EXHIBIT 27 PART 4

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.
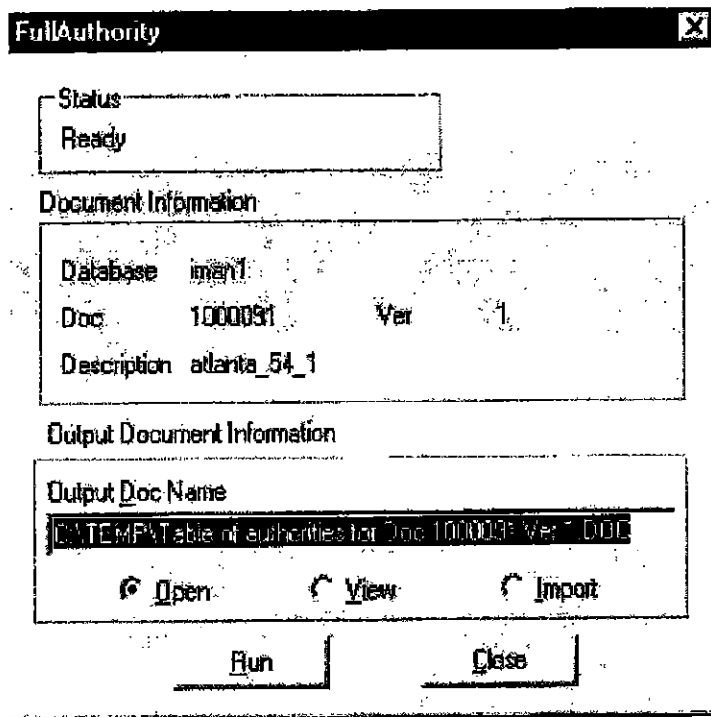
6

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

6

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.
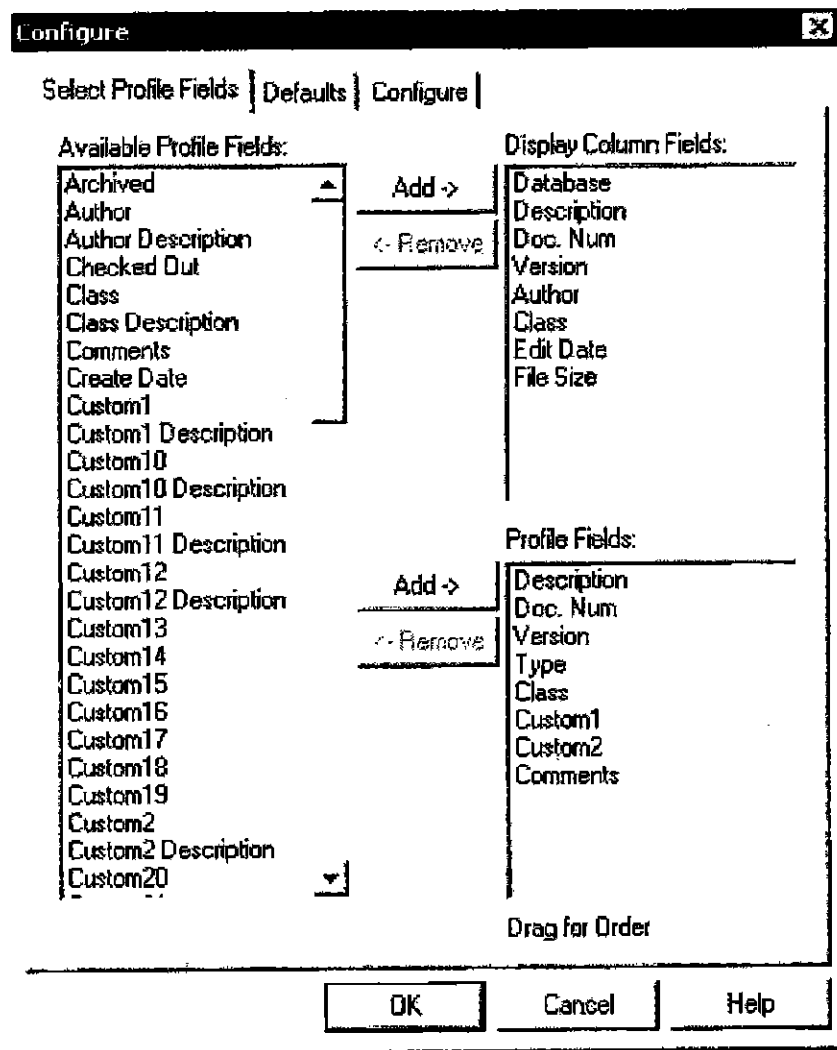
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Figure 6.3: *Configure* dialog, *Select Profile Fields* tab

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**.

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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

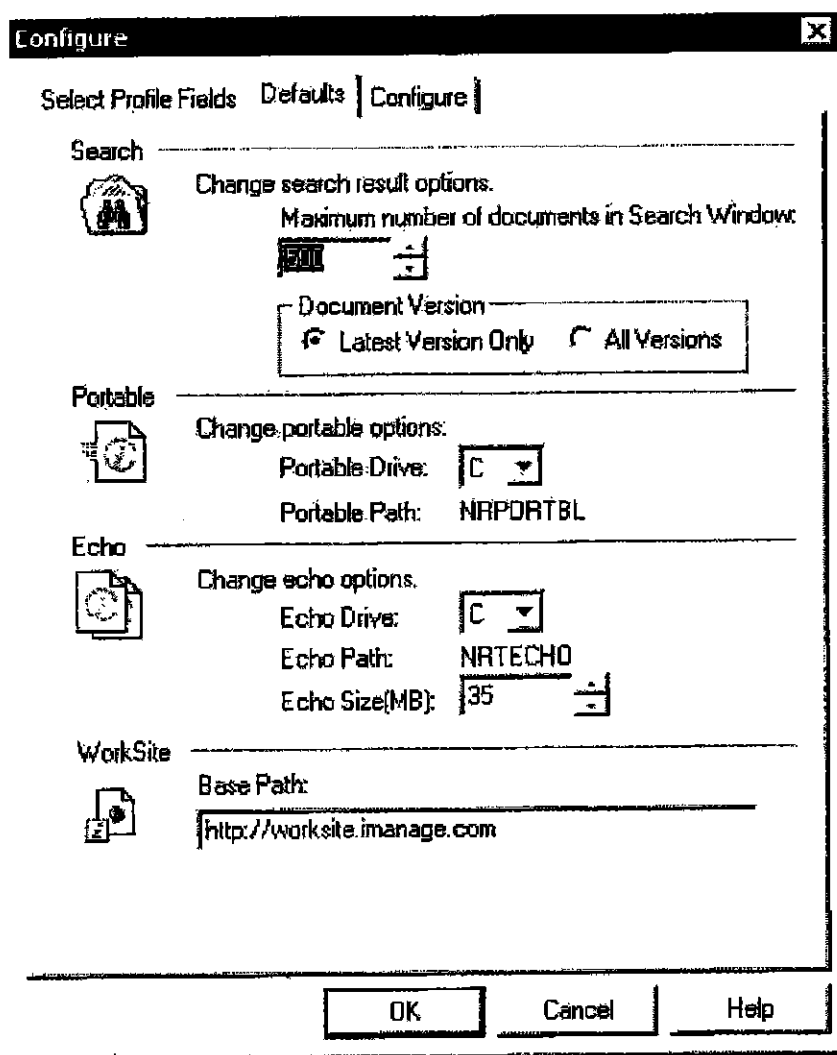A number of different system settings are completed in the **Default** tab of the *Display Options* dialog.

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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.

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- 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.

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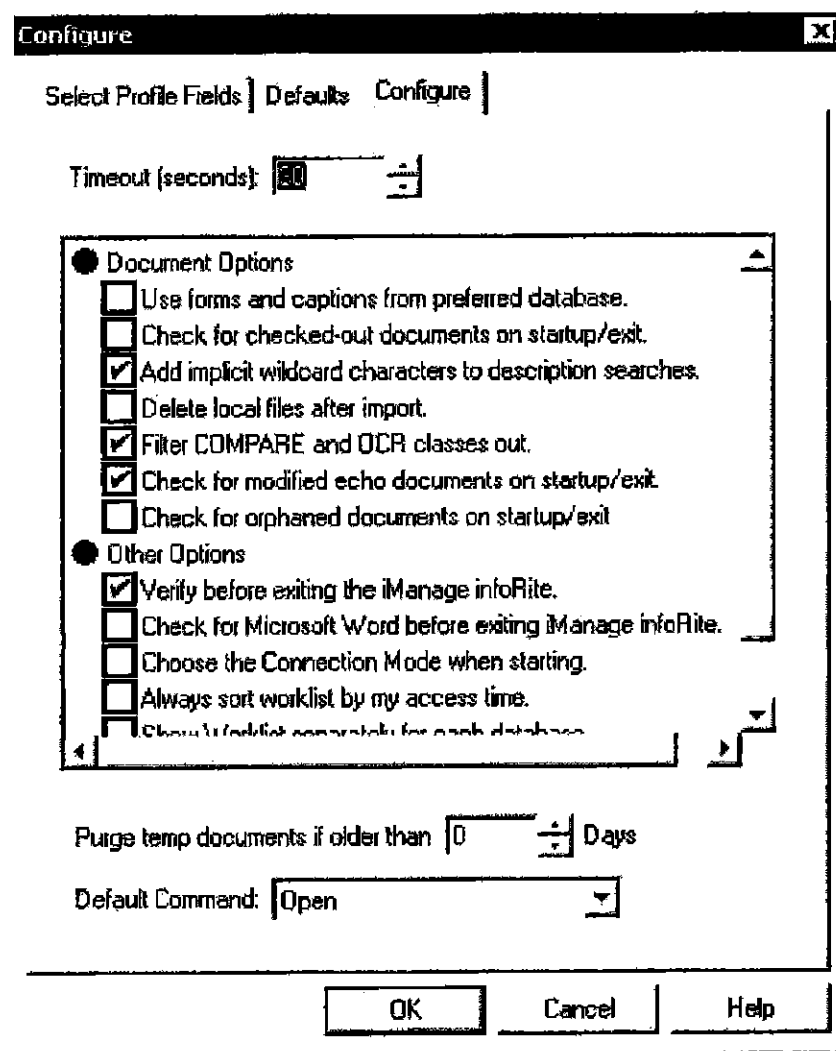
Figure 6.5: *Advanced Options* dialog, **Defaults** tab

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.

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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.
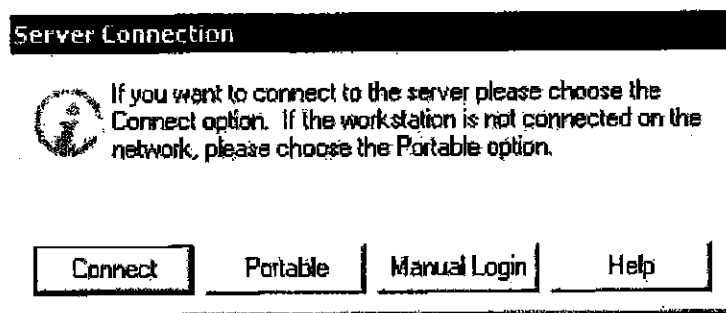
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Figure 6.6: *Server Connection* dialog

- 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.

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.

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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

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

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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.

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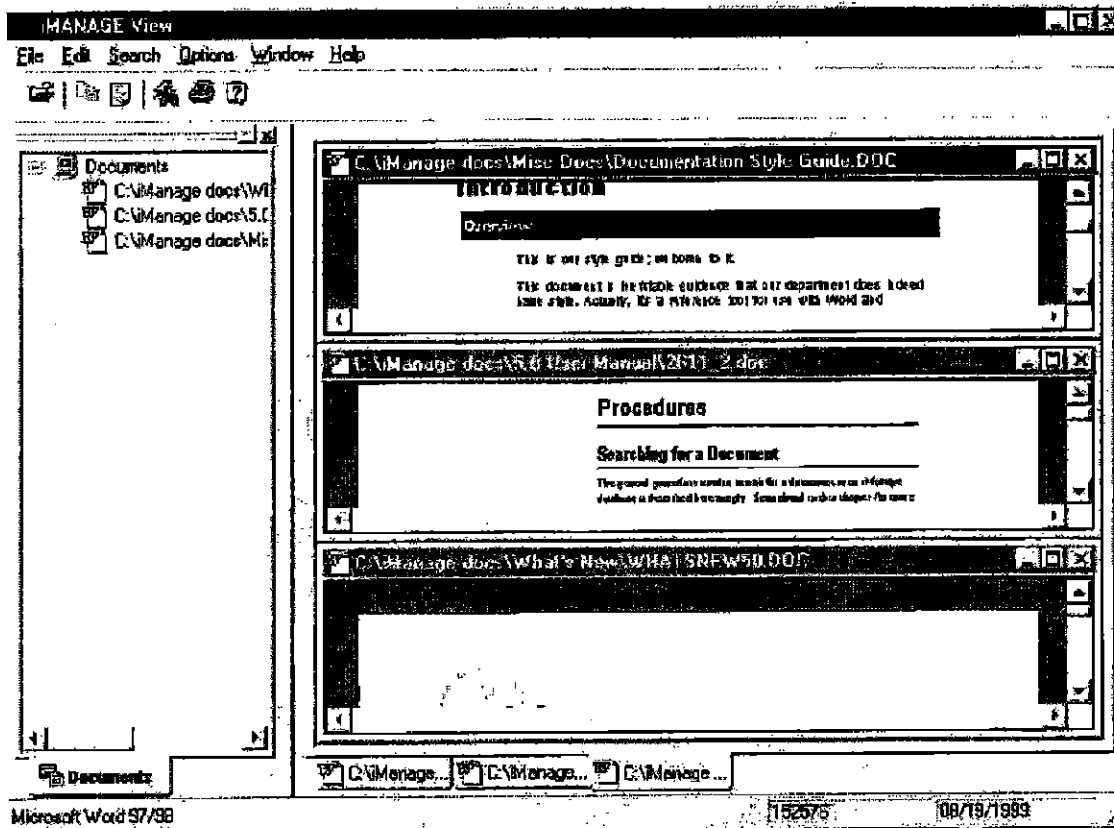
Figure 7.1: *iManage View* with documents displayed in cascade format

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.

AUT0020166
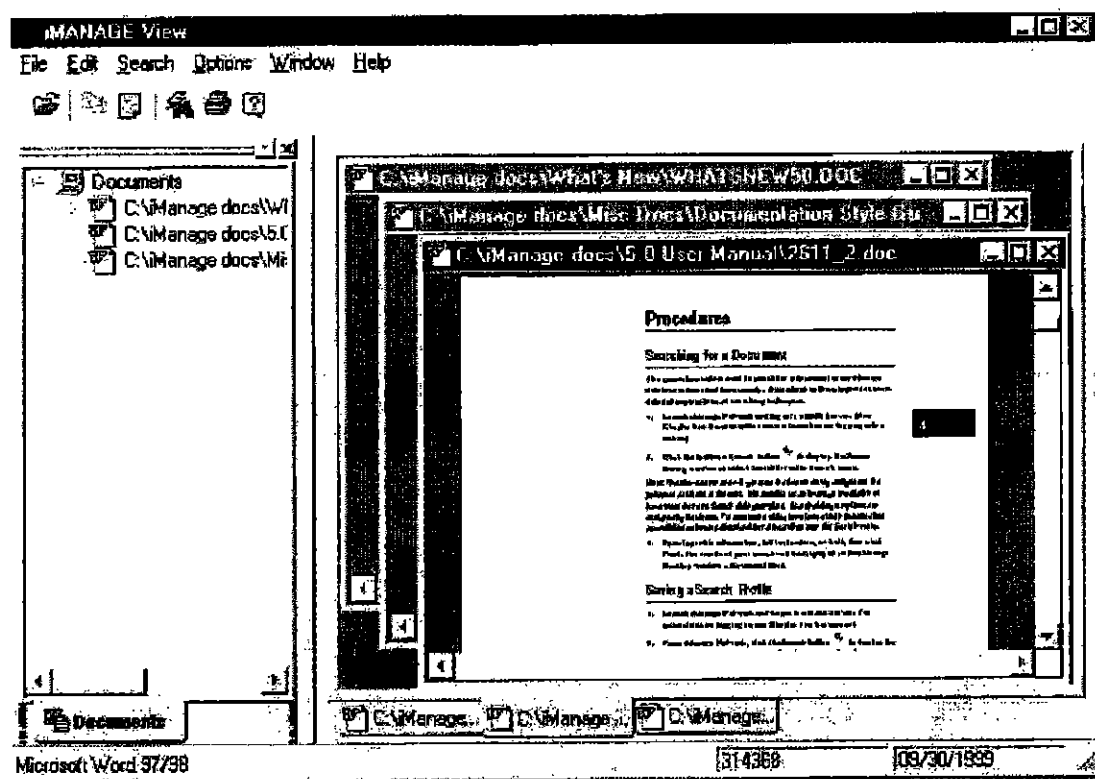
Figure 7.2: *iManage View* with documents displayed in cascade format

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.

AUT0020167
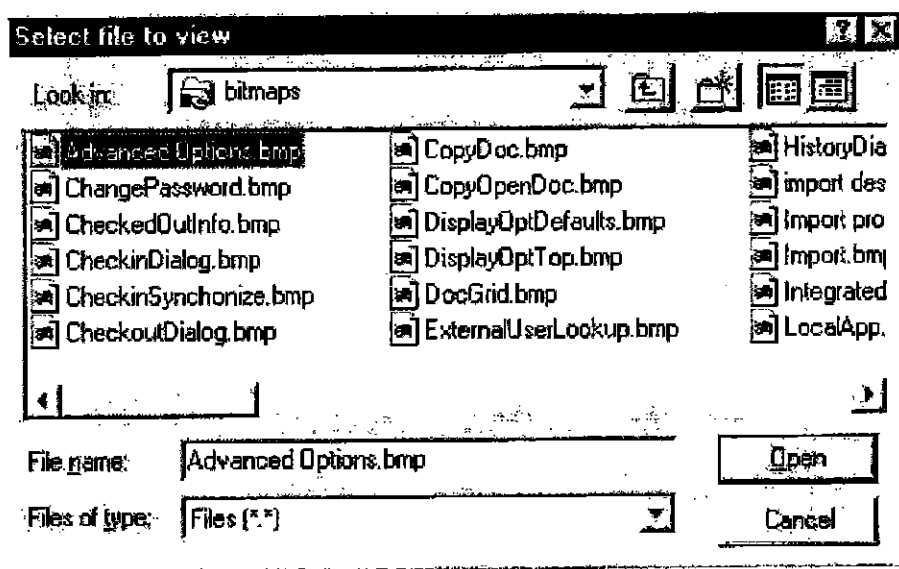
Figure 7.3: *Select Local File to View* dialog box

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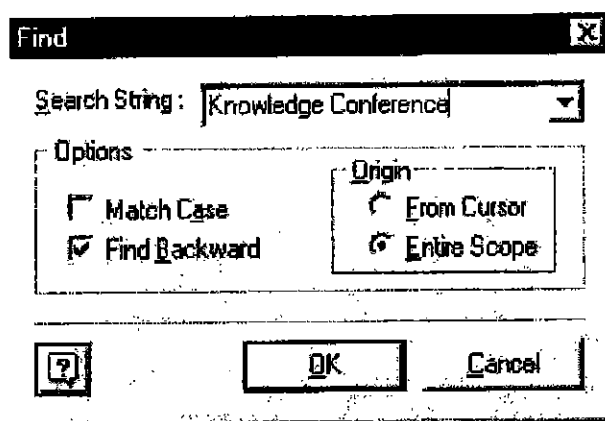
Figure 7.4: You can use the *Find* dialog box to search the full text of any documents displayed in iManage View

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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.

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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.

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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:

- **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.

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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.
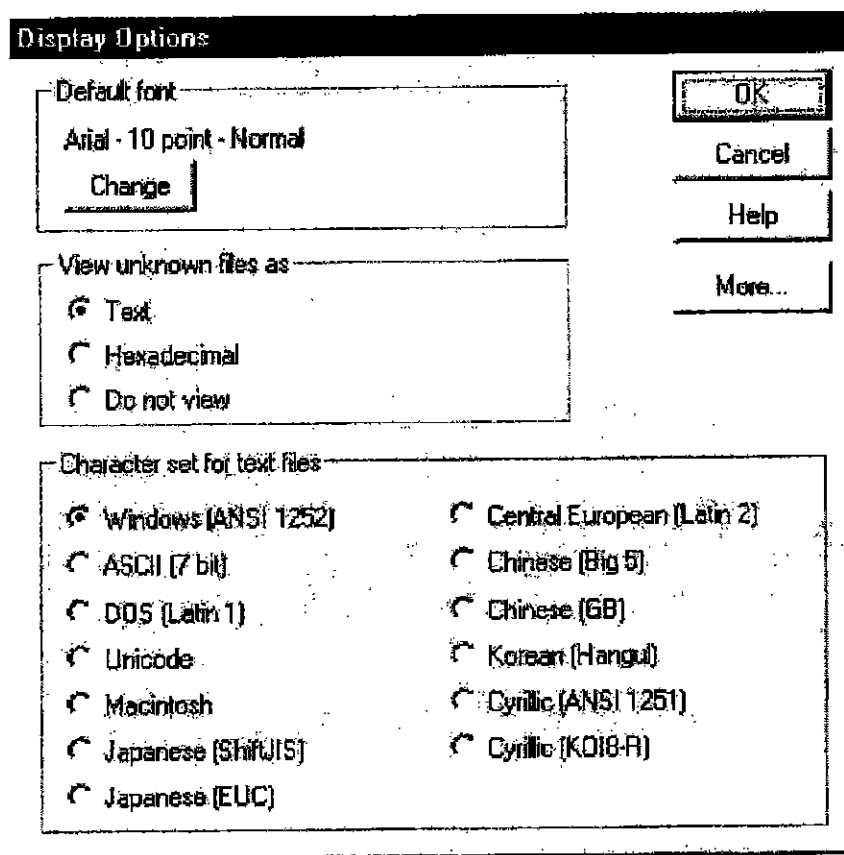
Figure 7.5: *Display Options* dialog box

- 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.

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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.

7
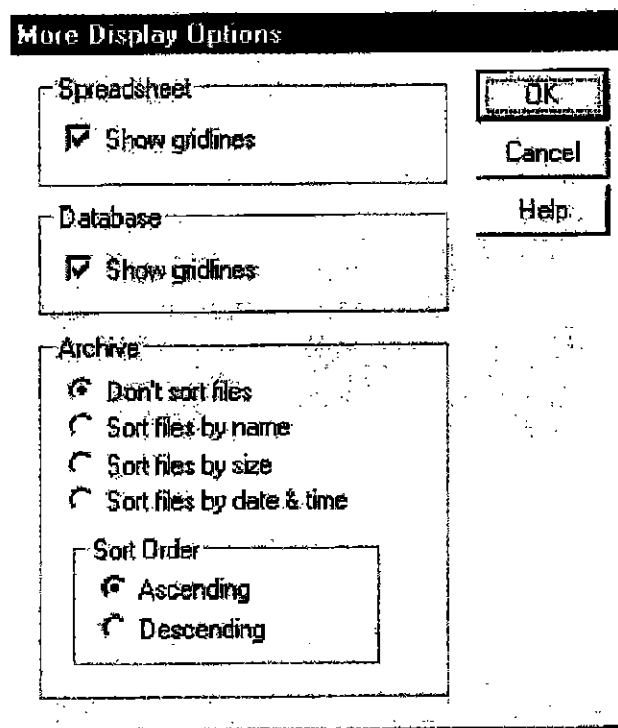
Figure 7.6: *More Display Options* dialog box

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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 <u>cannot</u> 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 <u>Chapter 9:</u> <u>*Using Echo Documents*</u>.

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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.

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Checkout ☒

Document information

Database: Finance

Number: 414   Version: 1

Description: Project Plan

Options

☑ Portable Checkout

Destination Path:

Details

Due Date: 6/21/01 ▼

Comments:

[OK] [Cancel] [Help]

8

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.
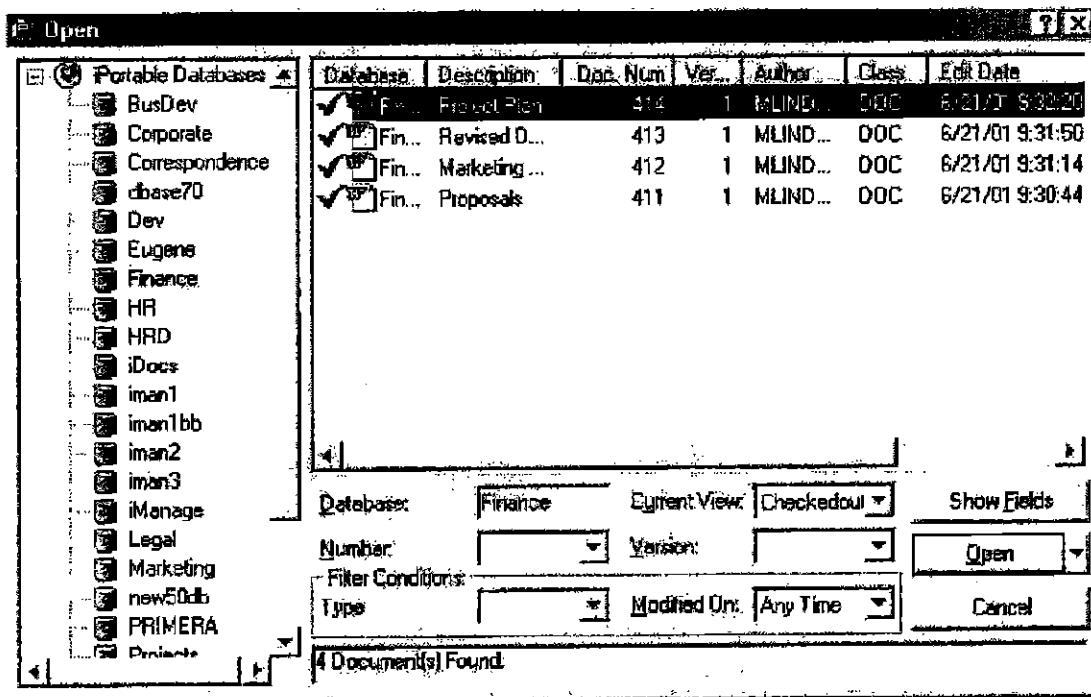
Figure 8.2: *Integrated Portable Desktop* dialog box

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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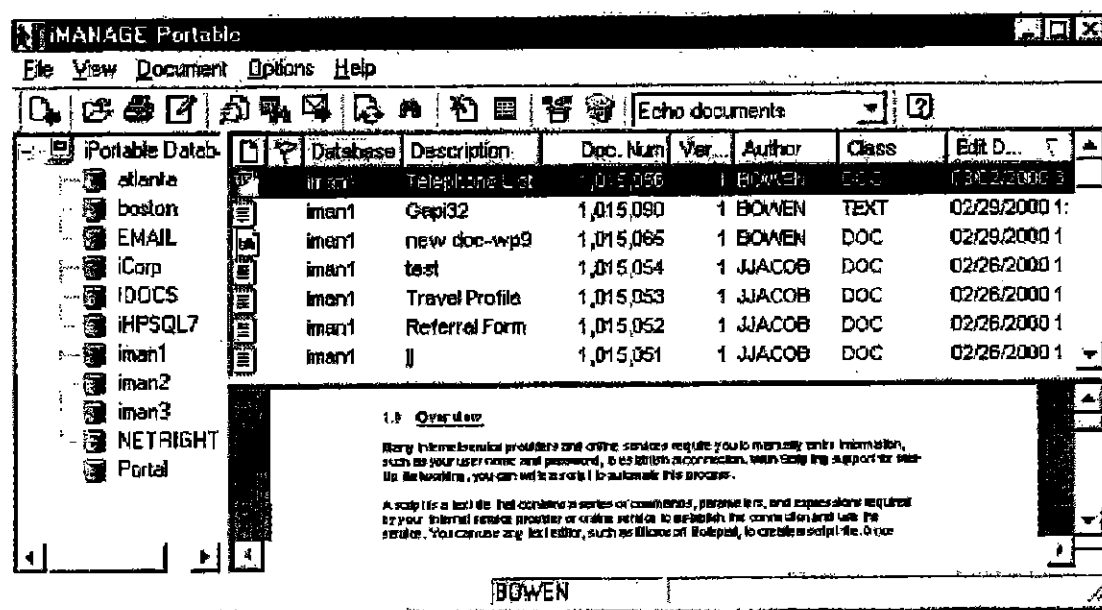
Figure 8.3: *iManage Portable Application Desktop* window

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 ![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-

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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.
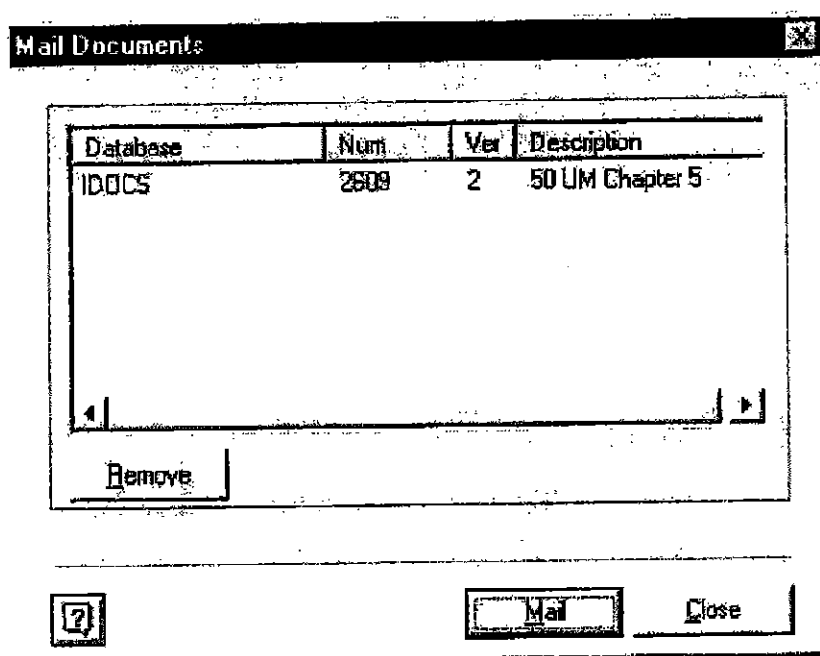
Figure 8.4: *Mail Documents* window

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.
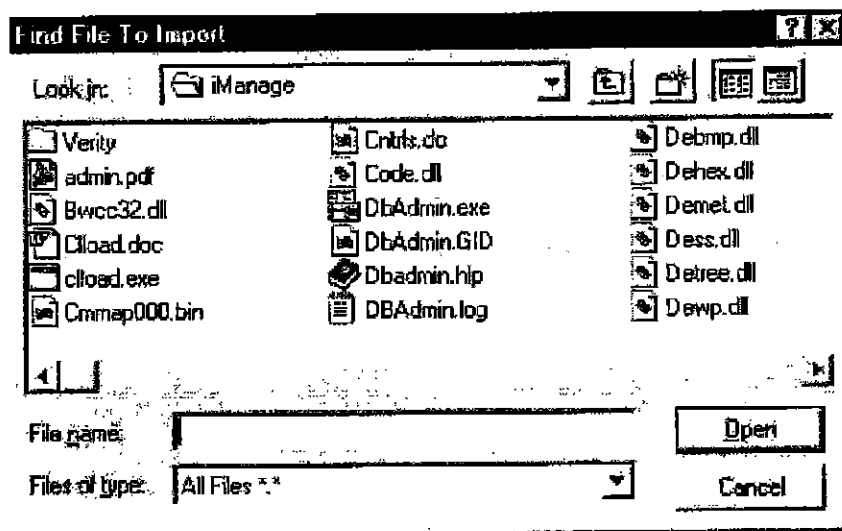
Figure 8.5: *Find File To Import* dialog box

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.

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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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CHAPTER 9
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.

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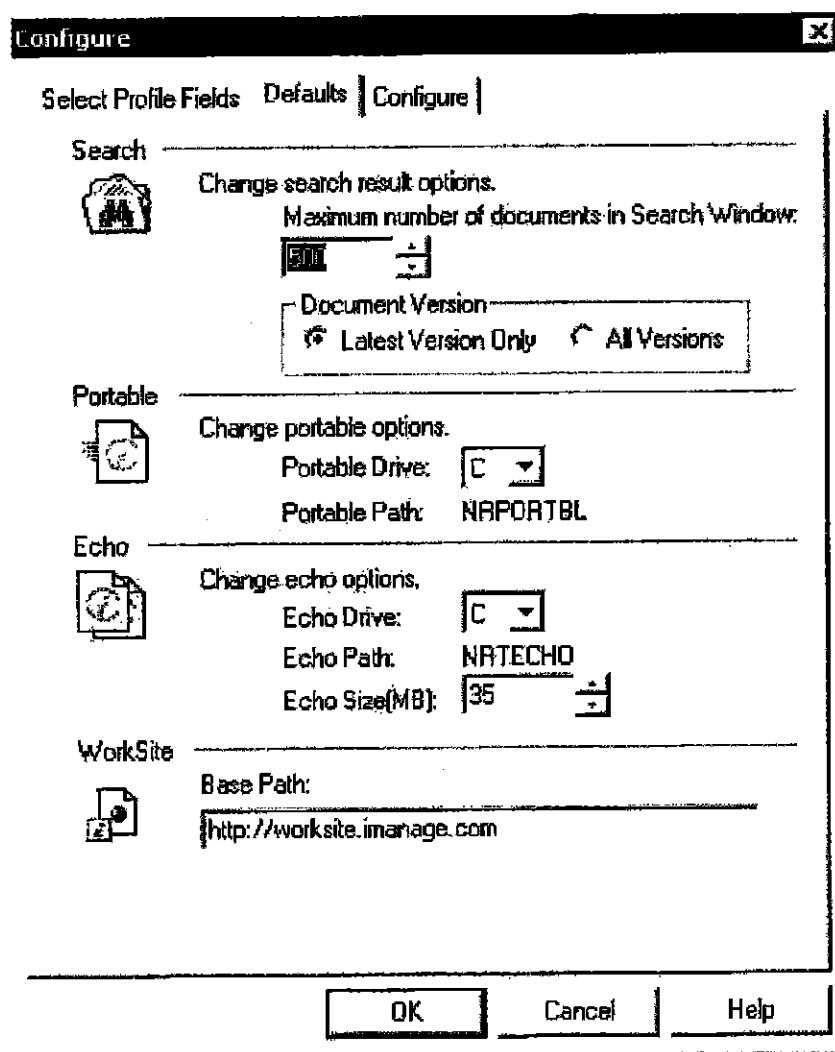
Figure 9.1: *Display Options* dialog where Echo defaults are set.

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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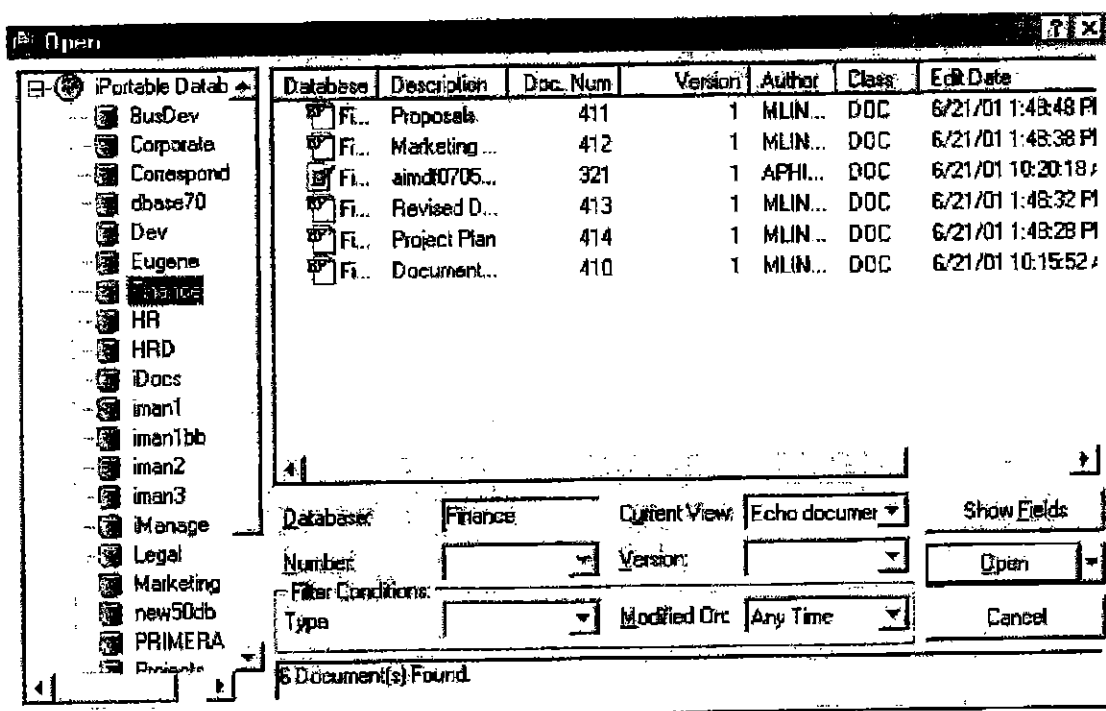
Figure 9.2: Integrated Portable Desktop

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

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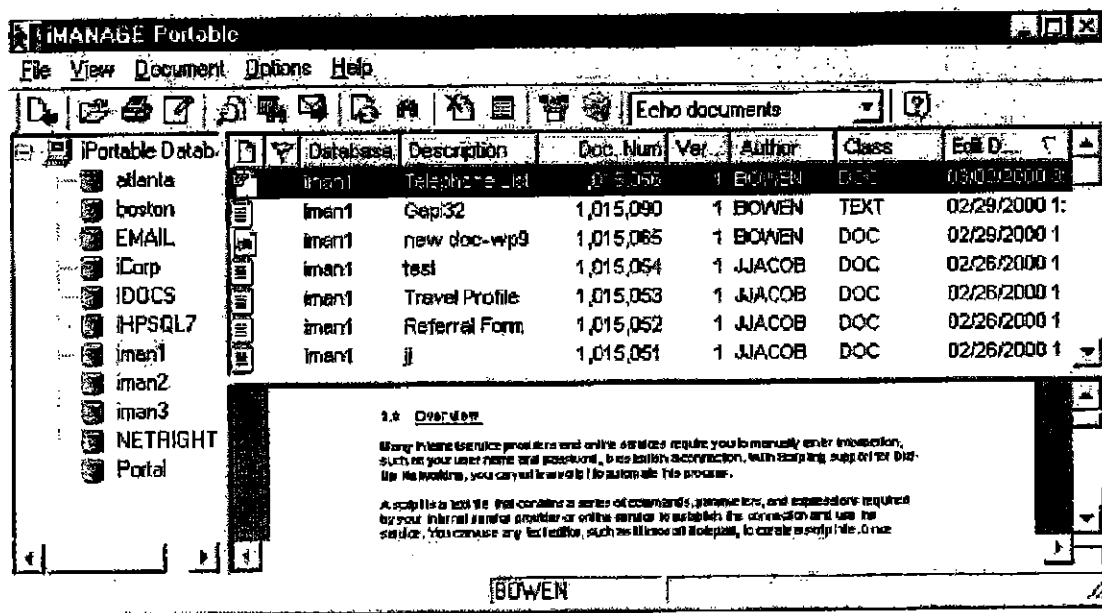
Figure 9.3: iManage Portable Desktop Window

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.

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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 >>
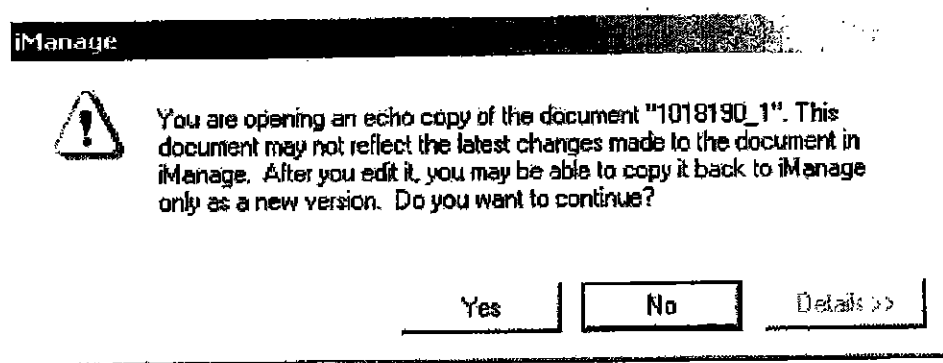
Figure 9.3: Echo document warning message

View Echo Documents:

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

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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 🗑️. 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.
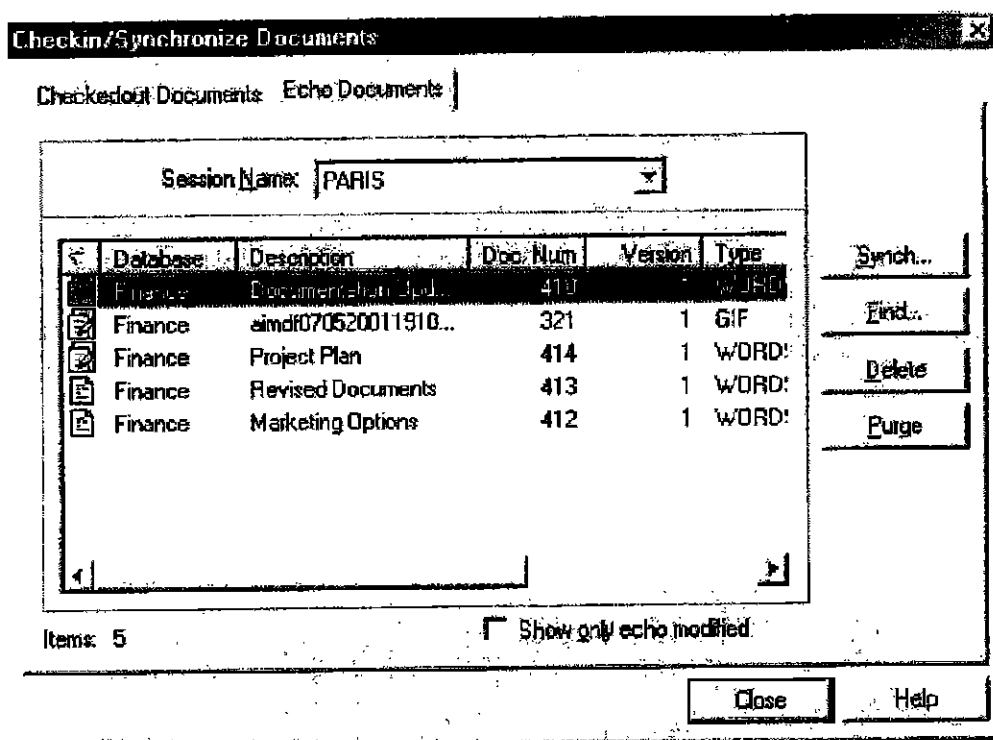
Figure 9.4: *Synchronize/Purge Echo Documents* dialog box

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.

```
┌─────────────────────────────────────────────────────────────────[X]─┐
│ Confirm Synchronize                                                  │
│ ┌─ Document Information ─────────────────────────────────────────┐   │
│ │  ≣   Number:       1,018,906                                   │   │
│ │      Version:      1                                           │   │
│ │      Description:  iManage Travel Profile                      │   │
│ └────────────────────────────────────────────────────────────────┘   │
│ ┌─ Echo Document ──────────────┐  ┌─ Database Document ──────────┐   │
│ │  ▤  Last edit date: 11/15/2000│  │  ▤  Last edit date: 11/15/2000│  │
│ │     Last edit time: 14:49:00  │  │     Last edit time: 13:22:44  │  │
│ │     File size:      45.50 KB  │  │     File size:      46.50 KB  │  │
│ │     Last user:      BOWEN     │  │     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.

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- 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:
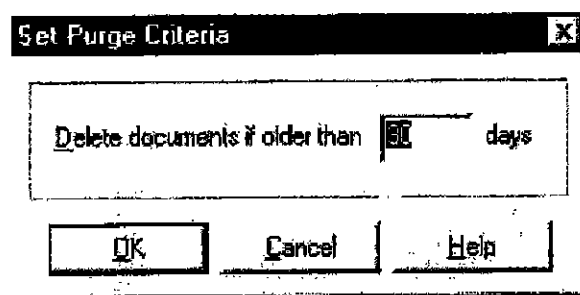
Figure 9.6: *Set Purge Criteria* dialog box

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:

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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.
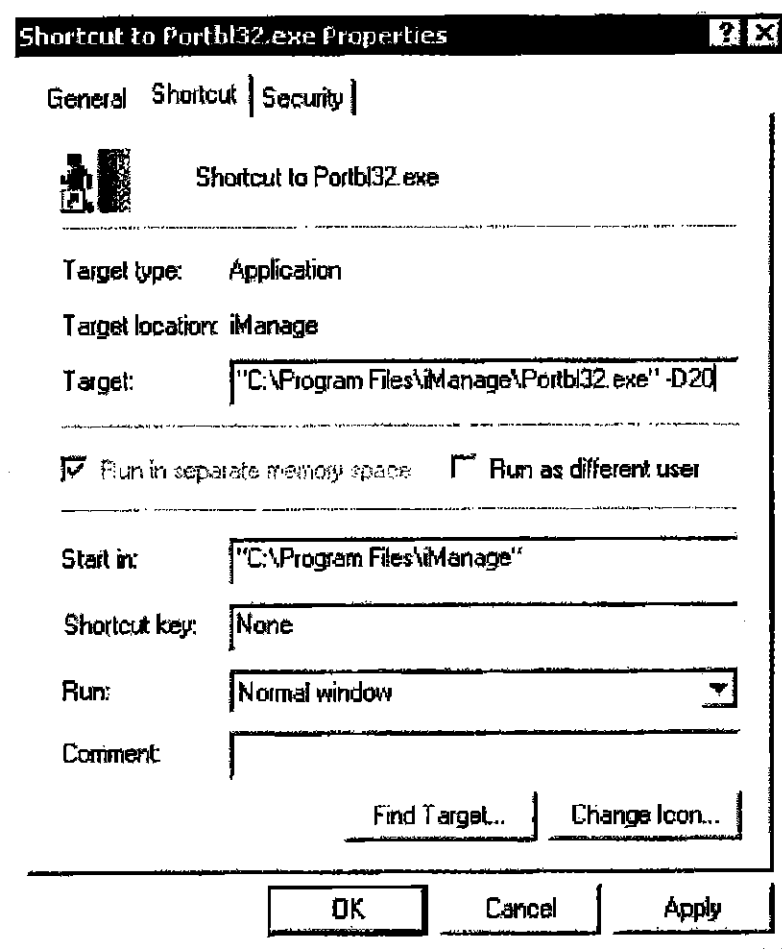
Figure 9.7: *Shortcut Properties* dialog box

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.

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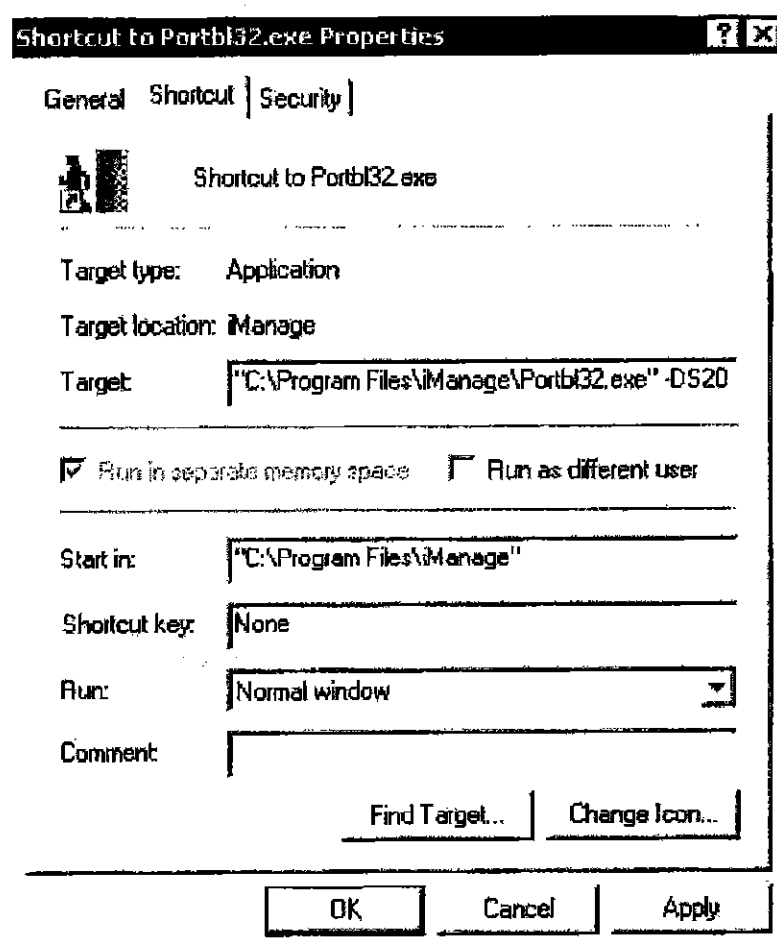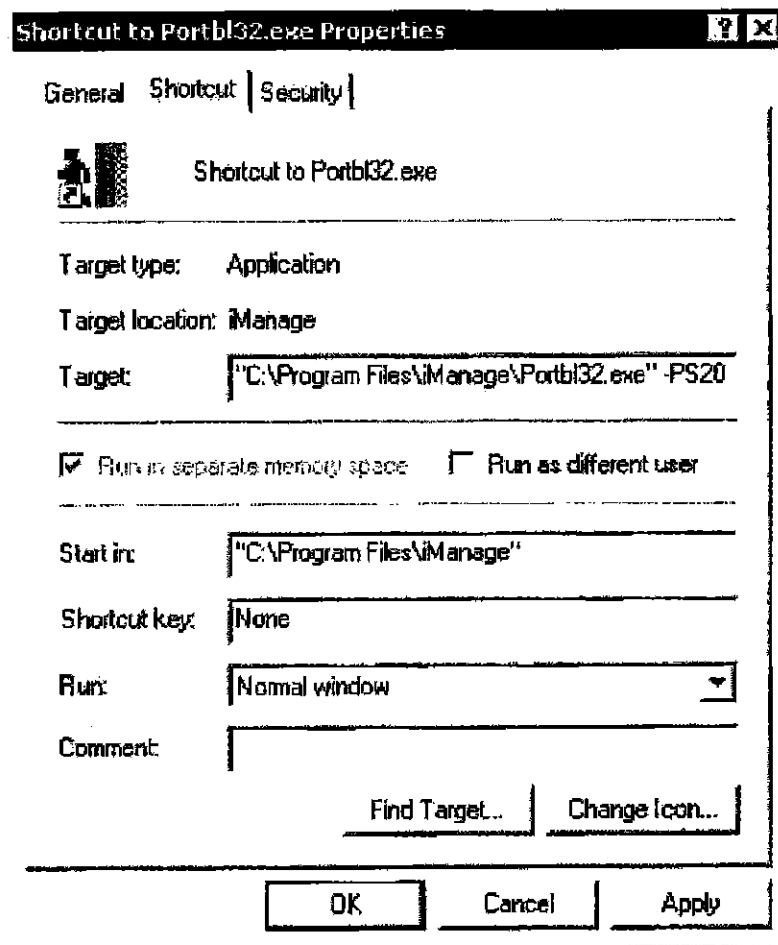
Figure 9.9: *Shortcut Properties* silent mode dialog box to purge echo documents for all users

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