

# A

## Configuring Application Integration for PowerDOCS

### **In This Appendix**

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This chapter explains the steps necessary to configure and use applications with PowerDOCS. These steps assume that you already have a DOCS library set up. If you do not, see Chapter 7, “Library Maintenance,” of the *DOCSFusion Setup and Administration Guide*.

## Steps Necessary to Set Up Application Integration with PowerDOCS

1. Determine whether the applications you want to set up with PowerDOCS are integrated using Interceptor, Passive Integration, or ODMA (Open Document Management API). See “Integration Methods” on page 75, to determine how your applications are integrated.
2. Use Application Maintenance to add launch methods for applications that will use new DDE (Dynamic Data Exchange) settings with PowerDOCS. See “Applications Using DDE Settings” on page 77, for which applications need new launch methods for use with PowerDOCS.
3. If you want to integrate applications that use ODMA, see “Integrating Applications with ODMA” on page 99.
4. If you want to integrate applications that use Interceptor, see “Integrating Applications with Interceptor” on page 99.
5. After you have turned on the applications in Interceptor that you want your users to have access to, see “Exporting the Interceptor Settings” on page 113, for sharing those settings with your users.

**IMPORTANT** It is strongly recommended that you not use Application Integration with PowerDOCS and DOCS Open on the same workstation.

# Integration Methods

There are several ways to integrate applications with PowerDOCS:

- **Interceptor**—an integration method that monitors when Open and Save As dialog boxes are called. Applications monitored through Interceptor should be set to Full Integration- see Chapter 8, “Library Maintenance,” of the *DOCSFusion Setup and Administration Guide*.
- **ODMA**—a document management integration method built into applications by their vendors.
- **Directory Monitoring**—a method that tracks documents created in applications not integrated with Interceptor, ODMA, or Passive Integration. You will be prompted to profile the document on saving the document to a monitored directory. To set up an application to use Directory Monitoring, see Chapter 7, “Library Maintenance,” of the *DOCSFusion Setup and Administration Guide*.
- **Passive Integration**—an integration method that allows you to profile Microsoft Word 97 and 2000, Microsoft Excel 97 and 2000, Microsoft Project 98 and 2000, and Adobe Acrobat 4.0 documents in PowerDOCS via a DOCS menu that is added to the application. You can bypass PowerDOCS and save in the native application using standard menus. For more information on Passive Integration, see Chapter 8 of the *PowerDOCS User’s Guide*.

**NOTE** The ability to use native dialog boxes may be disabled by your PowerDOCS administrator.

Table A.1 lists applications supported for use with PowerDOCS, charted by integration type and operating system.

**Table A.1 Application Integration by Operating System**

Application	Integration Type	Windows 95 & 98	Windows NT	Windows 2000
Adobe Acrobat Exchange 3.0	Interceptor	X	X	X
Adobe Acrobat 4.0	Passive Integration	X	X	X
Adobe Acrobat Reader 4.0x	Interceptor	X	X	X
AutoCAD R14	Interceptor	X	X	X
Corel Presentations 8	Interceptor	X	X	X
Corel Presentations 9	Interceptor	X	X	X
Corel Quattro Pro 8	Interceptor			X
Corel Quattro Pro 8	ODMA	X	X	
Quattro Pro 9	Interceptor	X	X	X
Corel WordPerfect 8	Interceptor			X
Corel WordPerfect 8	ODMA	X	X	
WordPerfect 9	Interceptor			X
WordPerfect 9	ODMA	X	X	
Lotus 1-2-3, 97	Interceptor	X	X	X
Lotus 1-2-3, ME	Interceptor	X	X	X
Microsoft Excel 97	Interceptor	X	X	X
Microsoft Excel 97	Passive Integration	X	X	X
Microsoft Excel 2000	Interceptor	X	X	X
Microsoft Excel 2000	Passive Integration	X	X	X
Microsoft PowerPoint 97	ODMA	X	X	X

Application	Integration Type	Windows 95 & 98	Windows NT	Windows 2000
Microsoft PowerPoint 2000	ODMA	X	X	X
Microsoft Project 98	Passive Integration	X	X	X
Microsoft Project 2000	Passive Integration	X	X	X
Microsoft Word 97	ODMA	X	X	X
Microsoft Word 97	Passive Integration	X	X	X
Microsoft Word 2000	ODMA	X	X	X
Microsoft Word 2000	Passive Integration	X	X	X
Visio 5	Interceptor	X	X	X
Visio 2000	Interceptor	X	X	X

## Applications Using DDE Settings

To set up certain applications with PowerDOCS, you must create an additional set of launch methods to enter new Dynamic Data Exchange (DDE) settings used with PowerDOCS. For example, if you have a launch method for Excel already set up in Application Maintenance for use with DOCS Open, you may need to create a new launch method for use with PowerDOCS that is identical to the original launch method except for the specific DDE settings. We recommend that you change the description field to “Excel - PowerDOCS,” to differentiate between the two launch methods.

**NOTE** Before integrating applications with PowerDOCS, verify that the application settings listed in Library Maintenance match those shown in the section entitled “DDE Settings for Specific Applications” on page 80.

Corel Suite applications are configured slightly different. Refer to “Application Integration for Corel Applications” on page 89.

The applications that require specific DDE settings are:

- Adobe Acrobat Exchange 3.0.x
- Adobe Acrobat 4.0x
- Adobe Acrobat Reader 4.0x
- Microsoft Excel 97 and 2000
- Microsoft Word 97 and 2000
- Microsoft PowerPoint 97 and 2000
- Microsoft Project 98 and 2000
- Corel WordPerfect 8.0 and 9.0
- Corel Presentations 8.0 and 9.0
- Corel Quattro Pro 8.0 and 9.0
- Visio 5 and 2000
- Lotus 1-2-3, 97
- Lotus 1-2-3, ME

To create the additional launch methods:

1. From the Windows Start menu, select Programs>DOCSFusion Services>DOCS Admin Tools>Library Maintenance.
2. Double-click the Applications icon.
3. From the Application Maintenance Select dialog box, highlight the application that needs an additional PowerDOCS launch method and click OK.
4. Click Launch Methods from the Application Maintenance dialog box.
5. Select a launch method and click Copy.

6. In order to differentiate between the DOCS Open launch method and the PowerDOCS launch method, edit the Launch Method Description to refer to PowerDOCS. For example, edit the Excel 97 Launch Method Description as “Excel 97 - (PowerDOCS).”
7. Click DDE Settings.
8. Specify the new DDE settings, listed in Table A.2 through Table A.23, in the Application DDE Settings dialog box.

**IMPORTANT** You must refresh the DOCSFusion cache when changes have been made in Library Maintenance. To do this, go to the DOCSFusion server and access the DOCSFusion Server Manager. Select the Caches tab and click Refresh All. The next time you launch PowerDOCS, your changes will take effect.

For more instructions on setting up applications in Application Maintenance, see Chapter 8, “Library Maintenance,” in the *DOCSFusion Setup and Administration Guide*.

**REMINDER** It is strongly recommended that you not use Application Integration with PowerDOCS and DOCS Open on the same workstation.

## DDE Settings for Specific Applications

### DDE Settings for Adobe Acrobat

Table A.2 Acrobat Exchange 3.0.x Launch Method Settings

Integration Type	Full Integration
Command Line Parameters	%FULLPATH

#### Acrobat Exchange 3.0.x DDE Settings - Open

Application Name	ACROVIEW
Topic Name	CONTROL
Command	[FileOpen("%1")]
Command (not running)	[FileOpen("%1")]

#### Acrobat Exchange 3.0.x DDE Settings - Print

Application Name	AIM
Topic Name	AcroExch.Document
Command	Print
Command (not running)	Print



**Table A.3 Acrobat 4.0x Launch Method Settings**

<b>Integration Type</b>	Full Integration
<b>Command Line Parameters</b>	%FULLPATH

**Acrobat 4.0x DDE Settings - Open**

<b>Application Name</b>	ACROVIEW
<b>Topic Name</b>	CONTROL
<b>Command</b>	[FileOpenEx("%1")]
<b>Command (not running)</b>	[FileOpenEx("%1")]

**Acrobat 4.0x DDE Settings - Print**

<b>Application Name</b>	ACROVIEW
<b>Topic Name</b>	CONTROL
<b>Command</b>	[FilePrintSilentEx("%1")]
<b>Command (not running)</b>	[FilePrintSilentEx("%1")][AppQuit]

**Table A.4 Acrobat Reader 4.0x Launch Method Settings**

<b>Integration Type</b>	Full Integration
<b>Command Line Parameters</b>	%FULLPATH

**Acrobat Reader 4.0x DDE Settings - Open**

<b>Application Name</b>	ACROVIEW
<b>Topic Name</b>	CONTROL
<b>Command</b>	[FileOpenEx("%1")]
<b>Command (not running)</b>	[FileOpenEx("%1")]

**Acrobat Reader 4.0x DDE Settings - Print**

<b>Application Name</b>	ACROVIEW
<b>Topic Name</b>	CONTROL
<b>Command</b>	[FilePrintSilentEx("%1")]
<b>Command (not running)</b>	[FilePrintSilentEx("%1")]

## Visio DDE Settings

To integrate Visio 5 and Visio 2000 you will need to disable ODMA integration in addition to using the specified DDE settings.

1. Disable ODMA for each application by adding the following Keys to the Windows Registry.

HKCR\VISIO

HKCR\VISIO\ODMA32

To make this task easier, Registry files have been provided. The files are found in the Tools>PowerDOCS directory on the Fusion Family CD. As the administrator, you can make a master registry file and provide it to your users. Please refer to “Exporting the Registry File” on page 65 and “Importing a Registry File” on page 115.

**Table A.5 Visio 5 Launch Method Settings**

<b>Integration Type</b>	Full Integration
<b>Command Line Parameters</b>	“%FULLPATH”

**Visio 5 DDE Settings - Open, None**  
**Visio 5 DDE Settings - Print**

<b>Application Name</b>	AIM
<b>Topic Name</b>	Visio.Drawing.5
<b>Command</b>	Print
<b>Command (not running)</b>	Print

**Table A.6 Visio 2000 Launch Method Settings**

<b>Integration Type</b>	Full Integration
<b>Command Line Parameters</b>	"%FULLPATH"

**Visio 2000 DDE Settings - Open, None**

**Visio 2000 DDE Settings - Print**

<b>Application Name</b>	AIM
<b>Topic Name</b>	Visio.Drawing.6
<b>Command</b>	Print
<b>Command (not running)</b>	Print

## DDE Settings for Microsoft Office Applications

Table A.7 Microsoft Excel 97 and 2000 Launch Method Settings

Integration Type	Full Integration
Command Line Parameters	

### Microsoft Excel DDE Settings - Open

Application Name	EXCEL
Topic Name	SYSTEM
Command	[open("%1")]
Command (not running)	[open("%1")]

### Microsoft Excel DDE Settings - Print

Application Name	EXCEL
Topic Name	SYSTEM
Command	[open("%1")][print?()][close()]
Command (not running)	[open("%1")][print?()][quit()]

**NOTE** To execute a Print command from the Recently Edited documents list without a pause at the printer setup dialog box, remove the ? from the command syntax.

**Table A.8 Microsoft Word 97 and 2000 Launch Method Settings**

<b>Integration Type</b>	ODMA Compliant
<b>Command Line Parameters</b>	/ND

**Microsoft Word DDE Settings - Open**

<b>Application Name</b>	WINWORD
<b>Topic Name</b>	SYSTEM
<b>Command</b>	[FileOpen("%1")]
<b>Command (not running)</b>	[FileOpen("%1")]

**Microsoft Word DDE Settings - Print**

<b>Application Name</b>	WINWORD
<b>Topic Name</b>	SYSTEM
<b>Command</b>	[FileOpen("%1")][FilePrint 0][DocClose 2]
<b>Command (not running)</b>	[FileOpen("%1")][FilePrint 0][FileExit 2]

**Table A.9 Microsoft PowerPoint 97 and 2000 Launch Method Settings**

<b>Integration Type</b>	ODMA Compliant
<b>Command Line Parameters</b>	%FULLPATH

**Microsoft PowerPoint DDE Settings - Open, None**  
**Microsoft PowerPoint DDE Settings - Print**

<b>Application Name</b>	AIM
<b>Topic Name</b>	PowerPoint.Show.8
<b>Command</b>	Print
<b>Command (not running)</b>	Print

**Table A.10 Microsoft Project 98 and 2000 Launch Method Settings (Passive Integration Only)**

<b>Integration Type</b>	Full Integration
<b>Command Line Parameters</b>	

**Microsoft Project DDE Settings - Open**

<b>Application Name</b>	WINPROJ
<b>Topic Name</b>	SYSTEM
<b>Command</b>	[FileOpen"%1"]
<b>Command (not running)</b>	[FileOpen"%1"]

**Microsoft Project DDE Settings - Print**

<b>Application Name</b>	WINPROJ
<b>Topic Name</b>	SYSTEM
<b>Command</b>	FileOpen "%1":FilePrint 1, 32767
<b>Command (not running)</b>	FilePrint 1,32767:FileExit 0



# Application Integration for Corel Applications

When configuring integration for Corel Suite applications, you must take into account both the application version and the operating system of the computer on which the application will be running.

When configuring DDE settings for Corel WordPerfect 8.0 and 9.0, Presentations 8.0 and 9.0, and Quattro Pro 9.0, you will need to set up two launch methods, one for Open and another for Print. Quattro Pro 8.0 only requires one launch method.

## **Corel Suite Application Integration for Windows 95, 98, and Windows NT**

On a Windows 95, Windows 98 or Windows NT system, Quattro Pro 8.0 and WordPerfect 8.0 and 9.0 can be integrated without further modifications other than the appropriate launch methods.

To integrate Quattro Pro 9.0, Presentations 8.0, and Presentations 9.0 you will need to disable ODMA integration and turn off enhanced dialog boxes. See “Disabling ODMA Integration for Corel Suite Applications” on the next page

## **Corel Suite Application Integration for Windows 2000**

On Windows 2000 systems, all Corel Suite applications require you to disable ODMA integration and turn off enhanced dialog boxes.

Instructions for disabling ODMA and turning off enhanced dialog boxes are listed on the next page. On the pages following these instructions the specific launch method/DDE settings that need to be configured are listed.

### **IMPORTANT**

The Launch methods listed on the following pages may instruct you to set the launch method to ODMA Compliant. If you are disabling ODMA integration, you must set the launch method to Full Integration as instructed in step 3, below.

## Disabling ODMA Integration for Corel Suite Applications

1. Disable ODMA for each application by adding the following Keys to the Windows Registry.

WordPerfect:

```
[HKEY_CLASSES_ROOT\WORDPERFECT]
```

```
[HKEY_CLASSES_ROOT\WORDPERFECT\ODMA32]
```

Quattro Pro:

```
[HKEY_CLASSES_ROOT\QPW]
```

```
[HKEY_CLASSES_ROOT\QPW\ODMA32]
```

Presentations:

```
[HKEY_CLASSES_ROOT\PRESENTATIONS]
```

```
[HKEY_CLASSES_ROOT\PRESENTATIONS\ODMA32]
```

To make this task easier, Registry files have been provided. The files are found in the Tools>PowerDOCS directory on the Fusion Family CD.

As the administrator, you can make a master registry file and provide it to your users. Please refer to “Exporting the Registry File” on page 65 and “Importing a Registry File” on page 115.

2. Within each application, clear the Use enhanced file dialogs option:

In WordPerfect select Tools > Settings > Files. Clear the Use enhanced file dialogs selection from the Document tab.

In Quattro Pro, select Tools > Settings. From the File Options tab, clear the Use enhanced file dialogs selection.

In Presentations, select Tools > Settings > Environment. From the Options tab, clear the Use enhanced file dialogs selection.

3. Go to Library Maintenance and edit the launch methods for each application to match the application settings shown below.
4. Enable the launch method in Interceptor. Refer to “Steps Necessary to Set Up Application Integration with PowerDOCS” on page 74.

## Specific DDE Settings for Corel Suite Applications

**Table A.11 Corel WordPerfect 8.0 Launch Method Settings - Open**

<b>Integration Type</b>	ODMA Compliant for Windows 9x & NT Full Integration for Windows 2000
<b>Command Line Parameters</b>	/ddeex

### Corel WordPerfect 8.0 DDE Settings - Open

<b>Application Name</b>	WPWin8_Macros
<b>Topic Name</b>	COMMANDS
<b>Command</b>	Display(1) FileOpen("%1") WPActivate
<b>Command (not running)</b>	Display(1) FileOpen("%1") WPActivate

**Table A.12 Corel WordPerfect 8.0 Launch Method Settings - Print**

<b>Integration Type</b>	ODMA Compliant for Windows 9x & NT Full Integration for Windows 2000
<b>Command Line Parameters</b>	/ddeex /smin :

**Corel WordPerfect 8.0 DDE Settings - Print**

<b>Application Name</b>	WPWin8_Macros
<b>Topic Name</b>	COMMANDS
<b>Command</b>	FileOpen("%1") PrintFullDoc() CloseNoSave(1)
<b>Command (not running)</b>	FileOpen("%1") PrintFullDoc() CloseNoSave(1)

**Table A.13 WordPerfect 9.0 Launch Method Settings - Open**

<b>Integration Type</b>	ODMA Compliant for Windows 9x & NT Full Integration for Windows 2000
<b>Command Line Parameters</b>	/ddeex

**WordPerfect 9.0 DDE Settings - Open**

<b>Application Name</b>	WPWin9_Macros
<b>Topic Name</b>	COMMANDS
<b>Command</b>	Display(1) FileOpen("%1") WPActivate
<b>Command (not running)</b>	Display(1) FileOpen("%1") WPActivate

**Table A.14 WordPerfect 9.0 Launch Method Settings - Print**

<b>Integration Type</b>	ODMA Compliant for Windows 9x & NT Full Integration for Windows 2000
<b>Command Line Parameters</b>	/ddeex /smin :

**WordPerfect 9.0 DDE Settings - Print**

<b>Application Name</b>	WPWin9_Macros
<b>Topic Name</b>	COMMANDS
<b>Command</b>	FileOpen("%1") PrintFullDoc() CloseNoSave(1)
<b>Command (not running)</b>	FileOpen("%1") PrintFullDoc() CloseNoSave(1)

**Table A.15 Corel Quattro Pro 8.0 Launch Method Settings**

<b>Integration Type</b>	ODMA Compliant for Windows 9x & NT Full Integration for Windows 2000
<b>Command Line Parameters</b>	

**Corel Quattro Pro 8.0 DDE Settings - Open**

<b>Application Name</b>	QPW
<b>Topic Name</b>	System
<b>Command</b>	{FileOpen "1%"}
<b>Command (not running)</b>	{FileOpen "1%"}

**Corel Quattro Pro 8.0 DDE Settings - Print**

<b>Application Name</b>	QPW
<b>Topic Name</b>	System
<b>Command</b>	{FileOpen "%1"}{Print?}{FileClose 0}
<b>Command (not running)</b>	{FileOpen "%1"}{Print?}{FileExit 0}

**Table A.16 Quattro Pro 9.0 Launch Method Settings - Open**

<b>Integration Type</b>	Full Integration
<b>Command Line Parameters</b>	%FULLPATH

**Quattro Pro 9.0 DDE Settings - Open**

<b>Application Name</b>	QPW
<b>Topic Name</b>	SYSTEM
<b>Command</b>	[open("%1")]
<b>Command (not running)</b>	[open("%1")]

**Table A.17 Quattro Pro 9.0 Launch Method Settings - Print**

<b>Integration Type</b>	Full Integration
<b>Command Line Parameters</b>	/dde

**Quattro Pro 9.0 DDE Settings - Print**

<b>Application Name</b>	QPW
<b>Topic Name</b>	SYSTEM
<b>Command</b>	[print("%1")]
<b>Command (not running)</b>	[print("%1")]

**Table A.18 Corel Presentations 8.0 Launch Method Settings - Open**

<b>Integration Type</b>	Full Integration
<b>Command Line Parameters</b>	/ddeex

**Corel Presentations 8.0 DDE Settings - Open**

<b>Application Name</b>	PRESENTATIONS
<b>Topic Name</b>	COMMAND
<b>Command</b>	ShellFileOpen("%1") PRActivate()
<b>Command (not running)</b>	ShellFileOpen("%1") PRActivate()

**Table A.19 Corel Presentations 8.0 Launch Method Settings - Print**

<b>Integration Type</b>	Full Integration
<b>Command Line Parameters</b>	/ddeex /pt

**Corel Presentations 8.0 DDE Settings - Print**

<b>Application Name</b>	PRESENTATIONS
<b>Topic Name</b>	COMMAND
<b>Command</b>	ShellPrintTo("%1")
<b>Command (not running)</b>	ShellPrintTo("%1") FileExit()



**Table A.20 Corel Presentations 9.0 Launch Method Settings - Open**

<b>Integration Type</b>	Full Integration
<b>Command Line Parameters</b>	/ddeex

**Corel Presentations 9.0 DDE Settings - Open**

<b>Application Name</b>	PRESENTATIONS
<b>Topic Name</b>	COMMAND
<b>Command</b>	ShellFileOpen("%1") PRActivate()
<b>Command (not running)</b>	ShellFileOpen("%1") PRActivate()

**Table A.21 Corel Presentations 9.0 Launch Method Settings - Print**

<b>Integration Type</b>	Full Integration
<b>Command Line Parameters</b>	/ddeex /pt

**Corel Presentations 9.0 DDE Settings - Print**

<b>Application Name</b>	PRESENTATIONS
<b>Topic Name</b>	COMMAND
<b>Command</b>	ShellPrintTo("%1")
<b>Command (not running)</b>	ShellPrintTo("%1") FileExit()

## DDE Settings for Lotus 1-2-3

Lotus 1-2-3 97 and Lotus 1-2-3 ME require 2 launch method settings, one for Open and one for Print.

**Table A.22 Lotus 1-2-3 Launch Method Settings - Open**

Integration Type	Full Integration
Command Line Parameters	%FULLPATH

Lotus 1-2-3 DDE Settings - Open, None

Lotus 1-2-3 DDE Settings - Print

Application Name	AIM
Topic Name	123Worksheet
Command	Print
Command (not running)	Print

**Table A.23 Lotus 1-2-3 Launch Method Settings - Print**

Integration Type	Full Integration
Command Line Parameters	-P %FULLPATH

Lotus 1-2-3 DDE Settings - Open, None

Lotus 1-2-3 DDE Settings - Print

Application Name	AIM
Topic Name	123Worksheet
Command	Print
Command (not running)	Print

## Integrating Applications with ODMA

ODMA is a document management integration method built into applications by their vendors. Some programs, such as Microsoft Word, can use either ODMA or Passive Integration. The two integration types should not be combined.

## Integrating Applications with Interceptor

Interceptor is installed with PowerDOCS. There are two ways that applications can be integrated using Interceptor, using the Interceptor Learning Tool or using Interceptor. In all cases, a launch method must be created in Library Maintenance.

### The Interceptor Learning Tool

The Interceptor Learning Tool (ILTWizard.exe) is used to integrate applications installed on the user's workstation. In most cases, these applications are not in the default list provided in Library Maintenance.

The Interceptor Learning Tool is located in the ...Tools\PowerDOCS\Interceptor Learning Tool folder on the Fusion Family CD. See **ILTWizard.PDF** for more information.

### Interceptor

Interceptor is the module that monitors when Open and SaveAs dialog boxes are called for specific applications integrated with PowerDOCS. It is represented by the system tray icon that is displayed when the user starts PowerDOCS.

Applications that are not currently integrated can be added to Interceptor manually.

# The Interceptor Module

You can use PowerDOCS Interceptor to:

- Enable or disable applications monitored by Interceptor.
- Edit Launch Method settings.
- Export the settings to a registry file that can be run on users' workstations to easily duplicate settings.
- Configure new applications.

Each of these tasks is described in the sections below. To configure a new application for integration with Interceptor, you can use the Interceptor Learning Tool or configure a new application directly from Interceptor.

## Launching the PowerDOCS Interceptor

1. Locate the Interceptor executable, `INTERCEPTOR.EXE`, in your PowerDOCS folder (by default, `...\Program Files\Hummingbird\PowerDOCS`) and double-click it. If you are not logged in to PowerDOCS, the login dialog box appears.

**NOTE** If you are logged in to PowerDOCS, the Interceptor will already be running. Proceed to step 3.

2. Once you are logged in to PowerDOCS, the Interceptor program icon is displayed along the bottom right corner of the desktop, in the system tray.

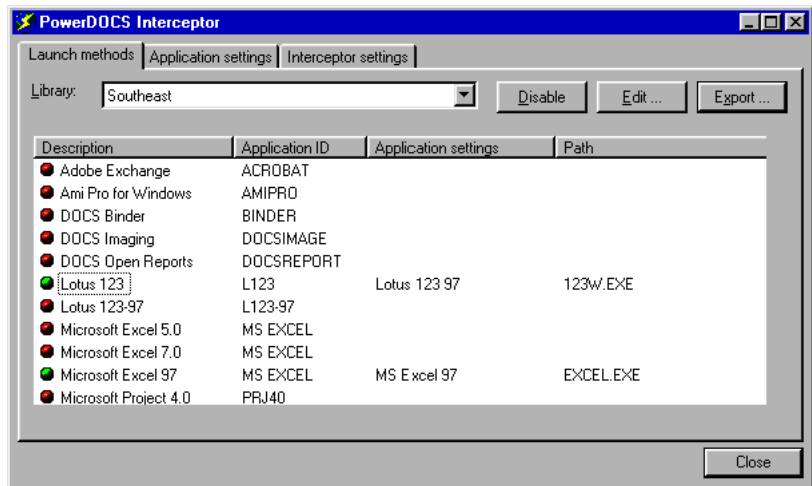
Figure A.1

*The Interceptor Icon*



- Double-click the Interceptor icon in the system tray. The PowerDOCS Interceptor dialog box appears. It contains a list of launch methods that are stored in Application Maintenance. The launch methods for the library you are logged in to are displayed by default. You can switch to a remote library by clicking the down arrow of the Library combo box.

Figure A.2

*PowerDOCS Interceptor*

**NOTE** Only applications that use Full Integration are listed.

## Configuring New Applications for Interceptor

The PowerDOCS Interceptor allows you to integrate new applications that do not already exist in Interceptor's list of launch methods. For both methods, you must create a launch method in Library Maintenance, using the DOCS Admin Tools.

You can integrate new applications in one of two ways:

- Use Interceptor directly or
- Use the Interceptor Learning Tool (ILT), located in the Tools>PowerDOCS>Interceptor Learning Tool folder on the Fusion Family CD. Instructions for using the ILT Wizard are found in **ILTWizard.PDF**.

### Integrating New Applications from the PowerDOCS Interceptor

You can integrate a new application directly from the PowerDOCS Interceptor. Once you have completed the following steps, the application you configured will be monitored by Interceptor. You can disable integration with applications at any time.

### Creating Launch Methods for Interceptor Applications

Before you can add and integrate a new application, you must create a launch method for that application in Library Maintenance. You can access Library Maintenance by using the DOCS Admin Tools.

**NOTE** After creating launch methods and enabling them in Interceptor, you should refresh the DOCSFusion Server cache and the PowerDOCS workstation. The workstation may be refreshed by pressing F5 or by deleting the Cache directory.

To create a launch method for a new application:

1. From Library Maintenance, double-click the Applications icon.
2. From the Application Maintenance Select dialog box, click the New button.
3. Complete the Application Maintenance dialog box as described below:

**Application ID:** Enter an ID that is appropriate and logical. You will later use this ID when adding a new application to Interceptor.

**Description:** Enter the Application name in this field.

**Filing Scheme:** Select the appropriate filing scheme from the drop-down list (typically, Enhanced).

**File Types:** Click the table lookup (ellipsis) button for this field and click Add to enter file extensions that are accepted by this application.

4. Click OK, then click the Options button. From Application Options, make sure that Shows on Desktop is selected.
5. Click Close from Application Options, then click the Launch Methods button.
6. From the Application Launch Methods Select window, click the New button.
7. The Application Launch Methods dialog box appears. Complete this dialog box as described below:

**Description:** Specify the Application name in this field.

**Location:** Specify the drive letter and directory for this application. Use the table lookup (ellipsis) button to browse for the correct directory.

**Default Directory:** Specify the same drive letter and directory that you entered in the Location field.

**Integration:** Select Full Integration from this drop-down list. In order for Interceptor to monitor new applications, you must select Full Integration.

8. Click OK. If this application requires specific DDE settings, click the DDE Setting button.
9. Enter the DDE setting information into the fields and click OK, then click Close.
10. Click Close to return to the Application Launch Methods Select dialog box. Your new launch method appears in the Description window of this dialog box.
11. Continue to click Close until you return to the original Application Maintenance Select dialog box. Your new launch method appears in the Application ID column.
12. Click Close and then File>Exit to close Library Maintenance.

You are now ready to add this application to Interceptor and should proceed with the steps in the following section. For more information about Library Maintenance, refer to Chapter 7, “Library Maintenance,” of the *DOCSFusion Setup and Administration Guide*.



## Adding New Applications to Interceptor

To configure a new application in the Interceptor:

1. Launch the Interceptor, using the instructions in “Launching the PowerDOCS Interceptor” on page 100. The PowerDOCS Interceptor window appears, displaying all applications that are currently configured to work with Interceptor. The application you are configuring will not appear in the list until you complete the subsequent steps and restart Interceptor.
2. Click the Application Settings tab. This window will be empty if you have never configured a new application in Interceptor. If you have previously integrated new applications, this list appears in the active window. Click Add to add a new application.
3. With the Common Properties tab selected, complete the following fields:

**Application ID:** Specify the Application ID you chose when creating this application’s launch method in Application Maintenance. If these Application IDs do not match, PowerDOCS may have trouble reconciling the application with its launch method.

**Description:** Specify the application name in this field.

**Keyword:** Specify the Application ID you chose when creating this application’s launch method. PowerDOCS attempts to match the value(s) in the Keyword field to words in the Launch Methods.

4. Click the Window Properties tab. This tab has two Autodetect check boxes that are selected by default. We highly recommend leaving these boxes selected. If you clear these boxes, you will have to enter all application settings manually. If you leave them checked, Interceptor attempts to automatically detect all settings.
5. Click the Application Dialogs tab to display the Dialogs window. This window will be empty until you add commands to be integrated with Interceptor.

6. Click Add to display the Dialog window. Fill out the fields as described below.

**Dialog Type:** Select the dialog type that most closely matches the nature of the dialog box you are integrating.

<b>Open</b>	Select this type if you want the Search Results dialog box presented and the selected document opened.
<b>Save As</b>	Select this type if you want the Document Profile form displayed so the user can profile and save the open document. When this type is selected, the original document is replaced by the new one.
<b>Import</b>	Select this type if you want the Search Results dialog box presented and the selected document opened into the current document. Some applications may not support Import and Export.
<b>Export</b>	Select this type if you want the Document Profile form displayed so the user can profile and save the exported document. Some applications may not support Import and Export. When this type is selected, the original document remains open. This is useful for MS Outlook and for graphics programs where you want to perform a “Save Copy As.”

**Dialog Caption:** Type the caption title of the dialog box.

**Not full caption:** Select this check box if you want to use the same settings for several dialog boxes with equal functionality and similar headings. In the Dialog Caption field, type the common part of the headings and select Not full caption.

**Autodetect:** This check box is selected by default, and it is strongly recommended that you leave it selected.

7. Click OK to save your settings. The dialog box you configured appears in the Dialogs window. You can repeat step 6 to configure other commands in this application.
8. When you have finished integrating commands, click OK and close the Application Settings dialog box.
9. Your new application should appear in the Application Settings list.
10. Enable the application in Interceptor. Refer to “Enabling Applications Within Interceptor” on page 107.

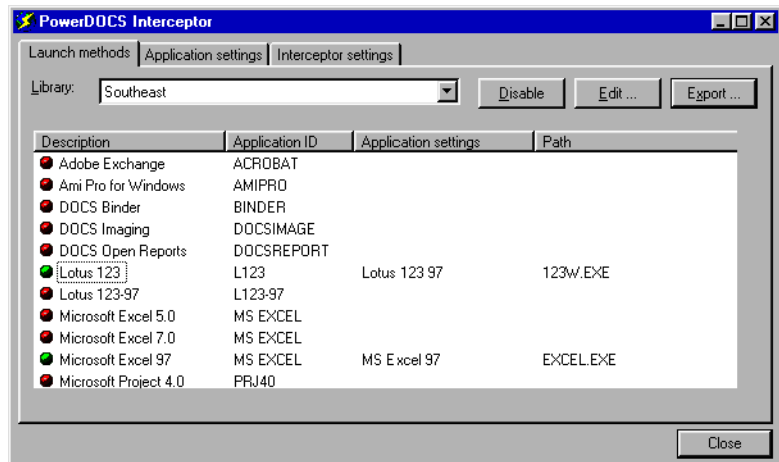
## Enabling Applications Within Interceptor

After creating a launch methods in Application Maintenance and in Interceptor, complete the following steps to enable the integration.

1. Launch the PowerDOCS Interceptor, as described in “Launching the PowerDOCS Interceptor” on page 100.

Figure A.3

*PowerDOCS Interceptor  
Launch Methods tab*



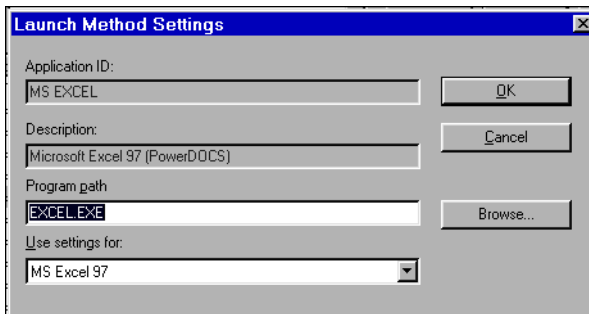
2. From the Launch Methods tab of the PowerDOCS Interceptor window, shown in Figure A.3, highlight the launch method for the application that you want to integrate and click Enable.

**IMPORTANT** Remember to select the launch method that applies to PowerDOCS, not DOCS Open.

The following dialog box is displayed.

**Figure A.4**

*Launch Method Settings dialog box*

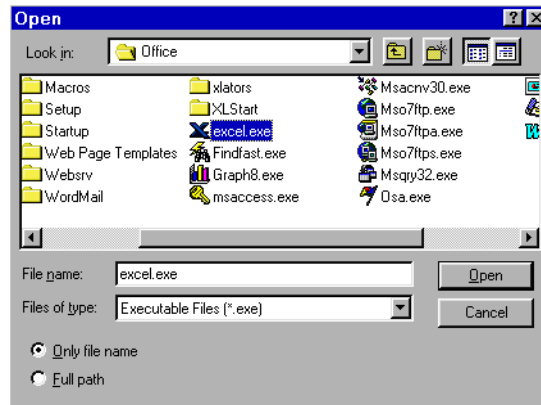


- The Application ID and Description fields are filled in by default.
- Click the Browse button to ensure that your program path is correct. The Open dialog box appears. If you do not have the full path to the application in your system path, select the Full Path radio button before you select the executable (\*.EXE) file.

If this information is in your system path, you can accept the default of Only File Name.

**Figure A.5**

*The Open dialog box*



3. Click Open.
4. In the Launch Method Settings dialog box, click the down arrow of the Use settings for drop-down list and select the correct application from the list.
5. Click OK to enable Interceptor to monitor the application's launch method. A green dot is then displayed next to the application, indicating that the application is now set to be monitored by Interceptor.

If the Program Path on the users' individual workstations is different from the Location defined in Application Maintenance, you need to point Interceptor to the application's executable. For more information, see "Editing the Launch Method Settings" on page 110.

6. Click Close to exit Interceptor.

Once you have enabled each application that you want integrated, you can create a registry file that can be run on users' workstations to duplicate the integration information that you have created on your workstation. See "Exporting the Interceptor Settings" on page 113.

**NOTE** There are some applications that require specific Launch Method or Registry settings. Please refer to "DDE Settings for Specific Applications" on page 80.

## Disabling Integration with Interceptor

If you want to disable integration for an application that you have integrated with Interceptor, complete the following steps.

1. Launch the PowerDOCS Interceptor as described in "Launching the PowerDOCS Interceptor" on page 100.
2. Select the application that you want to disable from the Launch Methods tab of the PowerDOCS Interceptor dialog box.
3. Click Disable. The green dot to the left of the application description will change to a red dot indicating that the application launch method will no longer be monitored by Interceptor.

**NOTE** A yellow dot to the left of an application description means a setting (launch method) exists in the registry but is missing or incorrect in the database.

## Editing the Launch Method Settings

The Interceptor allows you to edit the path to an application that Interceptor will monitor. When you edit the launch method settings from Interceptor, your edits do not apply to Application Maintenance in Library Maintenance. You are only editing the path that Interceptor will monitor. This allows more flexibility in the location of your users' integrated applications.

**REMINDER** You need launch methods configured in both Application Maintenance and Interceptor.

For example, suppose you selected Microsoft Excel to be monitored by Interceptor and the Location defined in the Application Launch Methods is:

```
C:\Program Files\Microsoft\Office\Excel.EXE
```

If you have users who have Excel installed on their D:\ drive, you would have multiple launch methods set up. In Interceptor, you only need to enable one of those launch methods. Specify only the file name of the executable in the Program Path field and select the Only File Name option on the Open dialog box, shown in Figure A.5.

This allows Interceptor to monitor the application independent from where it is launched, as long as the executable is in the user's search path.

To edit the launch method that Interceptor will monitor:

1. From the Interceptor dialog box, select the launch method that you want to edit and click Edit from the Launch Methods tab. The Launch Method Settings dialog box is displayed.
2. Fill out the fields as described below:

**Program Path:** Specify the path to the application that you want Interceptor to monitor. The path can be a whole or partial path or simply the executable file name. If you have a company whose individual workstations have different configurations, use the executable file name. Click Browse to ensure that your program path is correct. The Open dialog box appears, shown in Figure A.5. If you do not have the full path to the application in your system path, select the Full Path radio button before selecting the executable (\*.EXE) file. If this information is in your system path, you can accept the default of Only File Name.

**NOTE** Click the Full Path button to save the information you enter in the Program Path field.

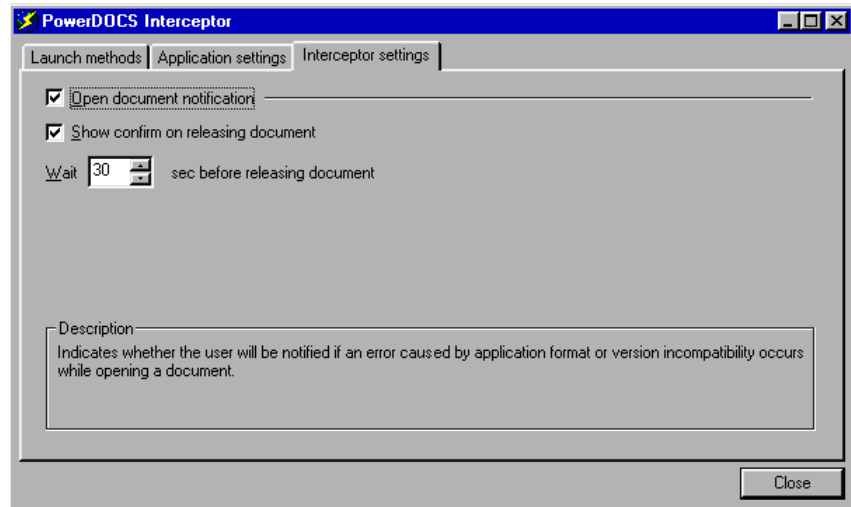
**Use Settings for:** Select the appropriate launch method from this drop-down box.

## Interceptor Settings

The Interceptor Settings tab of the PowerDOCS Interceptor dialog box contains three general settings that affect how Interceptor behaves when errors occur.

Figure A.6

*Interceptor Settings tab of the PowerDOCS Interceptor*



**Open Document Notification:** If this option is selected, users will be notified when an application format or a version incompatibility causes an error while opening a document. If this option is checked, and a conflict occurs, PowerDOCS will lock the document and release it only if you have selected Show Confirm on Releasing Document.

**Show Confirm on Releasing Document:** If you selected Open Document Notification, you must also check this option. If this option is checked, users will be prompted to release the document after the designated time if an error occurs while opening it.

**Wait n seconds before releasing document:** The default value is 30 seconds. If you accept the default, PowerDOCS will try to open the document for 30 seconds before prompting you to release it. You can override the default value.

After making these changes, you can export your settings to a registry file for your users. For more information, refer to “Exporting the Interceptor Settings” on page 113.



## Exporting the Interceptor Settings

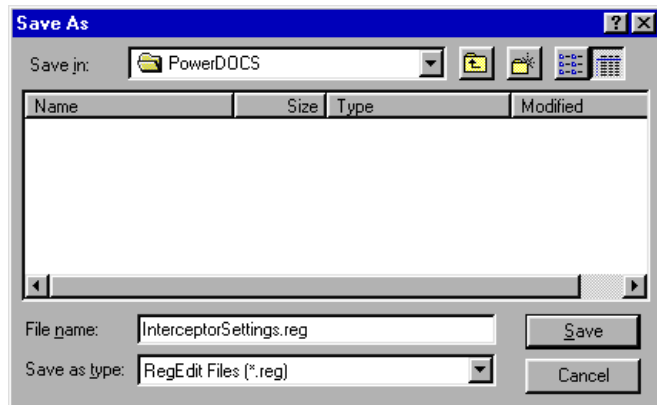
The Export option in the PowerDOCS Interceptor enables you to create a registry file that you can distribute to users to duplicate the application integration settings you created using Interceptor.

Only the applications that you enabled in Interceptor before creating the registry file will be turned on and actively integrated in the user's Interceptor.

1. Launch the PowerDOCS Interceptor as described in “Launching the PowerDOCS Interceptor” on page 100.
2. From the Launch Methods tab of the PowerDOCS Interceptor dialog box, select Export.
3. The Export Settings dialog box appears.
4. The default setting on this dialog box is All Settings. We recommend that you leave this selected and click Export. The Save As dialog box is displayed. If you select All Settings, PowerDOCS assigns a default file name for the registry file of `InterceptorSettings.reg`.

**Figure A.7**

*Save As dialog box*



- **Export Settings:**

**All Settings:** This option exports application settings and launch method settings for all applications and all libraries. This is the most common setting when exporting a registry file. Selecting this option creates a registry file named `InterceptorSettings.reg`, by default.

**Only Application Settings:** This option exports the settings that relate to application properties and creates a registry file named `InterceptorAppDB.reg`, by default.

**All Launch Method Settings:** This option exports only the launch method settings for your applications and creates a registry file named `LaunchMethodSettings.reg`, by default.

**Launch Method Settings for the Selected Library:** This option exports only the *enabled* launch methods for the currently selected library and creates a registry file named `LibraryName.reg`, by default, where your library name is inserted.

5. Select a location for the registry file and click Save.

**NOTE** Place the registry file in the PowerDOCS Install Kit directory (by default, `..Program Files\Hummingbird\Install\PowerDOCS`); it will run automatically when your users install PowerDOCS on their machines.

If you do not place the registry file(s) in the PowerDOCS folder, place it in a location that is accessible to all users.

## Importing a Registry File

Inform your users of the location of the registry file to be imported.

Instruct your users to double-click the registry file(s). The following dialog box appears, confirming that the registry settings were installed on their workstation.

Figure A.8

*Registry Editor confirmation message*



**NOTE** If your users install PowerDOCS in a directory location that is different from the computer from which you export the Interceptor registry file, they may receive messages stating that there are no valid launch methods for their applications. To resolve this issue you should export and apply the Interceptor files in two parts:

Application Settings Only

All Launch Method Settings

## Restricting Users from Accessing Interceptor Settings and Native Dialog Boxes

By design, PowerDOCS is set up to allow users to open and save files both within and outside the document management system.

If you, as the PowerDOCS administrator, do not want to allow the users and/or certain groups in your organization to save documents outside of PowerDOCS, you should follow the instructions listed below. As the PowerDOCS Administrator, you should set up all applications via the Interceptor beforehand and export a registry file that can be accessed by the user. See “Exporting the Interceptor Settings” on page 113.

**NOTE** Disabling Native Save and Open and access to Interceptor work hand in hand. You can't disable one without disabling the other.

1. Copy the `DisableNativeDialogs.reg` file from the `...Tools\PowerDOCS` directory on the Fusion Family CD-ROM to the `..\install\PowerDOCS` directory. This file will be automatically merged into any workstation that runs the PowerDOCS Admin Kit installation program.

This registry change will disable the option located in the PowerDOCS Options > Defaults > General tab called Disable native dialogs. In conjunction with step 2, below, all native dialog boxes allowing the user to open or save to the local file system will be disabled. If you plan to implement this feature after your users have already installed PowerDOCS, you will need to instruct your users to import the registry file. See “Importing a Registry File” on page 115.

- 2. In Library Maintenance>System Parameters and/or Groups Maintenance, access the Features dialog box and set the Disable Native Open/Save option to Yes.

Figure A.9

Groups Maintenance  
Features dialog box

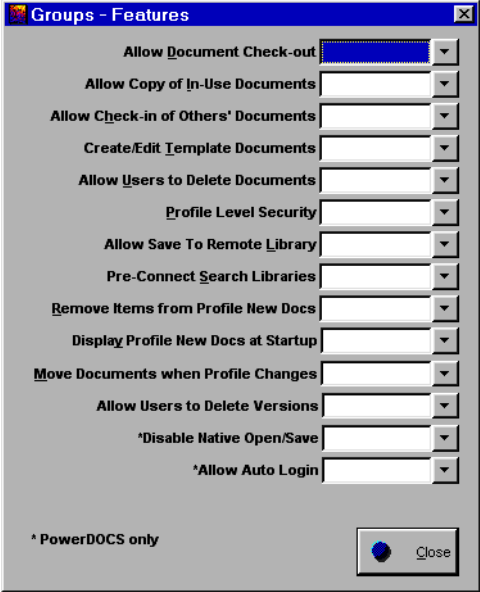
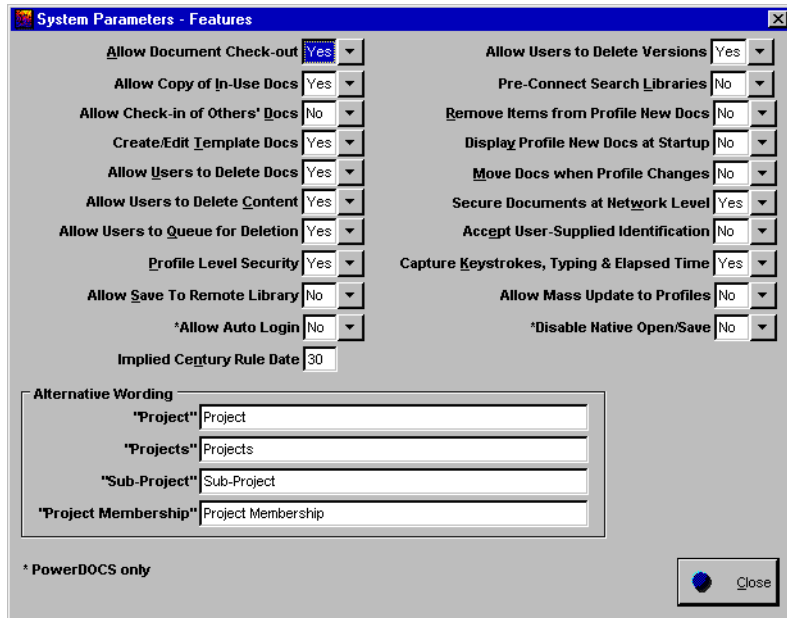


Figure A.10

*Library Maintenance  
System Parameters  
Features dialog box*



Enabling this option will result in the following:

- The Disable Native Save check box located in the PowerDOCS Options dialog box will be unavailable for modification.
  - The Settings option in Interceptor will be unavailable.
3. As the final step, you will need to refresh the cache at the DOCSFusion Server Manager. In DOCSFusion Server Manager, on the Caches tab, click Refresh All to update the library information in DOCSFusion.

4. If you want to revert to allowing your users to save outside of PowerDOCS, instruct your users to run the `EnableNativeDialogs.reg` file, located in the `...Tools\PowerDOCS` folder on the Fusion Family CD.

You must also return to Library Maintenance and/or Groups Maintenance and reset the Disable Native Save option to No. Remember to refresh the DOCSFusion Server Cache as described in step 3.

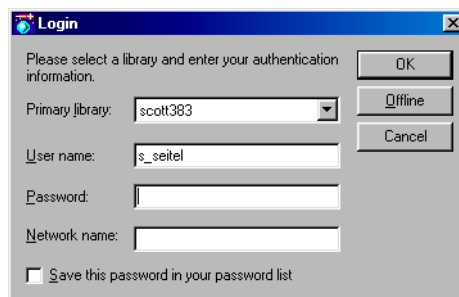
In either case, you will need to close PowerDOCS and reopen the application before these changes take effect.

## PowerDOCS Auto-Login

You can enable the Auto-Login feature so that users can save their PowerDOCS password to allow quick login to the system. As an administrator, you can enable this feature on a global or group level.

**Figure A.11**

*PowerDOCS Login dialog box - Windows 95 and 98*



When using PowerDOCS on a Windows NT or Windows 2000 system, the ability to save the PowerDOCS password is not immediately available. As an administrator you can provide registry files that will allow Windows NT users to save their PowerDOCS password.

**NOTE** Before providing these features to your users, consider the security issues that may result from allowing unrestricted access to PowerDOCS.

## **Disabling the Auto-Login Feature-Windows 95 and 98**

In Library Maintenance>System Parameters and/or Groups Maintenance, access the Features dialog box and set the Allow Auto Login to No. Refer to Figure A.9 and Figure A.10.

## **Enabling and Disabling Auto-Login - Windows NT and Windows 2000**

By design, the ability to save passwords for PowerDOCS is not available for Windows NT users. If your Windows NT users would like access to this feature, you can modify the Windows registry to allow auto-login by installing the registry files provided for this purpose. The files are found on the ...Tools\PowerDOCS folder on the Fusion Family CD.

The portion of the registry that is modified is:

```
HKEY_CURRENT_USER\Software\Hummingbird\PowerDOCS\Core\nPlugins\Fusion\
```

The two files provided to turn this feature off and on are:

NT\_Auto\_Login\_OFF.reg

NT\_Auto\_Login\_ON.reg



# Installing PowerDOCS Macros in Microsoft Word and Corel WordPerfect

When you install PowerDOCS, two sets of macros are included for use with Microsoft Word and Corel WordPerfect. Both macros allow the user to add PowerDOCS information to the footer of a document. Instructions for using these macros are found in Chapter 8 of the *PowerDOCS User's Guide*.

## Installing the Microsoft Word Macros

1. If you have previously integrated with Word and have customized your DOCS Open macros, you need to rename the file NORMAL.DOT under a different file name. You will then have a backup copy of your customized macros, which can be used by a qualified integrator to recustomize the new macros.
2. Start Word. Select File>Open. If Word is integrated using ODMA, the Search Results dialog box is displayed. If you are not logged in to PowerDOCS, the login screen is displayed.

**NOTE** Do not start the macro by double-clicking the file in My Computer or Windows Explorer.

3. If you use Word with ODMA integration, click Cancel to display a native Open dialog box. PowerDOCS displays a message box, asking you if you want MS Word to open a document. Click Yes to display the native Open dialog box. Proceed to step 5.
4. If you are using Passive Integration, you do not need to click Cancel. With Passive Integration installed, you only need to select File>Open to display a native dialog box.

**NOTE** If Native Save and Open are disabled, a native dialog box will not appear. For additional information, refer to "Restricting Users from Accessing Interceptor Settings and Native Dialog Boxes" on page 116.

5. From the native Word Open dialog box, locate the integration template `POWERDOCSFOOTER.DOT` or, if you use Word 2000, `POWERDOCSFOOTER2000.DOT`. The integration template is located in the PowerDOCS folder (by default, `... \Program Files \ Hummingbird \ PowerDOCS`). Remember to change the Files of type field to Document Templates (\*.DOT).
6. If you have Word set up to warn you when a document contains macros, the following dialog box is presented.

Click Enable Macros.

**Figure A.12**

*Word Macro Warning dialog box*



7. A Word document appears. Click the Install Macros button at the bottom of the page. If the Install Macros button is not visible, select Tools>Options>View from the menu bar and clear the Field Codes check box.

**Figure A.13**

*PowerDOCS  
Automated Macro  
Installation Document*

**PowerDOCS**  
**Automated Macro Installation**  
**For**  
**Microsoft Word 2000**

This document allows you to install or remove the macros necessary to use Microsoft Word footer and mail merge functionality with PowerDOCS.

**Warning:**

**Have your PowerDOCS macros been customized?** If so, you need to close this template (PowerDOCSFooter2000.dot), exit Word, and rename the file Normal.dot under a different file name. You will then have a backup copy of your customized macros, which can be used by a qualified integrator to re-customize the new macros. If you have any questions, please feel free to call our support hot line at (850) 942-5000 for assistance.

**Click** on one of the options below:

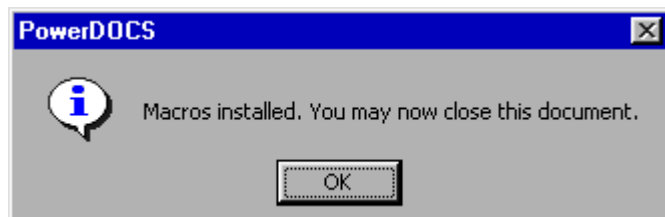
Install Macros

Remove Macros

A PowerDOCS information dialog box, like the one in Figure A.14, appears. Click OK.

**Figure A.14**

*The PowerDOCS information dialog box*



8. Choose File>Close. Do not save changes to the integration template. You should, however, save changes to the global template NORMAL.DOT, if you are prompted to do so.

This process adds global macros containing PowerDOCS function calls to Word's Normal template.

9. Close Word.

Distribute this updated Normal.DOT file to your users.

## **Unintegrating the Microsoft Word Macros**

Prior to uninstalling PowerDOCS, you must unintegrate the Microsoft Word Macros.

1. Start Word. Select File>Open. If Word is integrated using ODMA, the Search Results dialog box is displayed. If you are not logged in to PowerDOCS, the login screen is displayed.
2. If you are using ODMA integration, click Cancel to display a native Open dialog box. PowerDOCS will ask you if you want MS Word to open a document. Select Yes to display the native Open dialog box. Proceed to step 4.

**NOTE** If Native Save and Open have been disabled, the native dialog box will not appear.

3. If you are using Passive Integration, you do not need to click Cancel. With Passive Integration installed, you only need to select File>Open to display a native dialog box.
4. Locate the integration template POWERDOCSFOOTER.DOT or, if you use Word 2000, POWERDOCSFOOTER2000.DOT. The integration template is located in the PowerDOCS folder (by default, \Program Files\Hummingbird\PowerDOCS).

5. If you have Word set up to warn you when a document contains macros, the following dialog box is presented.

**Figure A.15**

*Word Warning dialog box*



Click Enable Macros.

6. Click the Remove Macros button at the bottom of the page.
7. Select File>Close.
8. Exit Word, saving the changes to the NORMAL.DOT template. The integrated menu options have been removed from your system. Redistribute the Normal.DOT file to your users.

## Installing the WordPerfect Macro in the Template

The WordPerfect Footer macro must be added to the WordPerfect document template. Once the macro is added, distribute the updated template to your users. The macro will be accessible to your users through the Tools>Macro menu.

1. Click File, New From Project.
2. Choose a category from the first list box, then choose a template from the second list box.
3. Click Options, Edit WP Template.
4. On the Template toolbar, click the Copy/Remove Object button.
5. If the Template toolbar is not displayed, click View, Toolbars, then enable the Template check box.
6. Choose the template that contains the macro from the Template
7. To Copy From list box.
8. Choose Macros On Disk from the Object Type list box.
9. In the Macros On Disk section, click the Browse button.
10. Choose the drive where the macro is stored from the Look In list box. The default location for the file is ...\\Program Files\\Hummingbird\\PowerDOCS\\PowerDOCSFooter.wcm.
11. Double-click the folder in which the macro is stored.
12. Click Select.
13. Click one of the following buttons:
  - Copycopies only selected items in the Source list box
  - Copy Allcopies all items in the Source list box
14. Click Close.

Distribute the new document template to your WordPerfect users.