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iManage DeskSite 6.0
User Reference Manual

iManage DeskSite 6.0
User Reference Manual

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Acknowledgments

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CHAPTER 1
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 differ-
ent name for the existing document. It is not possible to generate a report
describing when and which users revised a particular document. Applica-
tions do not keep track of document versions or who made changes to a par-
ticular document.

- The ever increasing number of documents prevents users from locating
required documents. Staff members spend increasing amounts of time locat-
ing 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 com-
mon 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

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

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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.

iManage WorkSite's Middle Tier Server

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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.
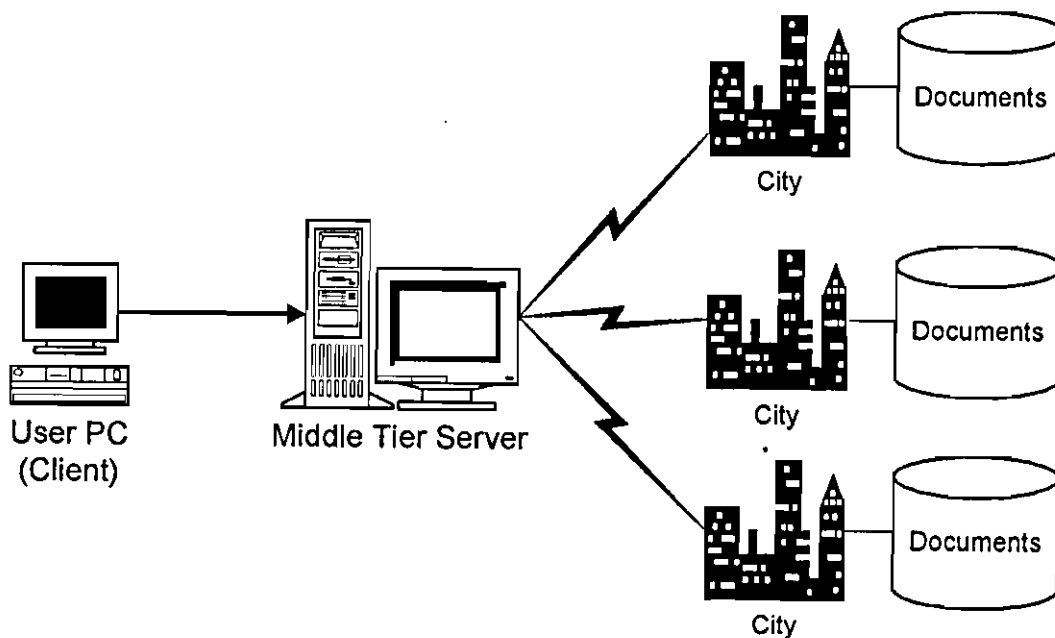
Figure 1.1: How a user accesses documents through iManage DeskSite.

What is an iManage Library?

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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 every-day tasks in iManage
- **Web Browser:** provides access to the web directly from the iManage DeskSite Desktop
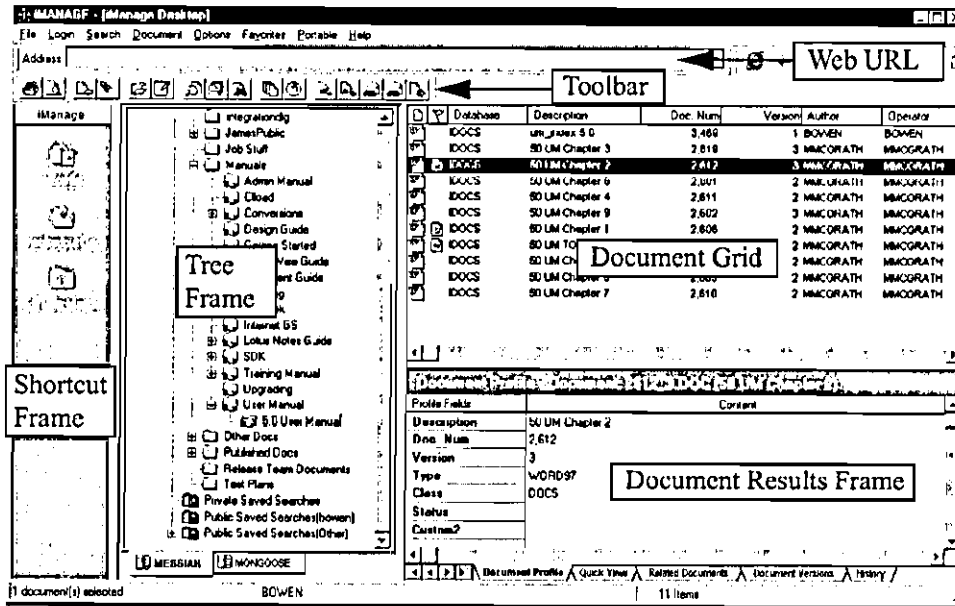
Figure 2.1: iManage DeskSite 5.0 Desktop Window

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 Short-cut 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

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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.

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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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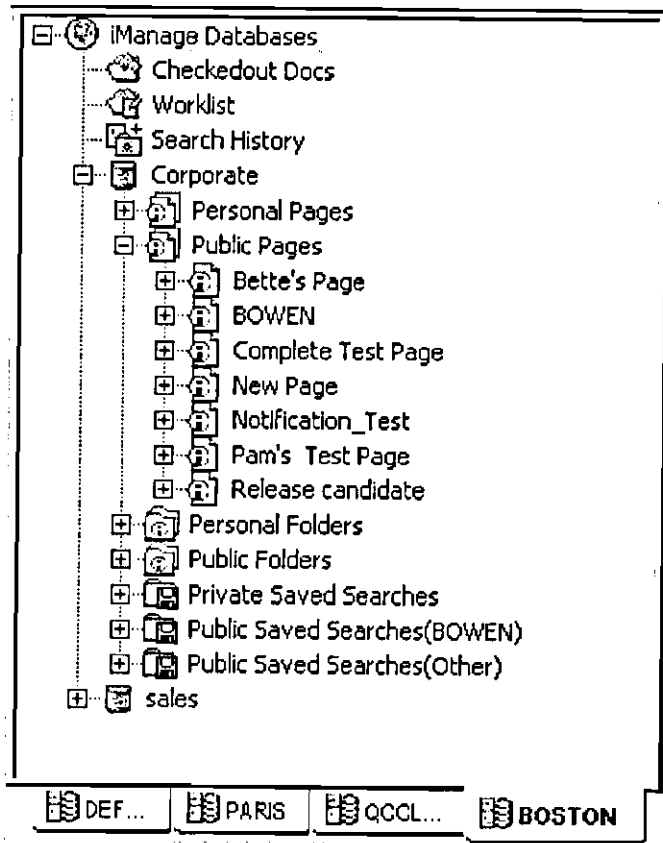
Figure 2.2: Tree Frame

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.

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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 user-rid of the folder owner.

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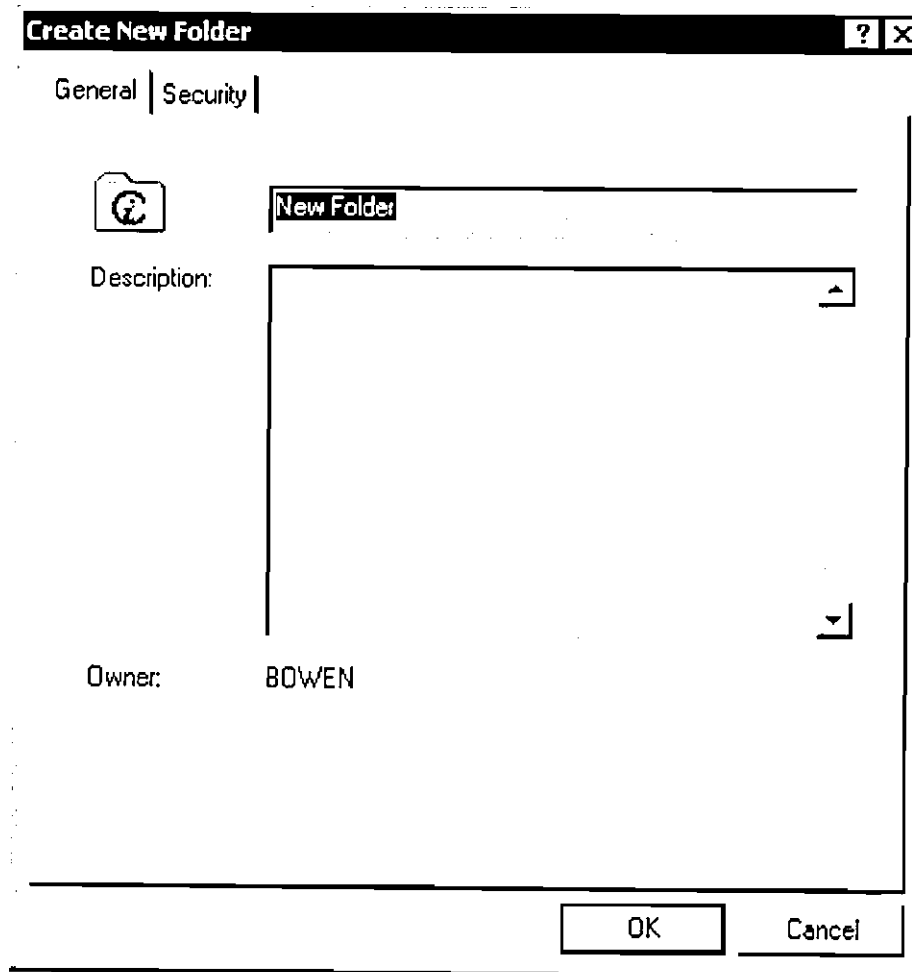
Figure 2.3: *Create New Folder* dialog -- *General* tab

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.

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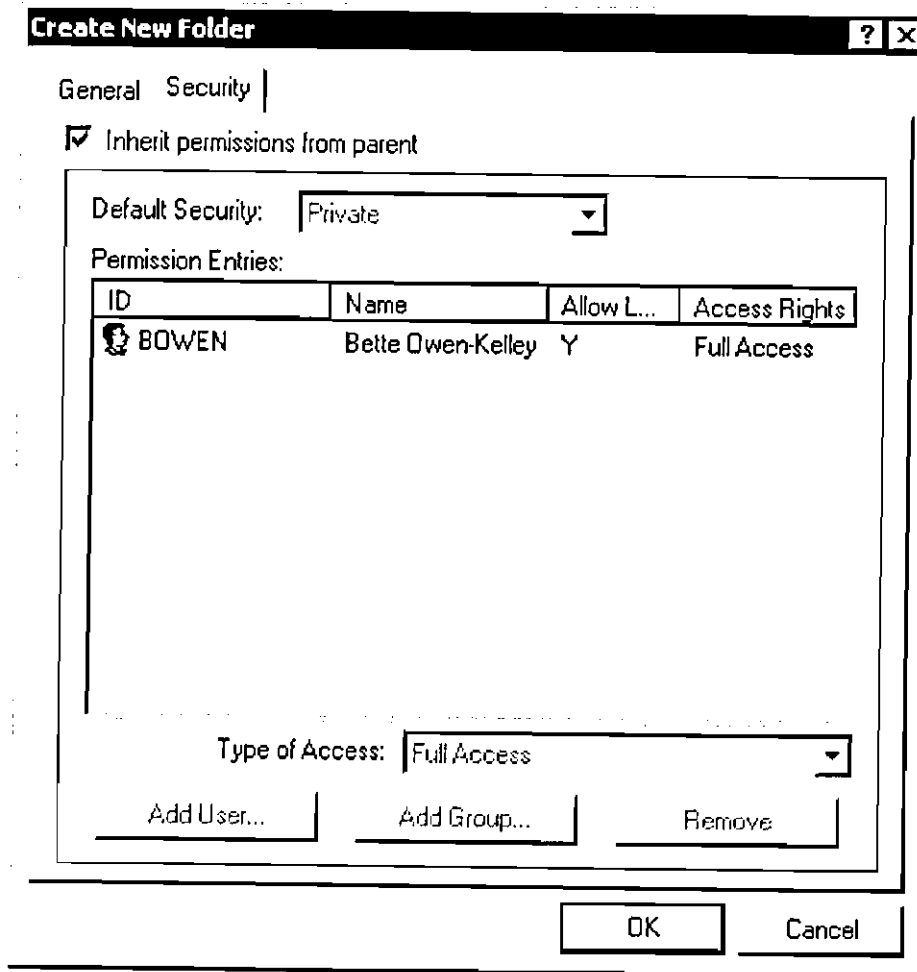
Figure 2.4: *Create New Folder* dialog -- *Security* tab

- 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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Create New Folder [?] [X]

General   Security |

☐ Inherit permissions from parent

Default Security: |View |▼|

Permission Entries:

ID	Name	Allow L...	Access Rights
PVINCENT	Pamela Vincent	Y	Read/Write
JTAMBURELLO	Joe Tamburello	Y	No Access
BOWEN	Bette Owen-Kelley	Y	Full Access
APHILIPS	Anthony Philips	Y	Read/Write

Type of Access: [Read/Write   ] ▼

Add User...   Add Group...   Remove

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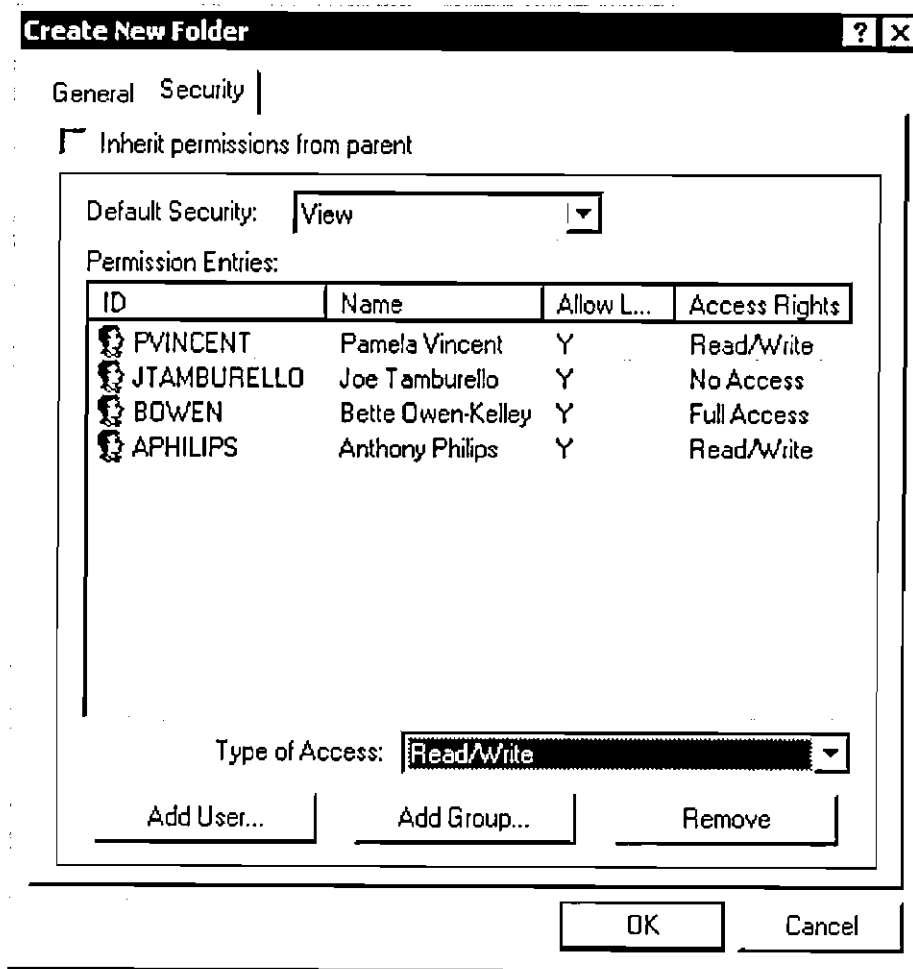
Figure 2.5: *Create New Folder* dialog -- *Security* tab -- Permissions not inherited from parent folder

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 sub-folders, but cannot change folder security.

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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, 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.

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

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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.

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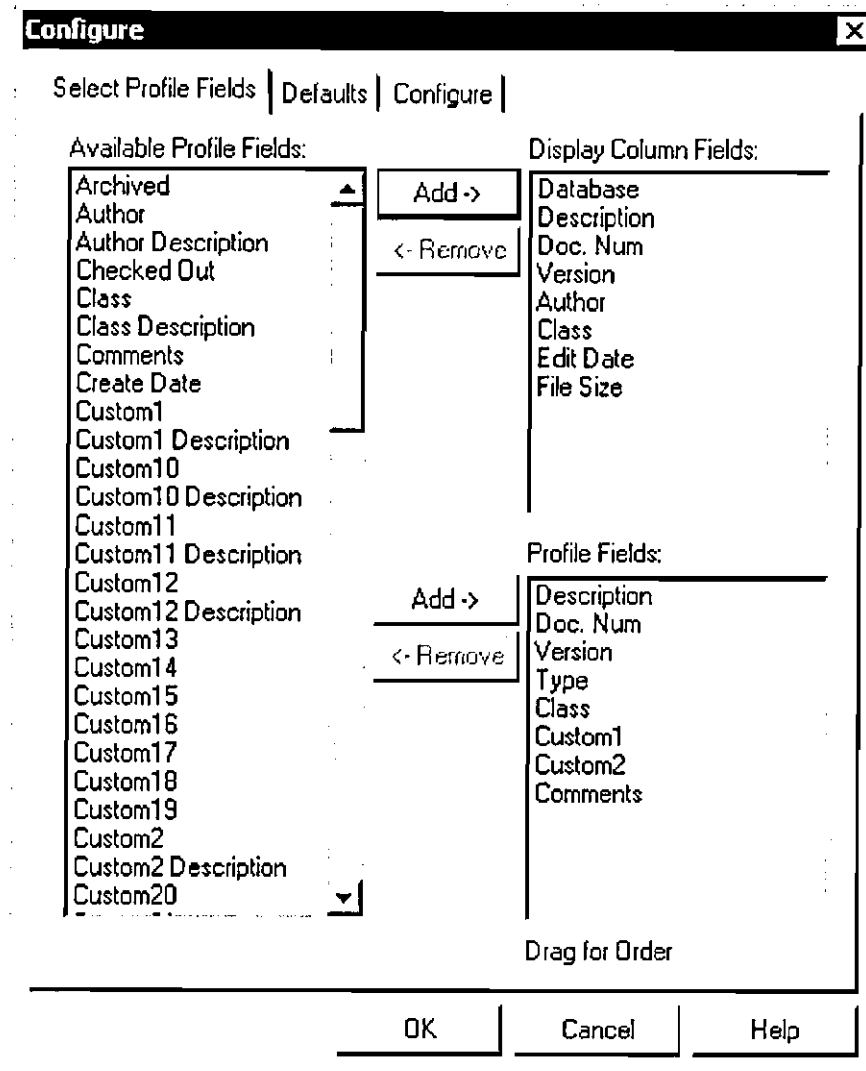
Figure 2.7: *Configure* dialog, *Select Profile Fields* tab

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.

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> **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.

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:

```
┌─────────────────────────────────────────────────────────────┐
│ Configure                                               [×]  │
├─────────────────────────────────────────────────────────────┤
│                                                              │
│   Select Profile Fields   Defaults │ Configure │             │
│                                                              │
│   Search ──────────────────────────────────────────────     │
│     ┌──┐     Change search result options.                   │
│     │  │         Maximum number of documents in Search Window:│
│     └──┘         ┌──────┐  ┌───┐                             │
│                  │ 500  │  │ ▲▼│                             │
│                  └──────┘  └───┘                             │
│                  ┌ Document Version ──────────────────┐      │
│                  │  ⊙ Latest Version Only   ○ All Versions │ │
│                  └─────────────────────────────────────┘      │
└─────────────────────────────────────────────────────────────┘
```
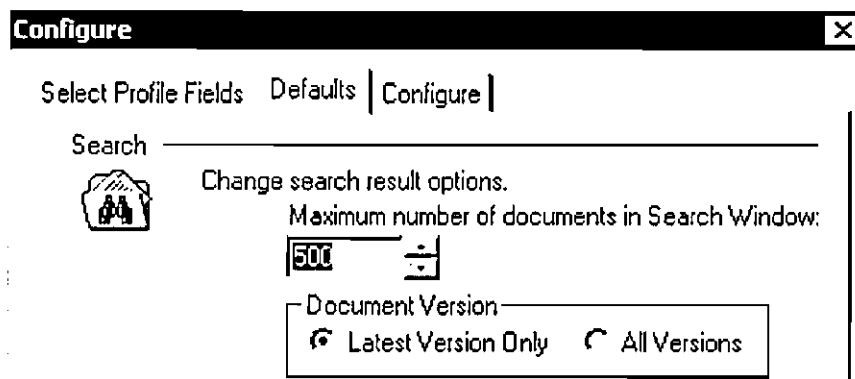
Figure 2.8: The top portion of the *Display Options* dialog, Defaults tab.

- 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.

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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 toolbar. 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

2

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	---	

2

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	---	

2

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: | Address 🛢 http://www.imanage.com/ ▼ |

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.

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.

CHAPTER 3
iManage DeskSite: Basic Functions

3

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

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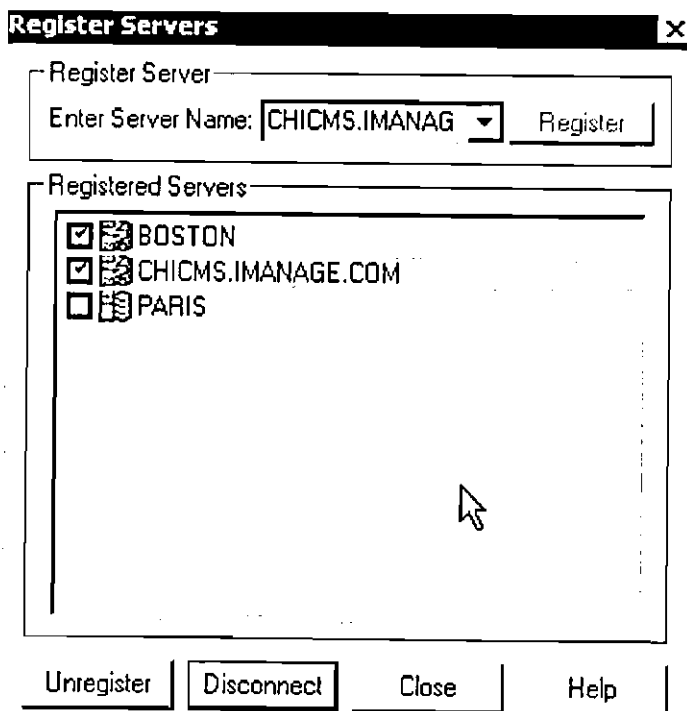
Figure 3.1: *Register Servers* dialog. The icons show which servers are connected. In this illustration, BOSTON and CHICMS.IMANAGE.COM are connected and PARIS is not.

The dialog shows a list of all the servers that are registered. A check in the
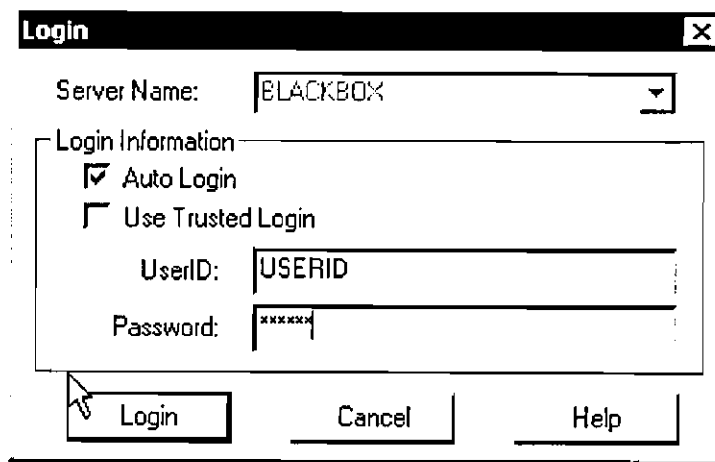
checkbox indicates that the server is set to log on automatically when you open iManage DeskSite. You can select which registered servers to log into by checking or unchecking them.

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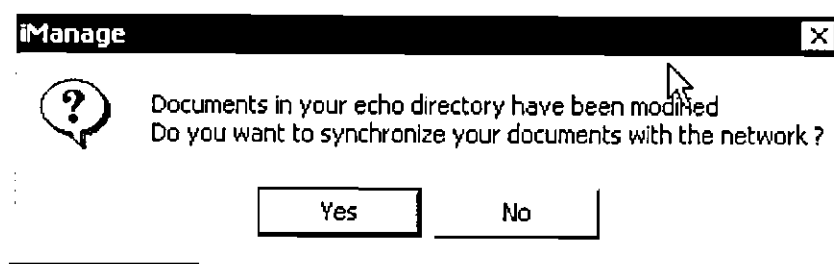
Figure 3.3: The Autosynchronize or checkin alert box appears to inform you that you have portable or echo documents stored locally that need to be synchronized back to the library.

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.
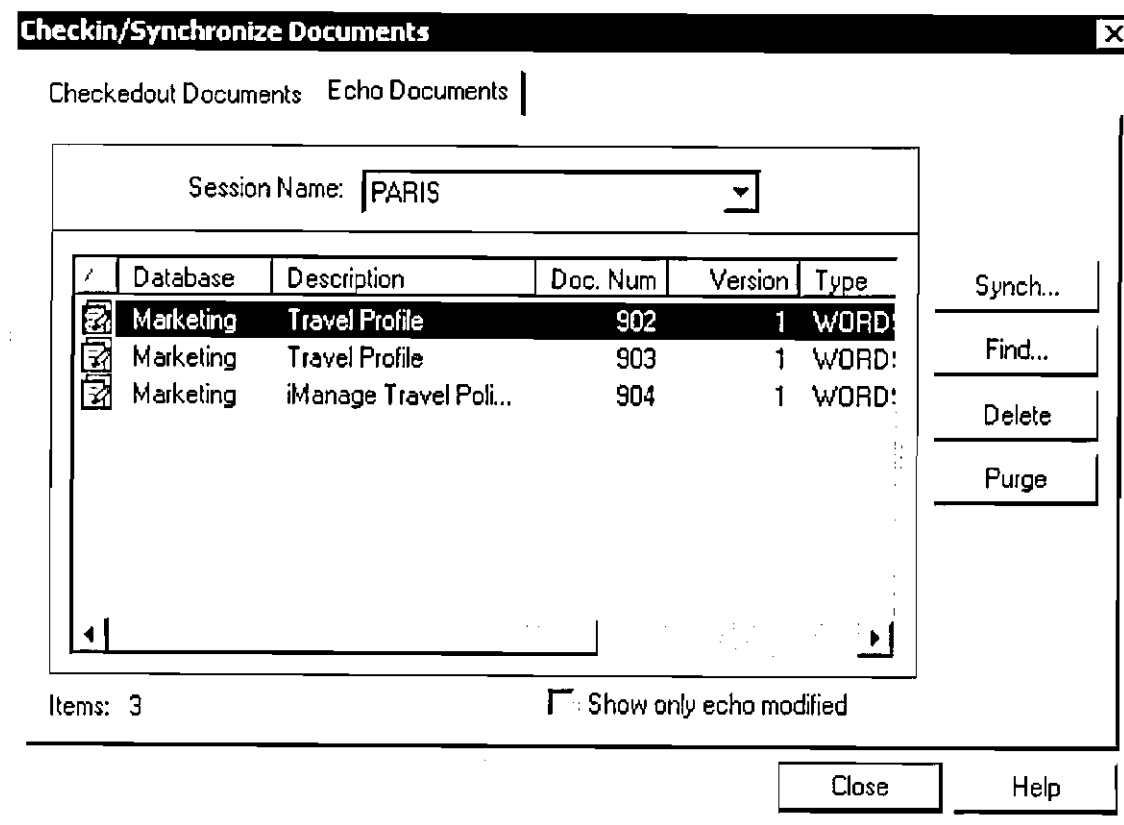
Figure 3.4: *Checkin/Synchronize Documents* dialog box

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.

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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.

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```
┌─────────────────────────────────────────────────────────────────┐
│ Confirm Synchronize                                          [×]  │
│ ┌─ Document Information ────────────────────────────────────────┐ │
│ │  ≡ȷ   Number:      902                                        │ │
│ │       Version:     1                                          │ │
│ │       Description: iManage Travel Profile                    │ │
│ └──────────────────────────────────────────────────────────────┘ │
│ ┌─ Echo Document ──────────────┐ ┌─ Database Document ──────────┐ │
│ │  ▭  Last edit date: 06/01/2001│ │ ₫  Last edit date: 06/02/2001│ │
│ │     Last edit time: 12:06:30  │ │    Last edit time: 00:02:52  │ │
│ │     File size:     19.00 KB   │ │    File size:     19.00 KB   │ │
│ │     Last user:     BOWEN      │ │    Last user:     BOWEN      │ │
│ └──────────────────────────────┘ └──────────────────────────────┘ │
│ ┌─ Options ─────────────────────────────────────────────────────┐ │
│ │  ⊙ Replace Original    ○ New Version      ○ New Document       │ │
│ └──────────────────────────────────────────────────────────────┘ │
│         ┌──────┐  ┌────────┐  ┌──────┐  ┌──────┐                   │
│         │  OK  │  │ Cancel │  │ Skip │  │ Help │                   │
│         └──────┘  └────────┘  └──────┘  └──────┘                   │
└─────────────────────────────────────────────────────────────────┘
```

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.

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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 .

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 for more information.

Opening from an Integrated Application

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

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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

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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

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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.

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.

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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.

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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.

New Document Profile-Default File imported into: \\PARIS\HR\Travel

Database: HR

Apply Template: <None>

Document Profile Fields

Description: revised travel policy

Author: Author

Class: Class

Subclass:

Custom3: Custom3

Custom4: Custom4

Operator: BOWEN — Bette Owen-Kelley

Type: WORD97 — MS Word 97

Comments...

Security: Private — Access Rights

OK

Cancel

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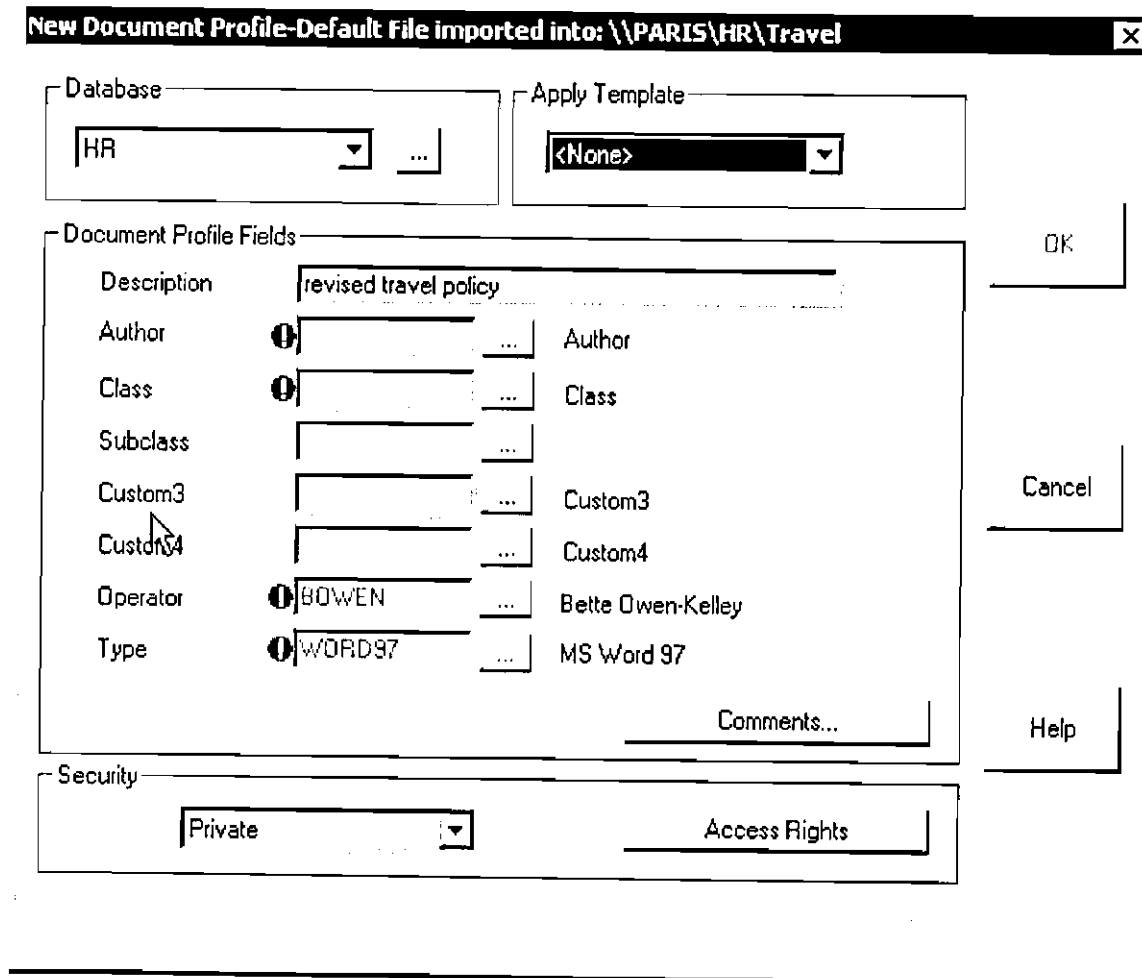
Figure 3.6: Default appearance of the *New Document Profile* dialog box, which is used to enter profile information for new documents in the database.

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:

O	The green exclamation point symbol indicates that profile information is required for this field.
X	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.

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Rules and Definitions:

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.
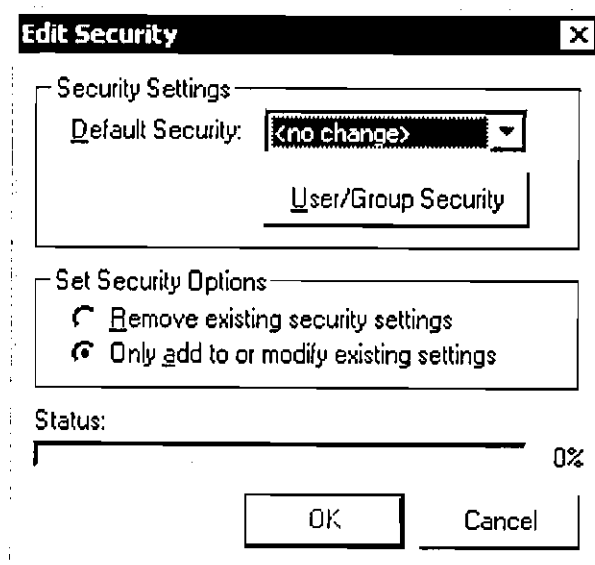
Figure 3.7: *Edit Security* dialog

3

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.

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.

3
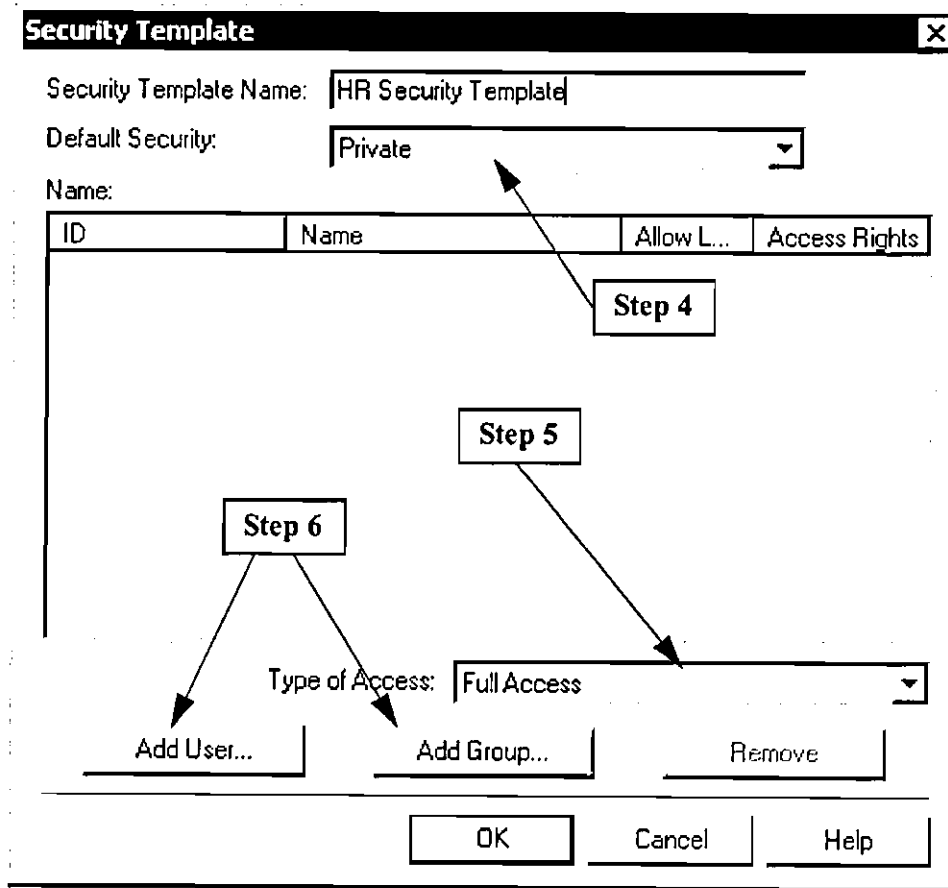
Figure 3.9: *Security Template* dialog box with name

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 <u>"Setting Access Privileges" on page 55</u>.

6. Click **Add User** or **Add Group** to add specific users or groups to the template.

AUT0020060
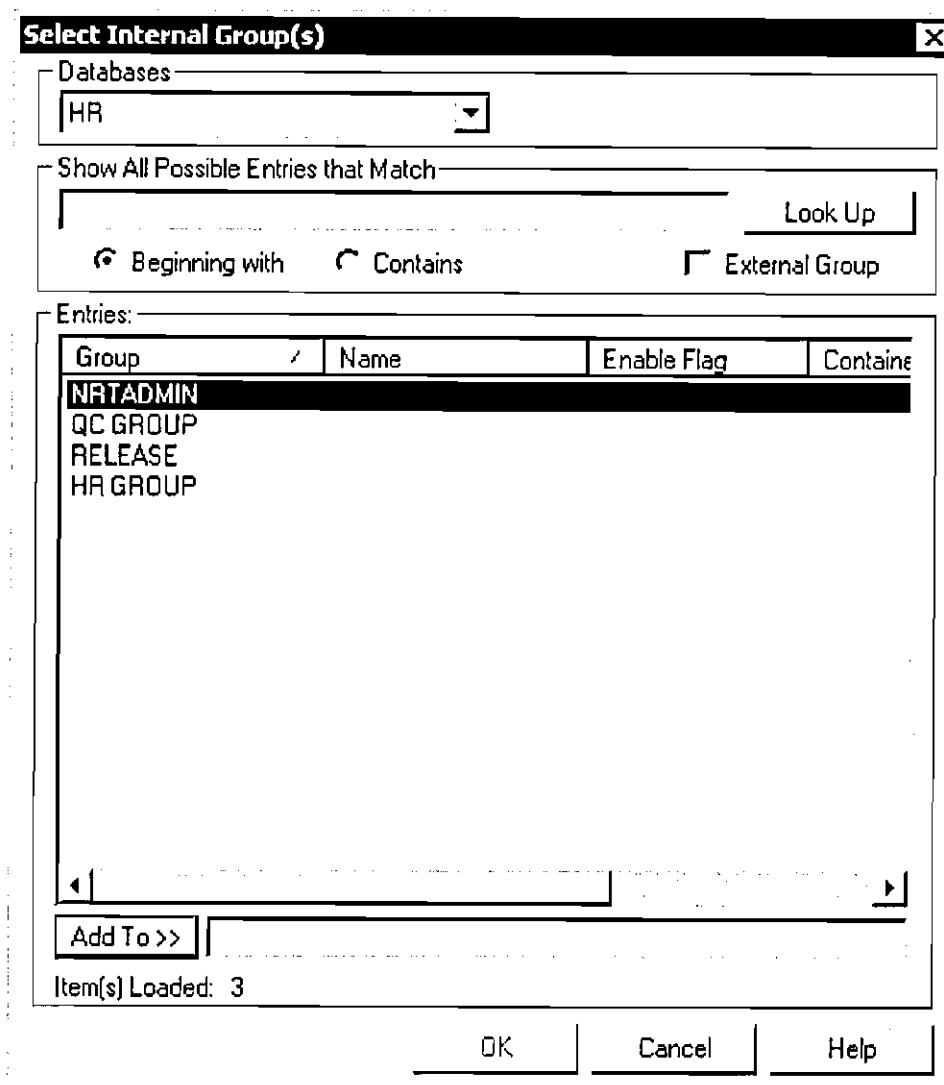
Figure 3.10: *Select Internal Group(s)* dialog box

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.

3
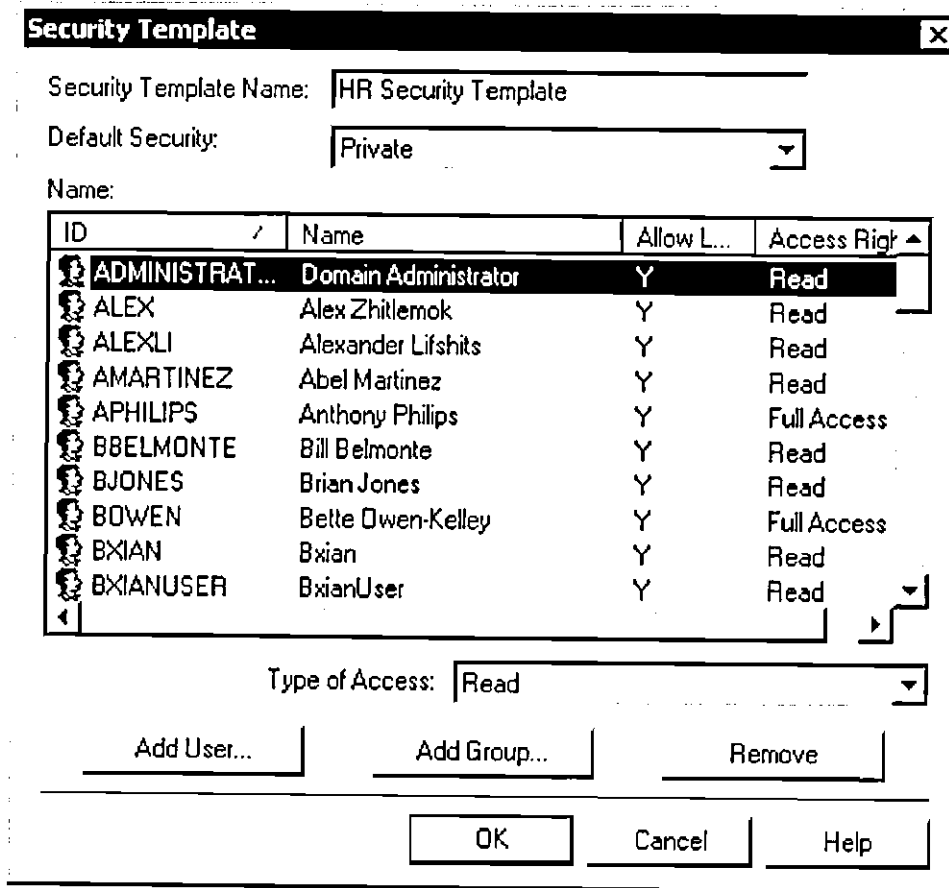
Figure 3.11: *Security Template* dialog box showing list of groups and users

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**.

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.

3
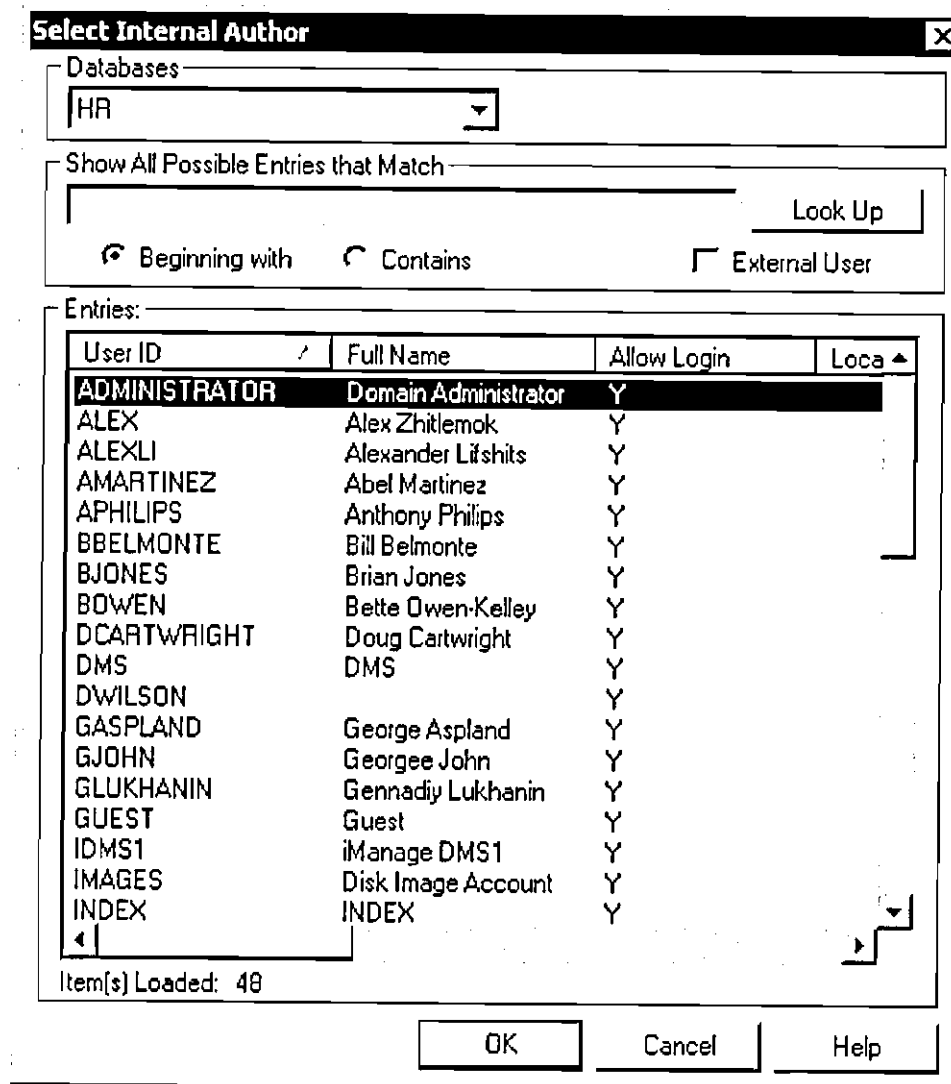
Figure 3.12: *Select Internal Author* dialog box

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.

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.

3

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			

OK

┌─ Profile Fields ───────────────────────────────

Description   Airline Travel Info

Author   ⓞ BOWEN   ... | Bette Owen-Kelley

Class   ⓞ DOC   ... | Document   Cancel

Subclass   [   ]   ...

Custom3   [   ]   ...

Custom4   [   ]   ...

Operator   ⓞ BOWEN   ... | Bette Owen-Kelley   Help

Type   ⓞ WORD97   ... | MS Word 97

        ☑ Index Document   Comment...

┌─ Security ─────────────────────────────────────
    View   ▼   ↖   *Access Rights

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.

3

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 [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.

3

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 Checkedout 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.

---

3. 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.

Checkin   ☒

┌─ Document Information ───┐
│ Database: HR   │
│ Number: 2   Version: 1   │
│ Description: iManage Travel Policy   │
└───┘

┌─ Options ──┐
│ ⦿ Replace Original   ⦿ New Version   ⦿ New Document   │
└───┘

☐ Keep checked out
☐ Delete local file after check in

                              │   OK   │   Cancel   │   Help   │
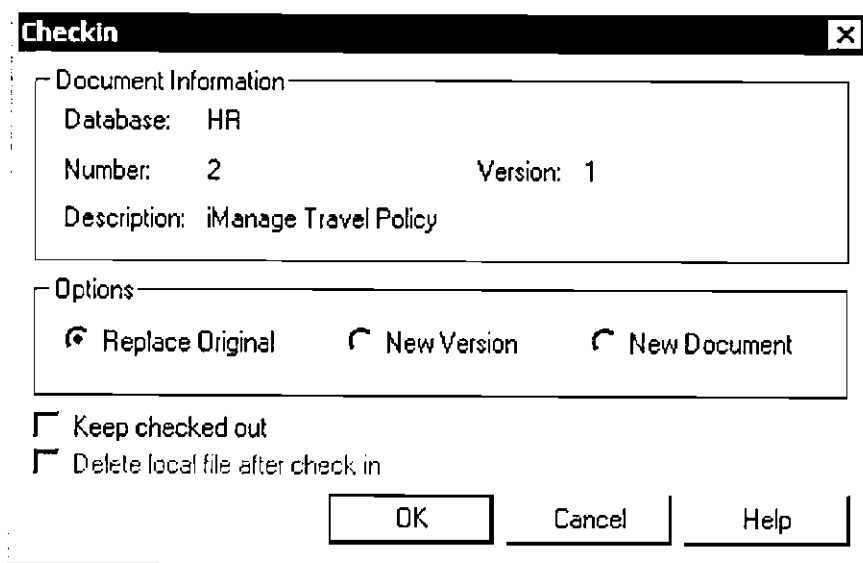
Figure 3.15: *Checkin* dialog

4. 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.

---

5. 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.

3
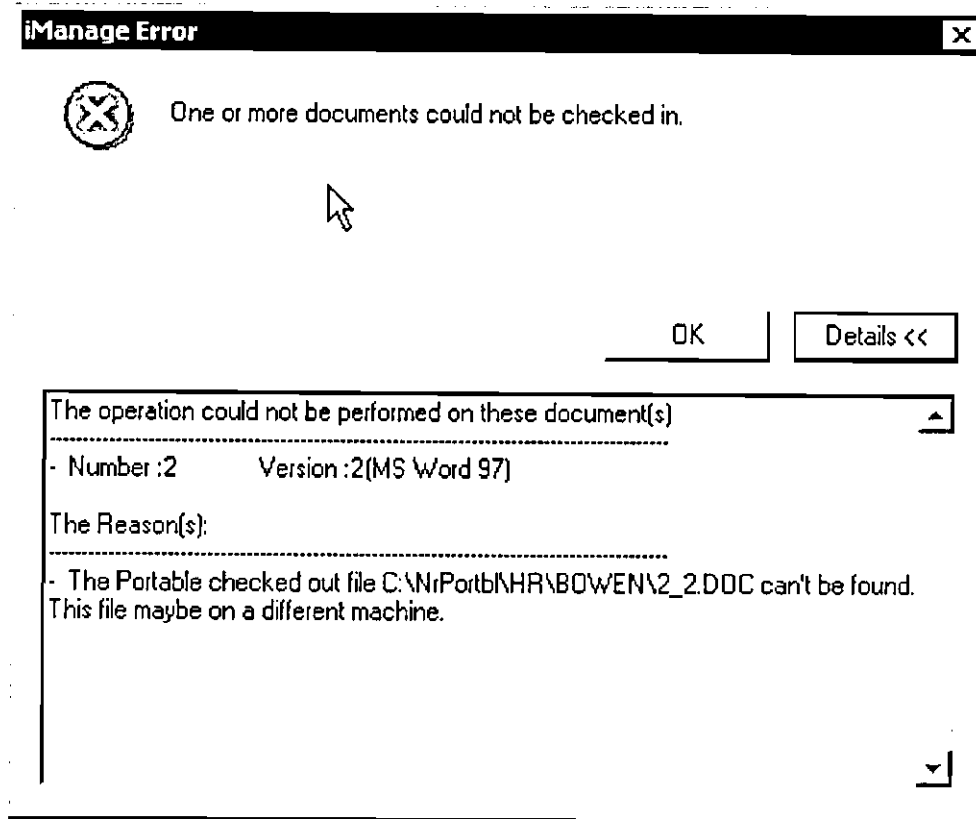
Figure 3.16: Error message you see if you attempt to check in a document that you checked out on a different machine. Click **Details** to see the reason as illustrated above.

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.

iManage

The file 23_1.DOC was checked out to [10.5.3.186]C:\Documents and Settings\bowen.NETRIGHT.COM\Desktop\HR_23_1.doc. Proceed in [BOWEN]C:\Documents and Settings\bowen.NETRIGHT.COM\Desktop\HR_23_1.doc?

Yes | No
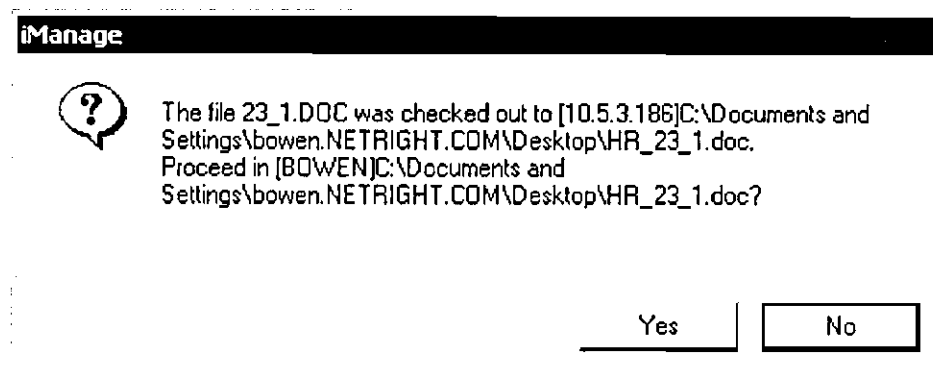
3

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 **Push-Pin.**
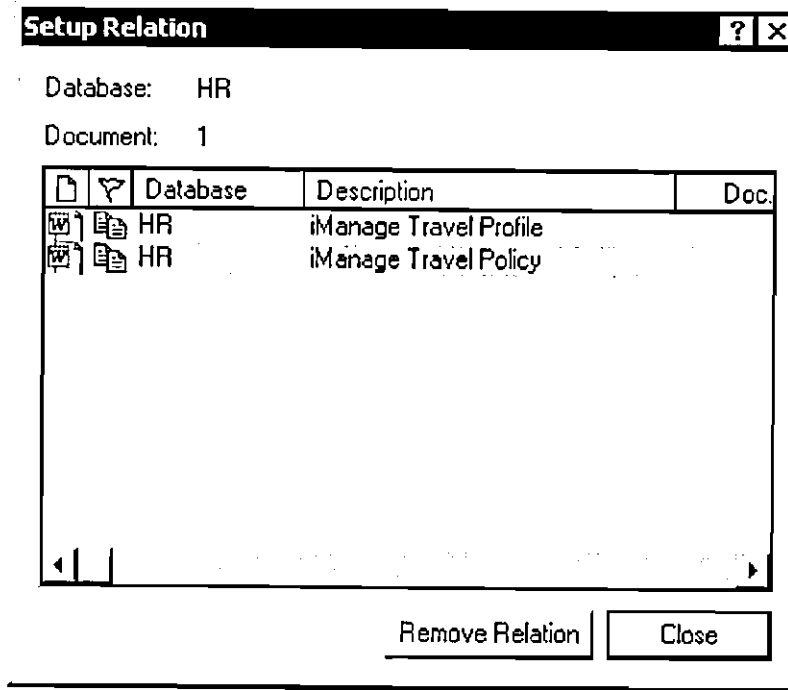
Figure 3.18: *Setup Relation* dialog

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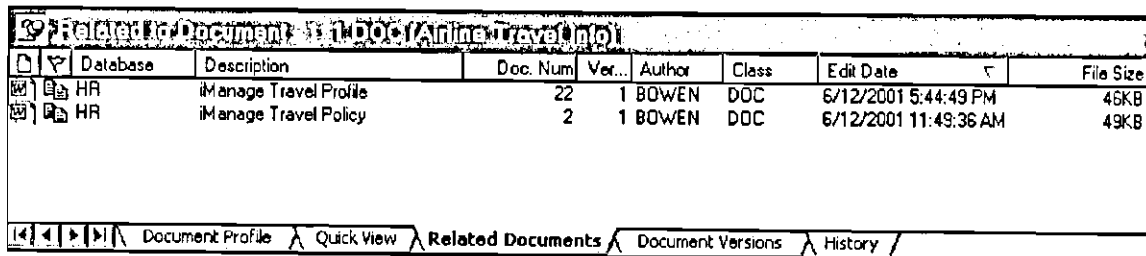
Figure 3.19: The Related Documents tab of the Document Results Frame

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

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

3

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.

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 you 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

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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.

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.

   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.
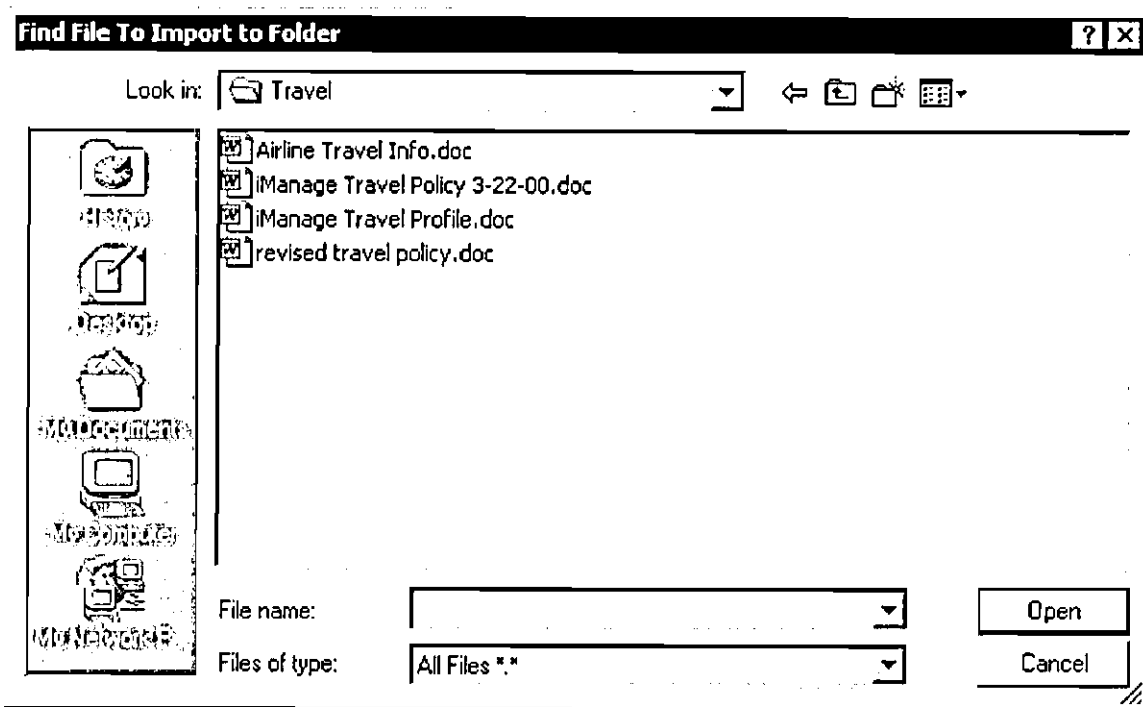
Figure 3.20: *Find File to Import to Folder* dialog box

5. The new document profile dialog box opens.

AUT0020076

New Document Profile-Default File imported into: \\PARIS\HR\Travel ⊠

Database

HR ▼ ...

Apply Template

<None> ▼

Document Profile Fields

OK

Description [revised travel policy]

Author ❶[ ] ... Author

Class ❶[ ] ... Class

Subclass [ ] ...

Custom3 [ ] ... Custom3

Cancel

Custom4 [ ] ... Custom4

Operator ❶BOWEN ... Bette Owen-Kelley

Type ❶WORD97 ... MS Word 97

Comments...

Help

Security

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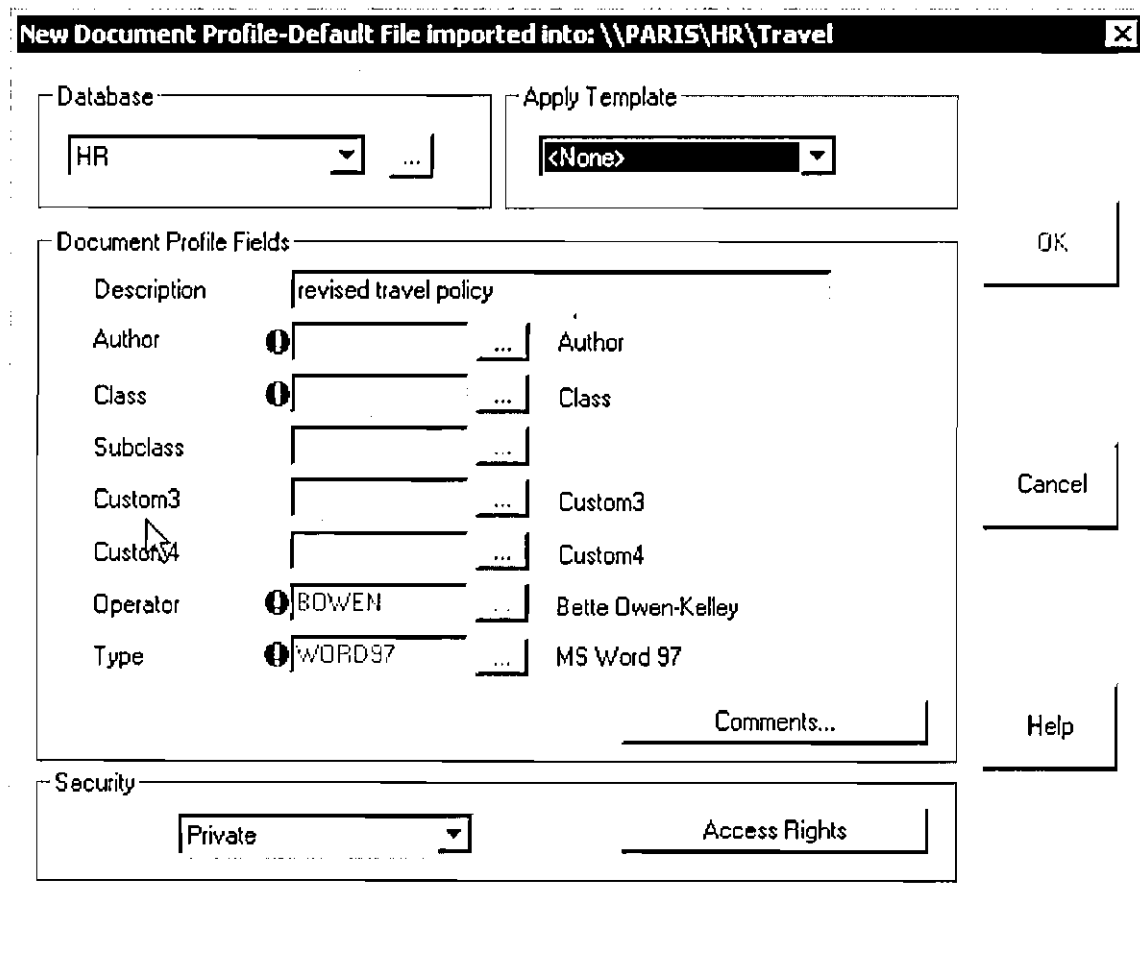
Figure 3.21: Select the database from the drop-down list; then click the lookup button next to it to select the destination folder.

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.
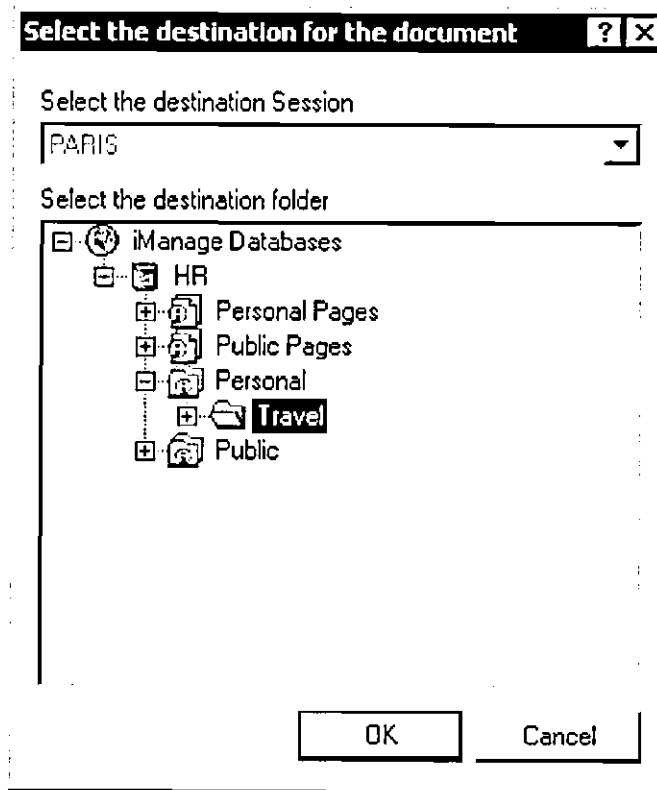
Figure 3.22: *Select the destination for the document* dialog box

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.
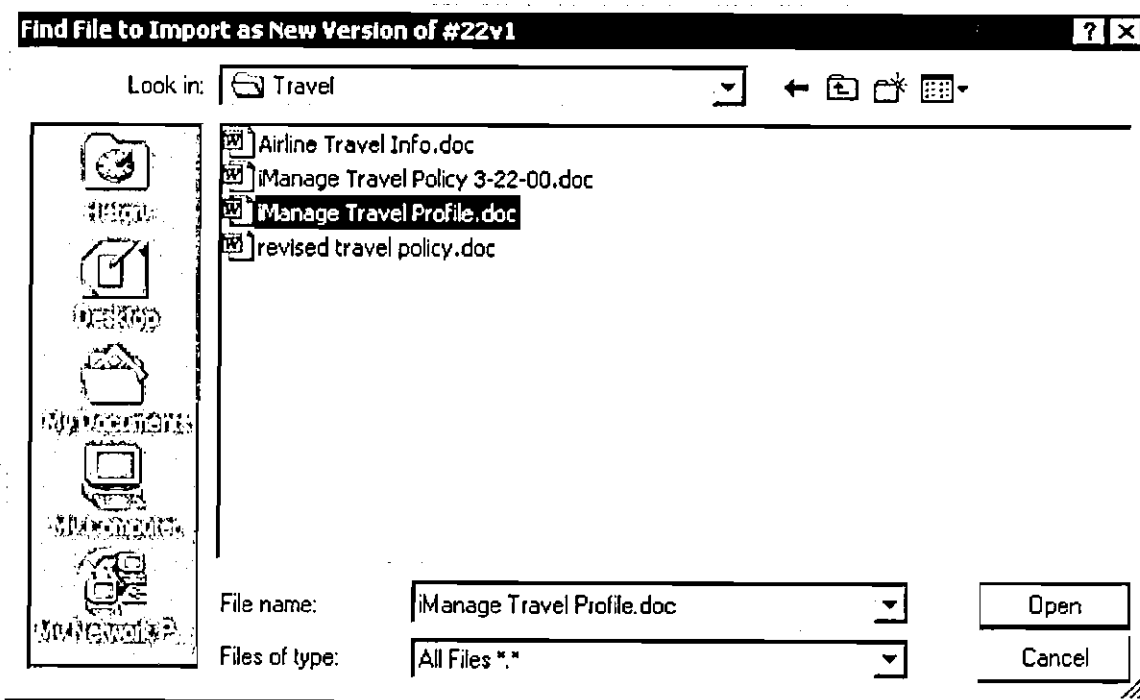
Figure 3.23: *Find File to Import as New Version* dialog

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

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case, you can only import it as a new document. See <u>Chapter 9</u> for more detailed information on Echo Documents.

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.

Export	☒
Document	
Database: HR	
Number: 23	Version: 1
Description: revised travel policy	
Options	
☐ Echo	
File Name: [23 1]	
Destination Path: C:\iManage docs\Admin	...
	OK Cancel Help
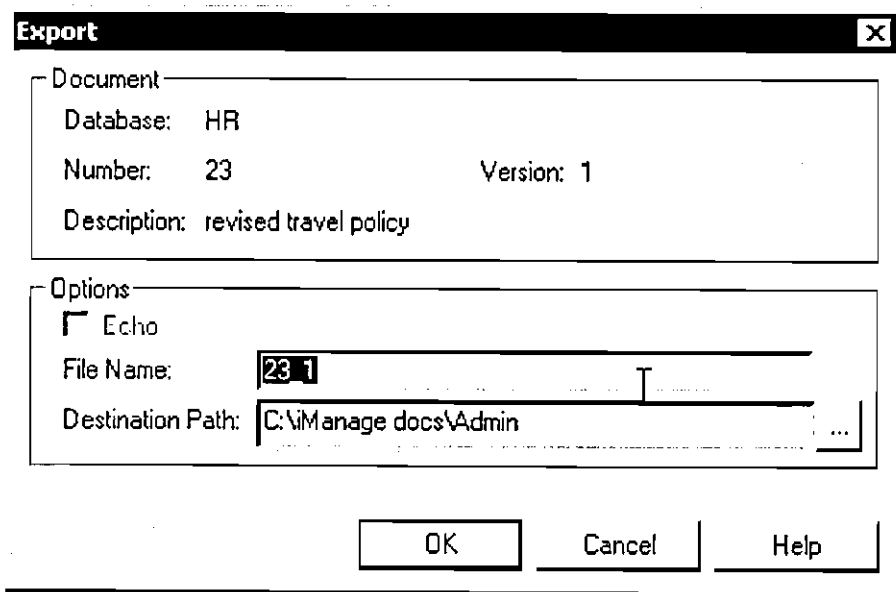
Figure 3.24: *Export* dialog box

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.

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.

3

```
┌─────────────────────────────────────────────────────────────┐
│ ■Document Checked Out                                    ⊠  │
├─────────────────────────────────────────────────────────────┤
│ ┌─Document────────────────────────────────────────────────┐ │
│ │  Database:      HR                                      │ │
│ │  Number:        23                    Version:  1       │ │
│ │  Description:   revised travel policy                   │ │
│ │  Date-Time:     6/14/2001 2:03:06 PM                    │ │
│ │  Checkout Path: [BOWEN]C:\NrPortb\HR\BOWEN\23_1.DOC     │ │
│ └─────────────────────────────────────────────────────────┘ │
│ ┌─User────────────────────────────────────────────────────┐ │
│ │  User ID:       BOWEN                                   │ │
│ │  Full Name:     Bette Owen-Kelley                       │ │
│ │  Location:                                              │ │
│ │  Phone:                       Extension:                │ │
│ │  Fax:                                                   │ │
│ │  E-Mail:                              ▷                 │ │
│ │  PC Location:                                           │ │
│ └─────────────────────────────────────────────────────────┘ │
│ ┌─Details─────────────────────────────────────────────────┐ │
│ │  Due Date:   │ 6/14/2001   ▼ │                          │ │
│ │              ┌──────────────────────────────────┐ ▲    │ │
│ │  Comments:   │                                  │      │ │
│ │              └──────────────────────────────────┘ ▼    │ │
│ └─────────────────────────────────────────────────────────┘ │
│                              ┌───────────┐ ┌───────────┐    │
│                              │    OK     │ │   Help    │    │
│                              └───────────┘ └───────────┘    │
└─────────────────────────────────────────────────────────────┘
```

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

User	Applicati...	Activity	Date - Time	Duration	Pages Prin...	Location	Comments
BOWEN	WINWORD	Checkin	6/14/2001 2:20:48 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

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

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.

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.

iManage

? Unlocking document 1.1.
You may lose changes if the document is currently open in an Application.
Confirm Unlock?

| Yes | No | Help |
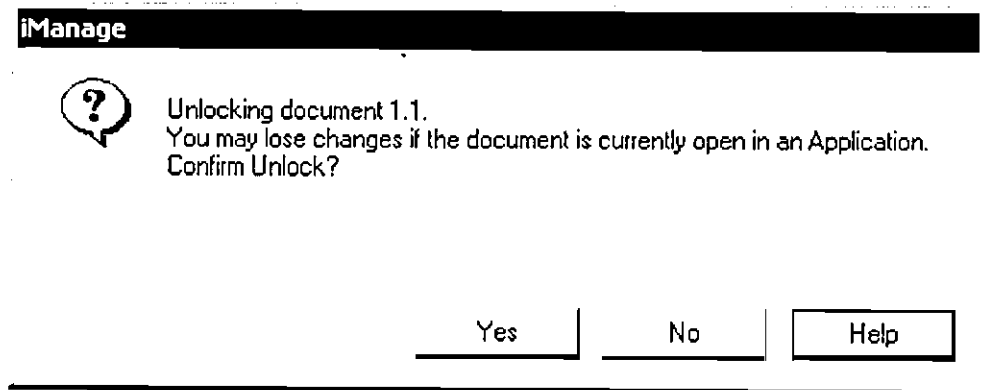
Figure 3.27: Unlocking document confirmation message

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).

AUT0020084
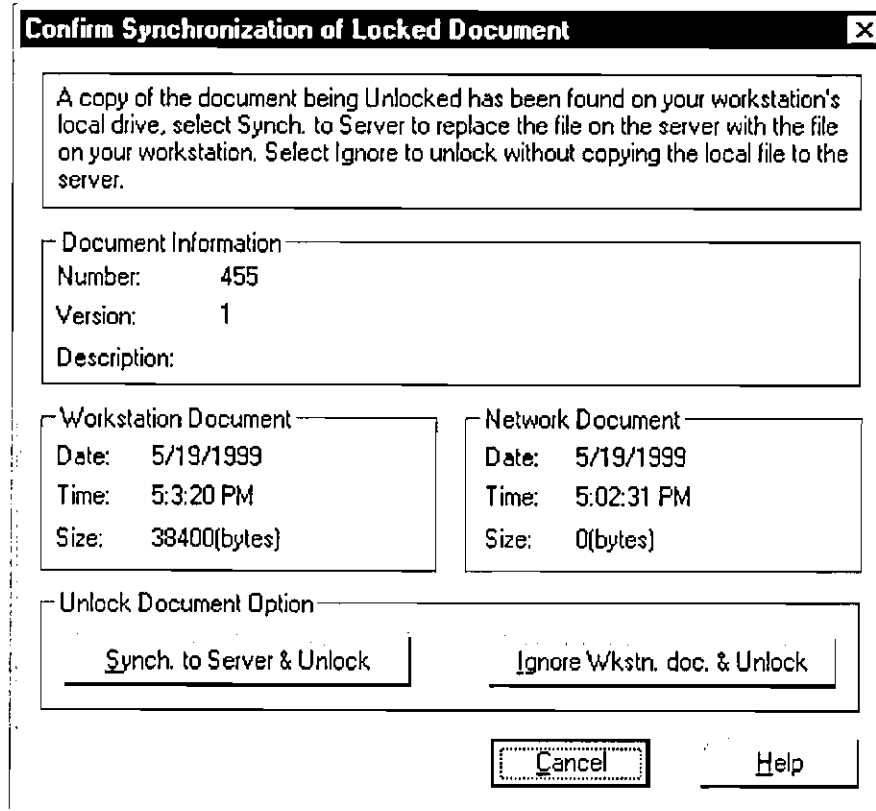
Figure 3.28: *Confirm Synchronization of Locked Document* Dialog

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.

Removing a Document

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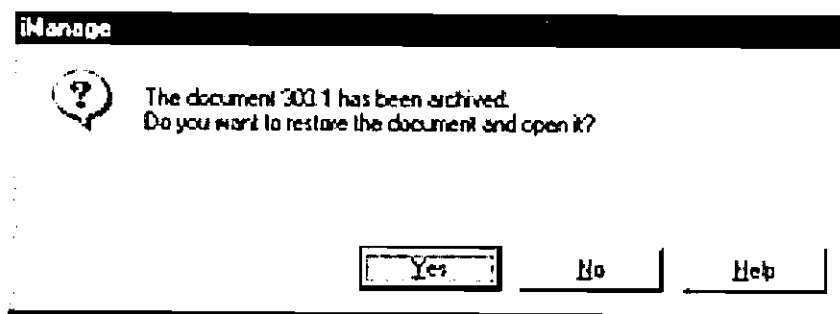
Figure 3.29: The *Document Archived* dialog box presents you with the option of restoring archived documents immediately.

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.
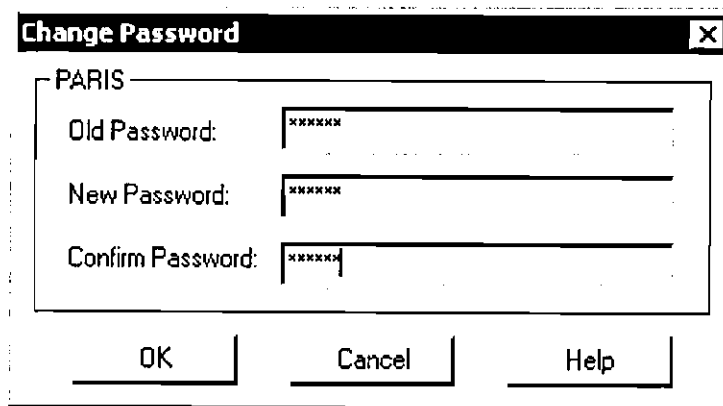
Figure 3.30: *Change Password* dialog box

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.

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.

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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 ![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.

Search	
Search...	Ctrl+F
Refresh	F5
Database Search ▶	iman1
	iman2
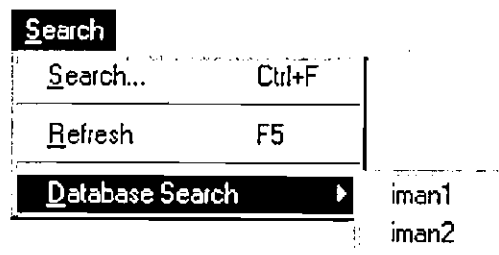
Figure 4.1: Search menu

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.

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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.

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).

AUT0020094
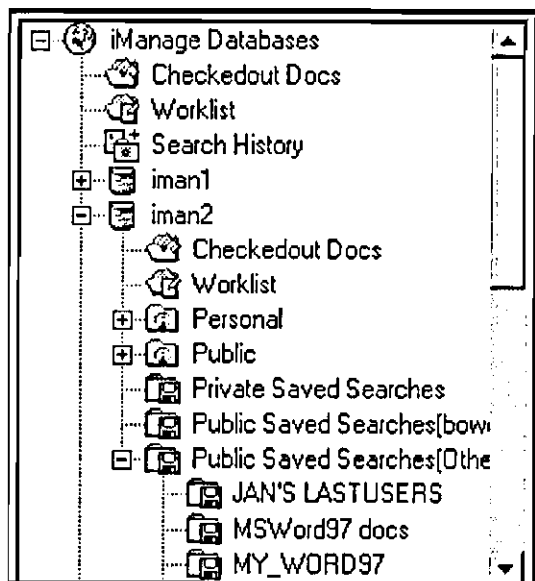
Figure 4.2: Tree Frame with Saved Searches highlighted

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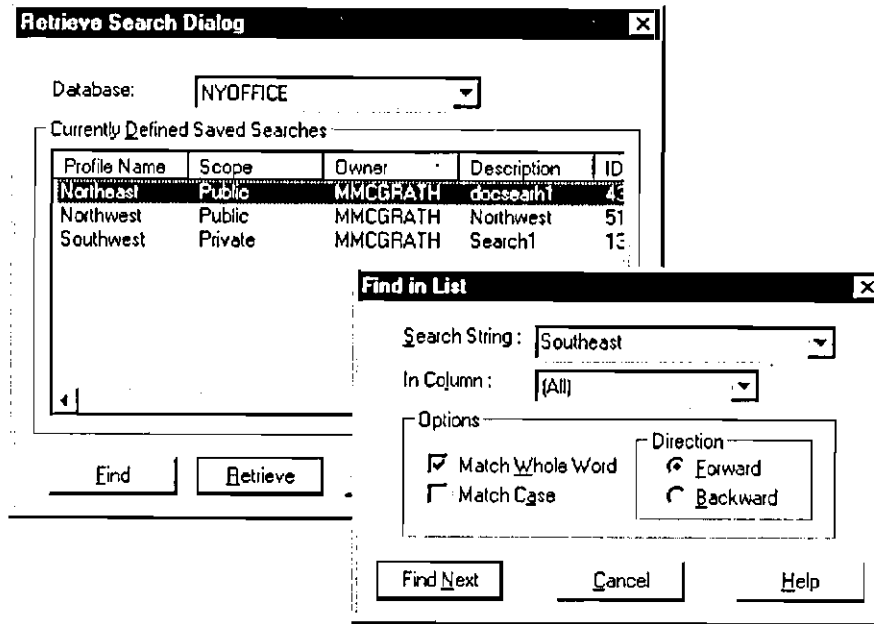
Figure 4.3: Searching through available Saved Searches in the *Retrieve Saved Search* dialog box using the **Find** option.

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** [printer icon].

3. A standard Windows *Print* dialog box will be displayed, such as the one shown in .

4. Set any print options that you want to change in this dialog box, then click **OK**.

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

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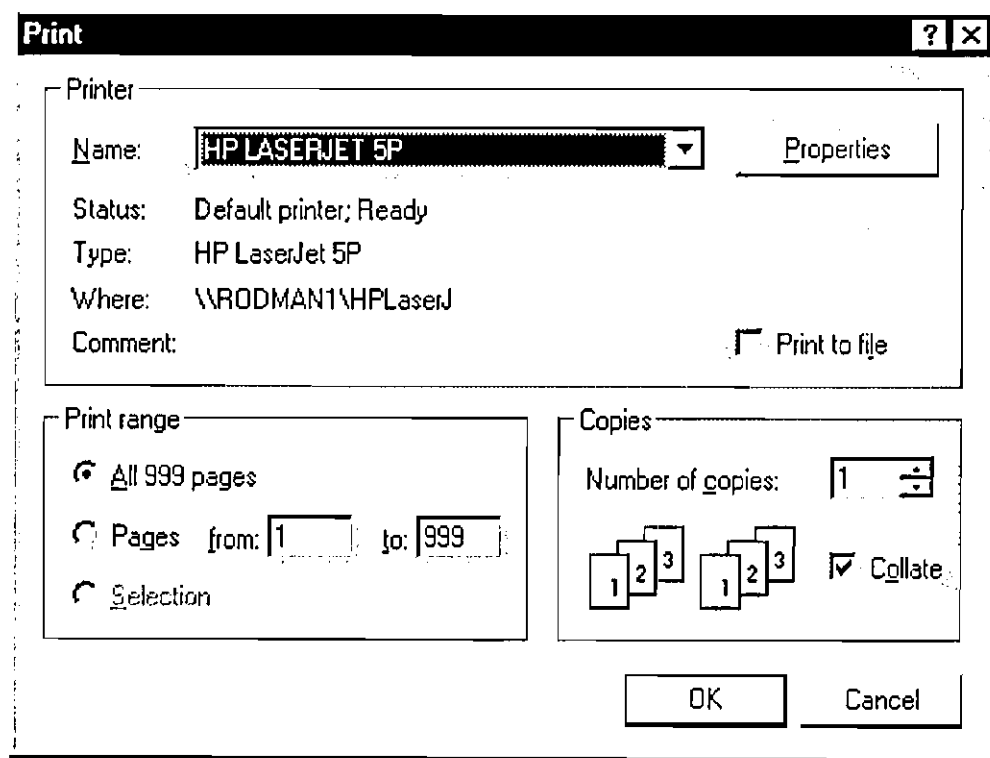
Figure 4.4: Example of a standard Windows *Print* dialog box

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.

Click on a browse button to see a selection table of valid entries for each field of profile information.

In this box, select the databases in which you want to search.

Click here to clear all fields.

4

Document Search

Number	250-500
Version	
Description	
Type	EXCEL4,EXCEL3,EXCEL5,EXCEL97
Class	
Author	AMARTINEZ,APHILIPS,BOWEN
Operator	
Client	
Matter	
Last User	

Search Databases
EMAIL
IDOCS
Portal

Clear

Click here to start the search.

Work List

Save Search...

Retrieve Search...

Find

Cancel

| Edit Date Range | From | 01/01/200 | To | 03/01/200 |
| Create Date Range | From | 03/01/200 | To | 03/01/200 |

Help

Index

Documents
Comments

Local Open

Select whether to search the full text of documents or the comments field of profile information.

Click here to search through the list of all saved

Click here to save the search

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

vary, because this dialog can be customized by your system administrator. Table 4.1 provides a list of the many possible fields that may be used to search for documents in your database.

To search for documents according to profile information:

1. If iManage DeskSite is not running, launch iManage DeskSite and log into the WorkSite Middle Tier Server. If you are working from within an application that is integrated with iManage DeskSite, select **Open** from the **File** pulldown menu in your application to display the *iManage Integrated Desktop*.

2. Display the *Search Dialog* window by clicking on the **Search** icon or by selecting **Search** from the **Search** pulldown menu in iManage DeskSite.

3. Enter search criteria in the fields of profile information displayed in the *Search Dialog* window. When you click on the **Find** button, iManage DeskSite will locate documents whose profile records match the information entered in the *Search Dialog* window.

Note: If Lookup buttons are available in your *Search Dialog* window, these are an easy and quick way to enter search criteria into search fields. Click on the Lookup buttons to select valid entries from a lookup table.

Click on **Find** to display the search results in the Document Grid. iManage DeskSite will display up to the maximum number of documents. You can change the maximum number of documents that will be displayed in the Document Grid as the result of a search by selecting **Setup Display Options** from the **Options** menu.

Table 4.1: Fields of Profile Information that may be searchable in your database

Profile Field	Description
Number	The document number is a unique number automatically assigned by iManage DeskSite
Version	Version number of the document (1–999)
Description	Long name of document, up to 254 characters
Name	Short name of document, up to 16 characters

Table 4.1: Fields of Profile Information that may be searchable in your database

Profile Field	Description
Format Type	This field indicates which application should be used to open the document. In most cases, this field is automatically set when the document is added to the database
Author	Author of the document
Operator	The Operator is another user, who like the author, has read/write access to the document, its profile information, and can set document access rights
Class	A classification used to help identify the document
Client	Another custom classification field. This field determines the valid entries for the Matter field
Matter	Another custom classification field used to identify and classify the document. The list of valid entries for this field depends on the entry in the Client field. (In effect, this field can be conceived of as a subclassification)
Custom Fields	Other custom fields may appear in the profile information for documents in your database. These fields may be additional fields used to classify the document, or numeric entry fields, checkboxes, or date entry fields.
Creation Date	Date document was created or installed
Last Edit Date	Most recent date when document was edited
Last EditTime	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	This is the number of days that the document can remain inactive in the database before iManage DeskSite tags it for archiving.
Index Flag	Indicates whether the document should be indexed by the full text indexer
Comment	Comment associated with the document, up to 8,000 characters, fully searchable

A Sample Profile Search

Profile searches are performed by entering information into the profile fields in the *Document Search* window. Documents are found that have profile fields that match the search information specified. This type of search is sometimes called a query-by-form search. In the example below, an Author name and Document Type are specified. For documents to match the search criteria, BOTH fields of

profile information must match the entries in the *Document Search* window.
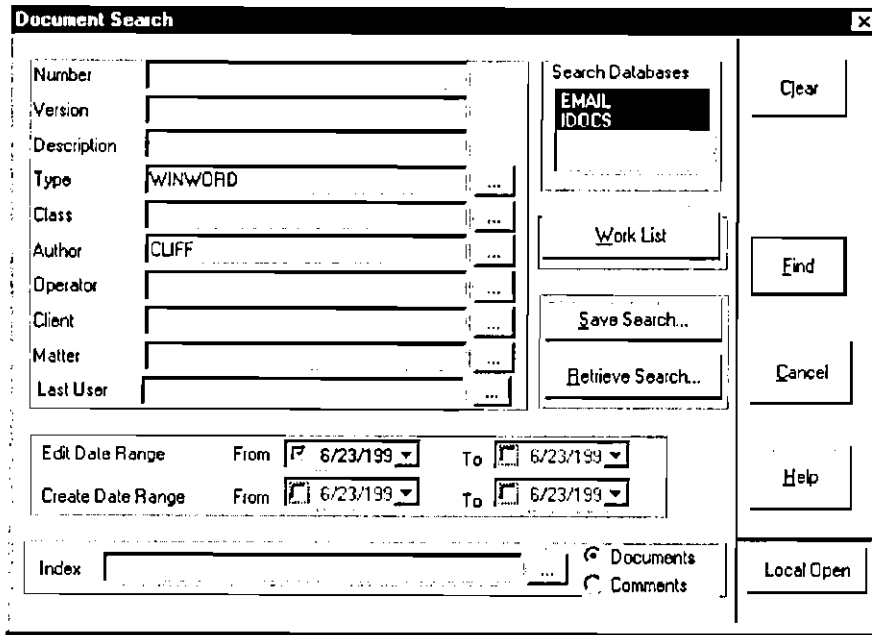
Figure 4.6: Sample *Document Search* window

The documents returned from this search must have CLIFF in their Author field and WINWORD in the Document Type field.

A More Detailed Search

If you find that your search results include too many documents, you need to restrict the scope of your searches further. You can restrict the scope of your search and usually decrease the number of hits by adding more criteria to the search profile. Below is an example of a more detailed profile search. Fields that contain no information always match.

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Figure 4.7: A more detailed search

Notice the differences between the search performed in Figure 4.6 and the search performed in Figure 4.7. In Figure 4.7, three Authors are specified, a Client is **Multiple Entries in the Same Field**

When you specify multiple valid entries in the same field of profile information, such as in Figure 4.7, where AMARTINEZ, APHILIPS and BOWEN are all specified in the Author field, iManage DeskSite will return documents in the search results that match ANY of these entries. This is different from when you specify entries in multiple fields of profile information. In Figure 4.6, for instance, in which information was specified in the Type and Author fields, iManage DeskSite would only return documents whose profile information matched BOTH of these fields. When you include multiple entries in a single field of profile information, iManage DeskSite will return documents that include at least one of these entries in that field of profile information. Hence, after the search shown in Figure 4.7 is performed, all of the documents found will contain WINWORD6 in the Type field AND MONTAGE in the Client field AND either AMARTINEZ, APHILIPS or BOWEN in the Author field. The documents

returned will also have a Create date after 12/01/98.

Note: When multiple entries are provided in a single search field, use **commas** to separate each entry.

Wildcard Characters

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In addition to being able to select validated entries from selection lookup tables, you can also use wildcard characters to expand and simplify searches. Wildcard characters allow you to match only parts of entries in document profile fields. There are two principal wildcard characters: the **asterisk** and the **question mark**.

- The **asterisk** or **percent sign** stands for any sequence of multiple characters
- The **question mark** stands for any single character

An Example

Let's say that you want to search for all of the documents pertaining to a particular client, called The Montage Company. However, because there are so many documents in the database pertaining to this client, multiple Client classifications were created. Some of these are:

- MONTAGE
- MONTAGE CO
- MONTAGE EST
- MONTAGE MFG

You could enter all of these in the Client field in the *Search Dialog* window to perform a search that would find all of the documents that include any one of these entries in the Client field of profile information. You could also do the same thing by entering

| Client | MONTAGE* | ... |

in the *Search Dialog* window. **MONTAGE*** or **MONTAGE%** will instruct iManage DeskSite to match any entries that begin with MONTAGE and that are following by any string of characters.

If the library also including documents pertaining to The Montage Company that were classified with the Client classification THE MONTAGE COMPANY, you could include these documents in your search results by adding an asterisk or percent sign to the front of the entry in the Client field, namely:

Client	*MONTAGE*	...

The Question Mark

The question mark is used to match any single unspecified character. If you wanted to match Client field entries of the type:

- MONTAGE1
- MONTAGE2
- MONTAGE3
- MONTAGE4

You could use **MONTAGE?** in the Client field in the *Search* window.

Caveat

The danger in using wildcard characters is that you will increase your search results by including undesired matches. For instance, you could match all of the example Client classifications mentioned earlier that pertain to our fictional example, The Montage Company, using this entry in the Client field:

Client	MONT*	...

However, this entry would also match such possible Client entries as:

- MONTHLY REPORTS
- MONTGOMERY CO
- MONTSOON FLOWERS CORP

Wildcard Characters in the Description Field

Wildcard characters can be particularly useful in searching the Description field. By default, iManage DeskSite automatically inserts wildcard asterisks as shown. This finds all documents that have the terms WINSOR TRUST in the Description field:

Description   [*WINSOR TRUST*]

You can change the default in the *Advanced Options* dialog box explained in Chapter 6. If you did not include the leading asterisk, iManage DeskSite would only find documents whose Description field began with WINSOR TRUST. On the other hand, if you omitted the ending asterisk, iManage DeskSite would only find documents whose Description field ended with the terms WINSOR TRUST.

4 Searching by Document Numbers

One of the most direct ways to locate documents in the database is to search for specific document numbers. If you know the document number for a document, this can be an effective way of locating the document quickly, because every document in the database has a distinct document number and version number.

Numbers can be entered in the Number and Version fields in the *Search Dialog* window either as single numbers or as ranges. The following search would find documents with the numbers 1, 10 to 20, and 100 to 110 (if they exist), and would return only versions 1 to 3 of these documents (if those versions exist).

Search Dialog

Number	1, 10-20, 100-110
Version	1-3
Description	
Type	...
Doc Type	...
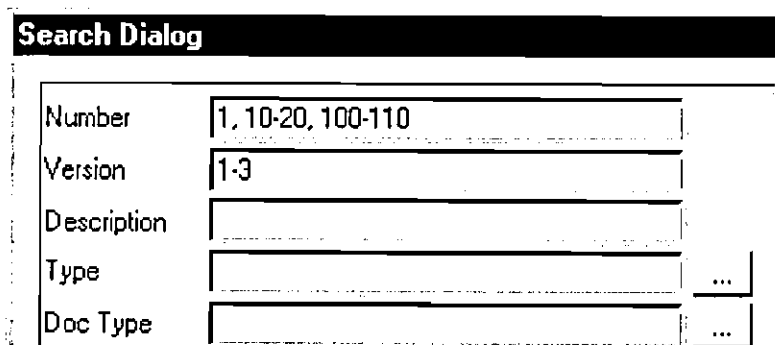
Figure 4.8: Partial screen shot of the *Search Dialog* window.

You can also use the less than (<) and greater than (>) symbols to find a range of document numbers.

Using *Lookup* Dialog Boxes

The fastest and most accurate way to enter search criteria in the *Search Dialog* window is to select entries from Lookup dialog boxes. Lookup dialog boxes list

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valid search entries for each field of profile information. If the field of profile information that you would like to use to search the database has a browse button next to it, clicking on the browse button will display a *Selection* dialog box and a list of valid entries from which you can choose.

Below is an example Selection dialog box where you can select or look up values for the Type profile field.

Select Type   [×]

Databases
IDOCS

Show All Possible Entries that Match
[   ]   Look Up
(• Beginning with   (Contains

Currently Loaded Type

Description	Auto	Alias	▲
Ami Pro 3.0/3.1	AMI3	Y	
Windows Ansi Text	ANSI	Y	
Visio Files	VISIO	Y	
Help Map Files	HH	Y	
HTML	HTML	Y	
Help Files (Misc)	HLPMISC	Y	
JPEG image	JPEG	Y	
Tagged Image File Format	TIFF	Y	
WordPerfect 5.0	WPF50	Y	
WordPerfect 6.0	WPF60	Y	
WordPerfect 5.1/5.2	WPF51	Y	
WordPerfect 6/7/8	WPF61	Y	
QuattroPro for Windows 6/7/8	QUATR...	Y	
Excel 5.0	EXCEL5	Y	
Presentations Slide Show 7/8	PRSHW	Y	
MS Excel 97	EXCEL97	Y	▼

Add To >> [   ]

Item(s) Loaded : 37

OK   Cancel   Help

Figure 4.9: Selection dialog box for Type entries in a sample database.

Note: The Lookup dialog boxes only displays up to the first 500 valid entries listed for that field of profile information in the database. If there are more than 500 possible valid entries, use the Find option at the top of the Selection dialog box to locate your entry. When you enter a value in the Find field at the top of the Selection dialog box, iManage DeskSite searches the entire list of valid entries for matches – not just those listed in the Selection dialog box.

4

The Lookup *Feature in all* Selection *Dialogs*

Use the Lookup feature at the top of all Lookup dialog boxes to locate valid entries in especially long lists. When you enter search criteria in the Lookup field, the table of available options immediately highlights the first match. Click the **Look Up** button and the table displays only those options that match.
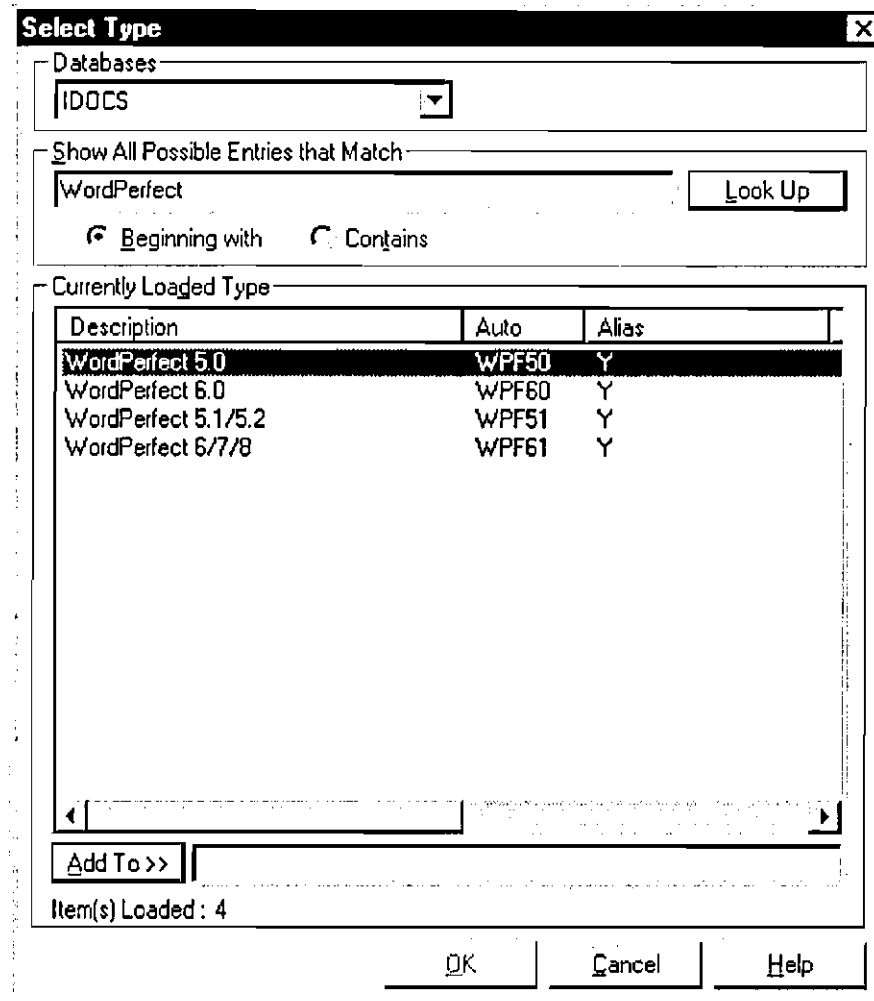
Figure 4.10: Selection dialog box after search was performed for the string "WordPerfect"

Selecting Multiple Entries

Figure 4.10 also shows that you can select multiple entries in the Selection dialog box before clicking the **OK** button. When you click **OK**, all selected entries appear in the appropriate field in the *Search Dialog* window.

Double-clicking an entry in a Selection dialog box selects the entry and returns you to the *Search Dialog* window.

Full Text Searches

Overview

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iManage DeskSite's full text searches find documents based on the occurrence of individual words, partial words, and phrases, referred to collectively as *terms*. You can search for occurrences of terms either in the contents of documents or in the text of profile comment fields. You can also perform a search of documents that are within multiple libraries at once.

Full text searches can be performed in conjunction with profile searches. The documents that are found must meet the profile search criteria *and* contain the words or phrases specified by the full text search.

By default, full text searches are not case sensitive.

Entering Full Text Search Criteria

You can enter full text search criteria at the bottom of the *Search Dialog* window. You can also select whether to search through the entire body of the document or the comments field of profile information by clicking the **Documents** or **Comments** radio buttons. In the example below, the user is searching for occurrences of the word "car" or "cars" in the full text of documents that were written by CLIFF and are of the type WINWORD2:

Figure showing Document Search dialog with the following fields:

Document Search

Number [_____] Author [BOWEN] Search Databases
Version [_____] Operator [_____] IDOCS
Class [_____]
Type [WINWORD6]
Book/Manual [_____] Search
Release [_____]
Product [_____] Save Search...
Description [_____]
Filename [_____] Retrieve Search...

Edit Date Range From [10/07/199 ▼] To [10/07/199 ▼] Clear
Create Date Range From [10/07/199 ▼] To [10/07/199 ▼]
                                                    Cancel
Index [car OR cars] ⦿ Documents
                     ◌ Comments Help

Enter full text search queries | Click here for the simplified full text search query dialog creation window. | Select whether to search the full text of documents or the Comments field of profile information.

Figure 4.11: *Document Search* dialog

Simplified Full Text Searching

A simplified full text search window is available for users who are not familiar with Boolean logic or who do not want to learn how to construct full text search commands. This dialog box enables you to enter key terms or phrases and to construct a simple full text search query automatically.

To access the simplified full text search window:

Click on the browse button next to the Index field, which is used to enter full text search queries. When you click this browse button, the *Find Documents Containing* dialog box appears:
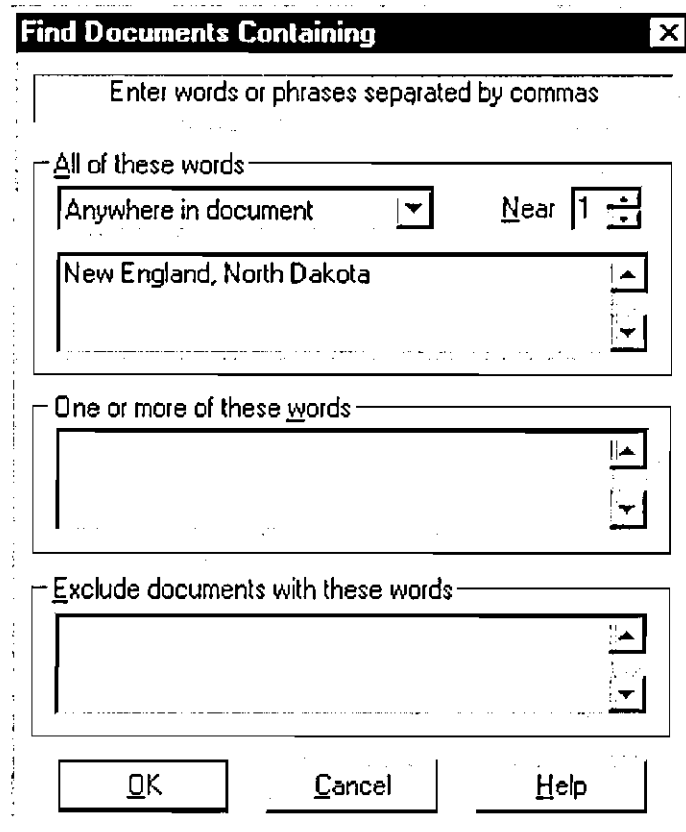
Figure 4.12: Simplified full text search dialog box

Using the Find Document Containing *Dialog Box:*

You can use the intuitive *Find Documents Containing* dialog box to create simple full text search queries automatically. When the *Find Documents Containing* dialog box appears, enter words or phrases separated by commas into the appropriate fields. In the topmost field, enter a list of terms which must ALL appear in the document in order for it to appear in your search results.

The drop-down list box available above this field lets you set the proximity with which these terms must appear near each other. If you select **Anywhere in document**, then iManage DeskSite will return documents in which these terms appear anywhere in the document, not necessary within any proximity of each other.

If you select **Near each other** from the drop down list box, then the words listed in the topmost field must appear within a defined proximity of each other in a document for that document to be listed in the search results. The **Near** field indicates the proximity within which the words in the topmost field must appear in

the document in numbers of words. If the **Near** field is set to 10 and two words are listed in the **All of these words** field, then these words must both appear in a document and cannot be separated by more than 9 words for iManage DeskSite to list the document in the search results.

In the middle field, enter a list of terms only one of which must appear in the document for it to appear in your list of search results.

In the bottom field, enter terms that should exclude a document from the search results if they appear in that document.

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Examples

The example in Figure 4.11 finds documents that include both the phrase *New England* and the phrase *North Dakota*. It does not return documents that contain the word *New* and the word *England* in separate places – these words must be next to each other and in that order. The same applies to the two terms in the phrase, *North Dakota*.

Error Checking

When you click **OK** in the *Find Documents Containing* dialog box, iManage DeskSite checks the syntax of the terms you have entered and reports any error that you may have entered. If no errors are found, iManage DeskSite constructs a valid search query, which appears in the Index field in the *Search Dialog* window.

Example with Wildcard Characters

You can also enter wildcard characters in the *Find Documents Containing* dialog box. Figure 4.12 shows the use of a wildcard character in the *Find Document Containing* dialog box with terms entered in the middle field.
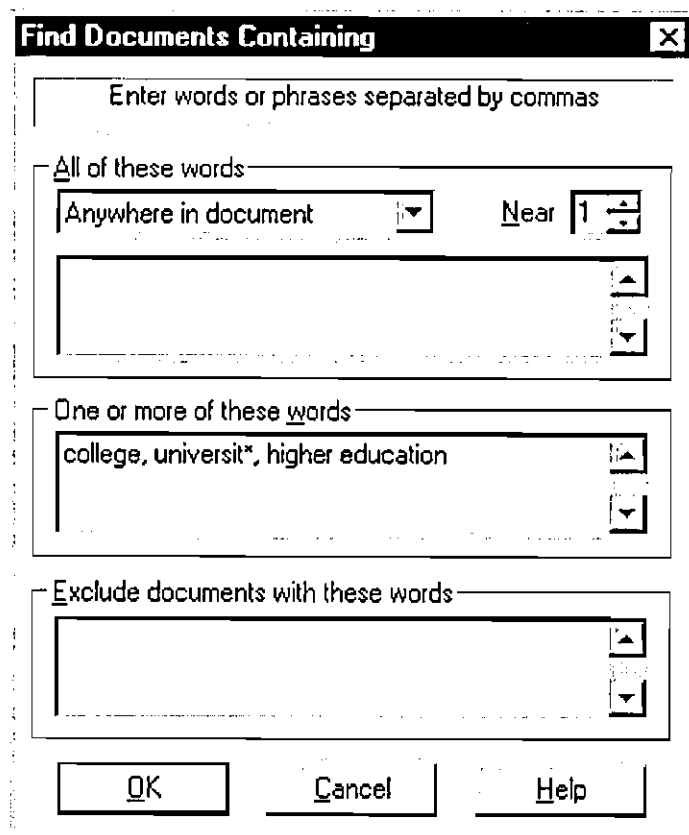
Figure 4.13: Another example of *Find Documents Containing* dialog box

The example search query shown in Figure 4.13 would return documents that included the term *college,* or the phrase *higher education,* or the terms *university* and *universities.*

Proximity Searches

Figure 4.14 below shows how to enter a proximity search in the *Find Documents Containing* dialog box. By "proximity search," we mean a search based on the proximity of words in relation to each other in the document, not just on their occurrence in the document.

Find Documents Containing

Enter words or phrases separated by commas

All of these words:

| Near each other ▼ | Near: |14⬦|

| client,complaint |

One or more of these words:

Exclude documents with these words:

| OK | Cancel | Help |

Figure 4.14: *Find Documents Containing* dialog box with search criteria entered for a proximity search.

In Figure 4.14, the **Near each other** option has been selected from the drop-down list and the **Near** numeric value has been set to 14. When this search is performed, iManage DeskSite finds only those documents in the database that contain the words client and complaint within 14 words of each other. The two words can appear in any order, but they cannot be separated by more than 13 words.

Search Elements

A query expression is the criteria used to perform a full text search. It is comprised of several elements, either explicit or implicit: operators, modifiers, and terms.

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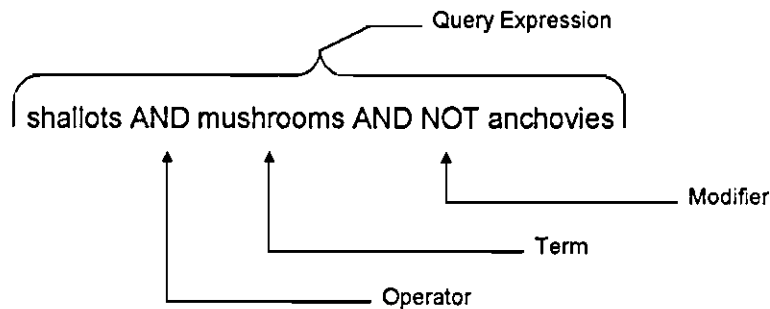
Operators

Operators are codes that represent logic to be applied to a search. These are listed and defined in the following section, *Operators*. To specify an operator in a search, type the operator in less than/greater than brackets and then the word or phrase that you want to find, as in *<STEM> facilitate*.

Although operators need not be entered in all caps, they appear in this chapter as such for the sake of clarity.

Modifiers

Modifiers adjust the default meaning of a given operator. For example, the CASE modifier would make the WORD operator case sensitive. The modifiers are listed and defined under "Modifiers" on page 124.

Simple and Explicit Syntax

You can perform a full text search according to *simple* or *explicit* syntax.

Simple Syntax

Simple syntax refers to when you enter just terms with no accompanying codes or punctuation. iManage DeskSite produces matches as if the terms are preceded by the STEM operator. Although they are less exact, simple searches net more matches than explicit ones.

Explicit Syntax

You can use explicit syntax by enclosing a word in double quotation marks. When you double-quote a word, iManage DeskSite performs a literal search; *facilitator* and *facilitation* would not be offered as matches to *"facilitate"*.

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Other Syntax Options

Parentheses

Parentheses indicate the order in which the search is to be executed. iManage DeskSite reads information within parentheses before looking at whatever may be outside them. For example, suppose you were to enter the following search:

(Homer AND Marge) OR Bart

iManage DeskSite would look for documents that refer to *Homer* and *Marge*— not just one or the other. Any documents that referred to *Bart* also would be included.

Parentheses can also be placed within each other. The following example means, "Find documents that contain either *Homer* or *Marge*—it doesn't matter which— as long as the document also contains *Bart*. Also, give me any documents that mention *Lisa.*"

(Bart AND (Homer OR Marge)) OR Lisa

Double Quotation Marks to Search for Operator Words

To search for a word that happens to be an operator, such as AND or NOT, put the word in double quotation marks to indicate that the word should be considered as such, not as an operator. For example, to search for the phrase *Lewis and Clark,* you would enter:

Lewis "and" Clark

Operators

This section lists each of the operators used in full text and profile searches.

Profile Field Operators

Some operators work only in profile fields.

> (Greater Than)

The greater than sign can be used to search for documents that contain a value in a particular profile field that is greater than a specified minimum value. For example, to select documents with a document number greater that 2500, enter the following criteria in the Document Number profile field:

> 2500

>= (Greater Than or Equal To)

The greater than or equal to sign searches for documents that contain a value in a particular profile field that is greater than or equal to a specified value. To search for documents with a document number greater than or equal to 2800, enter the following criteria in the Document Number profile field:

>= 2800

< (Less Than)

The less than sign can be used to search for documents that contain a value in a particular profile field that is less than a specified maximum limit. For example, to search for documents with a version number less than 3, enter the following criteria in the Version Number profile field:

< 3

<= (Less Than or Equal To)

Like the greater than or equal to sign, the less than or equal to sign combines the searching power of the less than and equal to signs. To search for documents with a version number less than or equal to 3, enter the following criteria in the Version Number profile field:

<= 3

Full Text and Comment Operators

The following operators work in full text searches of profile comments and full documents.

<AND>

This Boolean operator finds documents that contain both terms on either side of it. While the OR operator broadens a search, the AND operator narrows it. Use AND to connect terms with different meanings. The search query *New England AND North Dakota* would find only documents that contain **both** phrases; if a document contained only one of the terms, it would not be included in the search results. Enclosing brackets are optional on the AND operator.

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<NEAR>

The NEAR operator is similar to AND in that only documents that contain both terms are included in the search results; however, NEAR presents matches that contain both terms close together. For example, suppose you enter the following search:

> lincoln <NEAR> beard

The search criterion finds documents with the words lincoln and beard near each other.

<NEAR/n>

The <NEAR/n> operator is a more specific variety of the NEAR operator in that you specify the maximum distance allowed between each term. The N variable can be any whole number between 1 and 1,024 (exclude the comma in numbers greater than 999), where 1 indicates that the terms are adjacent. For example, suppose you enter the following criteria:

> jefferson <NEAR/7> crop

The search criterion finds documents with the words jefferson and crop within seven words of each other.

<OR>

OR is a Boolean operator that finds documents that contain at least one of the terms to which it is applied. The OR operator enlarges the search topic and is normally used to look for terms that have similar meaning or refer to similar subjects. The search criterion *louis armstrong OR satchmo* would find documents with one or both of the terms. The enclosing brackets are optional on the OR operator.

<PARAGRAPH>

The <PARAGRAPH> operator searches for documents that include all of the given search elements within a paragraph. You can specify search elements in a sequential or random order.

To get documents that contain variations of the word *wombat* and the phrase *ice cream* in the same paragraph, enter:

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wombat <PARAGRAPH> ice cream

If you search for more than two words or phrases, you must include the PARA-GRAPH operator between each word or phrase. For example, suppose you enter the following criterion:

oak <PARAGRAPH>maple<PARAGRAPH>ash tree

The search finds all documents that have oak, maple and ash tree in the same paragraph.

<SENTENCE>

The <SENTENCE> operator searches for documents that include all of the given search elements within the same sentence. For example, suppose you enter the following criterion:

automobile industry <SENTENCE> aftermarket

The search finds all documents that have automobile industry and aftermarket in the same sentence.

You can specify words in sequential order by using the SENTENCE operator in conjunction with the ORDER modifier.

<STEM>

The <STEM> operator searches for documents that include variations of the word you specify, as well as explicit matches. For example, to search for documents that contain a variation of the word *distill,* you would enter the following criterion:

<STEM> distill

Matching documents would include the terms *distill, distillation, distillery, distilling, distilled,* and *distills.*

Note: The <STEM> operator is used by default and does not need to be specified. To override <STEM>, put the term in double quotation marks.

<THESAURUS>

This operator selects documents that contain one or more synonyms of the word you specify. To locate documents containing synonyms of big, enter the following:

> <THESAURUS> big

Matching documents include words such as large, vast and extensive.

<TYPO/N>

The TYPO/N operator performs approximate pattern matching to identify words that are similar to the query term. You can use this operator to search for documents that have been scanned using an Optical Character Reader (OCR). Since the TYPO/N operator must scan the entire index to find potential matching words, this operator is not practical for use in databases containing over 100,000 documents or in performance-sensitive environments.

If you wish, you can specify a variable (N) to define the maximum number of errors between the query term and a matched term. This value is called the error distance. If you do not specify an error distance iManage DeskSite uses 2 as a default. This means that there can be a maximum of 2 differences between the query term and the matched term. An error is defined as a character insertion, deletion or replacement. For example, the following table shows word matches with an error distance of 1:

Query and Term	Matching Term	Explanation of Error
<TYPO/1> Mouse	House	H replaces M
<TYPO/1> Agreed	Greed	A is deleted
<TYPO/1> Cat	Coat	O is added

The following table shows a word match with an error distance of 3:

Query Term	Matching Term	Explanation of Error
<TYPO/3> Sweeping	Swimming	I, m, m replace e, e, p respectively

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The following table shows a word match with an error distance of 2:

Query Term	Matching Term	Explanation of Error
<TYPO/2> Swept	Kept; wept	S is deleted and K replaces W; S is deleted (1 error does not exceed the maximum error distance of 2)
<TYPO> Swept	Kept; wept	Same as above since the error distance 2 is the default

<WORD>

The <WORD> operator searches for documents that include a given word. For example, to search for documents that contain the word *carrot,* you could enter *<WORD> carrot.* The WORD operator is only needed when you want to use a modifier, such as CASE, as a search term.

<WILDCARD>

Using wildcard symbols lends a great deal of flexibility to full text searches. Wildcards can be used when searching for word prefixes, roots, suffixes, plurals, and to find words that have variations in spelling. The wildcard characters recognized by iManage DeskSite are listed in Table 4.2. Use the <WILDCARD> operator to indicate when you are using wildcard symbols.

Note: Wildcards usually increase the scope of a full text search and can also increase the time it takes to complete them. In particular, using a wildcard symbol at the start of a word can greatly increase search time, because every entry in the index must then be searched.

Table 4.2: Wildcard Symbols used for Full Text Searching

Symbol	Explanation
?	The question mark replaces any single alphanumeric character. For example, <WILDCARD> b?rn would match *born, barn,* or *burn.* Similarly, <WILDCARD> ?andy would match *candy, dandy,* or *sandy.* You can use more than one question mark within a term; for example, WILDCARD sh??e could produce *shore* and *shade* as matches.

Table 4.2: Wildcard Symbols used for Full Text Searching

Symbol	Explanation
*	The asterisk is used to represent any number of alphanumeric characters (including none). For example, WILDCARD *vert* would match convertible, inverted, vertigo, and covert. When using the asterisk wildcard, try to narrow the potential scope of the wildcard entry as much as possible. For instance, to find documents about automobiles, the criterion WILDCARD auto* finds the words **auto, automobile,** and **automotive,** but it would also find **autobiography, autocracy,** and **autograph.** A more specific query is <WILDCARD> auto OR automo*.
[ ]	Brackets tell iManage DeskSite to find one of any character within the brackets. For example, <WILDCARD> r[aou]t would match documents that contain *rat, rot,* or *rut.* When you enclose a caret (^) within brackets, the search excludes the string of characters to the right of the caret. For example, if you enter WILDCARD '[^block]head', the term *blockhead* is not included in the search results. Note that you must place the caret before the string of characters you want to exclude, for example WILDCARD '[^block]head', but not WILDCARD '[block^]head'. When you enclose a hyphen (-) within brackets between two letters, iManage DeskSite looks for every term within that alphabetical range inclusively. For example, suppose you were to enter WILDCARD 'a[a-w]a', iManage DeskSite looks for every matching three-letter term from aaa to awa. **Note:** When you use brackets, you must enclose the word that contains character string with backquotes ('). The character string cannot contain spaces.
{ }	Braces are similar to brackets but let you search for groups of characters, separated by commas. For example, <WILDCARD> spill{s,age,ing} would match documents that contain *spills, spillage,* and *spilling.* **Note:** When you use braces, you must enclose the word that contains character string with backquotes ('). The character group listing cannot contain spaces.

Literal Searches for Wildcard Characters

If you want a wildcard character to be interpreted as text and not as a wildcard,

precede the character with a backslash (\). For example, if you wanted to search for the term M*A*S*H, you would enter <WILDCARD> m*a*s*h.

Modifiers

Modifiers fine-tune the performance of your chosen operators. For example, you can use the <CASE> modifier with the <WORD> operator to make the search case-sensitive.

<CASE>

The <CASE> modifier makes <WORD> and <WILDCARD> searches case-sensitive. For example, the criterion *<CASE> <WORD> President* would retrieve documents that contained the word *President;* occurrences of *president* or *PRESIDENT* would be ignored.

<NOT>

Used with the AND and OR operators, NOT tells iManage DeskSite to exclude documents that contain a given term. For example, to retrieve documents that contain the words *mushrooms* and *olives* but not the word *anchovies,* you would enter:

mushrooms <AND> olives <AND> <NOT> anchovies

<ORDER>

The <ORDER> operator matches terms based on the order in which they appear in the query expression. This modifier can be used with the NEAR/N operator.

The ORDER modifier must appear in front of the operator name. For example, if you wanted to search for the word *iced* followed by the word *mocha* in the same phrase, you would enter the following criterion:

iced <ORDER> <PHRASE> mocha

C H A P T E R 5
Integrated Application Operation

Overview

The iManage Integrated Application Operation allows a user to perform iManage functions directly from the application they are using. This integration eliminates the need to switch to the iManage DeskSite application to perform certain iManage tasks.

iManage DeskSite is actively integrated with most major Windows applications, including:

- Microsoft Office 97 and 2000
- Corel WordPerfect Suite (8) and WordPerfect Office 2000
- Watermark Professional
- Any ODMA-Compliant Application
- Lotus Notes

- Novell GroupWise 5.2 or 5.5
- Microsoft Outlook
- Any MAPI compliant E-mail
- Lexus/Nexus Office Suite 7.x (CompareRite, CiteRite, CheckRite, FullAuthority)

In addition, if you are using Microsoft Office 2000, another integration option is available, called Passive Integration. This is an option that your system administrator may set, according to the needs of your system.

What does it mean to be "integrated" with other applications?

Active Integration

When iManage DeskSite is integrated with another application, certain functions in the other application are slightly changed. The functions usually affected are: **Open, Close, Save, Save As, Insert, Print,** and **Exit**

There are also new commands that exist only in integration mode. They are: **Local Open, Local Save, Versions** and **Edit Profile.**

Passive Integration

When the Passive Integration option is set on systems using Microsoft Office 2000, the **iManage Open** and **iManage Save As** menu options become available.

5

Non-Integrated Applications

In some cases, an application cannot be integrated with iManage DeskSite. In those cases, iManage DeskSite's functions will not be available from within the application. You can still organize, track, and store your documents using iManage DeskSite. You will need to, however, follow this general procedure to open a document:

1. Launch iManage DeskSite and log into a WorkSite Middle Tier Server.
2. Search for and find the document that you want to open.
3. **Checkout** the document from the database.
4. Launch the application, if it is not already running.
5. **Open** the document from within the application.

When you are finished editing or revising the document:

1. Launch or switch focus to iManage DeskSite.
2. Use the **Checkin** option to copy the revised document back to the database.

Startup

In most cases, when you first launch an integrated application, the application automatically detects whether iManage DeskSite is running and launches it if

necessary. In other cases, the integrated application launches iManage DeskSite when you select an integrated function from the **File** pull-down menu.

If iManage DeskSite is running but you are not logged into an iManage server, iManage tries to log into a WorkSite Middle Tier Server. If Autologin settings are available, iManage DeskSite tries to do this automatically. If Autologin settings are not available, or if iManage DeskSite is running, but you are not logged into a WorkSite Middle Tier Server, the *Register Servers* dialog box appears, as shown in Figure 5.1.
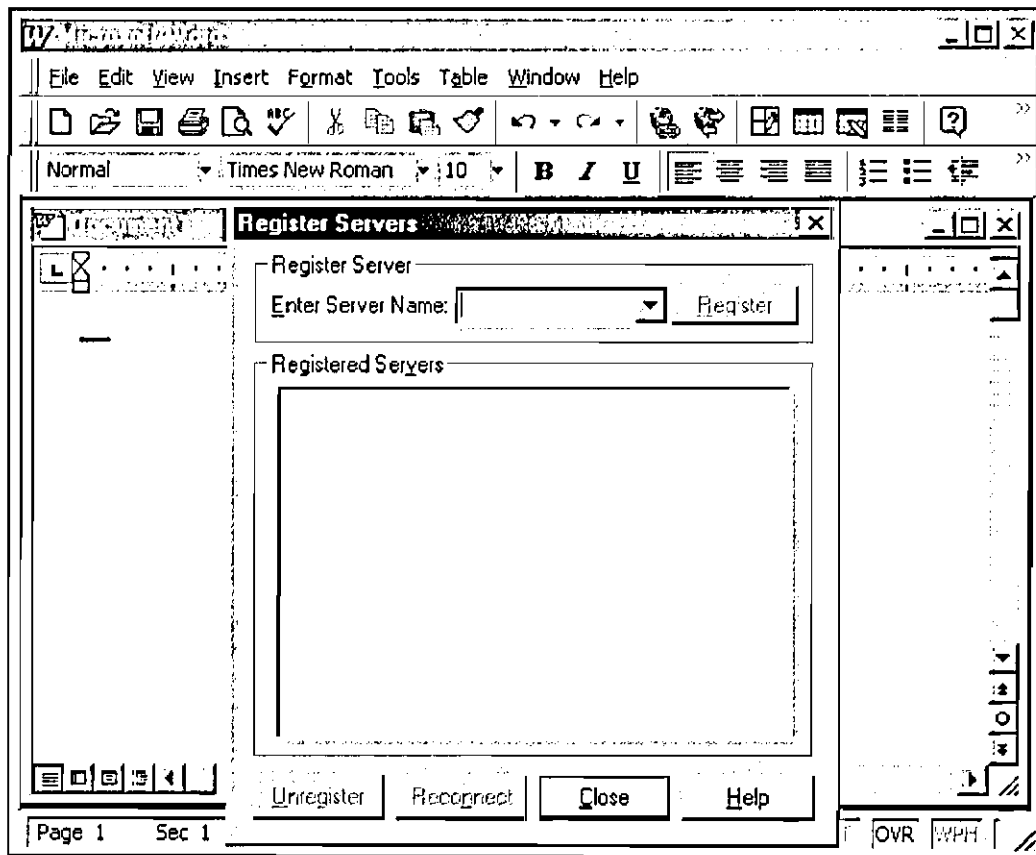
Figure 5.1: *Login to iManage Server* dialog from an integrated application

1. Type the name of the server in the Enter Server Name field, the click **Register**. The *Login* dialog box opens.
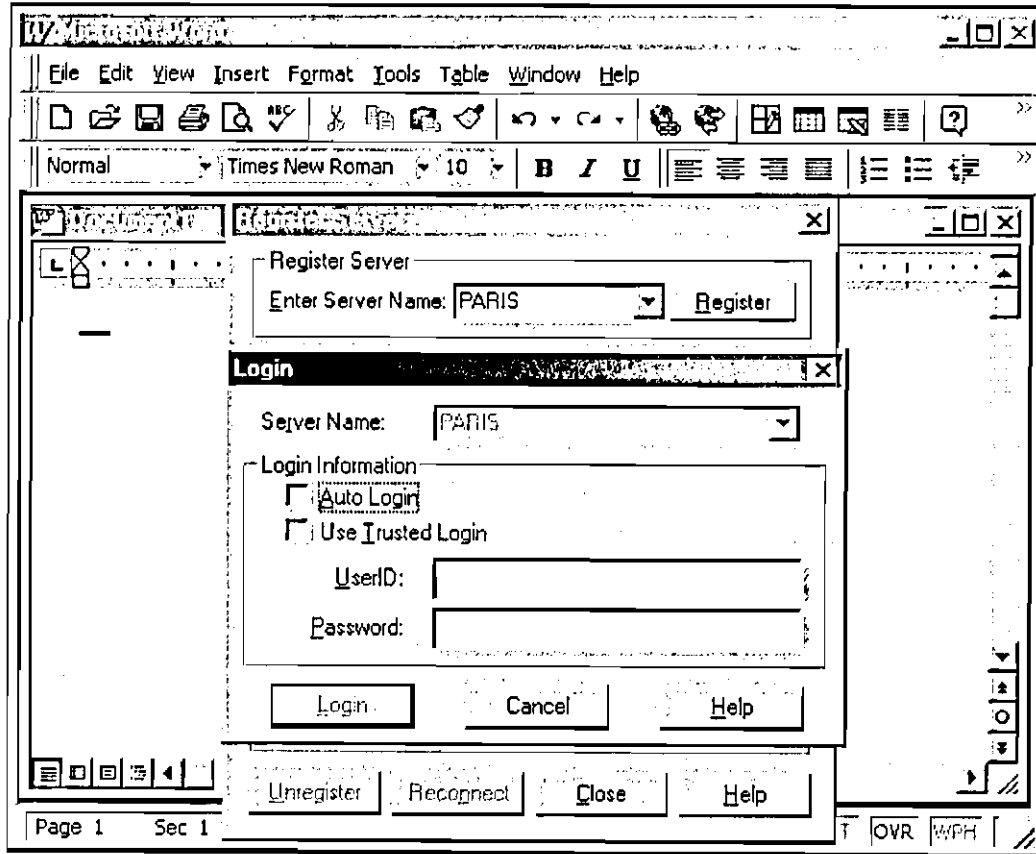
5

**Figure 5.2:** *Login* dialog box in an integrated application

2. Select the type of **Login** that you want to use. See Chapter 3 for more information about connecting to the DMS.

3. (Optional) Complete the UserID and Password fields. You will complete this step only if Login that you have selected requires this information.

4. Repeat Steps 1 through 3 for each server you want to use and then click **Close**.

File Menu From within Integrated Applications

Active Integration

An application's file menu changes in a number of ways when the application is integrated with iManage. The figure below displays what the MS-Word 97 File menu looks like when integrated. Many of the command's behaviors change and some new options appear. This section details each of these commands.
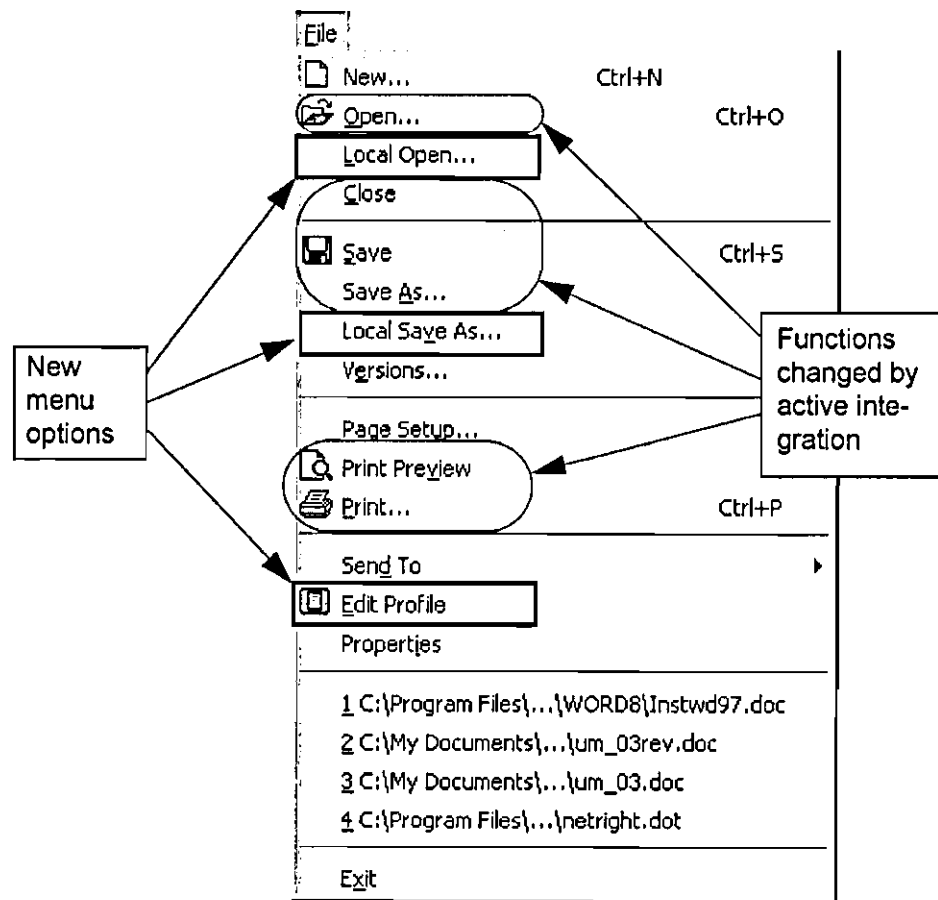
5

Figure 5.3: File menu from Microsoft Word 97 while in Active Integration mode with iManage DeskSite.

Open:

When an application is integrated with iManage DeskSite, and a user selects the **Open** command in the application, iManage launches the *iManage Integrated Desktop*. The next section of this chapter outlines all the functionality of the *iManage Integrated Desktop*.

Local Open:

The **Local Open** command exists only if the application is integrated. Selecting it launches a standard Windows *Open* dialog box, which you can use to locate files on your local hard drive or on the network. You can use this option to open a document that is not in an iManage library.

Save:

If the document already exists in iManage DeskSite the Save command simply replaces the original document. For documents that do not exist in an iManage DeskSite the **Save** command launches a *New Document Profile* dialog to allow you to enter profile information for the new document.

Save As:

When you select the **Save As** menu item from the **File** menu in an integrated application the *Save As Options* dialog box is launched. You now have three options:
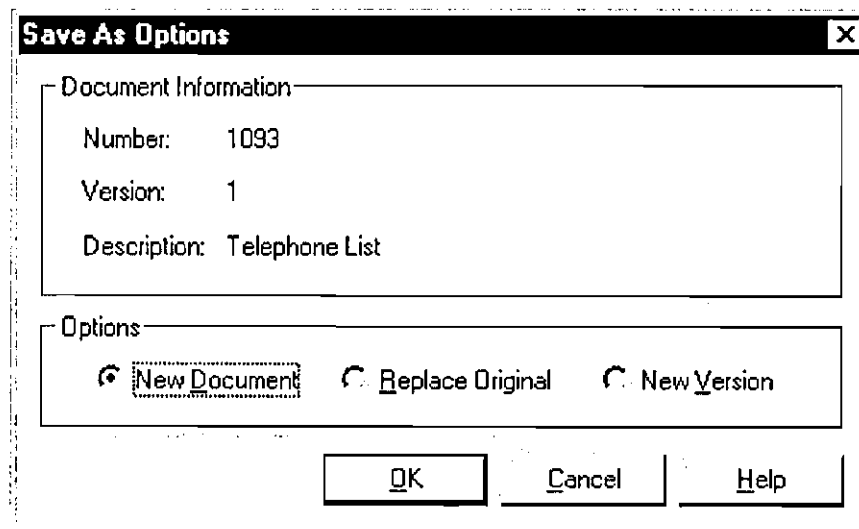
Figure 5.4: The *Save As Options* dialog box appears when you select **Save As** from the **File** menu in an integrated application.

- **Save as a new document:** This launches a *New Profile* dialog box. Enter the new document's profile information.

- **Save as a replacement for the original document:** This saves the document as the same document number and version. It replaces the iManage DeskSite version. This option is, in effect, the same as selecting **Save** from the **File** menu. If you have read-only access to the document you cannot use this option. Instead, save the document as a **New Document** or **New Version** of the original document.

- **Save as a new version of an existing document:** iManage DeskSite automatically assigns a new version number to the document and a dialog box displays to enter the new version's profile information.

If your application is ODMA-compliant, iManage DeskSite remembers the option you used the last time you performed the **Save As** command and uses that option as a default. However, your system administrator can set a specific option to use as the default all the time.

If the active document does not exist in iManage DeskSite when you select the **Save As** command, then a *New Profile* dialog opens for you to enter the new document's profile information.

Local Save As:

When you select **Local Save As** from the **File** menu in an integrated application, a standard Windows *Save As* dialog displays. Use this dialog box to save your file on a local hard drive or other directory available on the network. When you use the **Local Save As** option, you are saving the file independently of iManage DeskSite and any libraries to which you may be connected. If your document originated from an iManage database, the **Local Save As** option does not automatically update the original copy of the document with any changes you may have made.

Note: The **Local Save As** command is a convenient method of making a copy of a document outside the iManage DeskSite document management system. Simply open a document that is in an iManage database, then use the **Local Save As** command to save a local copy of it. The **Local Save As** option is equivalent to using the **Export** function in iManage DeskSite.

Note: Local Save As and **Local Open** may be disabled in selected applications by your system administrator.

Print:

Printing documents in integrated applications is the same as printing documents in non-integrated applications. The only difference is that the document's activity history in iManage DeskSite is updated to show that the document was printed, how many pages were printed, and who printed the document. If a document is printed that does not currently exist in iManage DeskSite, a warning message may appear.

Edit Profiles:

When you select **Edit Profile** from the **File** menu in an integrated application, iManage DeskSite's standard dialog box for viewing or editing document profile information appears. Users who have read-only access to a document cannot change the information displayed in this dialog. Users with read-write access can change certain fields, such as the comments. Only the Author and Operator of a document have the full authority to change such criteria as the access privileges to the document.

Figure 5.5: The default appearance of the *Profile Edit and View* dialog box. Your system administrator can customize this dialog box.

Close:

You close a document in an integrated application the same way you close a document in the non-integrated application. Whenever you close a document in an integrated application, you will be given the option of saving the document if the contents have changed since the document was opened. Figure 5.6 shows an example of the message box that you will receive when you close a document in an integrated application.
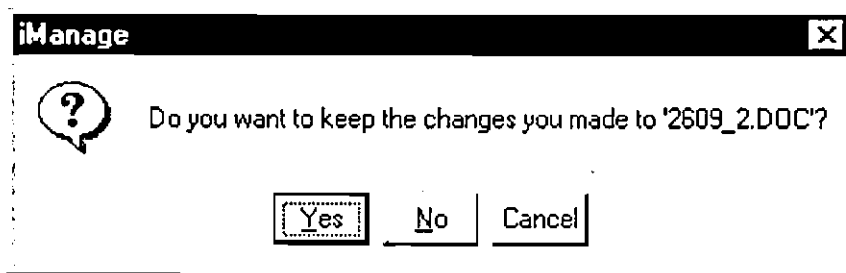
Figure 5.6: Example of the message box that appears when you close a document in an integrated application.

If you select **Yes** from this message box, iManage DeskSite responds as if you selected **Save** from the **File** menu. If the document is not already in an iManage database, you are prompted to enter profile information for the new document.

Passive Integration

If you are running Microsoft Office 2000 applications, your system administrator may set up passive integration. Most menu options remain the same as with Active Integration. There are a few differences.

For more information about using infoLook with Microsoft Office 2000 applications, see the *iManage Office 2000 Integration Module Installation and User's Reference Manual.*
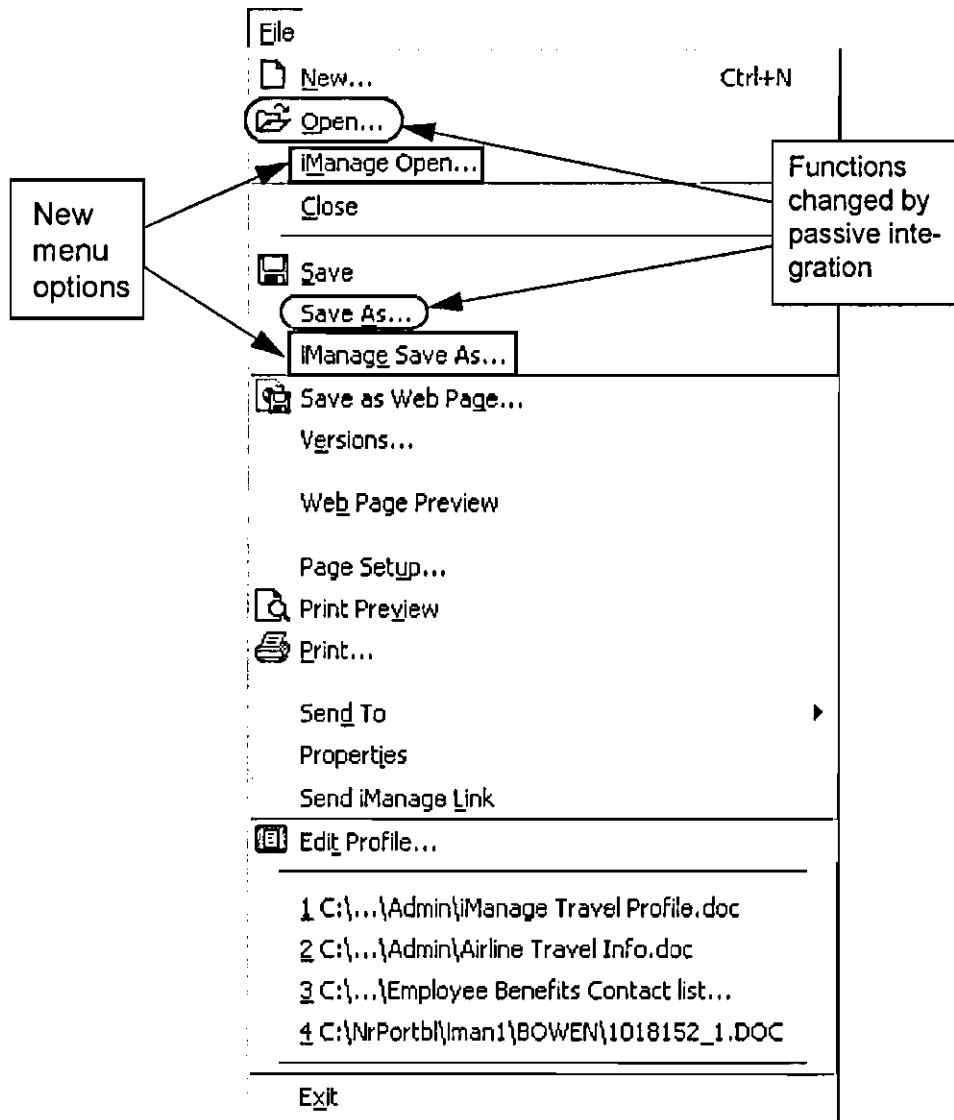
Figure 5.7: File menu from Microsoft Word 2000 while passively integrated with iManage DeskSite

Open

The **Open** command launches a standard Windows *Open* dialog box, which you can use to locate files on your local hard drive or on the network. You can use this option to open a document that is not in an iManage library.

iManage Open

When an application is passively integrated with iManage DeskSite, and a user selects the **iManage Open** command in the application, iManage launches the *iManage Integrated Desktop,* explained in detail in th next section.
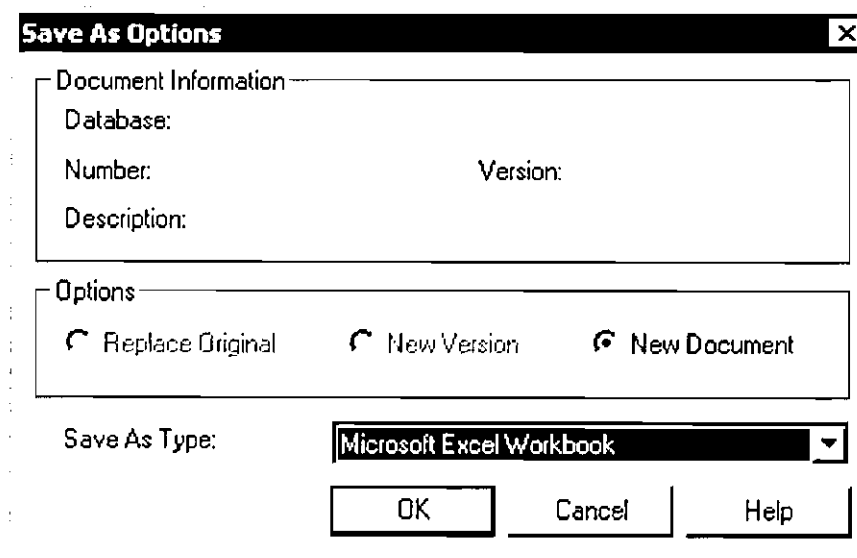
Save As

When you select **Save As** from the **File** menu in a passively integrated application, a standard Windows *Save As* dialog opens. Use this dialog box to save your file on a local hard drive or other directory available on the network. When you use the **Local Save As** option, you are saving the file independently of iManage DeskSite and any libraries to which you may be connected. If your document originated from an iManage database, the **Save As** option does not automatically update the original copy of the document with any changes you may have made.

iManage Save As

When you select the **iManage Save As** menu item from the **File** menu in a passively integrated application the *Save As Options* dialog box launches. You have three options:

Figure 5.8: *Save As Options* dialog box for Microsoft Office 2000 applications

- **Save as a new document:** You may select the **Save As Type** by selecting from the drop down list. The list is the same as the list you would see in the Microsoft Office 2000 application you are using. When you click OK, a *New Profile* dialog box launches. Enter the new document's profile information.

- **Save as a replacement for the original document:** This saves the document as the same document number and version. It replaces the iManage DeskSite version. This option is, in effect, the same as selecting **Save** from the **File** menu. If you have read-only access to the document you cannot use this option. Instead, save the document as a **New Document** or **New Version**

of the original document. This option does not allow you to select the **Save As Type** from the drop down list.

- **Save as a new version of an existing document:** iManage DeskSite automatically assigns a new version number to the document and a dialog box displays to enter the new version's profile information. This option does not allow you to select the **Save As Type** from the drop down list.

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iManage Integrated Desktop

As has been detailed earlier in this chapter, iManage documents can be accessed directly through an Integrated Application. The Integrated Desktop is the dialog that appears instead of the standard Windows dialogs that normally appear in non-integrated applications.
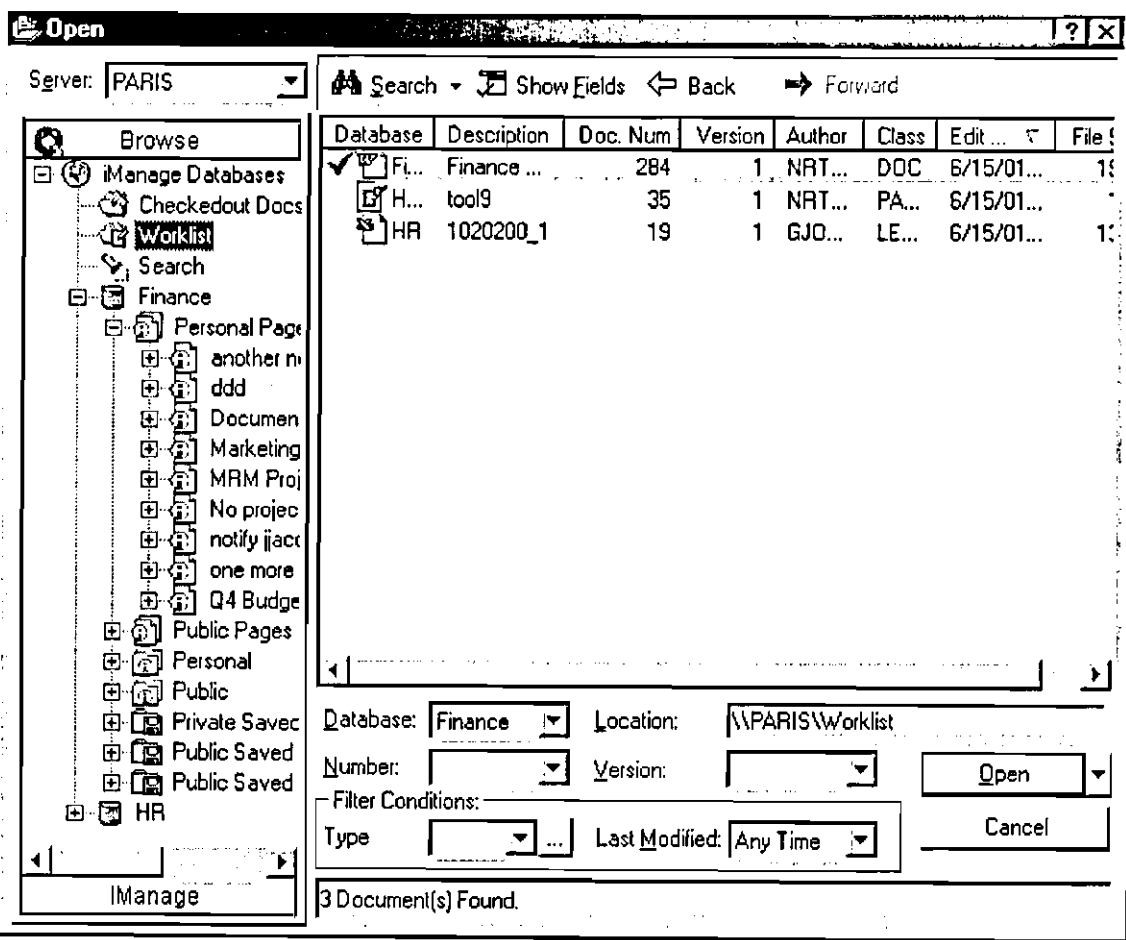
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Figure 5.9: Integrated Desktop Main Window

Integrated Desktop: Main Window

Tree Frame:

On the left side of the Integrated Desktop is the Tree Frame. It contains the organizational structure of all servers, libraries, iManage WorkSite pages if any, folders, worklists and saved searches. Clicking a page icon displays the folders listed

on an iManage WorkSite page. Clicking a folder icon displays the contents of that folder in the **Document List.**

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

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.

Document List:

All the documents of a highlighted folder in the **Tree Frame** are displayed in this Document List view. You can organize the list in Ascending or Descending order by clicking the column heading.

You can also narrow the focus of documents in the Document List by using the Document Number and Document Version pull-down menus in the Filter Conditions section at the bottom of the window.

To configure which columns appear in this Document List, click

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⌐𝕁𝔼 Show Fields . The *Document List Column Selection* dialog launches.

Shortcut Bars:

The **Browse Bar** contains the **Folder Tree** to locate any document on the server you are logged on to. A user can create Shortcut bars beneath the Browse Bar to keep folders. The iManage Shortcut Bar exists as a default and can not be deleted.

To Create a Shortcut Bar:

1. Right-mouse click on the iManage Shortcut Bar.

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

3. Name the new group in the space provided.

4. Click on any other Shortcut Bar.

To Delete a Shortcut Bar:

1. Right click once on the Shortcut Bar you wish to delete.

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

To Insert Folders into your Shortcut Bar:

1. In the Folder Tree, right-mouse click on the folder you would like to add to a shortcut bar.

2. In the menu displayed, select **Add to Shortcutbar.**

3. Select the specific Shortcut Bar where you wish to insert the folder.

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Integrated Desktop: Searching for Documents

New Search

Click **Search** at the top of the Integrated Desktop Window to perform a standard iManage search. The *Search* dialog form is customizable so the options available on the form vary. The *Document Search* dialog is designed in the iManage Dialog Editor application that is usually not accessible by anyone but the System Administrator. For detailed information on searches, see *Chapter 4: Searching for Documents.*

Navigation Buttons

Forward

Click Forward to navigate to a folder lower in the tree structure that you looked at previously and then moved back from.

Back

Click Back to navigate to a folder higher in the tree structure.

Integrated Desktop: Document Commands

Open, Insert, Insert Link, etc

The user launches the Integrated Desktop most often because he or she simply

wants to access a document in iManage. If you reach the Integrated Desktop by clicking Open from an application's File menu then you most likely just want to open the document in the application. To do this, double-click the document. If you reach the Integrated Desktop by clicking Insert File or Insert Link from an application, navigate to the document and click open. iManage inserts the document or link at the point of your cursor. You can perform all the usual functions from the Integrated Desktop.

Versions

To view a list of document versions, highlight the desired document and right-mouse click. Select **Versions** from the pop-up menu.

History

To view the document history of a particular document, highlight the desired document and right-mouse click. Select **History** from the pop-up menu.

The *History* dialog displays the activity record for a particular document in chronological order. The fields displayed in the activity table are User, Application, Activity, Date-Time, Duration, Pages Printed, Location, and Comments. The Document History table is not customizable.

The kinds and number of activities recorded for this history is up to your system administrators but typically include:

- 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.

Related Documents

To view related documents, highlight the desired document and right-mouse

click. Select **Related Documents** from the pop-up menu.

Document relations are one of the ways you can organize and group documents, in addition to folders and document classifications. See Chapter 3 for more information about related documents.

Edit Profile

To Edit or View a document's profile information, highlight the desired document and right-mouse click. Then choose **Edit Profile** from the pop-up menu.

The *Edit Profile* dialog box displays the document's current profile information. You can edit the information displayed in these fields and then record your changes. For detailed information on document profiles see *Chapter 3: iManage DeskSite: Basic Functions*.

Checkout

To checkout a document from the Integrated Desktop, select the document(s) from the **Document List** and right mouse click. Then choose **Checkout** from the pop-up menu.

Use this Checkout feature when you want to work on a document outside the Document Management System (i.e. on your local workstation, away from the network) AND you intend to return the document to the system as the same document. The Checkout feature will prevent anyone else from editing the document while you have it.

Checkin

To check in a document that is marked checked out, select the document(s) from the document table and right-mouse click. Then choose **Checkin** from the pop-up menu:

The *Check In Options* dialog box essentially 'puts back' a document that you previously checked out.

This dialog box presents a number of check-in options:

- **Replace Original**: The checked in copy of the document replaces the original in the database.

- **New Version**: The checked in document is added to the database as a new version of the original document. The original document remains intact.

- **New Document:** The checked in document is added to the database as a new document.

- **Keep Checked Out:** The checked in document remains on the local drive. However you will no longer be able to check the local copy back into the database.

- **Delete Local File:** The local file is deleted after adding it to the database. (This option does not apply if you are checking in portable documents.)

Checkedout Info

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 pop-up menu.

Export

To **Export** a document, highlight the desired document and right-mouse click. Select **Export** from the pop-up menu.

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. See Chapter 3 for more information about exporting documents.

View

To **View** a document, highlight the desired document and right-mouse click. Select **View** from the pop-up menu.

The View command launches a read-only version of the selected document in the iManage View application. See Chapter 7 for detailed information on the View application.

Viewing documents is useful to verify that you have selected the document you want before you check it out.

Unlock

To Unlock a document from the Integrated Desktop, select the document(s) from the document table and right mouse click. Then choose **Unlock** from the pop-up menu.

About Unlock

If you have suffered a network failure or system malfunction while you were using documents you may find that those documents are still marked as IN USE. In such instances, you can use the Unlock feature to tell the system to consider the document 'not-in-use'. This allows you or others to checkout the document.

Implications of Unlocking

Any copy of a document that exists locally will be 'orphaned' from the network version after an Unlock is complete. You can only put the local document into iManage as a new document. Therefore, you should only use the Unlock option to free up documents that appear to be in use or checked out, but are erroneously marked as such due to a network or system failure.

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Note: You can only unlock documents that are currently marked as IN USE by you. You cannot unlock documents in use by other users.

Remove from folder

The **Remove from folder** menu option removes selected document(s) from a particular folder. To delete a document from a folder, highlight the document(s) to be deleted and right-mouse click. Then choose **Remove from folder** from the pop-up menu.

Note: The **Remove from folder** menu option does NOT remove a document from the network or a particular database. Removing a document from the network or database requires a Purge command. Not everyone who has **Remove from folder** menu option permissions will have Purge permissions. Contact your System Administrator for more information.
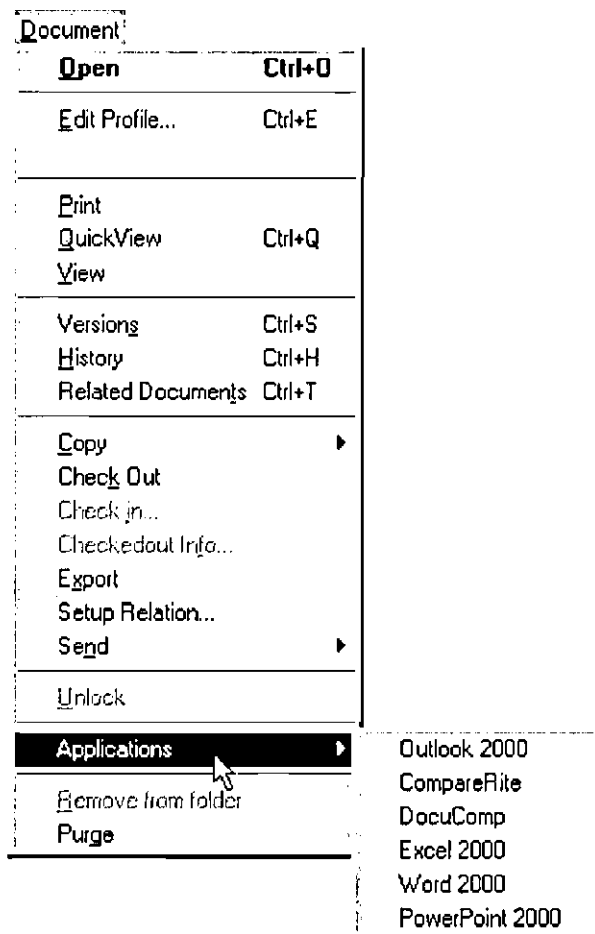

Purge

To *purge* a document is to remove it entirely from the database.

You purge a document from the database by highlighting the desired document in the Document Grid and selecting **Purge** from the pop-up menu. Only the author or operator of a document are allowed to purge a document. This option may also be disabled for some users.

Other Applications

Integration with CompareRite, DocuComp, FullAuthority, and CiteRite

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```
Document
    Open              Ctrl+O
    Edit Profile...   Ctrl+E

    Print
    QuickView         Ctrl+Q
    View

    Versions          Ctrl+S
    History           Ctrl+H
    Related Documents Ctrl+T

    Copy                        ▶
    Check Out
    Check in...
    Checkedout Info...
    Export
    Setup Relation...
    Send                        ▶

    Unlock

    Applications                ▶    Outlook 2000
                                     CompareRite
    Remove from folder               DocuComp
    Purge                            Excel 2000
                                     Word 2000
                                     PowerPoint 2000
```

The iManage DeskSite program includes a direct interface to the following document utilities: CompareRite, DocuComp, FullAuthority, and CiteRite. CompareRite and DocuComp allow you to compare versions of documents with each other and to produce a report of variations. FullAuthority and CiteRite are citation utilities that allow you to analyze the citations that appear in a document. Access to these utilities is provided in iManage DeskSite by selecting **Applications** from the **Document** menu, then selecting the appropriate application.

Users must have a path established to the directories for these utilities. Each iManage database automatically provides entries in the application table for each

of these document utilities.

E-mail Integration

iManage DeskSite is integrated with electronic-mail products through the MAPI interface standard. E-mail systems supported include:

- Network GroupWise
- Microsoft Mail
- Microsoft Outlook
- Lotus cc:Mail
- Lotus Notes
- DaVinci

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About E-mail Integration

The iManage DeskSite program includes a user interface where you can select documents and mail them through electronic mail.

Using standard drag-and-drop techniques, you can select documents that need to be mailed from the iManage Desktop window's Document Grid. Once you have selected the documents, iManage DeskSite can automatically invoke the e-mail-send mechanism. iManage DeskSite uses the MAPI standard to display *Mail To* windows appropriate to the e-mail system present. When sent via e-mail, document profiles have the extension TXT while document filenames have the application's extension—DOC for Word files, WRI for Write files, etc.
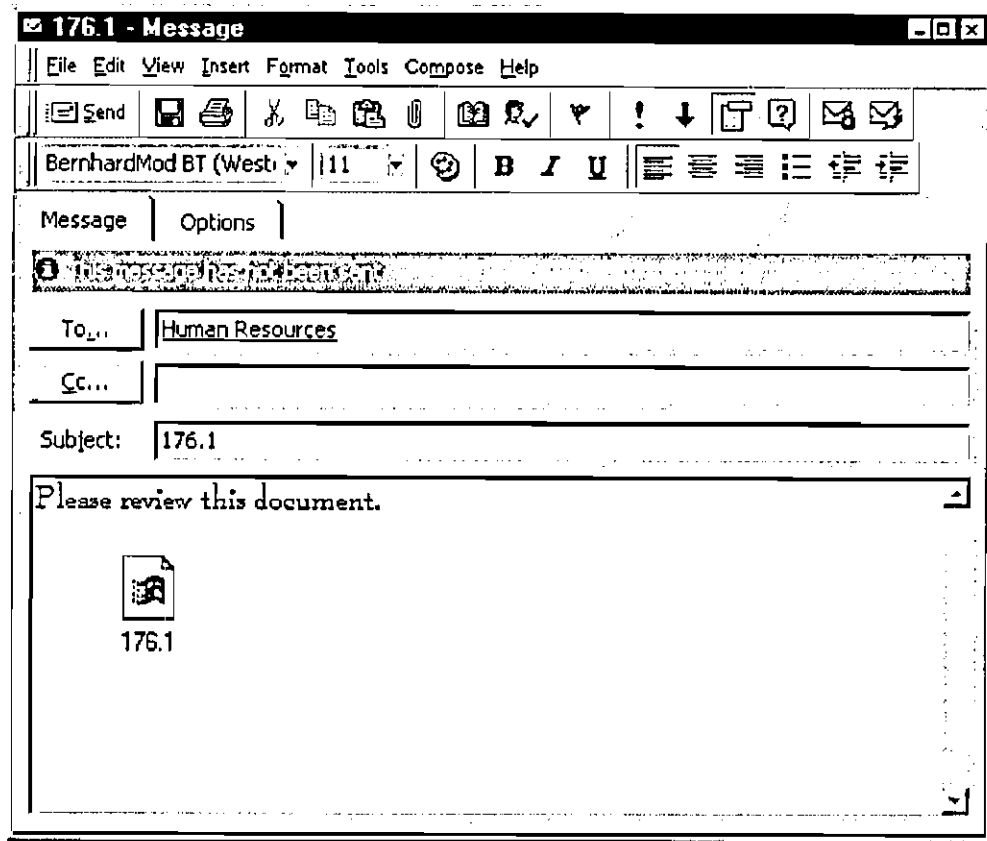
Figure 5.10: Documents selected for emailing appear as attachments in your email application. This screen shot shows how a document appears in Microsoft Outlook.

Additional Integrated Functions

Microsoft Word 97 and 2000

Additional integrated functions are available in selected applications. The following additional integrated functions are available in Microsoft Word 97 and 2000. Your system administrator can disable or enable some of these options selectively.

iManage Mail Merge

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When you select **iManage Mail Merge** from the **Tools** menu, you can perform a mail merge using documents from an iManage database as your master document and data source document. To perform an iManage Mail Merge, select **iManage Mail Merge** from the **Tools** menu, identify a master document and data source document, then perform the mail merge. Links to the data source document are removed when you close the master document.

Compare iManage Documents

When the Compare iManage Documents menu option is enabled by your system administrator, you can compare the currently open document against a document in an iManage database by selecting **Tools**, then **Track Changes**, then **Compare iManage Documents.** If this menu option does not appear, then this option has not been enabled by you iManage Administrator.

iManage Footer

When you select the **iManage Footer** option from the **View** menu, the following information will be inserted in the footer of the currently open document:

Document Name : Document Number – Version Number

If the document name field is empty, only the Document Number and Version Number will be displayed. Other footer information, such as author name, page number, file path information, etc., can be inserted automatically using built-in options in Microsoft Word.

CHAPTER 6

iManage DeskSite Advance Functions

6

Overview

This chapter describes some advanced functions available in the iManage DeskSite program.

- Using CompareRite and DocuComp
- Using FullAuthority and CiteRite
- Setting display options

CompareRite, DocuComp, FullAuthority and CiteRite are not provided with iManage DeskSite.

Other advanced features, such as portable mode and document echoing, are described in Chapter 7 and Chapter 8 of this manual.

Using CompareRite and DocuComp

CompareRite and DocuComp are applications that enable you to compare versions of documents and to produce comparison reports automatically. For the CompareRite and DocuComp menu options available in iManage DeskSite to work properly, these applications must be integrated correctly with iManage DeskSite.
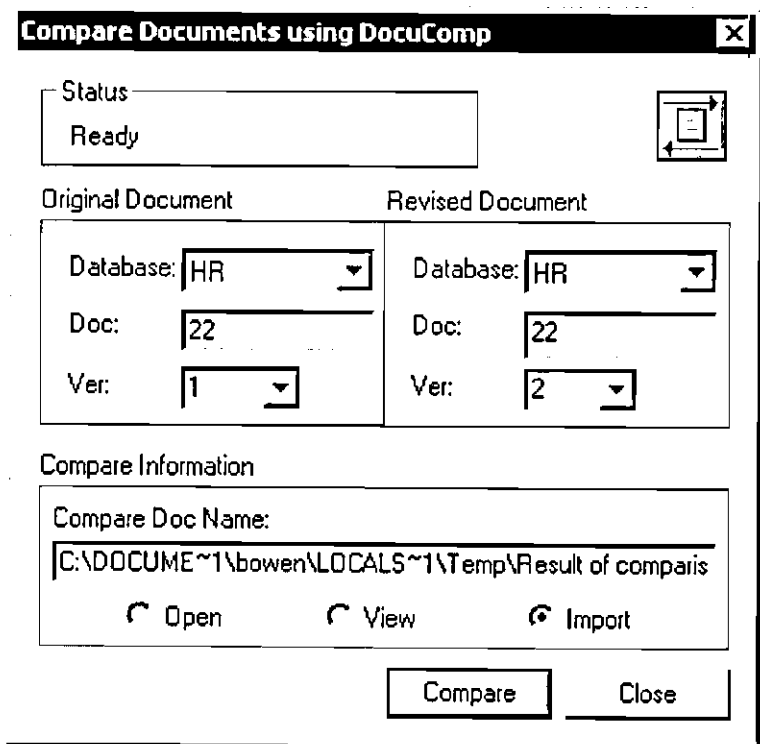
To compare documents using CompareRite or DocuComp:

1. Highlight the two versions of the document that you want to compare in the document grid.

Note: To compare versions of the same document you must show all versions of the document. See "Defaults Tab" on page 155 for details.

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2. Select **Applications** from the **Document** menu.

3. Select **CompareRite** or **DocuComp** from the submenu that appears. The *CompareRite* or *DocuComp* dialog box appears. The version of the document shown first in the document grid is listed as the original document. You can sort the grid by version number by clicking the column heading.

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Figure 6.1: *CompareRite* dialog box

4. The application saves the comparison results to the file named in the **Compare Doc Name** field. Enter a filename in this field.

5. Select how you want to handle the resulting comparison document.

   – Select the **Open** button to the results document.

   – Select the **View** button to view the comparison results with the iManage View program.

   – Select the **Import** button to import the comparison results document automatically into iManage DeskSite.

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6. Click **Compare** to perform the comparison.

Using FullAuthority or CiteRite

FullAuthority and CiteRite are software applications provided by Lexis-Nexis that enable you to analyze the citations in a document. For the FullAuthority and CiteRite menu options in iManage DeskSite to work properly, these applications must be integrated correctly with iManage DeskSite.

To analyze citations in a document using FullAuthority or CiteRite:

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1. Highlight a document in the document grid.

2. Select **Applications** from the **Document** menu.

3. Select **FullAuthority** or **CiteRite** from the submenu that appears. The *Full-Authority* or *CiteRite* dialog box appears with the highlighted document listed in the dialog box.

4. In the **Output Doc Name** field, enter a filename that will be used to store the table of authorities or citation report that will be produced by FullAuthority or CiteRite.

   - Select the **Open** radio button to open the output file automatically.
   - Select the **View** radio button to view the output file in the iManage Viewer
   - Select **Import** to add the output file to an iManage library.

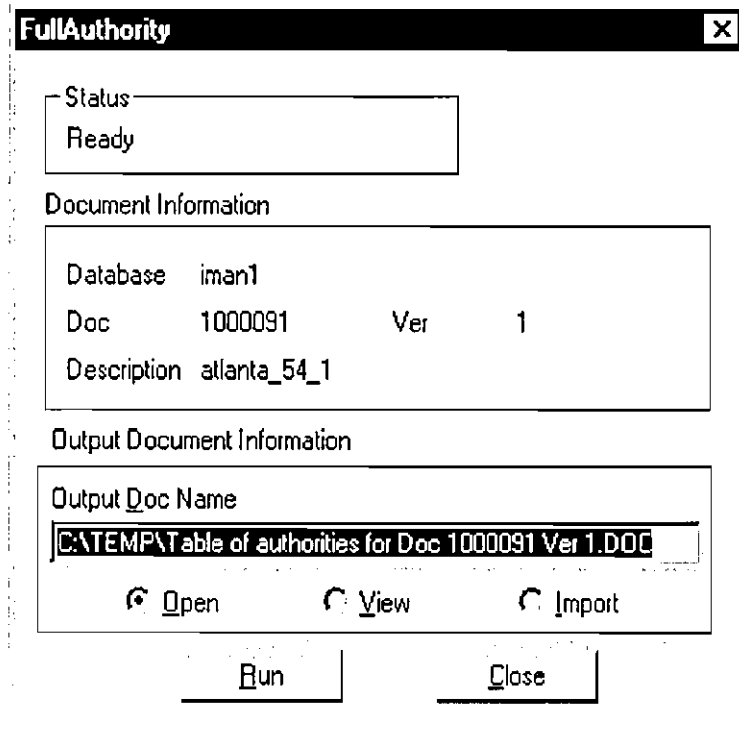5. Click **Run** to run FullAuthority or CiteRite analysis on the selected document.

Figure 6.2: *FullAuthority* dialog box

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Configuration Options

iManage DeskSite allows you to customize the way information is displayed. To access the *Display Options* dialog, select **Options** from the **Options** menu. The *Configure* dialog is displayed in three tabs, Select Profile Fields, Defaults, and Configure.

Select Profile Fields Tab

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The **Select Profile Fields** tab allows you to customize which profile fields display in the Document Grid and the Document Profile tab in the Document Results Frame.
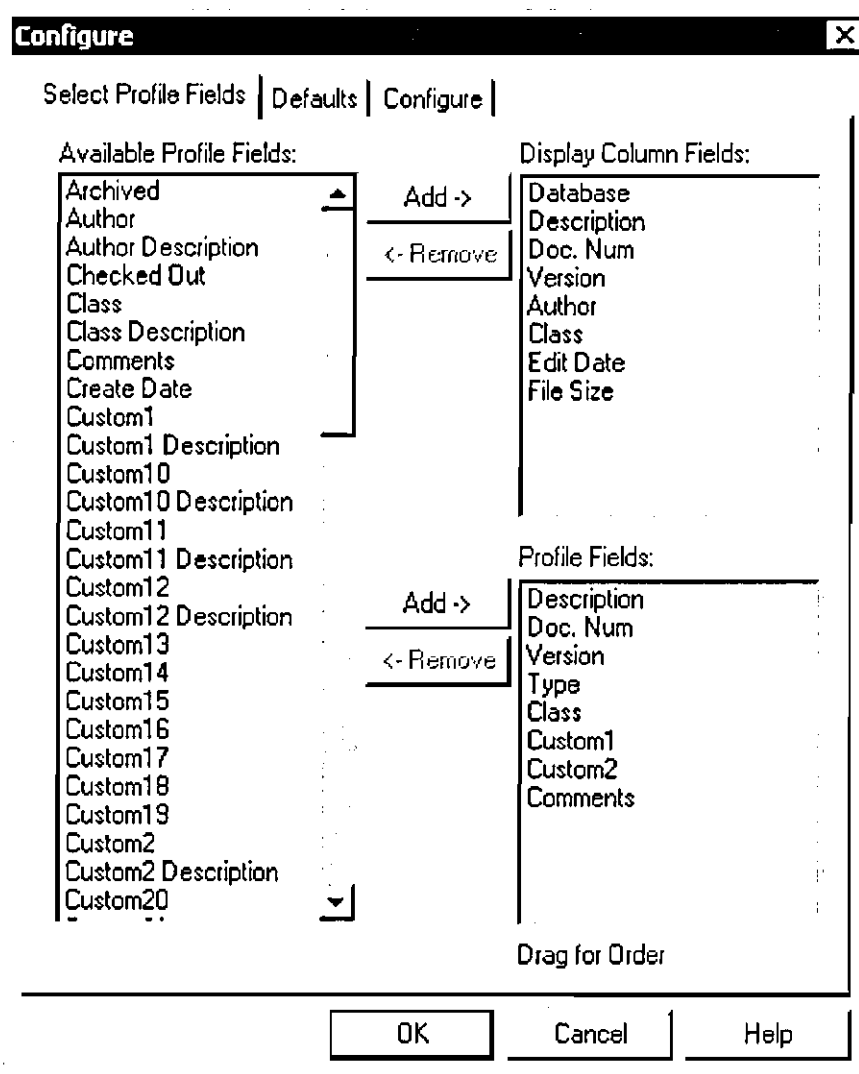
Figure 6.3: *Configure* dialog, *Select Profile Fields* tab

To customize the Document Grid

The **Display Column Fields** list contains those fields that are already selected to be included in the Document Grid (upper right side of the iManage DeskSite Desktop). The column fields appear in the Document Grid in the same order in which they appear in this list.

1. To add profile fields to this list, select the desired field(s) from the **Available Profile Fields** list and click **Add**.

2. To remove a profile field from the Document Grid, select the fields in the **Display Column Fields** list and click **Remove**.

3. Drag and drop the selected fields into the desired order.

To Customize the Document Profiles tab of the Document Results Frame

The **Profile Fields** list contains those fields that appear in the *Document Profiles* tab of the Document Results frame in the lower-right side of iManage DeskSite Desktop. These fields appear in the same order in which they appear in the list.

1. To add profile fields to the **Profile Fields** list, select the desired field(s) from the Available Profile Fields list and click **Add**.

2. To remove profile fields from the profile list, select the fields in the Display Column Fields list and click **Remove**.

3. Drag and drop the selected fields into the desired order.

Defaults Tab

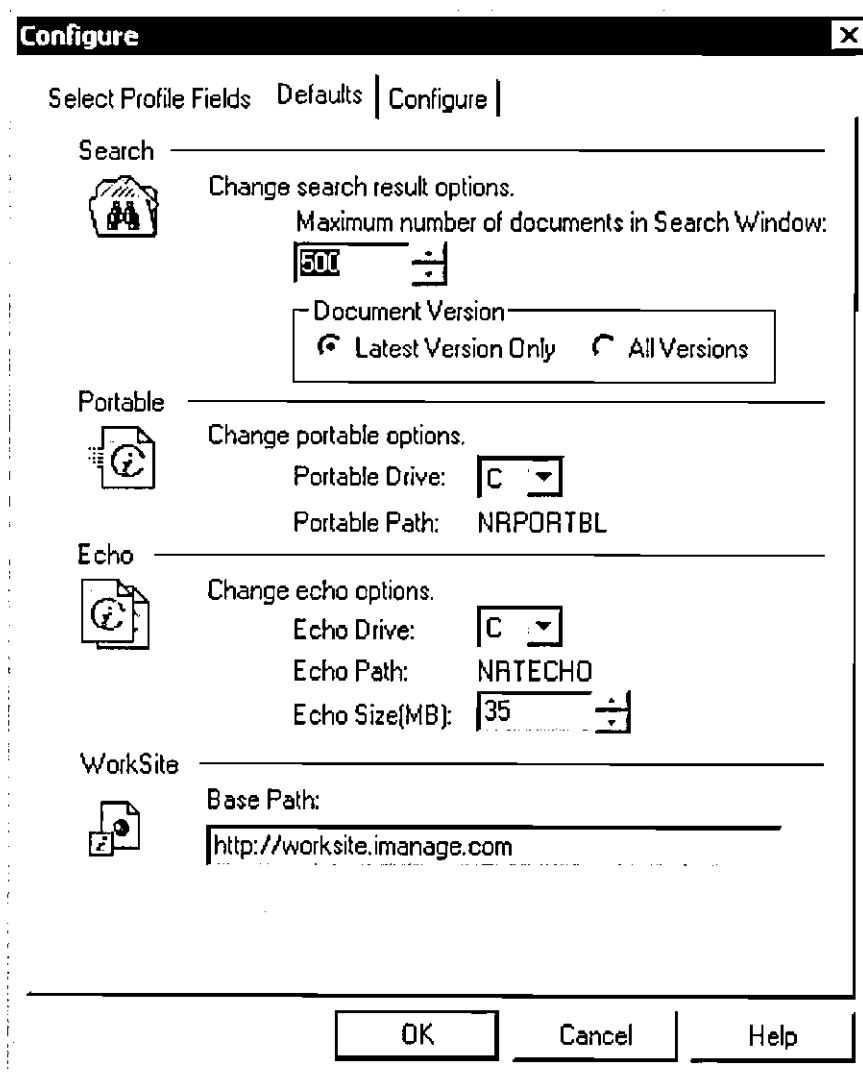A number of different system settings are completed in the **Default** tab of the *Display Options* dialog.

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Figure 6.4: *Configure* dialog, *Defaults* tab

Options of the Defaults tab:

- In the **Maximum Number of Documents in Search Window** field, enter the maximum number of documents that should appear in the Document Grid as the result of a search. The default value is 500.

- In the **Document Version** box, select either **All Versions** or **Latest Version Only.**

Note: If you select **Latest Version Only,** you can still locate all the versions of a document in the library by highlighting the document in the grid, then clicking the *Document Versions* tab.

- In the **Change Portable Options** box, you can change the drive designation of your Portable directory. The Portable Path is hard-coded to **NRPORTBL.**

- In the **Change Echo Options** box, you can change the drive designation of your echo directory and the size, in megabytes, of the Echo Directory. The Echo path is hard-coded to **NRTECHO.** You can also change the size of your Echo Directory by clicking the up or down arrows next to the **Echo Size (MB)** field.

- In the **WorkSite** box, you can enter the URL for accessing imanage Work-Site in the **Base Path** field. iManage DeskSite uses this information when you enter the commands Send Document URL Link or Send Folder URL Link from **Send** on the **Document** menu.

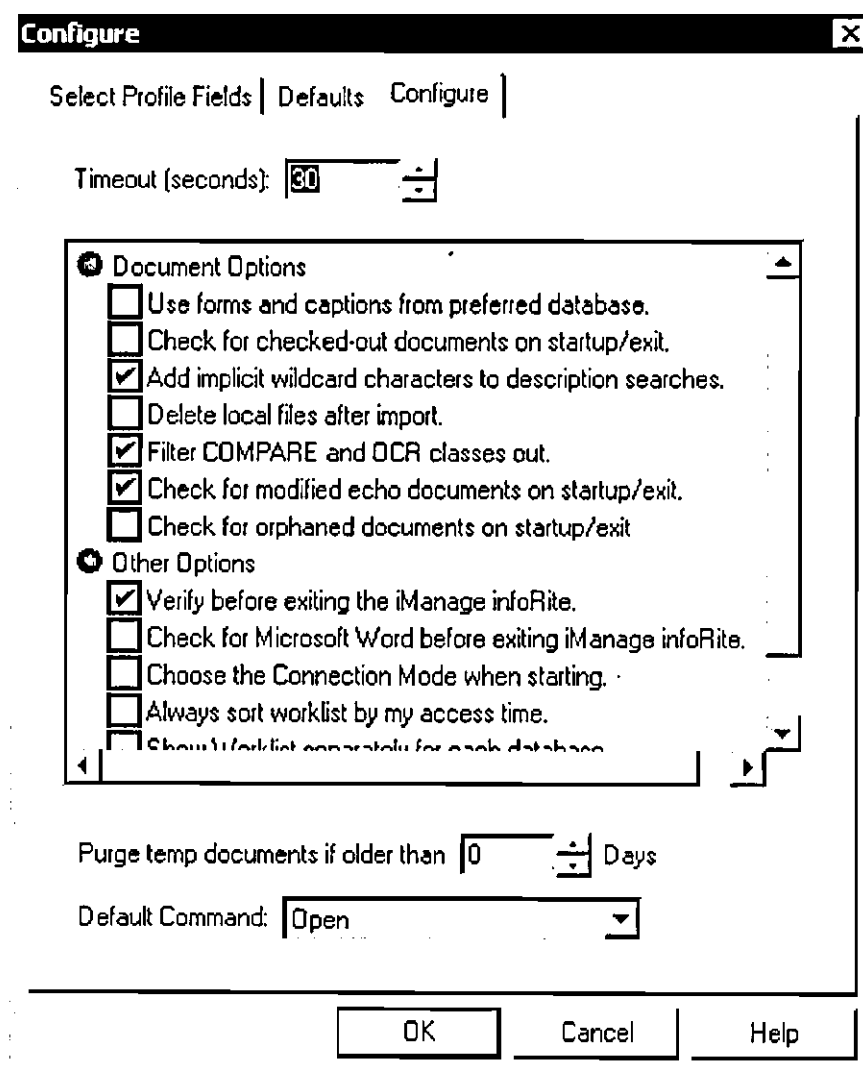**6**

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Configure Tab

Figure 6.5: *Advanced Options* dialog, **Defaults** tab

Timeout Option

Use the **Timeout** option to determine how long the iManage DeskSite client waits before timing out. The default value is 30. You may need to increase this value when connection times are slow or when downloading large files, for example, over a WAN connection.
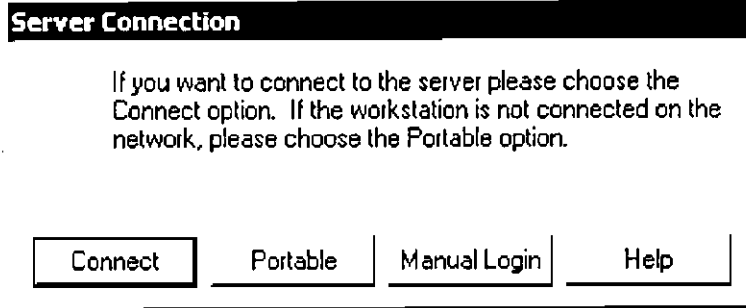
Document Options

- When **Use Forms and Captions from preferred database** is checked, the iManage DeskSite client downloads the Forms and Captions stored on the user's Preferred Database as you need them and applies these forms and captions to other databases. When this option is not checked, Forms and Captions are downloaded from each individual database as you need them.

- When **Check for Checked Out Documents on startup/exit** is checked, the iManage DeskSite client presents an alert message immediately after login whenever it detects altered checked out portable documents on your hard drive.

- When **Add implicit wildcard characters to description searches** is checked, iManage automatically inserts an asterisk at the beginning and end of the search string in the description field when performing a profile search.

- When **Delete local files after import** is checked, iManage removes documents from your local drive after you import them to iManage DeskSite.

- When **Filter COMPARE and OCR classes out** is checked, iManage DeskSite excludes all documents with the COMPARE and OCR (optical character recognition) document classes. If you want to include documents created with document comparison or OCR software, make sure this box is not checked.

- When **Check for modified echo documents on startup/exit** is checked, the iManage DeskSite client presents an alert message immediately after login whenever it detects altered echo documents on your hard drive.

- When **Check for orphaned documents on startup/exit** is checked, the iManage DeskSite client presents an alert message immediately after login whenever it detects orphaned documents on your hard drive. See "Orphan Documents" on page 195 for more information about orphaned documents.

Other Options

- When **Verify before exiting iManage DeskSite** is checked, you get a message asking if you are sure you want to close iManage when you click the exit button or select Exit from the File menu.

- When **Check for Microsoft Word before exiting iManage DeskSite** is checked, iManage DeskSite determines if the Microsoft Word application is open. If so, you receive a warning message asking if you want to close iManage DeskSite even though Word is still running.

- When **Choose connection mode when starting** is checked, you have the option of connecting to the server, working in Portable mode, or logging in manually.

Server Connection

If you want to connect to the server please choose the Connect option. If the workstation is not connected on the network, please choose the Portable option.

| Connect | Portable | Manual Login | Help |

Figure 6.6: *Server Connection* dialog

- If you choose **Connect**, iManage DeskSite opens and connects to the servers that are registered and selected for auto login.

- If you choose **Portable**, iManage Portable opens.

- If you choose **Manual Login**, the *Register Servers* dialog opens so you can log into the servers you choose. See "Connecting to WorkSite Middle Tier Servers" on page 44.

- When **Always sort worklist by my access time** is checked, the work list on the document grid sorts in the order in which the current user accessed the documents. This order may differ from the actual edit time of some documents since the edit time of a document changes if another user accesses the file.

- When **Show Worklist separately for each database** is checked, the tree frame shows both a consolidated worklist that includes all databases and an individual worklist for each database that shows the documents that you worked on most recently from just that database.

- When **Show overflow message if search returns have more entries** is checked, you receive an indicator in the status bar showing that your search request received more matches than in the search results list.

▷ 500 Items
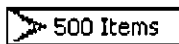
Figure 6.7: Overflow indicator

Purge temp documents if older than ___ Days

When you perform Print, View and Quick View operations in iManage DeskSite, the system creates temporary files on your computer. This setting lets you determine how long to retain these files. When you close iManage DeskSite, these files are permanently deleted after the number of days you specify here.

Default Command

Select from the list of commands in the **Default Command** drop-down menu to decide what a double-click should signify in the Document Grid. See the table below for details. Click **OK** when you have finished setting defaults.

Table 6.1: Options for double-clicking in the grid

If you select...	When you double-click on a document in the grid...
Open	iManage DeskSite opens the document in its associated application.
Edit Profile	You can view or edit profile information for the document.
Print	iManage DeskSite prints the document.
Quickview	The document appears in the Quickview frame.
View	iManage DeskSite opens the document in the View application.
Versions	The document version tab displays a list of all the versions of the document.
History	Document activity history for the document is displayed
Related Documents	The related document tab displays a list of all the document related to the selected document.
Checkout	The *Checkout* dialog box appears with the document listed as the document to be checked out.
Checkin	The *Checkin* dialog box appears with the document listed as the document to be checked in.
Checkedout Info	iManage DeskSite opens the Checkedout Info message box.
Export	iManage DeskSite opens the *Export* dialog box.
Unlock	iManage DeskSite unlocks the document.
Remove from Folder	iManage DeskSite removes the document from the current folder. The document is still in the library.
Purge	iManage DeskSite deletes the document from the library.

6

6

C H A P T E R   7
iManage View

Overview

iManage View lets you view documents without the need to launch their native applications. You can view multiple documents and print all or portions of the documents being viewed.

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To view documents from the *iManage DeskSite* program, select one or more documents you want to view in the document grid, then select **View** from the **Document** menu. A submenu appears; select **View** again from the submenu. If iManage View is not running, iManage DeskSite launches iManage View, then displays the documents in read-only format. You can also display documents in iManage View by highlighting multiple documents, then clicking on the **View** button in the toolbar.

To view documents from the *iManage Integrated Desktop*, select documents in the documents list and right-mouse-click. Then choose **View** from the pop-up menu. The iManage View program will launch with the documents displayed in a view window.

You can also launch the iManage View application manually.

iManage View allows you to:

- View documents in read-only format even when they are checked out or in use.
- Search the full text of documents currently displayed in the viewer.
- Copy portions of documents for pasting into other applications

- Print documents

File types supported by iManage View include all major word-processing, spreadsheet, and graphics file formats.

Note: When you view documents using iManage View, those documents are not locked or checked out of the database. Instead, the iManage View program makes a temporary copy of the document, which is displayed in read-only format.

Document Types Supported

The major word processing, spreadsheet, and graphic formats supported by iManage View are listed below:

Word Processing Formats

Word for Windows 1.0, 2.0, 6.0/7.0 and 2000

WordPerfect for Windows or DOS 5.0, 5.1/5.2, 6.0 and 7.0

Ami Pro 3.0

Word Pro

Windows Write

Word for DOS 5.x and 6.0

Professional Write 2.0

DisplayWrite

MultiMate

OfficeWriter

Wang PC

FrameMaker Interchange Format (MIF) (text only)

StarOffice Writer 5.2 (text only)

ANSI Text

Spreadsheet Formats

Excel 3.0, 4.0, 5.0 and 7.0

Lotus 1-2-3 for Windows or DOS 3.x and 4.x

QuattroPro for Windows

Graphic Formats

Windows Bitmap

Windows Metafile

WordPerfect Graphic 1.0, 2.0

Ami Draw

Tagged Image File Format TIFF

Micrografx DRW

CompuServe GIF

Paintbrush PCX

Miscellaneous Formats

Adobe Acrobat PDF (text only)

Website META Language (WML)

Presentation Formats

Microsoft PowerPoint

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iManage View Window

If you launch iManage View manually, the *iManage View* window initially contains no documents. If launched automatically—such as when you select the **View** option in iManage DeskSite—this window contains read-only copies of the documents that you selected. Below is an example of the *iManage View* window with three local documents displayed in tile format.
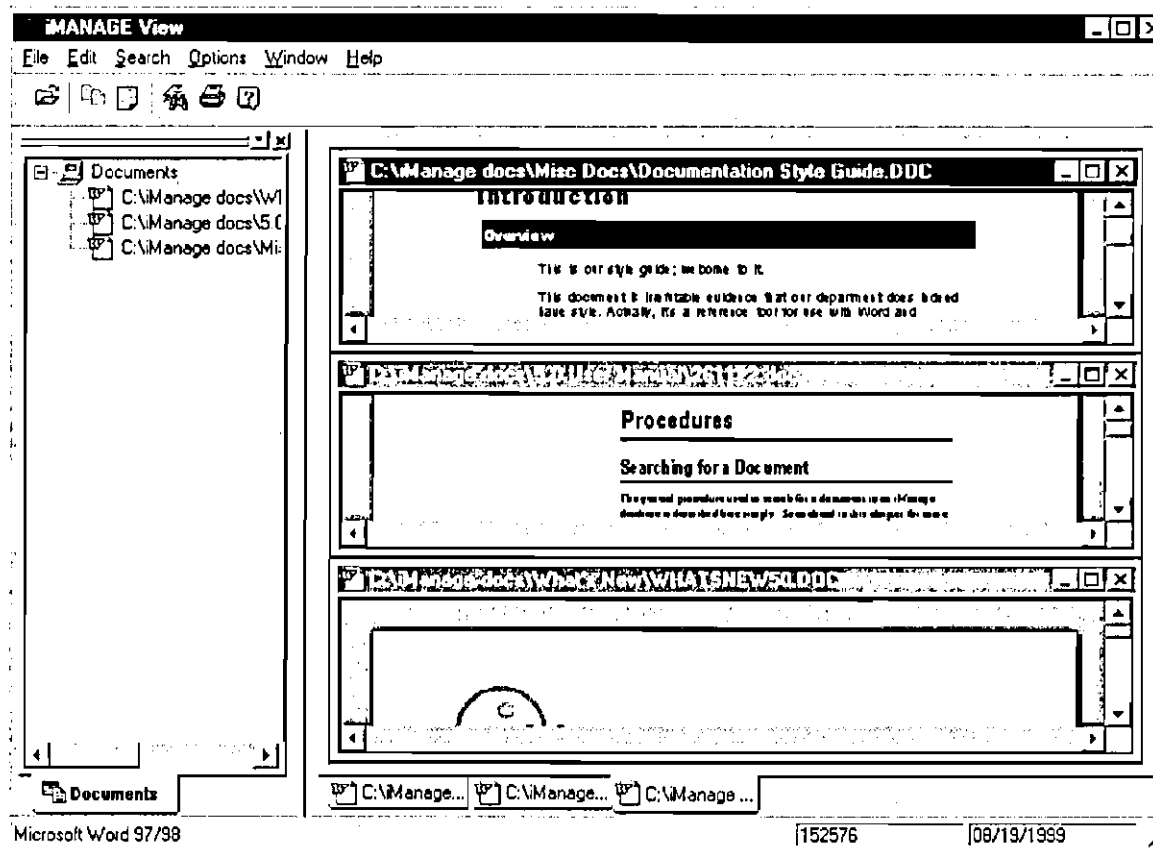
Figure 7.1: *iManage View* with documents displayed in cascade format

Tile and Cascade Formats

You can display documents in cascade or tiled format. Figure 7.1 shows an example of the *tiled* format. Following is an example of the same iManage View window with the three documents displayed in *cascade* format. You can also display other documents in the window as minimized icons.
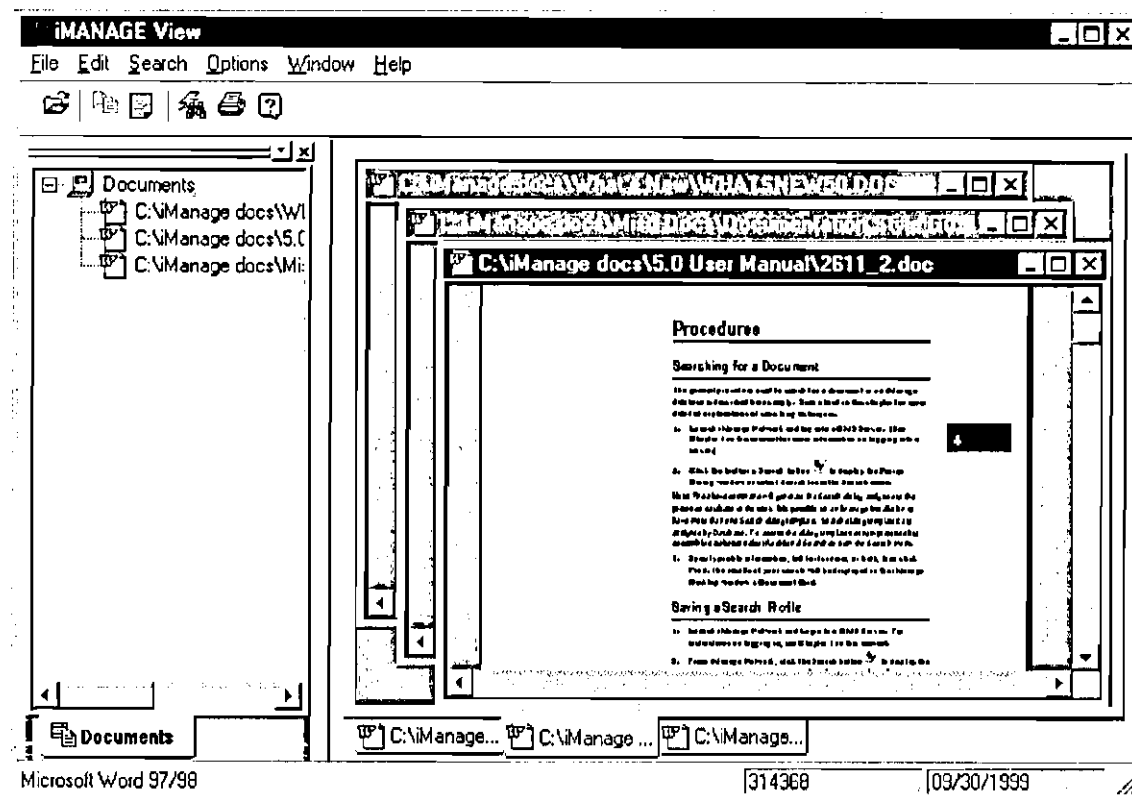
Figure 7.2: *iManage View* with documents displayed in cascade format

Viewing Local Files

You can use the iManage View program to view documents on an iManage database and/or documents that are stored locally on your hard drive or another network drive.

To view local documents:

1. Launch the iManage View program.

2. Select **Local Open** from the **File** menu. The *Select Local File to View* dialog box opens.

Select file to view

Look in: bitmaps

Advanced Options.bmp   CopyDoc.bmp   HistoryDia
ChangePassword.bmp   CopyOpenDoc.bmp   import des
CheckedOutInfo.bmp   DisplayOptDefaults.bmp   Import pro
CheckinDialog.bmp   DisplayOptTop.bmp   Import.bm
CheckinSynchorize.bmp   DocGrid.bmp   Integrated
CheckoutDialog.bmp   ExternalUserLookup.bmp   LocalApp.

File name: Advanced Options.bmp   Open

Files of type: Files (*.*)   Cancel

Figure 7.3: *Select Local File to View* dialog box

3. Use standard Windows techniques to locate and select a local file to view in the iManage View program, then click **Open** to display the file in the view program.

Searching the Full Text of Documents

Find

Search String: Knowledge Conference

Options
  ☐ Match Case
  ☑ Find Backward

Origin
  ○ From Cursor
  ◉ Entire Scope

OK   Cancel
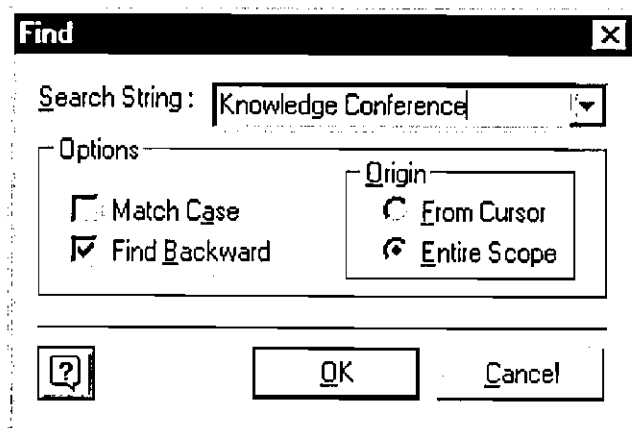
Figure 7.4: You can use the *Find* dialog box to search the full text of any documents displayed in iManage View

---

Note: The *Find Text* dialog box operates only on the active document displayed in iManage View. That document must be a word-processing document or spreadsheet. Textual searches cannot be performed on other document types.

---

1. Select **Find** from the **Search** menu.

2. Enter the text for which you want to search in the **Search String** field.

3. If you click the down arrow :▼|, you can select from a list of search strings that you entered previously.

4. Click **OK** to start searching.

Search Options

- The **Match Case** option specifies whether the search should be case-sensitive. If you do not check **Match Case**, all instances of your search string will be found regardless of whether they appear in upper or lower case.

- The **Origin** options specify where the search should start. If **From Cursor** is selected, the search will begin at the current position of the cursor in the active document. If **Entire Scope** is selected, the search will begin at the start of the document and proceed forward, or at the end of the document and proceed backward, depending on which direction is selected.

- The **Find Backwards** option specifies the direction the search should proceed.

Printing Documents

You can print all or portions of documents that are displayed in iManage View by clicking on the Print icon 🖨 or by selecting **Print** from the **File** menu. You may also select **Copy** from the pop-up menu on a right-mouse-click. When you select **Print**, a standard *Print* dialog box appears. The **Print** option operates on only the currently active document in the iManage View window.

Setting Print Options

You can set printer options from the iManage View window by selecting **Printer Setup** from the **File** pulldown menu. A standard *Print Setup* dialog box appears.

Copying Documents

You can copy all or portions of documents for pasting into other applications by highlighting the portion of the document that you want to copy, then clicking the Copy icon ⬛ or selecting **Copy** from the **Edit** menu. You may also select **Copy** from the pop-up menu on a right-mouse-click.

Setting Display Options

You can display documents in iManage View in a number of different formats. Different documents can be displayed in different formats at the same time.

Word-Processing Documents

You can display word-processing documents in **Draft, Normal,** or **Preview** mode:

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- **Draft** mode displays the document using the default font without the original formatting. Text wraps as necessary to display all text in the view window.

- **Normal** mode displays the document using the specified fonts in the documents and using the specified formatting. Text wraps inside the view window to display all text in the document.

- **Preview** mode displays the document using the specified fonts and specified formatting. Text does not wrap in the view window: Preview mode shows how the document would look when printed.

Bitmap Files

You can adjust the size of bitmap files that are displayed in the iManage View program and/or rotate these images in the display by increments of 90°. To change the size or rotation of a bitmap image, select the window in which the image is displayed, then select **Bitmap** from the **Options** menu. A submenu of display options appears. Select the size and/or rotation desired.

Vector Graphics

You can adjust the size of vector graphics files that are displayed in the iManage View program by selecting **Vector** from the **Options** menu. A submenu of display options will be displayed. Select the option desired.

Setting Default Display Options

You can select a default font that will be used to display ANSI text and select a file format to use to view files of unknown type. To set these options, select **Options, Document,** then **Font.** The *Display Options* dialog box will be displayed. The *Display Options* dialog box lets you specify iManage View's default fonts and file formats.

Display Options

- Default font -
  Arial - 10 point - Normal
  Change

- View unknown files as -
  (•) Text
  ( ) Hexadecimal
  ( ) Do not view

- Character set for text files -
  (•) Windows (ANSI 1252)   ( ) Central European (Latin 2)
  ( ) ASCII (7 bit)   ( ) Chinese (Big 5)
  ( ) DOS (Latin 1)   ( ) Chinese (GB)
  ( ) Unicode   ( ) Korean (Hangul)
  ( ) Macintosh   ( ) Cyrillic (ANSI 1251)
  ( ) Japanese (ShiftJIS)   ( ) Cyrillic (KOI8-R)
  ( ) Japanese (EUC)

  [OK]
  Cancel
  Help
  More...
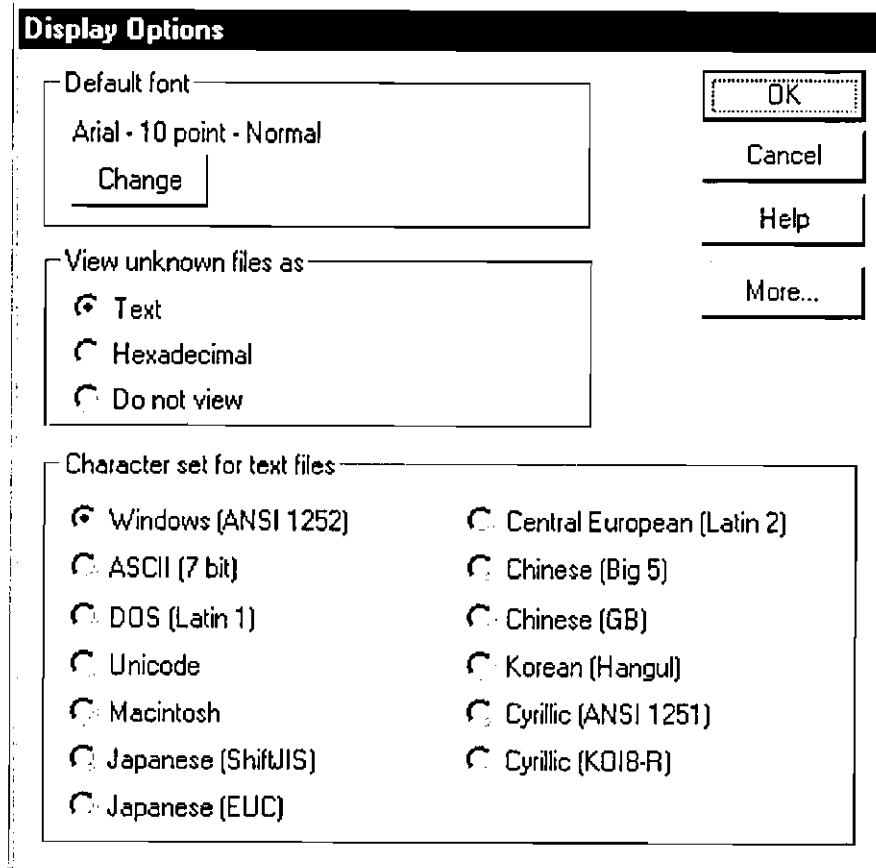
7

Figure 7.5: *Display Options* dialog box

- To change the default font of ANSI files, click the **Change** button. A standard Windows *Fonts* dialog box appears, allowing you to specify the font.

- To set the default display mode for documents of unknown file type, select the corresponding display option.

- To display additional options, click **More.** The *More Display Options* dialog box appears.

More Display Options

You can also set display options that specify how to display database tables and spreadsheet information. If you want to show gridlines for either of these displays, check the **Show gridlines** options.

The *More Display Options* dialog box is displayed by clicking on the **More** button in the *Display Options* dialog box.

Note: The options included for specifying display options for archived documents are not implemented.

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More Display Options

Spreadsheet
☑ Show gridlines

Database
☑ Show gridlines

Archive
◉ Don't sort files
○ Sort files by name
○ Sort files by size
○ Sort files by date & time

Sort Order
◉ Ascending
○ Descending

OK
Cancel
Help
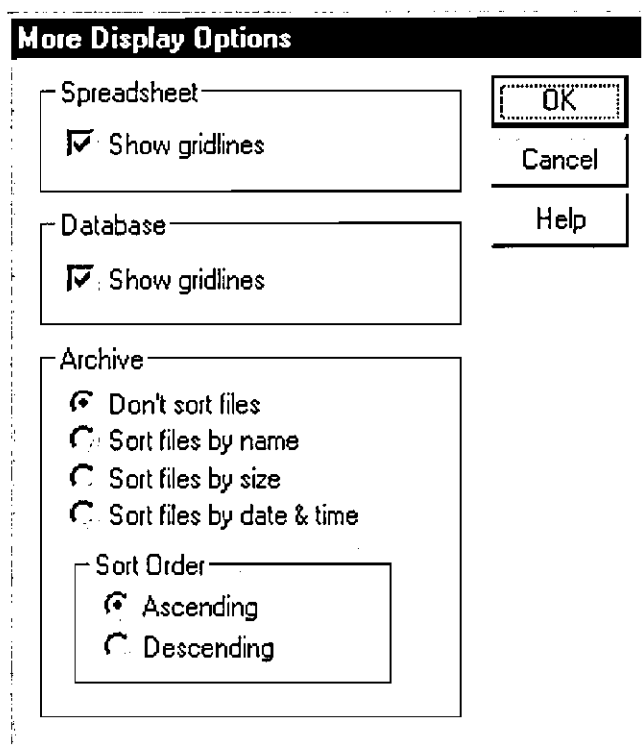
Figure 7.6: *More Display Options* dialog box

CHAPTER 8
iManage Portable

Overview

A portable mode of operation allows you take the iManage DeskSite document management system on the road with you and helps you synchronize your work with the network when you get back to the office. The process works like this:

1. A user checks out the desired iManage DeskSite documents, individually or en masse.

2. Once disconnected from the network, you can access portable documents through the iManage Portable application or through the standard commands (open, save, etc.) of an integrated application.

3. When the user re-attaches to an iManage DeskSite database, you can automatically check in the checked out documents and synchronize them with iManage DeskSite.

From Portable mode while disconnected from the network you can perform the following standard iManage functions:

- Import documents and assign a new document profile
- View and Quickview documents
- Save edited documents as new documents
- Save edited documents as the same document, thereby replacing the network version when synchronized with iManage DeskSite
- Edit and View document profiles
- Send documents as attachments to emails

What you _cannot_ do in Portable Mode:

- Save document as a new version of the same document
- Edit document security

Note: Echo documents are also accessed through portable mode. See _Chapter 9: Using Echo Documents_.

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Setup Procedures

Portable-mode operation does not require extraordinary amounts of memory or resources on the portable PC and does not require a separate stand-alone SQL database on the portable PC.

To access portable documents effectively, you need to set up your PC In the following manner:

- The PC must be registered for portable-mode operation.
- The PC should be able to run from a local copy of the Windows operating system.
- Local stand-alone versions of the application programs associated with the portable documents should be available on the PC.

Application Setup in iManage Portable

The local application table contains information that is used by iManage Portable to launch applications and to associate particular document types with appropriate applications. It is recommended that you do NOT edit the local copy of the application table UNLESS you understand the way applications are integrated with iManage. Information on how the application table is created and maintained and how iManage is integrated with other applications is provided in the *iManage DeskSite Administrative Reference Manual.*

Reasons why you might need to change the local copy of the application table include:

- The path to an application changes
- You want to associate a document type with a different application
- You want to integrate an application that is not listed in the application table on the database

To Add or Edit an entry to the local application table:

1. Click the App Setup icon ⊞ or select **Local Applications** from the **Options** menu.

2. Click the **Add** or **Edit** button in the *Application Setup Information* dialog.

3. Complete the fields in the *App Setup Entry* dialog. Click **OK** when finished.

> **Note:** iManage Portable's on-line help contains a detailed explanation of each field appearing in the *App Setup Entry* dialog.

Checking Out Portable Documents from iManage DeskSite

iManage DeskSite provides you with the ability to check out multiple documents in a single operation for portable-mode access. The checked-out documents are marked as in use in iManage DeskSite.

The checkout process copies the documents to the portable-document location on the local PC. This location is defined during portable-mode registration.

The profile information of the checked-out documents is also copied to the local portable-document location. iManage Portable uses the local profile information to find and access portable documents. You can change the profile information in portable mode.

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To checkout a document in portable mode:

1. Select a document by clicking on it in the iManage Desktop window's Document List. The document row becomes highlighted.

2. Click the **Checkout** toolbar button. The *Checkout* dialog box appears.

Figure 8.1: *Checkout* dialog box

3. Place a checkmark in the **Portable Checkout** field. The Destination Path field becomes deactivated because all portable documents are stored in the same directory.

4. Note your reason for checking out the document in the **Comments** field, specify the due date, and click **OK**. The iManage Desktop window reappears.

Working with Portable Documents from within Integrated Applications

You can open documents that are checked out in portable mode from within integrated applications.

Steps:

1. Launch iManage Portable if it is not already running.

2. Launch the integrated application

3. Select **Open** from the **File** menu in the integrated application. The *Integrated Portable Desktop* dialog box appears.
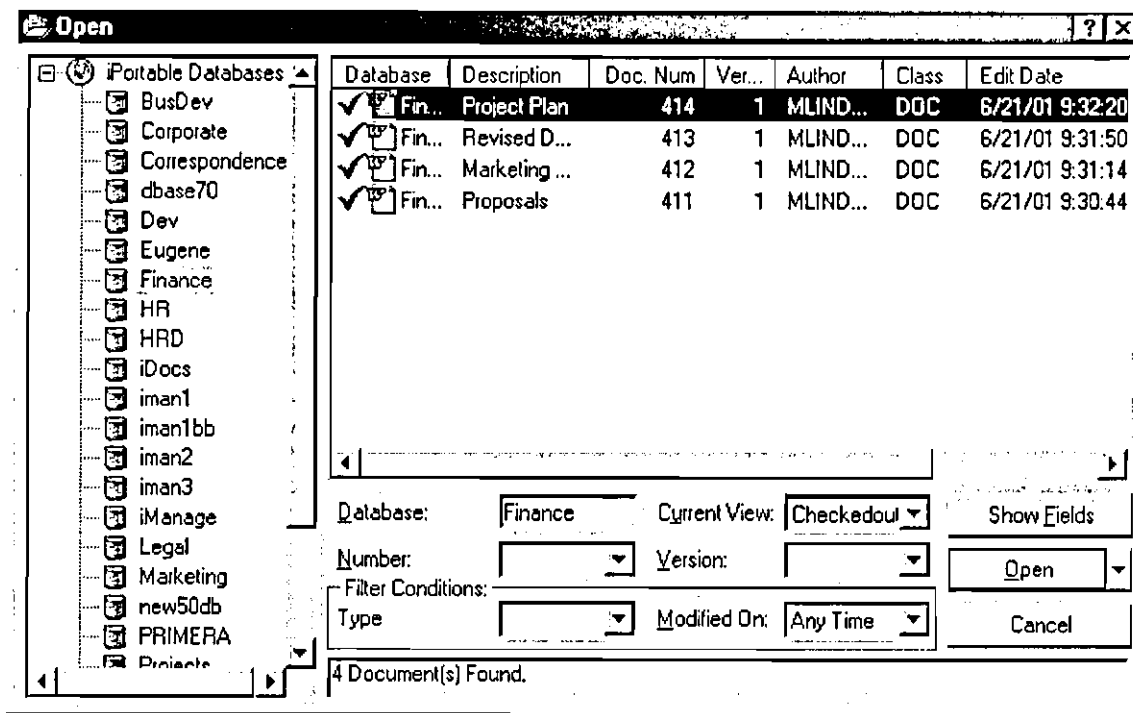
Figure 8.2: *Integrated Portable Desktop* dialog box

Working with Portable Documents from within *iManage Portable*

You may access documents directly from the iManage Portable application.

Read-only documents are indicated in the Portable directory by a locked icon.

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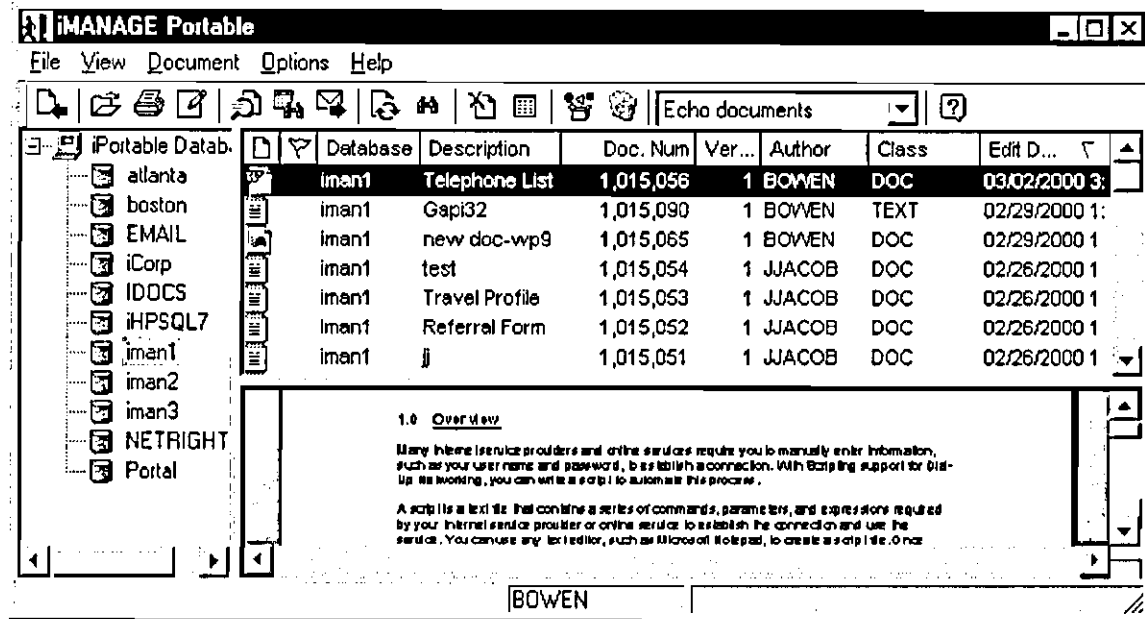
Figure 8.3: *iManage Portable Application Desktop* window

To Open *Portable* Documents

1. Launch iManage Portable and select **Checkedout Documents** from the drop down list. The *Checkedout Documents* list appears in the panel.

2. Select the desired document and click the Open icon ⬚ or just double-click on the desired document. The document opens in the local application that is associated with the document's type.

Note: The Portable program looks for documents that were checked out by the same user whose ID was used to log into Windows. If you checked out documents for portable use using a user ID other than the one you used to log into Windows, the Portable program will not be able to find those documents. If that happens, log out of Windows and log back in using the user ID that you used to log into the WorkSite Middle Tier Server when you checked out those portable documents.

To View Portable Documents

There are two options to view portable documents.

To view a portable document using the iManage View program:

iManage View is a sophisticated viewer program allowing you to view multiple documents at the same time and in different formats. To view a document this way, highlight the desired document(s) and click the View icon [icon] or select **View** from either the **Document** menu or the right-click pop-up menu on the selected document.

To view a portable document using Quickview:

Quickview is an easy way to view a document without leaving the Portable application. To view a document this way, highlight the desired document and click the Quickview icon [icon] or select **Quickview** from either the **Document** menu or the right-click pop-up menu on the selected document.

Editing/Viewing Portable Document Profiles

Portable document profile information can be accessed and edited by highlighting a document in the document list and clicking the Edit Profile icon [icon] or by selecting **Edit Profile** from either the **Document** menu or the right-click pop up menu of the highlighted document. Profile information can then be viewed and updated. Updated profile information is verified when the portable documents are checked back into iManage DeskSite.

Printing Portable Documents

You can print documents directly from iManage Portable by clicking on the Print icon [icon] or by selecting **Print** from either the **Document** menu or the right-click pop-up menu on the highlighted document. This will automatically launch the document in its associated application and perform a print command.

Note: This portable print command does not launch a *Print Options* dialog box before printing. See the next section about Print and Page setup options.

Print and Page Setup Options

Select **Printer Setup** from the **File** menu to launch the *Printer Setup* dialog. This dialog provides choices of printers, page types and Portrait/Landscape ori-

entation formats.

E-mailing Portable Documents

From the iManage Portable application you can create a new e-mail message with selected documents as attachments.

3. Select the document or documents you wish to attach and click the Send icon ⊠⃗ or select **Send** from either the **Document** menu or the right-click pop-up menu of the highlighted document. The *Mail Documents* window opens.
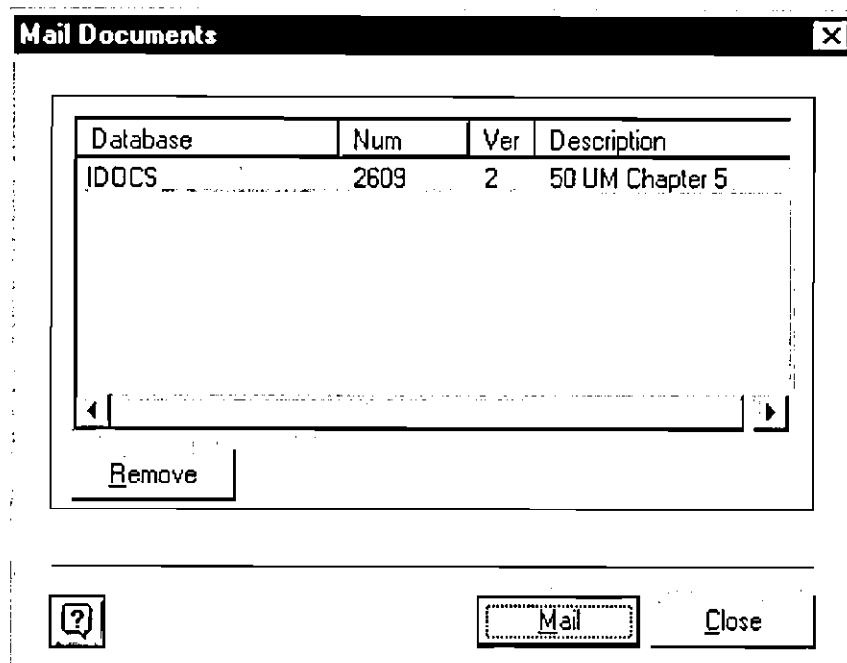

Database	Num	Ver	Description
IDOCS	2609	2	50 UM Chapter 5

Remove

Mail   Close

Figure 8.4: *Mail Documents* window

4. If this is the document you want to send, click **Mail**. A new e-mail launches automatically from your e-mail application with the selected documents as attachments.

5. You can remove any document from the list by highlighting the document and clicking **Remove**.

Import Documents to iManage Portable

If you have created a brand new document while away from the network you can integrate it with iManage DeskSite when you return to connectivity. Do this with

the Import feature.

Steps to Import:

1. Launch iManage Portable.

2. Click the Import icon or select **Import** from the **File** menu.
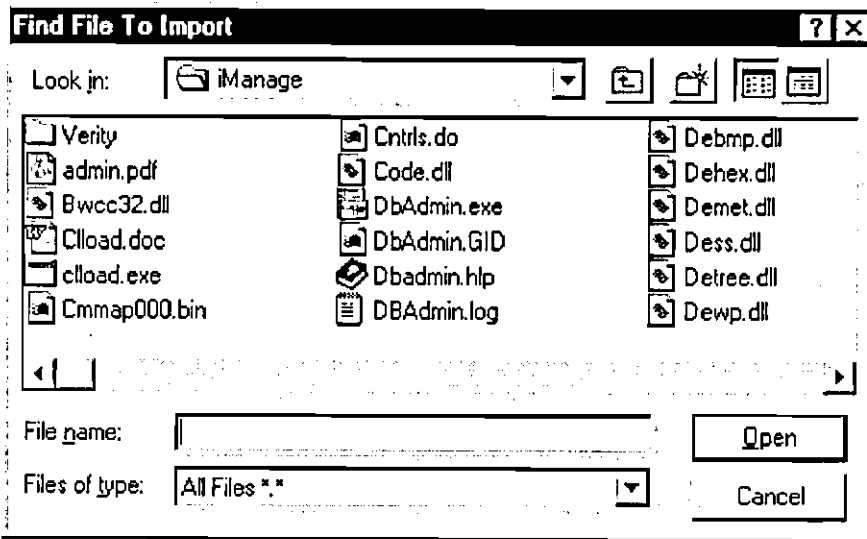
Figure 8.5: *Find File To Import* dialog box

3. Use the *Find File To Import* dialog to navigate to the document you want to import. When highlighted, click **Open**.

4. The *New Document Profile* dialog launches. Complete the document's profile and click **OK** when complete.

The document then appears in the document list of iManage Portable. It is ready to be checked in with all the other documents when you re-connect to the network.

Check-in Portable Documents

When you have been working in portable mode and you attach to an iManage DeskSite database, you can check in the checked out documents and synchronize them with iManage DeskSite. The check-in process verifies the profiles of the portable documents against the profile-entry tables. If errors are detected, you are prompted to enter correct information.

To check-in a portable document:

1. Launch iManage DeskSite and click **Checkin** on the toolbar. The *Checkin Documents* dialog box appears.

2. Select the documents to be checked in using standard Windows techniques.

3. Click the **Checkin** button. The *Checkin Options* window appears.

4. Select either the **Replace Original** or **New Version** option. To apply the selected option to the entire group of documents that you're checking in, select **Apply to All.**

5. Click **OK** to check in the documents and return to the *Checkin Documents* dialog box.

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AUT0020183

8

AUT0020184

Using Echo Documents

Overview

All computer networks fail at some point. iManage has created a safeguard for such an event. It's called *document echoing*.

Every time you close an iManage document, iManage DeskSite saves a duplicate copy to your hard disk. This is done to ensure that you can still access and perform functions to your important and recently used files, even when the network fails.

If you make revisions to these documents offline, iManage DeskSite provides a synchronize function to integrate revised echo documents back into the network.

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Setup

Enabling Document Echoing

iManage DeskSite echoes documents on your PC only if Document Echoing is enabled.

Your iManage DeskSite administrator can disable document echoing globally or for any given class of documents. If your PC is registered for portable mode but iManage DeskSite is not echoing documents to your hard drive, contact your system administrator for more information.

If you are enabling document echoing as a safeguard against network failure, you should also ensure that your PC is able to run a local copy of the Windows operating system and local, stand-alone versions of the application programs associated with your echoed documents. In the case of a network failure, networked copies of Windows and of essential application programs are not available.

Even in the absence of the application programs associated with your echoed documents, if you have a local copy of the Windows operating system on your PC, you can view your echoed documents using iManage View.

9 Setting the Default Drive for Echo Documents

You can select the disk drive where iManage DeskSite saves echo documents. Normally, the echo documents are stored on a disk drive on the user's local PC. While the disk drive for the echo directory can be changed, the name of the directory is always **nrtecho**.

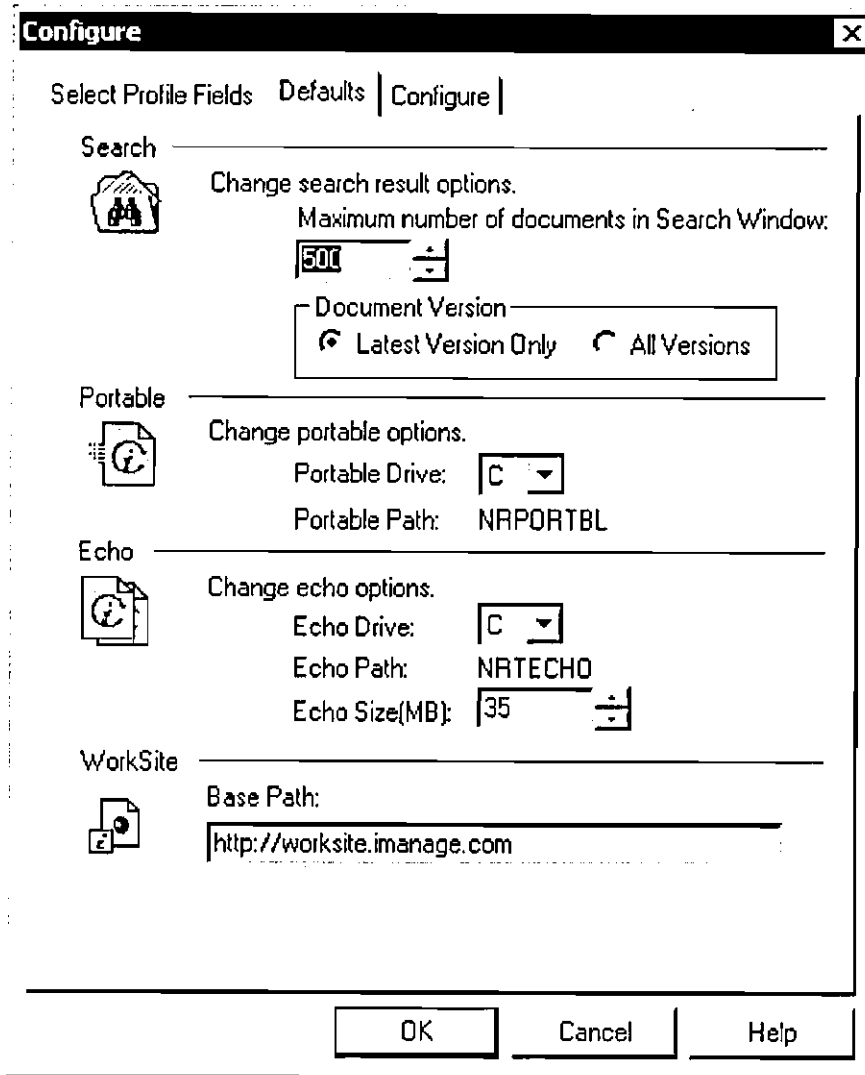1. Choose **Options** from the **Options** menu to open the iManage Desktop window's *Configure* dialog.

Configure

Select Profile Fields   Defaults | Configure |

Search ———————————————————————————

Change search result options.
    Maximum number of documents in Search Window:
    [500] ⬍

    ┌ Document Version ────────────────────┐
    │ ⦿ Latest Version Only   ○ All Versions │
    └──────────────────────────────────────┘

Portable ——————————————————————————

Change portable options.
    Portable Drive: [C ▼]
    Portable Path: NRPORTBL

Echo ——————————————————————————————

Change echo options.
    Echo Drive: [C ▼]
    Echo Path: NRTECHO
    Echo Size(MB):   [35] ⬍

WorkSite ——————————————————————————

Base Path:
[http://worksite.imanage.com]

        | OK | Cancel | Help |

Figure 9.1: *Display Options* dialog where Echo defaults are set.

2. Specify the disk drive where iManage should store your echoed documents
    and the maximum size of the echo directory. If the total size of the echo
    directory exceeds the specified limit, iManage DeskSite prompts you to
    purge the echo directory. For instructions on how to purge echoed files from
    the echo directory, see "Purging Echo Documents" on page 196. You can
    change the size of the echo directory, if you need to, by clicking the up or
    down arrows in the Echo Size (MB) field.

Using Echo Documents

You can access echo documents either through the iManage Portable application or through an integrated application such as MS-Word, WordPerfect, etc.

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.

Access Echo Documents from an Integrated Application

Steps to open documents that are checked out in portable mode from within integrated applications:

1. Launch iManage Portable if it is not already running.

2. Launch the integrated application.

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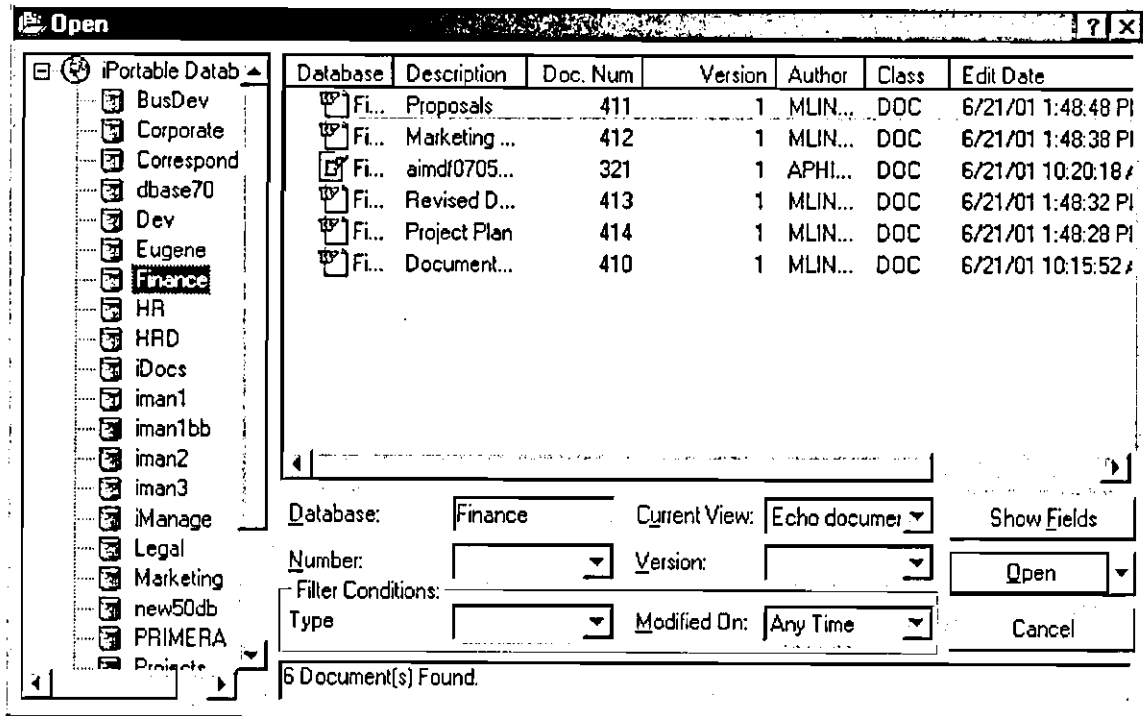
Figure 9.2: Integrated Portable Desktop

Access *Echo Documents* from the *iManage Portable* Application

Launching iManage Portable allows you to perform a variety of functions with echo documents. The main desktop screen looks like this:
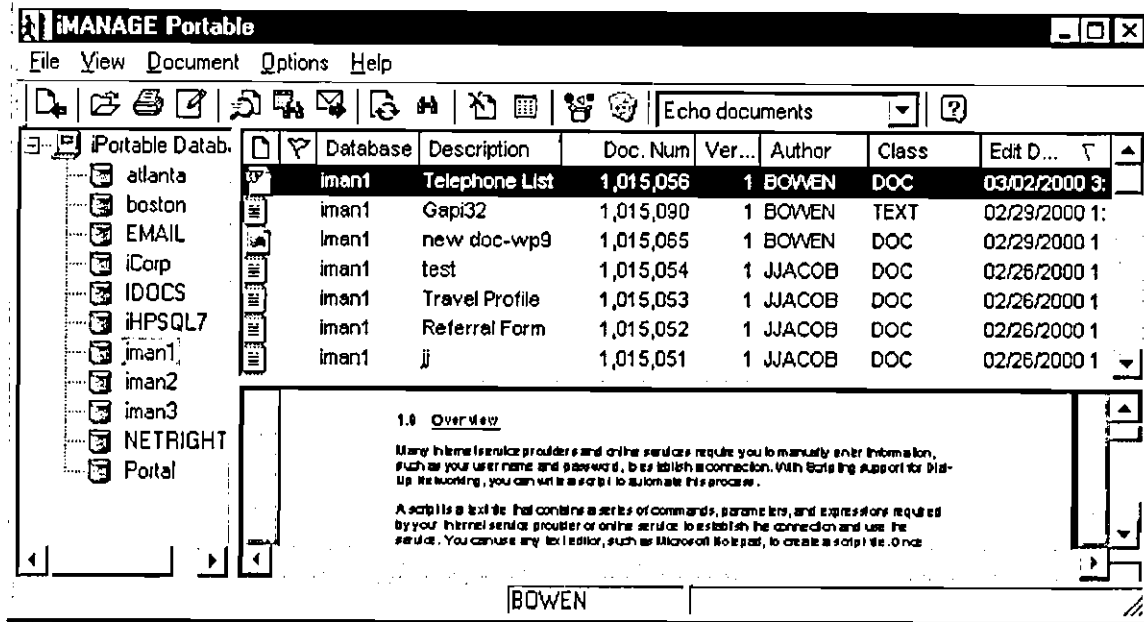
Figure 9.3: iManage Portable Desktop Window

Functions within iManage Portable

Because both Echo Documents and Portable documents are accessed through same Portable application the document functions are identical. Chapter 8 contains greater detail of the following document commands:

Open Echo Documents

Double-click on the desired document in the Echo Document List or highlight the document and click the **Open** icon. You then get a message that the document may have been changed by another user. If this is the case, you can check in the document to iManage DeskSite only as a new document.

Your system administrator may have configured your machine to display echo documents for all users on your machine.

iManage

You are opening an echo copy of the document "1018190_1". This document may not reflect the latest changes made to the document in iManage. After you edit it, you may be able to copy it back to iManage only as a new version. Do you want to continue?

| Yes | No | Details >> |
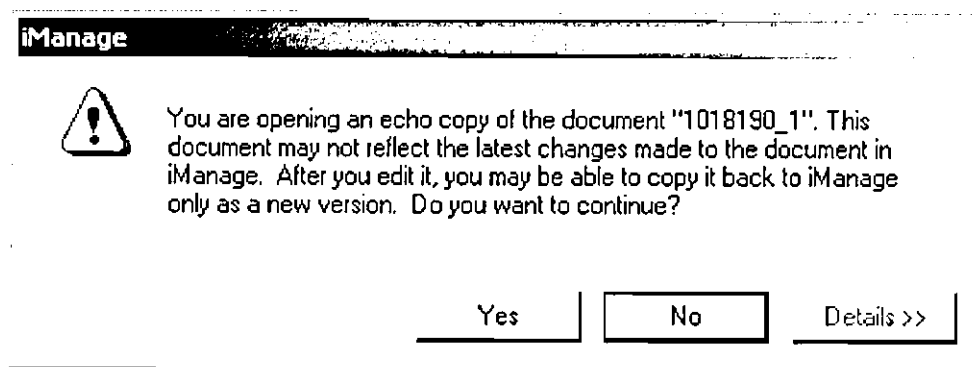
Figure 9.3: Echo document warning message

View Echo Documents:

Highlight the document(s) and click the View icon. This will launch **iManage View** - a sophisticated viewer application. See Chapter 7 for more information.

Quickview Echo Documents

Highlight the desired document and click the Quickview icon. The document will be displayed in the bottom right frame of the Portable Desktop Window.

Printing Echo Documents

Highlight the desired document(s) and click the Print icon. The document's associated application will launch and the document will be printed. Please note that this portable print command will not launch a *Print Options* dialog box before printing. See the next section about Print and Page setup options.

Printing a List of Echo Documents

To print a list of the documents currently displayed in the Document List of the Portable Desktop select **Print Preview** from the **File** menu. This will launch the list in the *Print Preview* dialog where you can execute a print command.

Sending Echo Documents

Highlight the desired document(s) and click the Send icon. A new e-mail will launch automatically with the selected documents as attachments.

Saving Echo Documents

After opening an echo document, you can save changes or revisions to it with the Save command under the File menu in the application associated with that document. Documents saved using the save command will be recognized in iManage DeskSite as echo documents. If you use the Save As command to create a new document from a revised echo document, however, the document will be identified as a new portable document in iManage DeskSite.

Deleting Echo Documents

Highlight the desired document(s) and click the Delete icon [icon]. You can also delete Echo documents from the *Checkin/Synchronize* dialog box in iManage DeskSite.

Editing and Saving Echo Documents

After opening an echo document, you can save changes or revisions to it with the Save command under the File menu in the application associated with that document. Documents saved using the save command are recognized in iManage DeskSite as echo documents. If you use the Save As command to create a new document from a revised echo document, however, the document is identified as a new portable document in iManage DeskSite.

9 Synchronizing Echo Documents into the Network

If you edit and save an echo document while offline, you will eventually want to copy the document back to the network after network connections are restored. iManage DeskSite provides an easy way to copy echo documents that have been revised and saved locally back to the network. This process of copying altered echo documents back to the network is referred to as *synchronization*.

When you start iManage DeskSite you will get a warning if you have echo documents with changes that are not reflected in the copy on the file server. This feature helps prevent you from overwriting changes that you made to the document.

Requirements for synchronization of a document

- Only the last user who edited a document through iManage DeskSite may synchronize an echo document. Other users who attempt to do so receive a warning message and are instructed to contact the particular user who last edited that document.

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- Your echo copy of a document must be newer than the copy on the network. iManage DeskSite does not allow you to synchronize an echo document back to the network if the network copy of the document is newer than your echo copy.

- You must have *write* access to the network copy of the document. You cannot synchronize a document if you have read-only access to the document.

You have the option of copying a document back as the original document, importing it as a new version of the original document, or importing it as a new document. If you are unable to use iManage DeskSite's synchronization process to copy your updated echo document to the network, you can instead **import** the echo document as a new document or a new version of the same document.

To synchronize an echo document:

1. In iManage DeskSite open the *Checkin/Synchronize Documents* dialog by selecting **Checkin/Synchronize** from the **Portable** menu.

Checkin/Synchronize Documents ☐ ☒

Checkedout Documents | Echo Documents

Session Name: PARIS ▼

⊤	Database	Description	Doc. Num	Version	Type		Synch...
📄	Finance	Documentation Upd...	410	1	WORD		
📄	Finance	aimdf070520011910...	321	1	GIF		Find...
📄	Finance	Project Plan	414	1	WORD!		
📄	Finance	Revised Documents	413	1	WORD!		Delete
📄	Finance	Marketing Options	412	1	WORD!		Purge

Items: 5   ☐ Show only echo modified

Close   Help
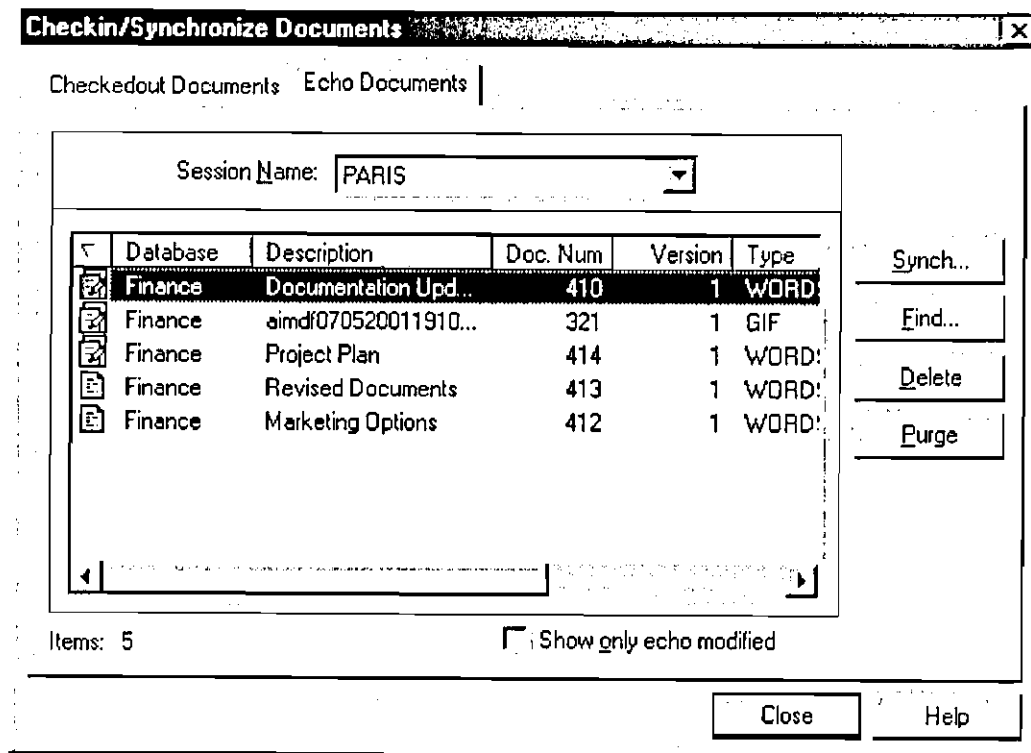
Figure 9.4: *Synchronize/Purge Echo Documents* dialog box

2. Profile information for echoed documents appears in the display table. Use the horizontal scroll bar to display more profile fields.

- Use the vertical scroll bar or **Page Up** and **Page Down** buttons to display all the echo documents.

- Use the **Find** button to search for echoed document profiles if the list is large.

- Check **Show only echo modified** to display only the echo documents that have been changed.

3. Use standard Windows techniques in addition to the **Select All** and **Deselect** buttons to select documents for synchronization back into the iManage DeskSite database.

4. Click **Synch** to begin the synchronization process. The Confirm Synchronize dialog box opens.

Confirm Synchronize   [×]

Document Information

Number:	1,018,906
Version:	1
Description:	iManage Travel Profile

Echo Document

Last edit date:	11/15/2000
Last edit time:	14:49:00
File size:	45.50 KB
Last user:	BOWEN

Database Document

Last edit date:	11/15/2000
Last edit time:	13:22:44
File size:	46.50 KB
Last user:	BOWEN

Options

(•) Replace Original   ( ) New Version   ( ) New Document

| OK | Cancel | Skip | Help |

Figure 9.5: *Confirm Synchronize* dialog box

5. Verify the comparison between the Echo document and the Database document. Choose whether you want to replace the original document, create a new version of the document, or create an entirely new document. Not all of these options are available in every circumstance.

- If the document is checked out in the iManage library, you can return the Echo document to the library only as a new document.

- If the document is *not* checked out in the iManage library and you were the last user of the document, you can return the Echo document to the library as a new version, a new document, or replace the original document.

- If the document is *not* checked out in the iManage library and you were *not* the last user of the document, you can return the Echo document to the library only as a new version of the document or as a new document.

6. Click **OK** to synchronize the document, **Cancel** to cancel the synchronize operation for all documents you have highlighted, or **Skip** to cancel the synchronize operation for the specified document only.

Icons in the Checkin/Synchronize Documents dialog box

Icons in the *Checkin/Synchronize Documents* dialog indicate the condition of the documents displayed in the windows. The list explains what the icons mean:

– This icon appears in the document display area of Checkedout Documents tab. The document that it is associated with is a checkedout document.

– This icon appears in the document display area of both the Checkedout Documents and Echo documents tab. In the Checkedout Documents tab, this icon indicates that an "orphan" document exists in the NrPortbl directory. In the Echo Documents tab, this icon is used to indicate unmodified echo documents that exist in the NrtEcho directory.

– This icon appears in the document display area of Echo Documents tab. This icon identifies echo documents that have been modified and need to be synchronized.

Orphan Documents

A user may have documents in his or her Portable or Echo directory which are not checked-out by that user (Orphan documents). When the user starts working in Portable mode, iManage DeskSite shows that the document is checked-out. The user can modify the document in Portable mode. However, when the user starts iManage DeskSite, he or she needs to know the local copy of the document has modifications that are not in the iManage file server copy.

iManage DeskSite identifies documents in the user's NRPortbl or NRTEcho directory and determines if they are checked out by the user. If there are docu-

ments in the NRPortbl or NRTEcho directory that are NOT checked out by the user, iManage DeskSite distinguishes those documents from documents checked out by the user or created in Portable mode that need to be checked in.

You can then import the orphaned documents into iManage DeskSite as new documents.

Purging Echo Documents

1. In iManage DeskSite, open the *Checkin/Synchronize* dialog by selecting **Checkin/Synchronize** from the **Portable** menu.

2. Click **Purge**. The *Set Purge Criteria* dialog box appears:

Set Purge Criteria [X]

Delete documents if older than [30] days

[OK] [Cancel] [Help]
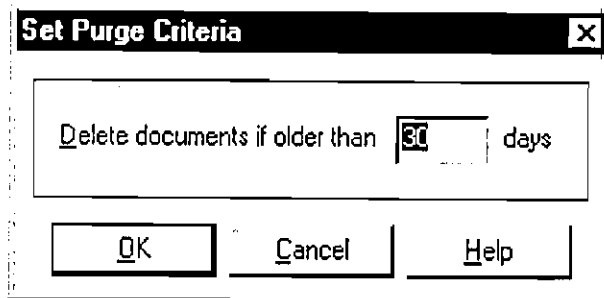
Figure 9.6: *Set Purge Criteria* dialog box

3. To delete all documents older a certain number of days, enter the maximum age in days of echo documents that you want to keep and click the **OK** button. All documents older than the specified number of days are deleted.

Note: The number of days set in the *Set Purge Criteria* dialog box is only for this manual purge of the directory. Echo documents continue to accumulate unless you purge the directory in this manner again. For instructions on how to purge the echo directory automatically, see the *iManage DeskSite User Reference Manual.*

Purging Echo Documents Automatically

You can set up your computer to automatically delete echo documents based on age at startup of iManage Portable. To implement this feature:

1. Create a shortcut to **Portbl32.exe**

2. Right-click on the shortcut and select **Properties.**

3. In the *Properties* dialog that appears, click the Shortcut tab.
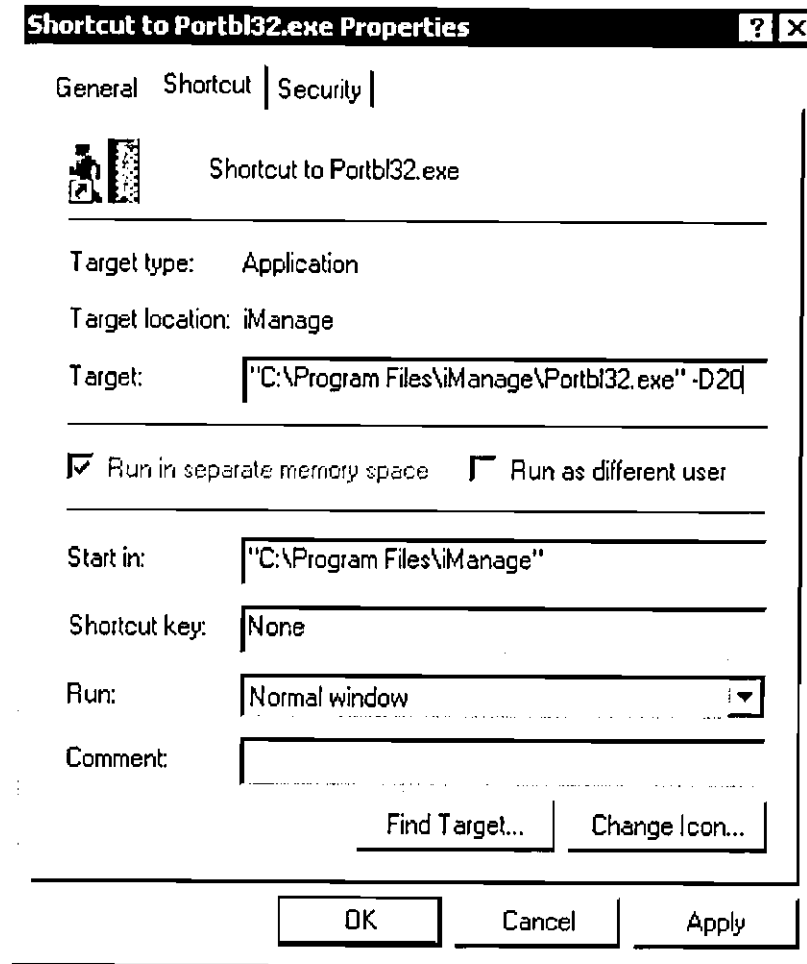
Figure 9.7: *Shortcut Properties* dialog box

4. In the Target field, enter the path to the portable executable file followed by -
    D then the maximum age of echo documents in days.

5. Example: If iManage is installed in the default installation path, you might
    enter the following in the Target field:

    "C:\Program Files\iManage\Portbl32.exe" -D 20

    Where 20 represents the maximum age of an echo document in days. Documents older than this specified number of days will be deleted.

6. When you double click on this shortcut to run the Portable application, any echo documents older than the specified maximum age are deleted.

Silent Mode

You can also use this command line feature in silent mode. Silent mode means that when you double click on the shortcut, the Portable application only runs long enough to delete any echo documents older than the specified maximum age, then exit. To implement this feature in silent mode, substitute -DS for -D.

Example: **"C:\Program Files\iManage\Portbl32.exe" -DS 20**

This command line opens iManage Portable, purges echo documents older than 20 days from the echo directory, then exits from iManage Portable.
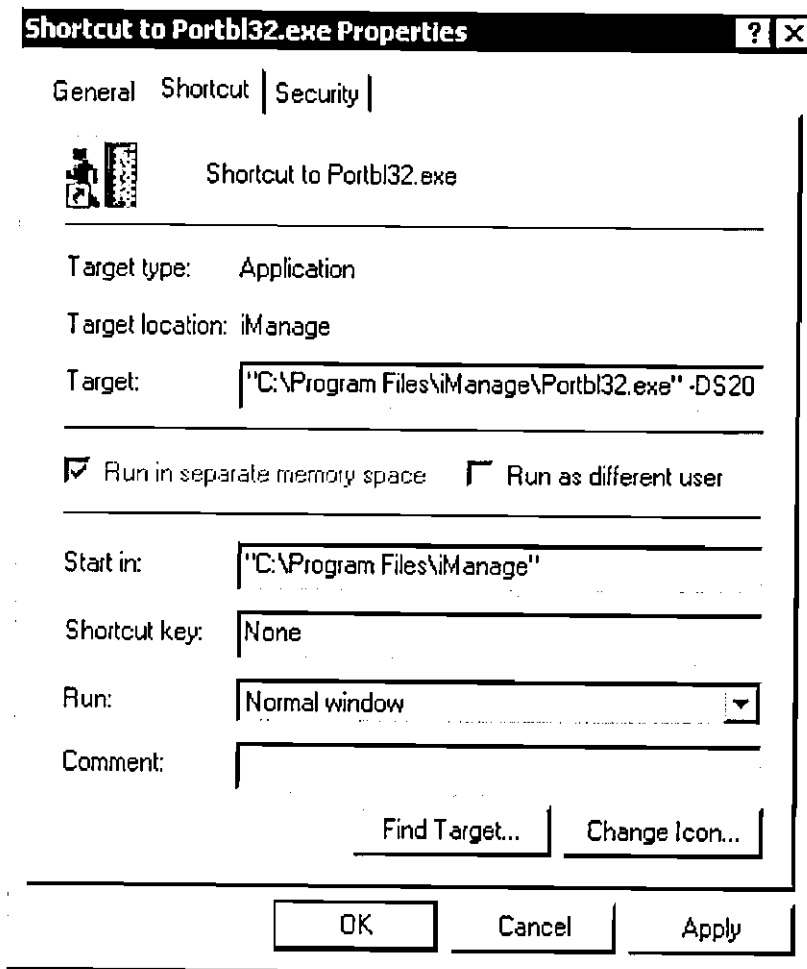
Figure 9.8: *Shortcut Properties* silent mode dialog box

Purging Documents for All Users

You can use this command line to purge echo documents for all users, not just the current user. To do this, substitute -PS for -D or -DS.

Example: **"C:\Program Files\iManage\Portbl32.exe" -PS20**

This command line opens iManage Portable, purges echo documents older than 20 days from the echo directory, then exits from iManage Portable.

Shortcut to Portbl32.exe Properties `?` `X`

General Shortcut | Security |

Shortcut to Portbl32.exe

Target type: Application

Target location: iManage

Target: "C:\Program Files\iManage\Portbl32.exe" -PS20

☑ Run in separate memory space   ☐ Run as different user

Start in: "C:\Program Files\iManage"

Shortcut key: None

Run: Normal window   ▼

Comment:

                              Find Target...   Change Icon...

                OK   Cancel   Apply
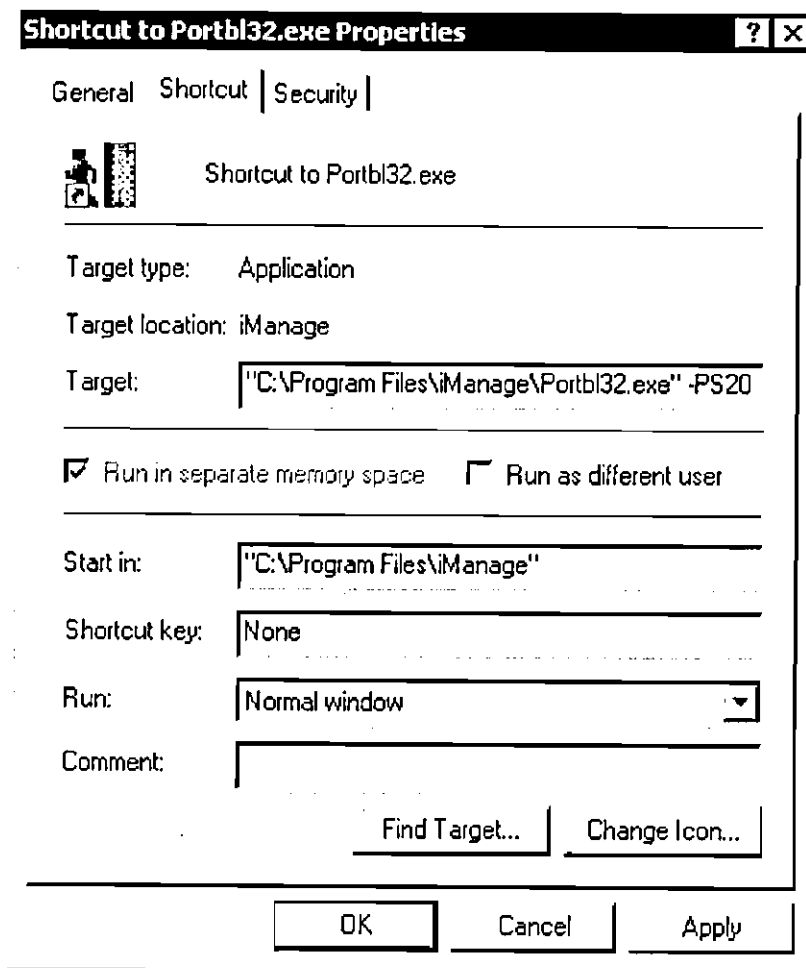
Figure 9.9: *Shortcut Properties* silent mode dialog box to purge echo documents for all users

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