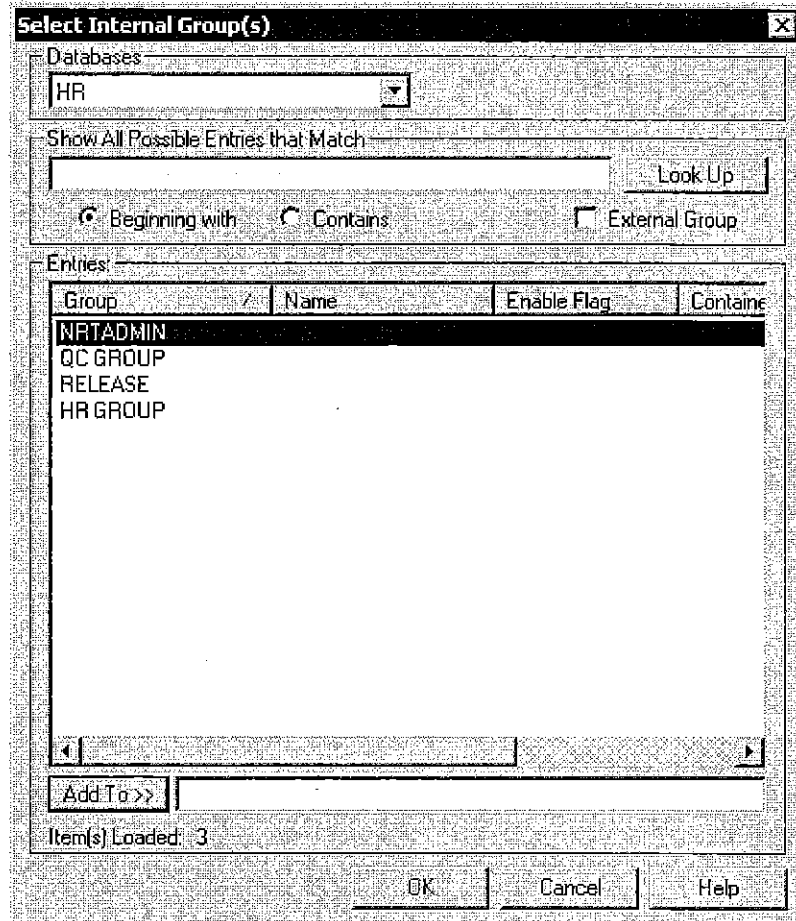


Figure 3.9: Security Template dialog box with name

4. Select a default level of security from the **Default Security** drop down menu to assign security access to anyone, except Author and Operator, not accounted for in your explicit security assignment list. This field defaults to Private. You can also select Public or View. (Public = Read/Write, View = Read Only, Private = No Access)
5. Select the type of access from the drop-down menu for the users and groups you specifically name in the template. You can choose from Full Access, Read/Write, Read, or No Access. See [“Setting Access Privileges”](#) on page 55.
6. Click **Add User** or **Add Group** to add specific users or groups to the template.



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Figure 3.10: *Select Internal Group(s)* dialog box

7. Select one or more groups or users from the list. You may select from a list of external users or groups by checking **External Group** or **External User**. Click **Add To>>** to add them to the security template. To remove users or groups from the security assignment list, highlight and delete them from the Add To list.

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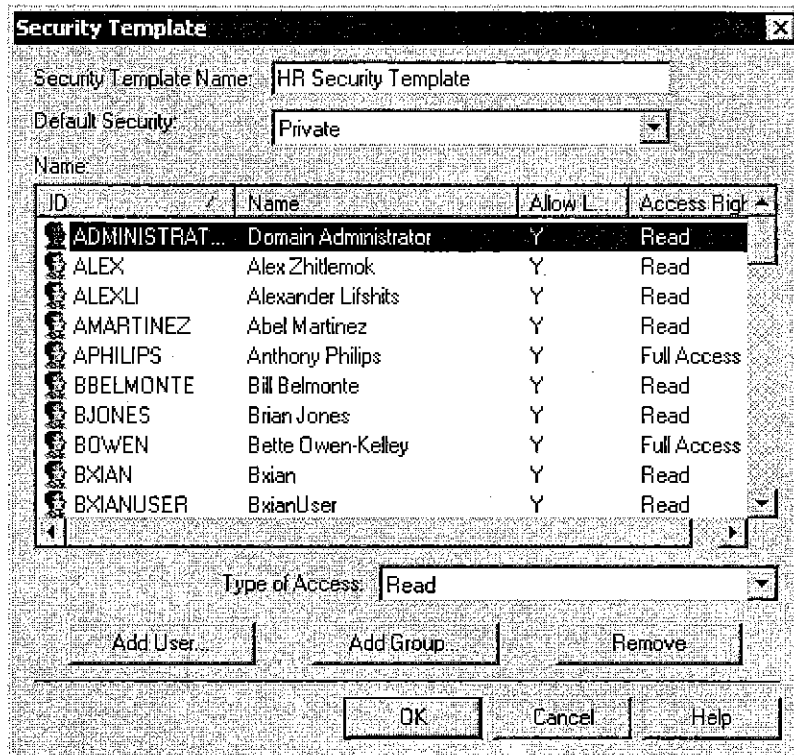



Figure 3.11: *Security Template* dialog box showing list of groups and users

8. To remove a user or group from the template list, highlight the user or group and click **Remove**.
9. Click **OK** to save the security template.

To Apply a Security Template

Once a security template has been created, you can apply it to any new document you add to an iManage library. In the *New Document Profile* dialog there is a **Security Template** drop down menu. This menu contains the Security Templates you have set up. Select a security template and you are finished with the security aspect of the document's profile. You can modify the access control lists when you import a document to an iManage library. However, if you assign an author-based security template, you cannot modify security settings assigned to that author.

Using *Lookup* Dialog Boxes:

If they are provided, use the lookup buttons  in the *New Document*, *New Version* or *Profile Edit* dialog boxes (or in the *Search Dialog* window) to enter profile information. When you click a lookup button in one of these dialog boxes, a selection box appears that contains a list of valid entries for that field of profile information. [Figure 3.12](#) shows an example of a selection dialog box for the Author field of profile information. Note that you can select either internal or external authors. To see the list of external authors, simply check **External**.

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Searching in the Selection Box

If the list of validated entries is long, enter a search string in the **Show All Possible Entries that Match** field and select whether you wish that string to occur only at the beginning of the document or anywhere in the document, then click the **Lookup** button to search the list.

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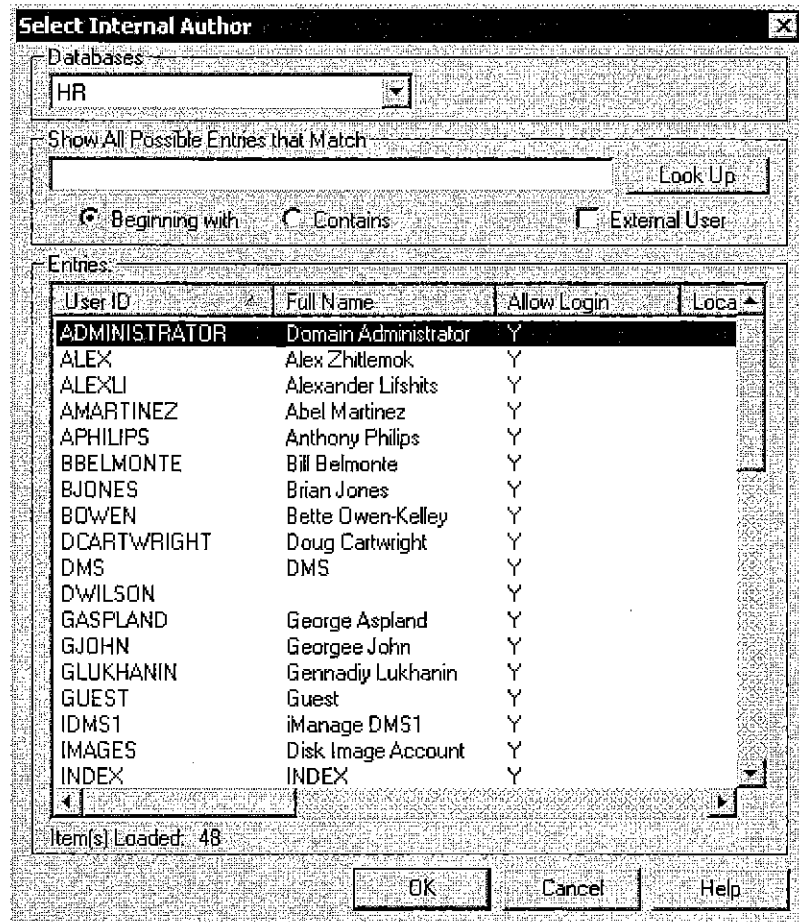


Figure 3.12: Select Internal Author dialog box

Primary Libraries

Administrators have the option of assigning each user a primary library. A user's primary library is his or her "home" library. It is where the user will store most of his or her documents; hence, when the user initiates a search or creates a new document, the user's primary library is selected automatically as the default.

Users can always select a different library. The ability to assign users a primary (or default) library is intended as a convenience to users.

When creating new documents...

When a user creates a new document, the user's primary library is initially selected as the storage location for the document. If the user enters a different user's name in the author field, and that user has a different primary library, then the library selection will switch to the primary library for the user whose name was entered in the author field. Users can change the library selection, if desired, before saving the document.

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When performing a search...

Initially, whenever a user opens the Search dialog window, the user's primary library will be selected. If the user changes the target libraries for the search, the new selections will remain in effect until the user changes them or until he or she closes and restarts iManage.

Editing Document Profile Information

To edit or view profile information for a document:

1. Highlight the document in the Document Grid.
2. Select **Edit Profile** from the **Document** menu. The dialog box used to edit profile information is displayed for that document.

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Profile Edit and View - Default

Document Number: 118 Last Edit Date: 6/7/2001
 Document Version: 1 Last Edit Time: 2:15:18 PM
 Creation Date: 6/7/2001 Size: 25.5KB (26,112 bytes)
 Last Edited By: _____

Profile Fields

Description: Airline Travel Info

Author: BOWEN Bette Owen-Kelley

Class: DOC Document

Subclass: _____

Custom3: _____

Custom4: _____

Operator: BOWEN Bette Owen-Kelley

Type: WORD97 MS Word 97

Index Document Comment...

Security

View *Access Rights

OK Cancel Help

Figure 3.13: Default appearance of the *Profile Edit and View* dialog box. This dialog box may appear differently in your version of iManage DeskSite.

Your capacity to edit profile information for a document will depend on whether you are the Author or Operator for the document and whether you have Read/Write or Full Access privileges. Only the Author or Operator or others to whom they have granted Full Access can change access privileges on a document. Users with Read/Write access to a document can edit profile information, but not access privileges.

Note: Your system administrator can enable your system to enter Child field information (such as Matter) without first entering Parent field information (such as Client).

Checking Out Documents

You can check out individual documents from an iManage database for use outside of the iManage system. You may want to edit a document off site or with an application that is not integrated with iManage DeskSite.


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Note: Individual document check-out is different than iManage Portable document checkout. See [Chapter 6](#) for information on checking out documents for portable use.

The document's number and version becomes its filename when it is checked out. For this reason, the document's filename must remain unchanged if you want to be able to check it back into the iManage system. If you check out a Microsoft Word document with a document number of 37 and a version number of 2, the document will be stored on your local hard drive (or other location) with a filename of **37_2.DOC**.

IMPORTANT!: Do not change a checked-out document's filename. It is used during the document check-in process.

To check out a document:

1. Highlight one or more documents in the Document Grid and click the **Checkout** icon  or select **Checkout** from the **Document** menu. The *Checkout* dialog box appears.
2. If you are checking out the documents for portable use, check the **Portable** check box.
3. In the **Destination Path** field, enter the path for the directory where you want to save the checked out documents. If the Portable checkbox is checked, the documents are saved to the **Nrportbl** directory. You can use the browse button next to the Destination Path field to search for a directory on your local hard drive or the network.
4. Enter a due date for the documents and a reason for checking out the documents in the comments field.
5. Click **OK** to checkout the documents.

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Checkout

Document information

Database: HR
Number: 2 Version: 1
Description: Manage Travel Policy

Options

Portable Checkout

Destination Path: C:\NRTEcho

Details

Due Date: 6/ 7/2001

Comments:


OK Cancel Help

Figure 3.14: Checkout dialog box


Checking In Documents

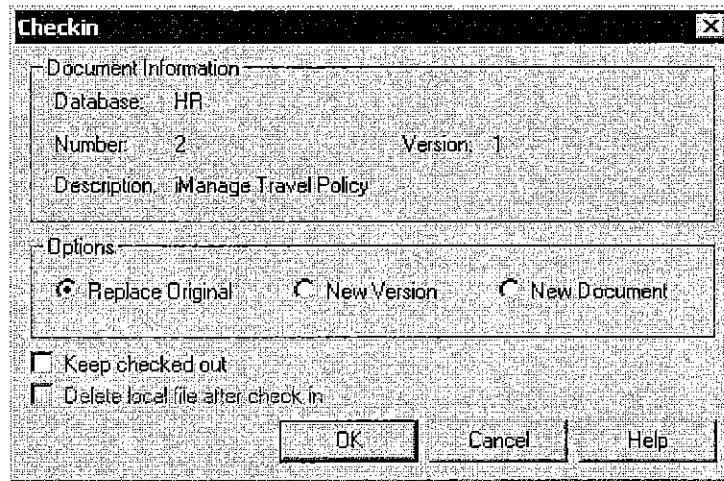
Documents that have been checked out can be checked back into iManage DeskSite easily using the **Checkin** option.

To checkin documents:

1. Launch iManage DeskSite and click the Checkouted Documents icon  within the Folder Tree. This displays all of the checkout documents for the selected server in the document grid.
2. Highlight the document(s) that you want to check in.

Note: Select multiple documents in the Document Grid by keeping the **Ctrl** key depressed and left-clicking the desired documents. If you hold down the the **Shift** key and then left click on two documents in the grid, those two documents and all those in between are selected.

- Click the Checkin icon  or select **Checkin** from the **Document** menu to check in the selected documents. A *Checkin* dialog box appears for each document to be checked in.



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Figure 3.15: *Checkin* dialog

- Select either **Replace Original**, **New Version** or **New Document**. To apply the selected option to the entire group of documents that you're checking in, select **Apply to all documents**. The **Apply to all documents** option appears only if you have multiple documents selected.

Note: Your system may not allow you to modify existing documents. In this case, you can check documents in only as new documents.

- Click **OK** to check in the documents and return to the iManage desktop.

Checking in Documents Checked Out on a Different Machine

If you checked out documents to the Portable directory (NrPortbl) on a different machine, a laptop computer for example, and try to check them in on your desktop computer, you receive an error message. You cannot check in the document. You must check it in on the computer where you checked it out to the Portable directory.

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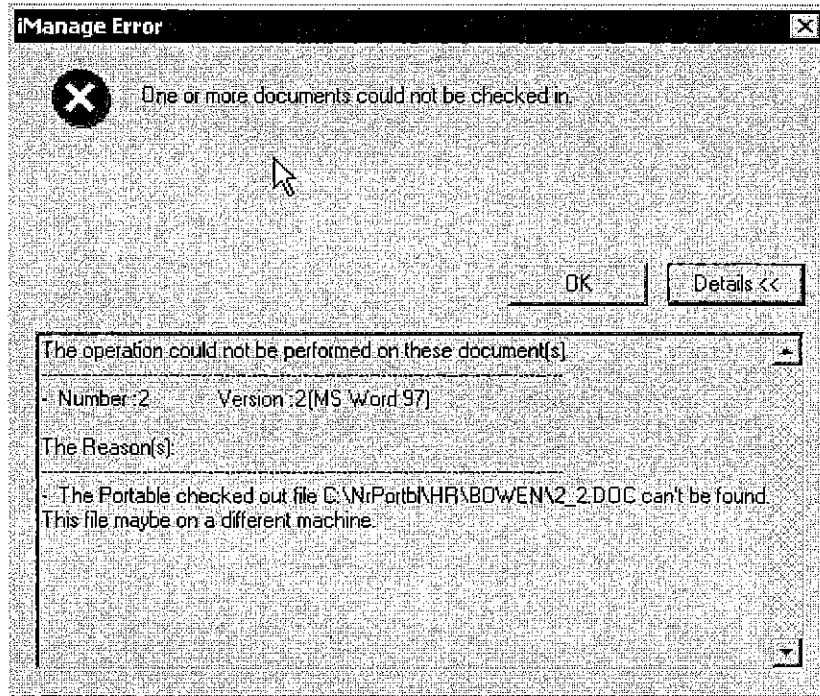
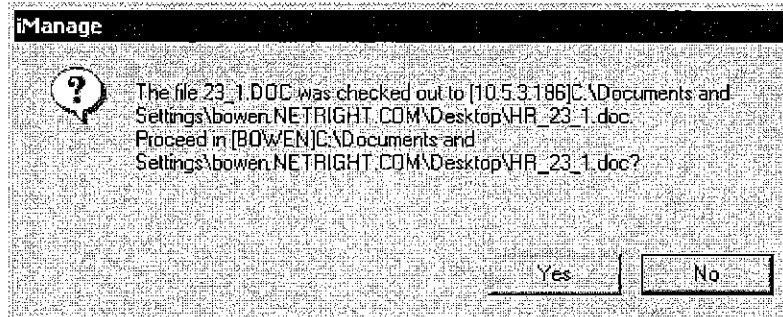


Figure 3.16: Error message you see if you attempt to check in a document that you checked out on a different machine. Click **Details** to see the reason as illustrated above.

Checking in Documents Checked Out to a Different Directory

If you checked out documents to a directory other than the Portable directory (NrPortbl), for example, your desktop or a diskette, and try to check them in on your desktop computer, you receive a warning message.



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Figure 3.17: Warning message you see if you attempt to check in a document that you checked out to a different directory.

The message reminds you of the directory where you checked out the document, but does not prevent you from checking it in.

Relating Documents

You can create one- or two-directional relations between documents in iManage DeskSite. Document relations are one of the ways you can organize and group documents in iManage DeskSite, in addition to folders and document classifications. Your iManage administrator must enable two-way relations in your system. Your system can handle either one-way or two-way relationships, but not both.

To create relations between documents:

1. Highlight a document in the Document Grid. If your system is set for one-way relationships, this becomes the parent document.
2. Select **Setup Relation** from the **Document** menu or right-click pop-up menu. The *Setup Relation* dialog opens and lists any documents that are already related to the document.

Or click the *Related Documents* tab and lock the **PushPin**. See “[Document Results Frame PushPin](#)” on page 37 for more information about the **PushPin**.

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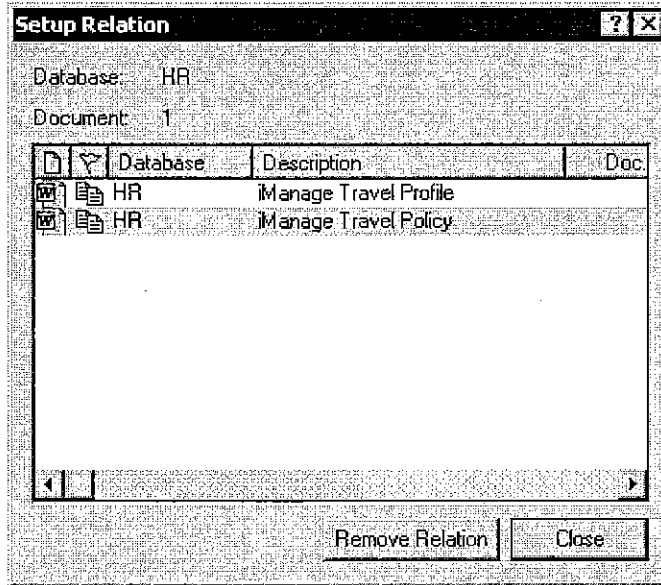



Figure 3.18: Setup Relation dialog

3. Using the Tree Frame and the Document Grid, navigate to the documents you want to relate to the document. The documents do not need to be in the same folder as the parent document.
4. Select the documents and drag them into the *Related Documents* tab. You can select multiple documents and drag them all at once. Or drag them into the *Setup Relation* dialog.

The  icon appears in the second column from the left in the documents grid for documents that have related documents.

5. You can see the related documents by highlighting the parent document in the document grid and clicking the *Related Documents* tab.

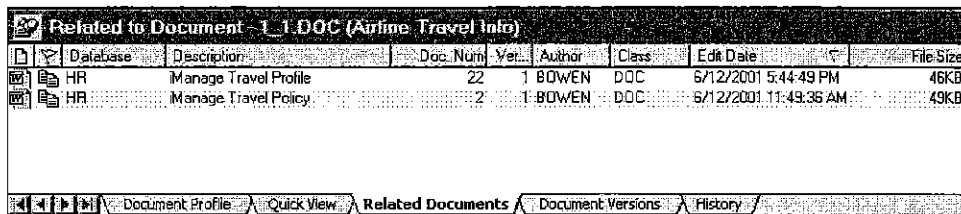


Figure 3.19: The Related Documents tab of the Document Results Frame

Depending on how your system is set up, each document you selected is related in a one-way or two-way relationship, to the original document. The selected documents, however, are not related to each other. For example, if you want to relate Documents B, C, and D to Document A, the following table shows how the documents relate.

Table 3.2: Document relationships

Relationship setup in your system	Document A relates to:	Documents B, C, and D relate to:
One-way	B, C, and D	Only documents you set up
Two-way	B, C, and D	A plus any other documents you set up

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Uses for Related Documents

You can use document relations to group documents and their attachments, a contract and its amendments, a contract and riders to the contract, etc. You can also use document relations to link a “parent” document with the documents that were used to create it, such as a final report with its inserts, which could be spreadsheets, graphics files, tables, figures, and charts.

Copying Documents

You can make a copy of a document that is stored in an iManage library by highlighting the document in the Table Frame, then selecting **Copy** from the **Document** menu.

Selecting **Copy** from the **Document** pull-down menu reveals four options:

- **Copy:** iManage makes a duplicate copy of the selected document.
- **Copy Document and Open:** iManage makes a duplicate copy of the selected document and opens the new copy of the document in its associated application.
- **Copy As New Version:** iManage makes a duplicate copy of the selected document and creates a new version of the document. Not available if document is checked out.
- **Copy As New Version And Open:** iManage makes a duplicate copy of the selected document, creates a new version of the document, and opens the

new copy of the document in its associated application. Not available if document is checked out.

When you select any of the above options, you are presented with the new profile dialog box, where you can enter information for the duplicate copy of the document before iManage adds it to the library. Enter profile information in the *New Profile* dialog and click **OK** to save the new copy of the document.

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Note: You can copy a document even when it is in use or checked out. The copy will be a copy of the last version of that document that was saved to the database. You cannot copy a document as a new version if it is checked out.

E-mailing Documents

You can send a copy of a document, a link of a document, or a URL link of a document through e-mail from iManage DeskSite.

To E-mail a copy of a document

Highlight the document(s) in the Document Grid and click the **Send** button, or select **Send Copy** from the **Send** sub-menu of the **Document** menu. A new mail message launches with the desired document(s) attached.

Or open a new message in your e-mail application, go to iManage DeskSite and select the documents you want to attach. Then drag the documents to your e-mail message and drop the documents into it.

To E-mail a link to a document

Highlight the document(s) in the Document Grid and click the **Link** button, or select **Send Link** from the **Send** sub-menu of the **Document** menu. A new mail message launches with the desired link(s) attached.

To E-mail a document URL link

Highlight the document(s) in the Document Grid and click the **Send document url** button, or select **Send Document URL Link** from the **Send** sub-menu of the **Document** menu. A new mail message launches with the desired url link(s) attached.

Note: In order to send a Document URL link, your system must include an iManage WorkSite Web Component server.

Refresh

You can use the **Refresh** option on the **Search** menu to update the information displayed in the iManage DeskSite window with the latest information from the database. You can also press **F5** to refresh. The refresh option is a quick alternative to re-performing the search or worklist request displayed in the iManage desktop.

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Importing Documents

You can use the import document function in iManage DeskSite to add documents to an iManage library that are currently stored on your local hard drive or on some other drive accessible on the network. Use this function to import only a few documents at a time. iManage DeskSite provides an additional administrative utility for performing mass document importations.

You can select a destination folder for the imported document by selecting the database from the drop-down menu and clicking the lookup button. Then navigate to the folder where you want to place the document. Depending upon how your system is set up, the document may inherit the security settings of the folder where you place it. If your system has this feature turned on, any other security settings are ignored.

Document importation is for documents that have never been stored on the database before.

If you are trying to	You should
return a document to the library that was previously checked out	use iManage DeskSite's checkin function
return an echo copy of a document to the library after you've edited it	synchronize the echo document
synchronize an echo document and you are unable to do so	use the import function to add it to the library as a new document

To import documents into an iManage database:

1. Launch iManage DeskSite and log into your WorkSite Middle Tier server.
2. Select **Import** from the **File** pulldown menu. A standard windows dialog box appears so that you can locate and select a file for importation.
3. Use standard windows techniques to locate the file. Double-click on the file name to select it.

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A standard dialog box for entering profile information for new documents will be displayed. Enter appropriate profile information for the document.

4. Click **OK** to add the file to the library.

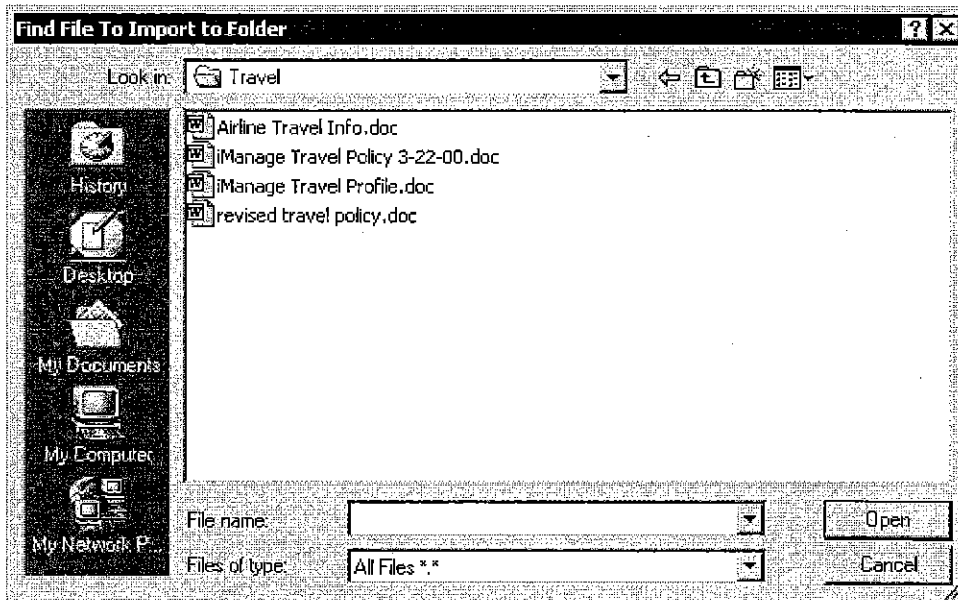
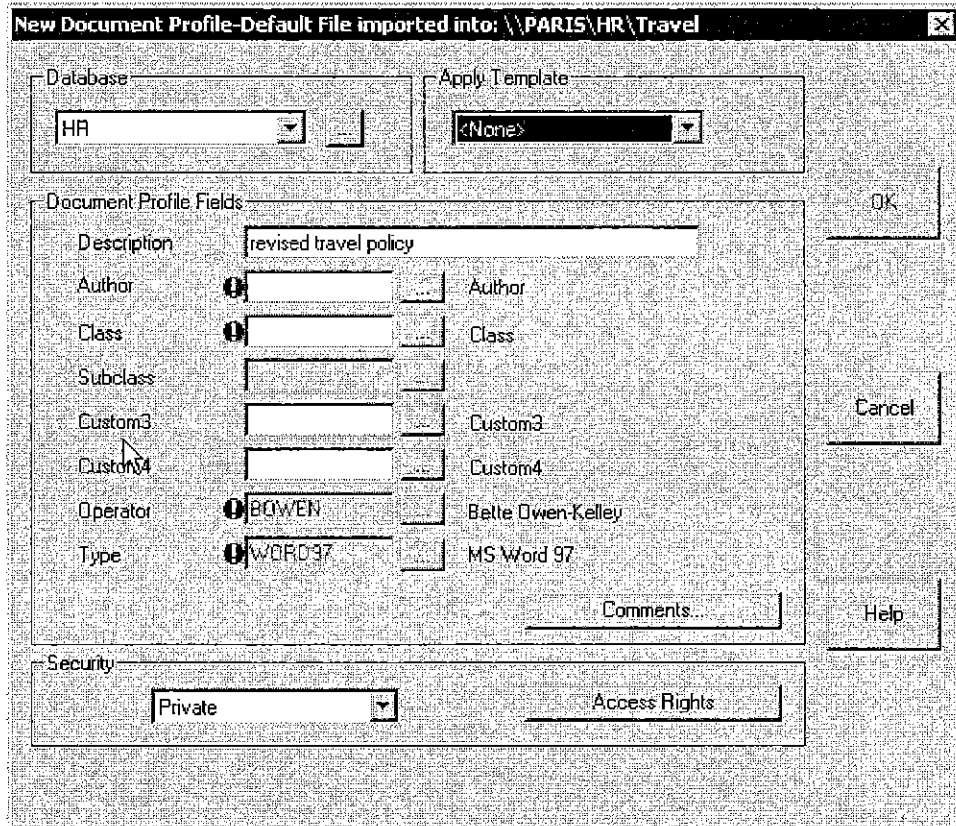


Figure 3.20: Find File to Import to Folder dialog box

5. The new document profile dialog box opens.



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Figure 3.21: Select the database from the drop-down list; then click the lookup button next to it to select the destination folder.

6. You can select a destination folder for the imported document by selecting the database from the drop-down menu and clicking the lookup button. The *Select the destination for the document* dialog box opens.
7. Navigate to the folder where you want to place the document.

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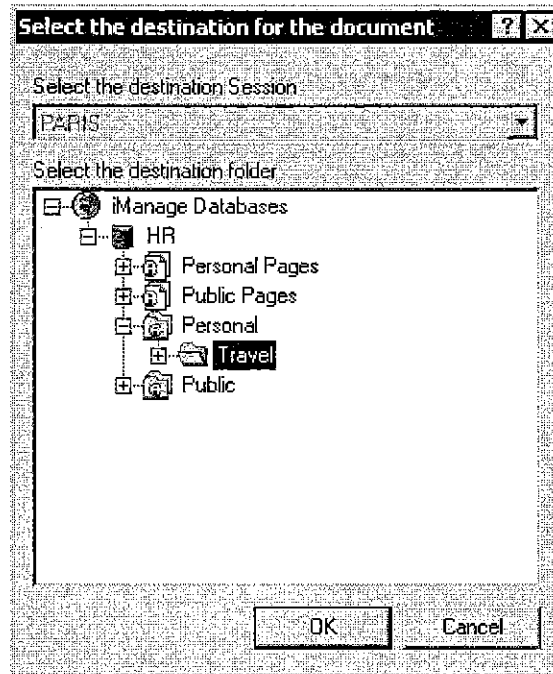


Figure 3.22: Select the destination for the document dialog box

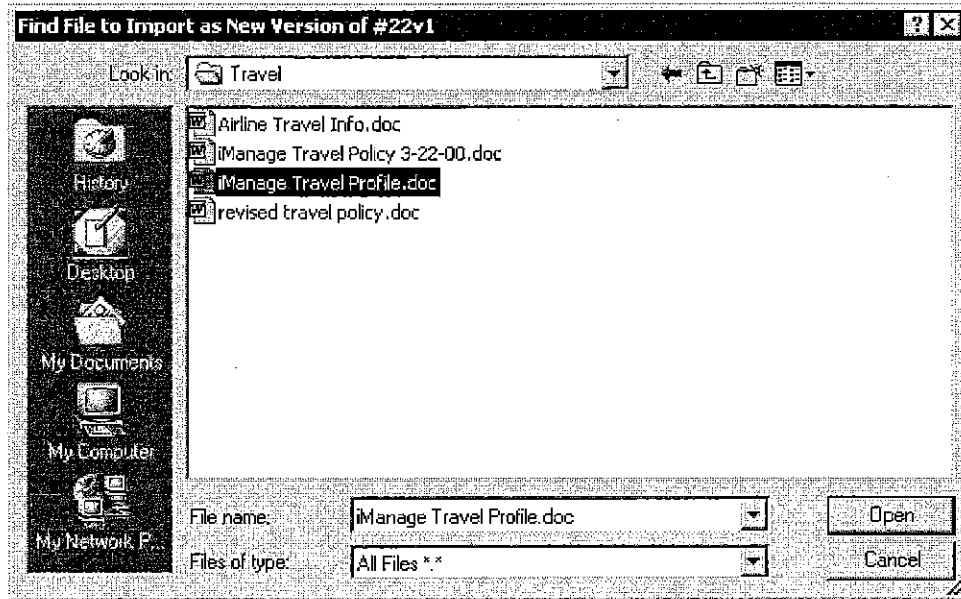
8. Complete the document profile dialog box.

Importing New Versions of Documents

You can import a new version of an existing document by using the Import as New Version feature.

To import a new version of a document:

1. Highlight the document in the Document Grid.
2. Select **Import as New Version** from the **File** menu. A Windows *Find File* dialog opens.
3. Navigate on your computer or network to the file that you want to import as a new version of the existing document.



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Figure 3.23: Find File to Import as New Version dialog

4. Click **Open**. The *New Version Profile* dialog opens.
5. Complete the *New Version Profile* dialog and click **OK**.

Exporting Documents

The document export function is essentially the reverse of document importation: it copies a document from the library to your local hard drive. If you are planning to edit a document and then return it to the database later, it is advisable to use iManage DeskSite's checkout function. Unlike with checkout, you can only return an exported document to the database as a new document. Also, when you export a document, it is not marked in the database as IN USE, so other users may access the document and possibly update it while you are editing it.

The document export function provides an option to export documents as echo documents. If you export documents as echo documents, you can edit them and then synchronize the edited echo documents back to the database. When you work on the echo copies of database documents, however, the original documents in the database will not be locked or marked as IN USE. If other users edit the database document while you are editing the echo copy of the document, you will not be able to synchronize the document back to the database. Instead, in such a

case, you can only import it as a new document. See [Chapter 9](#) for more detailed information on Echo Documents.

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Note: If you attempt to export a document that is currently in your Echo directory because you worked on it previously and made changes to it that are not reflected in the copy on the file server, iManage DeskSite warns you that you are about to overwrite the document in the Echo directory. Since iManage DeskSite copies a document to your Echo directory, by default, when you export it, this feature prevents you from overwriting changes that you made to the document in the Echo directory. You can, however, export the document to another directory.

To export a document from an iManage database:

1. Locate the document(s) in the database and highlight them in the document grid.
2. Select **Export** from the **Document** menu. The *Export* dialog box appears.

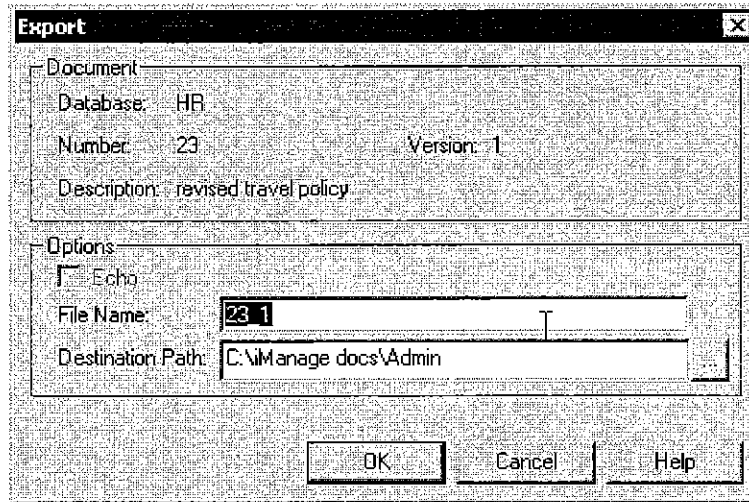


Figure 3.24: *Export* dialog box

3. The default filename is the iManage number and version. You can enter a new filename in the **File Name** field if you wish. You might want to use the document description as the filename.
4. Enter a destination directory to store the exported documents in the **Destination Path** entry field. You can browse for a local or network directory by

clicking the browse button.

5. If your system is set up to enable Echoing, you can export documents as echo documents. To export these documents as echo documents, check the **Echo** checkbox. The Destination Path entry field will be locked when the Echo checkbox is checked. When you export documents as echo documents, the destination directory is always **NRTECHO**, although you can select the drive on which this directory is stored.
6. Click **OK** to export the documents.

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Displaying Checked Out Information

If a document is checked out, you can display information about the checked out document by highlighting the document in the Document Grid and selecting **Checkedout Info** from the **Document** menu.

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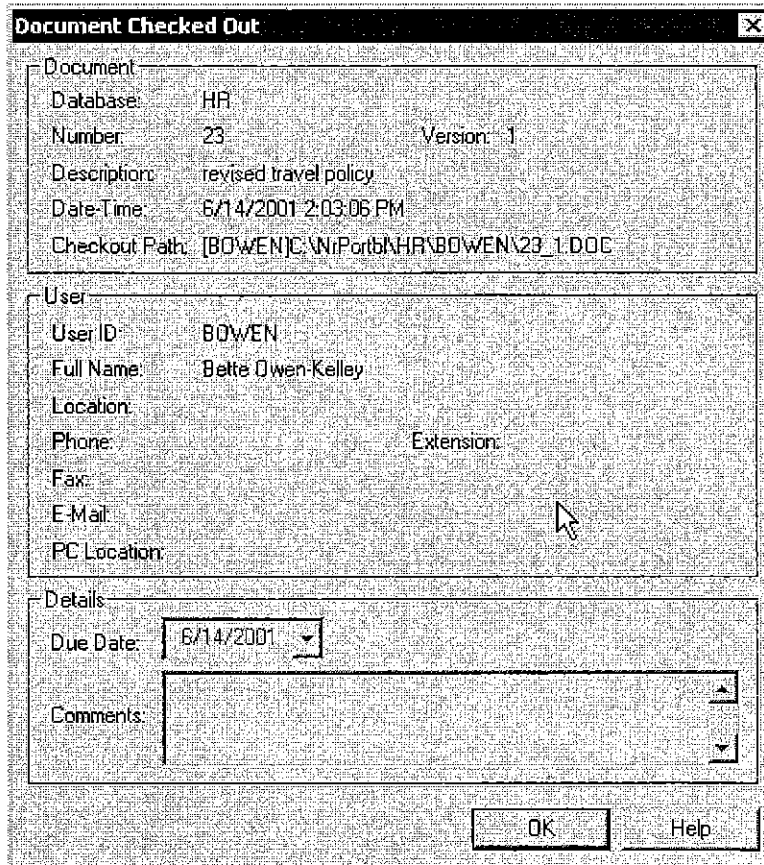


Figure 3.25: Document Checked Out dialog box

You cannot edit any information in this dialog box.

Displaying History of Document Activity

You can display the history of a document's activity by highlighting a document in the Document Grid, then clicking the History tab or the History toolbar icon



or selecting **History** from the **Document** menu. The document history record displays all activities of the types selected for recording by your system administrator. The types of activities typically recorded in the document activity record are:

- Opening and closing the document in an integrated application

- How long the document was open
- Editing the document's profile
- Changing the access rights of the document
- Printing a document and how many pages were printed
- Checking out, copying, and/or checking in the document
- Viewing the document
- Mailing the document through e-mail
- Creating a new version of the document
- The computer (location) where the activity took place
- Comments about the activity

History - Document 2_2.DOC (iManage Travel Policy)							
User	Applicat.	Activity	Date - Time	Duration	Pages Prin.	Location	Comments
BOWEN	WINWORD	Checkin	6/14/2001 2:20:43 PM	26	0	BOWEN	
BOWEN	WINWORD	Modify	6/14/2001 2:20:47 PM	0	0	BOWEN	
BOWEN	MANAGE32	Checkout	6/14/2001 2:20:22 PM	0	0	BOWEN	
BOWEN	MANAGE32	Create Versi	6/14/2001 2:14:39 PM	0	0	BOWEN	Created from version 1

Figure 3.26: The *Document History* tab displays the activity record for a document.

You can also print a hard copy of the document activity record. To print a hard copy, right-click on any activity and select Print from the menu. You can also select Print Preview.


Unlocking Documents

In some instances, when network connectivity fails or your computer shuts down unexpectedly, you may find that a document that you were working on when disaster struck is marked as IN USE in the iManage database, even when you know very well that it is no longer in use. In such a case, you can unlock the document in the library and tell iManage DeskSite to release it, even though you have not returned the document or checked it in using normal methods.

Only the user who most recently opened or checked out a document can unlock the document in the library. If you try to open or unlock a document that someone else is using, you will receive an error message.

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To unlock a document that is marked as IN USE:

1. Highlight the document in the Document Grid.
2. Click the **Unlock** icon  or select **Unlock** from the **Document** pulldown menu.
3. A message asking you to confirm the Unlock appears. Click **Yes** to unlock the document.

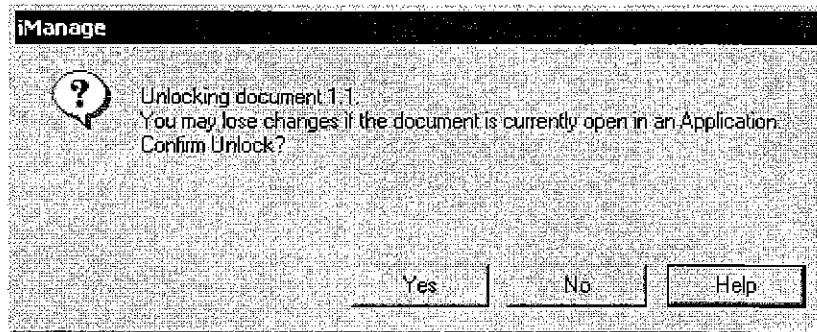
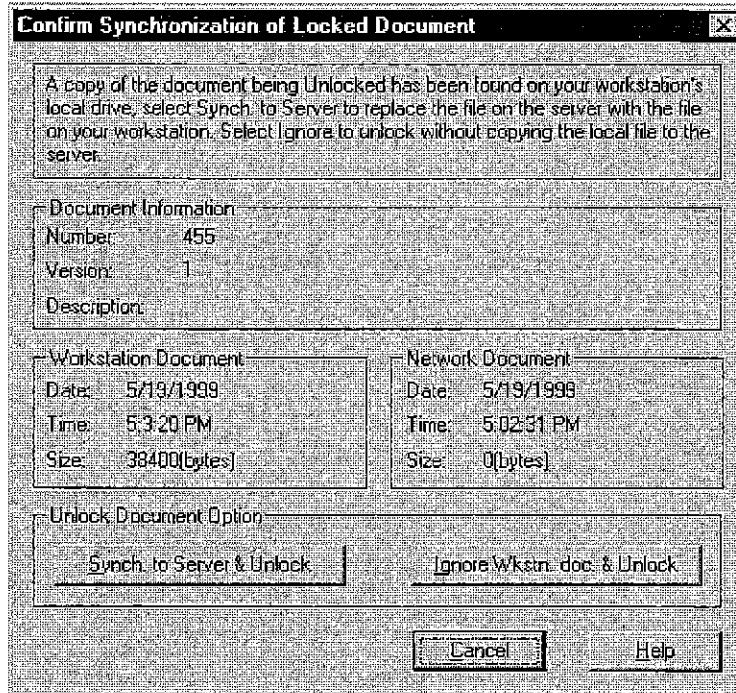


Figure 3.27: Unlocking document confirmation message

4. If the system detects that the document in question resides on your local drive, the *Confirm Synchronization of Locked out Documents* dialog launches (see [Figure 3.28](#)).



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Figure 3.28: *Confirm Synchronization of Locked Document Dialog*

This dialog gives you two choices:

- **Synch to Server & Unlock** checks in the local copy of the document and overwrites the network copy. Use this option if you are sure the local copy is the more appropriate copy to survive.
- **Ignore Workstation doc. & Unlock** unlocks the network copy of the document without consideration to the local copy.

Note: The Unlock option may be disabled for some users of iManage DeskSite.

Purging a Document

To *purge* a document is to remove it entirely from the database. To remove a document from a folder, see the next section of this chapter.


You purge a document from the database by highlighting the desired document in

the Document Grid and selecting **Purge** from the **Document** pulldown menu or right-click pop-up menu. Only the author or operator of a document are allowed to delete a document. This option may also be disabled for some users of iManage DeskSite.

3

Removing a Document

To *remove* a document is to remove it only from a folder. It does not remove the document from the database itself. To remove a document from the database entirely, see the previous section *Purging a Document*.

To remove a document from a folder, highlight the desired document in the Document Grid and click the Remove icon  or select **Remove from folder** from the **Document** menu or right-click pop-up menu. This option may also be disabled for some users of iManage DeskSite.

Restoring Archived Documents

You can restore archived documents directly from the iManage desktop, if the proper archive files are available to the server. When you try to open or checkout a document that is marked as archived, iManage displays an alert message that indicates that the document is archived and ask you if you want to restore it. If you click **Restore**, iManage retrieves the archived document from the archive location. If the archive file is not available to the server, iManage will mark the file for restoration by your administrator.



Figure 3.29: The *Document Archived* dialog box presents you with the option of restoring archived documents immediately.

Changing Your Password

Your password will expire after a length of time determined by your iManage administrator. You will receive a warning message before your password expires.

You can change your password by selecting **Change Password** from the **Options** menu. This launches a *Change Password* dialog box for the server currently highlighted in the tree frame. Enter your old password, enter your new password twice, then click **OK**. If you use Trusted Login, this iManage password is not used.

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Note: Passwords are database specific. To avoid a conflict, it is important that you have all databases available when you change your password. If one of the databases is down and not available when you change your passwords, the new password will not be updated for that database. Then, the next time you log in with your new password it will be unable to log you into the database that was not updated.

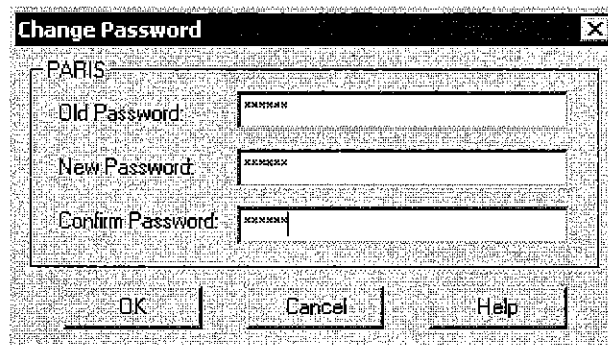


Figure 3.30: *Change Password* dialog box

Setting Default Profile Information for New Documents

You can create a virtual template of default document profile information that appears in the new document profile dialog box. This option enables you to set certain fields of profile information to standard values that typically do not change so you do not have to enter the same information each time you create a document. For instance, if you frequently create documents that have a certain field of profile information set to a constant value, you can enter that value as the

3

default value for that field, and it will appear automatically each time you create a new document.

To create default values for certain fields of document profile information, select **New Document Defaults** from the **Options** menu. The information that you enter in this dialog box will appear automatically in the dialog box used to enter profile information for new documents.

Note: Although the values that you enter in the *New Document Defaults* dialog box appear automatically in the document profile information dialog box for each new document you create, you can still edit these values whenever you create a new document. You do not have to use any of the default values set in the *New Document Defaults* dialog box. Each time you create a new document these default values appear automatically for your convenience – to eliminate the need for entering the same values repeatedly.

Special Strings

You can specify special strings for the current date, time, date and time, and user name in the *New Document Defaults* dialog box. If the following strings are entered in fields in the *New Document Defaults* dialog box, the following information is entered in the profile information dialog box when you create a new profile for a document:

Table 3.3: Special Strings

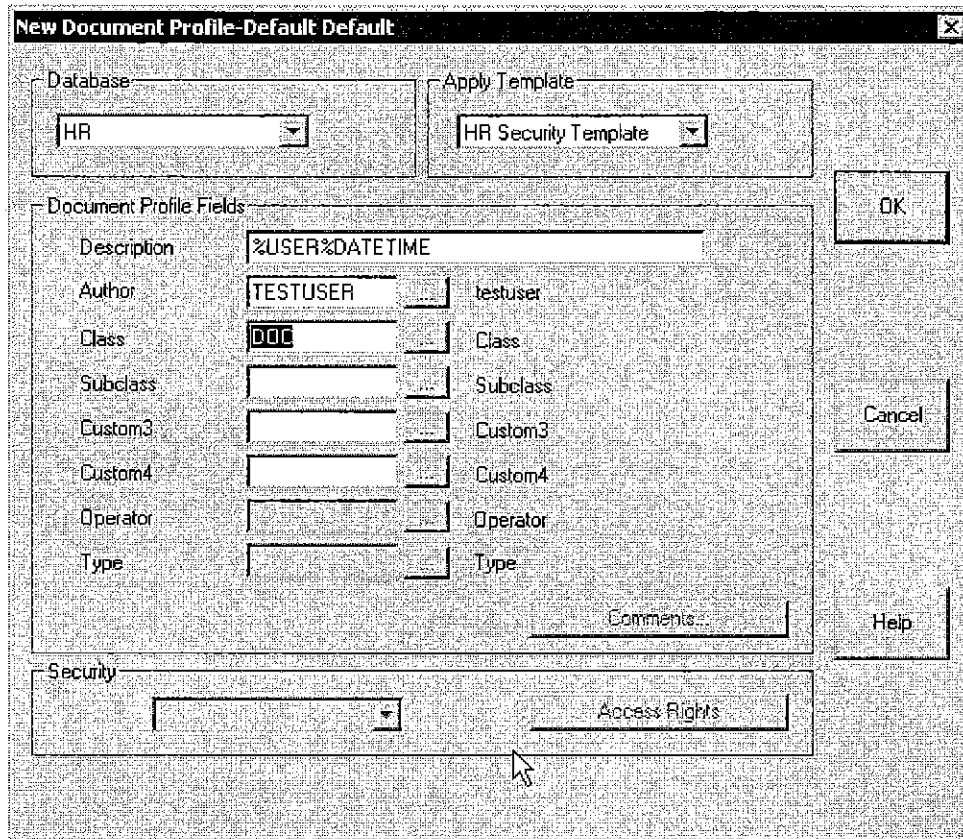
String	What it does
%DATE	Inserts current date
%TIME	Inserts current time
%DATETIME	Inserts current date and time
%USER	Inserts name of user currently logged in to database

Figure 3.31 shows an example of a *New Document Defaults* dialog box where the default document description will be the name of the current database user followed by the date and time. The author is also set to the current database user. The class defaults to DOC.

When you select a security policy in the *New Document Defaults* dialog box,

then that security policy is selected automatically in the *New Profile* dialog box each time you add a new document to the database. You can always select a different security profile or enter custom security settings for a document, if desired.

New document default settings remain in effect until you explicitly reset them.



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Figure 3.31: *New Document Defaults* dialog box with strings inserted to display username, date and time

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CHAPTER 4

Searching for Documents

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Overview

iManage DeskSite can perform fast and powerful searches for documents based on document profile and/or full text information. You can save searches and redisplay them by clicking an icon. You can share saved searches with other users. You can also display a worklist search for the forty documents that you most recently edited or accessed by clicking the worklist icon.

This chapter explains how to use iManage DeskSite's vast searching capabilities, how to perform searches of the full text index, and how to save, share, and retrieve saved searches.

Types of Searches

There are two types of searches that you can perform using iManage DeskSite: *profile searches* and *full text searches*. You can perform both searches simultaneously. The complete text of documents and the comments profile field are both indexed.

Profile Searches

Profile Searches are searches of the database based on a document's profile information. You can enter search criteria for certain fields of profile information and iManage returns as hits documents whose profile information matches that criteria. Search criteria can include wildcard characters. You can select profile field entries from table lookup windows. You can specify date ranges through graphic date-selection pop-up windows.

Full Text Searches

Full Text Searches are searches of the full text index based on the occurrence of words or phrases contained in the actual documents. Full text searches do not actually search through the full text of documents but search in an index of all of the words that appear in documents in the database. The criteria for full text searches can include wildcard characters and/or limitations on the positional relationship between words. Full text searches can also find documents based on the occurrence of individual words, partial words, phrases, and words in a particular sequence. A simplified, intuitive full text search dialog box is available for users who do not want to learn verity searching commands and techniques.

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Searching in Multiple Databases

Searches can be performed on single or multiple databases. iManage DeskSite can search one or all of the document databases that you are currently logged into. Search results appear in the iManage Desktop window's Document Grid area.

Note: Only documents that you have read/write or read-only access rights to are listed after a search. Documents that you have no access rights to are never listed when you perform a search.

Storing Search Criteria

If you perform searches repeatedly you do not have to re-enter them from scratch; you can save the search criteria and retrieve it for later use. Stored search criteria can be either public or available only to the user who saved it. Saved searches also appear as icons in the iManage DeskSite Tree Frame.

Procedures

Searching for a Document

The general procedure used to search for a document in an iManage database is described here simply. Scan ahead in this chapter for more detailed explanations of searching techniques.


1. Launch iManage DeskSite and log into a WorkSite Middle Tier Server. (See [Chapter 3](#) for more information on logging into a server.)
2. Click the toolbar's **Search** icon  to display the *Search Dialog* window or select **Search** from the **Search** menu. On the Search menu you can select a specific database to search.



Figure 4.1: Search menu


Note: The above command will generate the Search dialog assigned to the preferred database of the user. It is possible for an iManage installation to have more than one Search dialog template. Search dialog templates are assigned by Database. To access the dialog templates of non-preferred but accessible databases select **Additional Searches** from the **Search** menu.

3. Specify profile information, full text criteria, or both, then click **Find**. The results of your search will be displayed in the iManage Desktop window's Document Grid.

Saving a Search Profile

1. Launch iManage DeskSite and Login to a WorkSite Middle Tier Server. For

instructions on logging in, see [Chapter 3](#).

2. From iManage DeskSite, click the Search icon  to display the *Search Dialog* window or select **Search** from the **Search** menu.
3. Enter search criteria in profile fields. Use the browse buttons to select entries from lookup tables.
4. Save the profile by clicking on the **Save Search** button. The *Create New Saved Search* dialog box appears.
5. Select the database in which the search profile is to be saved.
6. Enter a unique ID code for the search profile in the **Profile Name** field.
7. Enter a description of the search profile in the **Description** field.
8. Mark the profile as either **public** or **private** by clicking on the corresponding radio button. Private saved searches are only available to the user who created them.
9. Click the **Save** button to save the search.

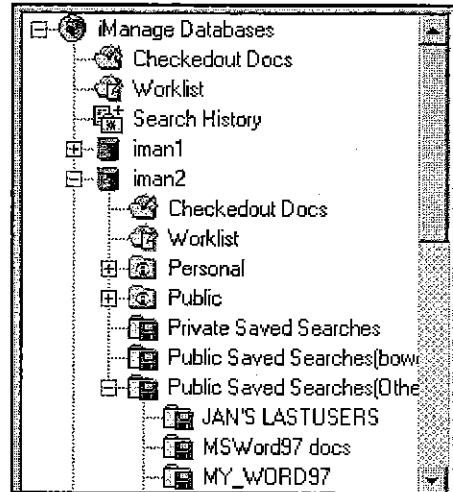
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Retrieving a Saved Search

When you retrieve a saved search, iManage DeskSite re-performs the search based on the saved search criteria. Saved searches are dynamic and will reflect any changes in the database each time you click on the saved search.

To display the results of a saved search:

1. Locate the saved search in the Tree Frame (see [Figure 4.2](#)).




4

Figure 4.2: Tree Frame with Saved Searches highlighted

2. Click the icon for that saved search to display the search results in the document grid.

If you can't locate the icon for the saved search in the Tree Frame, or if there are too many saved searches listed, then follow the procedure on the next page for searching for a saved search profile.

To search for a saved search:

1. Click the toolbar's Search icon  to display the *Search* dialog box.
2. Click the **Retrieve Search** button. The *Retrieve Saved Search* dialog box appears. This dialog box lists all saved searches that are available to you in the database.
3. Specify the database where the search profile was saved using the Database drop-down list box.
4. Click the **Find** button to display the *Find* dialog box.
5. Enter search criteria in the *Find* dialog box. Click on the **Find Next** button until you locate the Saved Search in the list.

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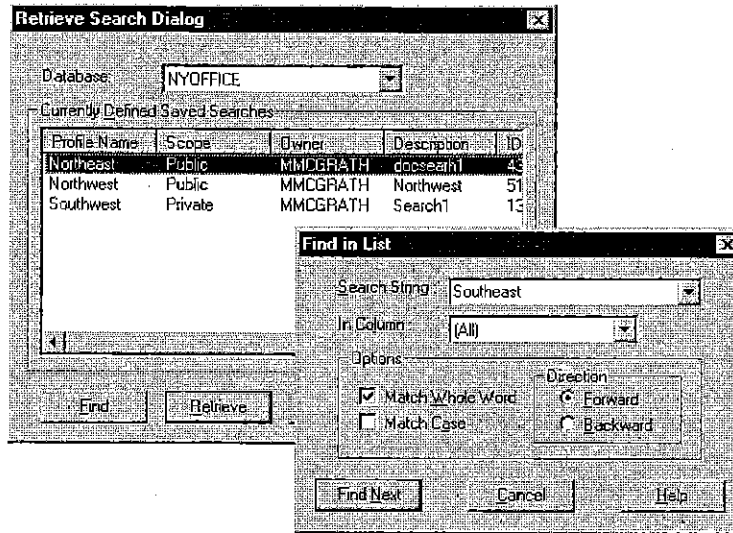


Figure 4.3: Searching through available Saved Searches in the *Retrieve Saved Search* dialog box using the **Find** option.

6. Click on the **Cancel** button in the *Find* dialog box to close the *Find* dialog box.
7. Highlight the saved search in the list and click on the **Retrieve** button. The *Search* dialog box will reappear with the saved search criteria automatically entered into the appropriate fields.
8. Click on the **Find** button in the *Search Dialog* window to display the search results.


Deleting a Saved Search

You can only delete saved search profiles that you created.

1. Click on the flashlight icon for the search in the Tree Frame to highlight it.
2. Hit the **Delete** key.
3. You will be asked to confirm the delete. Click on the **OK** button to delete the saved search.

Printing Search Results

To print a hard copy of your search results:

1. Redisplay your search results in the document grid, if they are not already displayed.
2. Click **Print Document List** .
3. A standard Windows *Print* dialog box will be displayed, such as the one shown in [Figure 4.4](#).
4. Set any print options that you want to change in this dialog box, then click **OK**.

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For information on setting other options for printing search results, read ahead in this chapter.

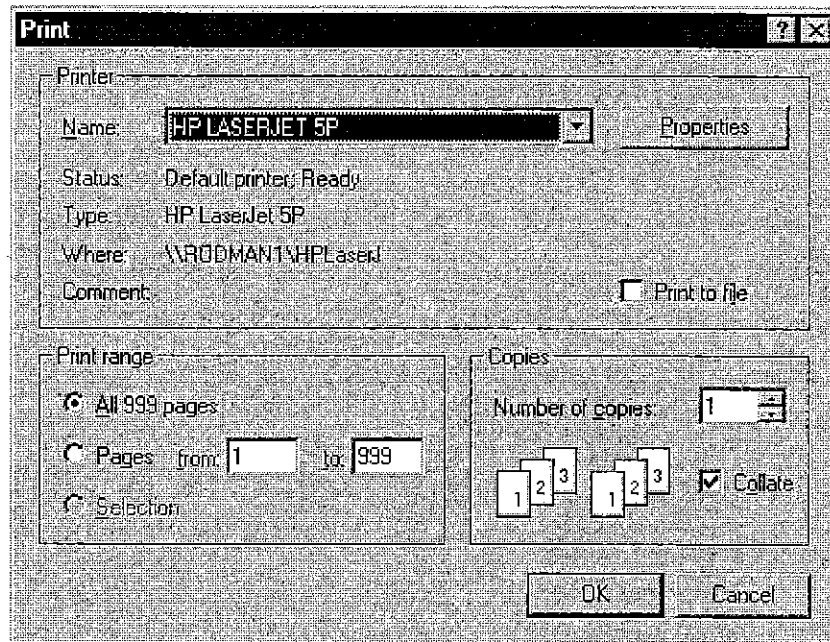


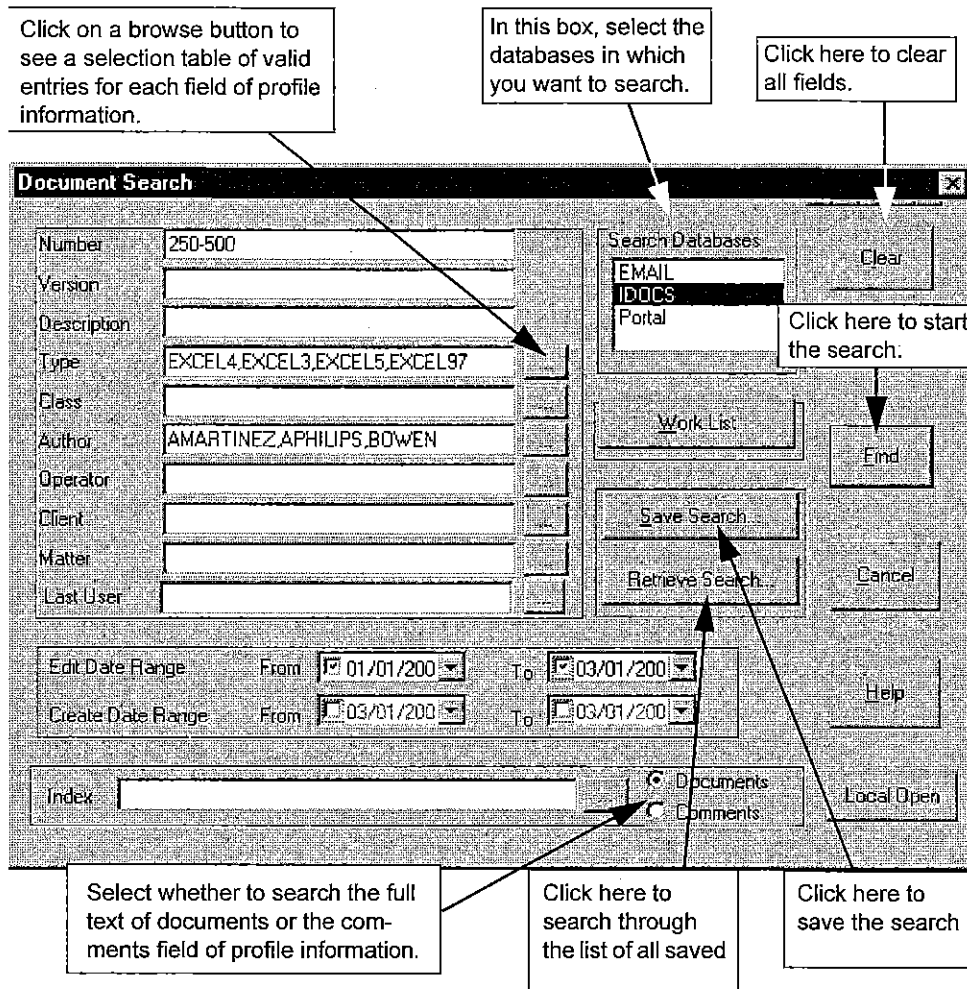
Figure 4.4: Example of a standard Windows *Print* dialog box

The *Search Dialog* Window

The *Search Dialog* window is used to enter search criteria for any type of search – whether you are searching the full text index or document profile information. The components, functions and features available in the *Search Dialog* window are defined below.

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Note: The *Search Dialog* window can be customized and may appear differently in your version of iManage DeskSite. The dialog box may contain different fields of information and fewer or lesser options. The figure below shows the default appearance of the *Search Dialog* window as it is shipped with iManage DeskSite.



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Figure 4.5: Search dialog

Searching According to Profile Information

You can search for documents in iManage databases using two types of criteria: profile information and full text information. You enter both types of information in the same dialog box and you can search for documents that meet both kinds of criteria simultaneously.

The actual fields of profile information that appear in the *Search Dialog* window