

PowerDOCS® Attaché

USER'S GUIDE

PowerDOCS Attaché Keyboard Shortcuts

To:	Press:
Activate the Explorer tab of the PowerDOCS Desktop	Ctrl-E
Activate the New tab of the PowerDOCS Desktop	Ctrl-N
Open a highlighted document	Ctrl-O
Print a highlighted document	Ctrl-P
Start the PowerDOCS online Help system	F1
Refresh the PowerDOCS Desktop	F5



PowerDOCS 3.9 with Attaché

PowerDOCS 3.9 includes the Attaché feature that lets you work with PowerDOCS documents while being disconnected from the network. Upon startup, PowerDOCS will automatically detect whether or not the DOCSFusion Server is available. If the server is unavailable, the user will be prompted to work in Undocked Mode. The server unavailability may be due to the fact your computer is not connected to your network or because the DOCSFusion Server is not functioning at the time you log on to PowerDOCS. In the event the server goes down during a docked PowerDOCS session, PowerDOCS 3.9 will automatically switch to Undocked Mode. When you are working in Undocked Mode, the PowerDOCS icon shown on the Windows taskbar will change, as shown below.



**PowerDOCS 3.9 taskbar icon
Undocked Mode**



**PowerDOCS 3.9 taskbar icon
Docked Mode**

PowerDOCS 3.9 does not support every PowerDOCS feature during undocked sessions, however, Attaché and PowerDOCS are still very powerful document management applications. Attaché affords the following features:

- Local storage of documents for undocked use
- Ability to add new documents during undocked use
- Ability to import documents during undocked use
- Ability to view, print, and edit Shadow documents
- Ability to save e-mail documents using Microsoft Outlook integration
- Automatic monitoring of DOCSFusion Server availability
- Ability to e-mail documents stored for undocked use, including shadow documents
- Ability to view limited document information while in Undocked Mode
- Application integration using ODMA, Interceptor, Passive Integration, and Directory Monitoring

At this time, quick searches, projects, and the ability to work with paper documents are features that are not supported in Attaché.

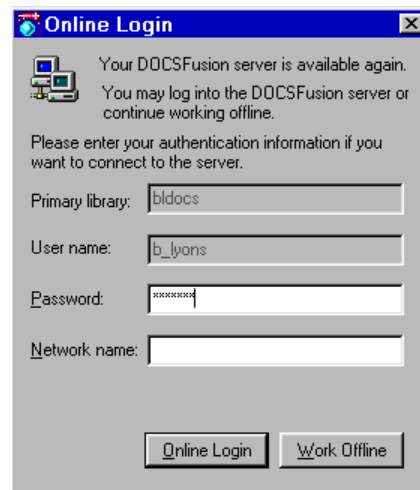
When working in Undocked Mode, Attaché is available from the PowerDOCS Desktop, Explorer, and Outlook Client.

This document describes features that deal solely with Attaché functionality. Some basic PowerDOCS features and functions are highlighted. It is recommended that you refer to the *PowerDOCS Quick Start Guide* and the *PowerDOCS User's Guide* for detailed information on using PowerDOCS 3.9.

Server Down Notification

In the event the DOCSFusion Server becomes unavailable during your PowerDOCS session and you attempt to execute a PowerDOCS function such as opening a document, the system will display the Offline Login dialog box shown below. You will be asked to either log in and continue working offline or log in and try to reconnect to the server. When you log in to work offline, you should use the Unplugged password specified for you in Library Maintenance. If you do not know your Unplugged password or are unsure if this feature has been activated for you, contact your PowerDOCS administrator.

When the server becomes available you will be notified and the Online Login dialog box will be displayed. You may continue working offline or log in to PowerDOCS.

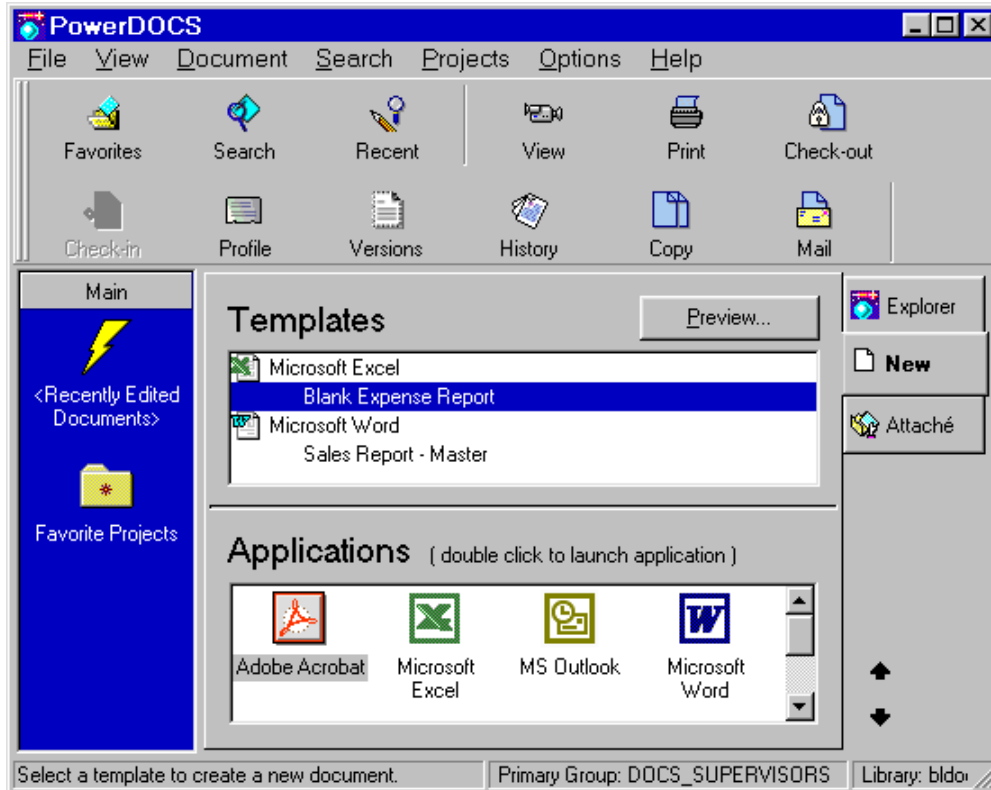


Although PowerDOCS is connected to the DOCSFusion Server, you might want to work using Attaché. When presented with the PowerDOCS login dialog box, click Offline. The Offline Login dialog box will appear. Enter your password and click Work Offline. To return to working in Docked Mode, select File>Work Online from the PowerDOCS menu. Refer to Page 10 for additional information on returning to Docked Mode.

To switch to Undocked Mode while docked, select File>Work Offline from the PowerDOCS menu.

The PowerDOCS Desktop

To start the PowerDOCS Desktop from your Windows desktop, double-click the icon labeled PowerDOCS Desktop. You can also select Start>Programs>PowerDOCS. The Desktop serves as the PowerDOCS “home base.” All functions and features are available from the PowerDOCS Desktop.



Menu Bar

A variety of pull-down menus are displayed across the top of the PowerDOCS Desktop. The menus list the PowerDOCS commands. If some of the menus or commands are dimmed instead of bold, this indicates that either those options are not available at the moment or you do not have rights to them. During undocked use, only the File, View, Document, and Help menus will be available. The features available on these menus will reflect the capabilities of Attaché while in Undocked Mode.

Toolbar

The PowerDOCS toolbar displays the most commonly and frequently used menu functions for easier access to these features. You can customize the toolbar to better suit your needs or preferences. For example, you could add the Add Document to Attaché button to the toolbar. See Chapter 2 of the *PowerDOCS User's Guide* for instructions on customizing the toolbar.

PowerDOCS Desktop Tabs

PowerDOCS Desktop has three tabs, Explorer, New, and Attaché. These tabs appear along the right side of the Desktop by default. When the New tab is selected on the Desktop, you have access to your applications. When the Explorer tab is active, your hierarchy of documents is displayed in an explorer-type interface. The Attaché tab displays documents you have downloaded for undocked use, including documents you have shadowed to your local workstation.

Templates

The Templates pane displays all templates that are currently available to you. This provides a quick way to access and create new documents. To activate or deactivate the Templates pane, go to View>Templates. When working in Undocked Mode, the Templates pane and template documents are not available.

Applications

The Applications pane shows applications that you have integrated with PowerDOCS on your workstation. This pane is only visible when the New tab is selected on the PowerDOCS Desktop. Chapter 3 of the *PowerDOCS User's Guide* instructs you on creating documents within integrated applications. Chapter 8 of the *PowerDOCS User's Guide* discusses using and setting up applications with PowerDOCS. Appendix A of the *PowerDOCS Installation Guide* provides detailed instructions on how to configure applications using the different integration methods.

Favorites Bar

The Favorites bar appears vertically along the left side of the PowerDOCS Desktop by default and is designed to provide quick access to the documents and projects you use most. When used in Undocked Mode, only documents are available. For instructions on adding documents to the Favorites bar, refer to Chapters 2 and 7 of the *PowerDOCS User's Guide*.

Status Bar

PowerDOCS displays system and document information in a Status bar along the bottom of the Desktop. The Status bar must be activated from the View menu. To activate the Status bar, select View>Status Bar.

Add-ons

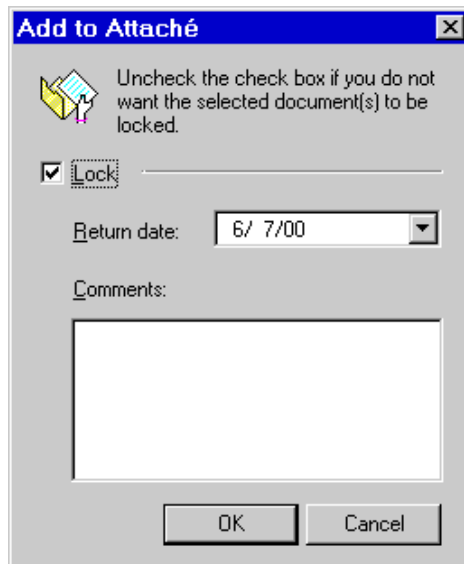
PowerDOCS allows you to view either a document's contents or the profile of a highlighted document. For these Add-ons to be available, you must manually turn them on. To do this, select View>Add-Ons, and PowerDOCS will then activate these options. Two Add-on tabs, the Viewer tab and the Profile tab, determine what is displayed in the lower-right pane of the Desktop.

Using Attaché for Document Management

Adding Documents to Attaché

Prior to disconnecting from the network, you must move documents to the Attaché tab if you want to work with them undocked. If your PowerDOCS administrator has set Shadow Documents to Yes, copies of documents you have accessed are saved to the Shadow directory. Shadowed documents are available in Attaché. Refer to the following section, *Opening Documents*, for information on accessing Shadow documents.

- 1 From a Search Results list, select the document(s) you want to move to the Attaché tab. Select Document>Add to Attaché.
- 2 The Add to Attaché dialog box will be displayed. By default, PowerDOCS will Lock the document. Select a Return Date and add Comments if desired. Click OK. If necessary, select the document version you want.
- 3 If you do not want to lock the document, remove the Lock check mark. Click OK. If necessary, select the document version you want. The document will be moved to Attaché, and the original will be available to others.

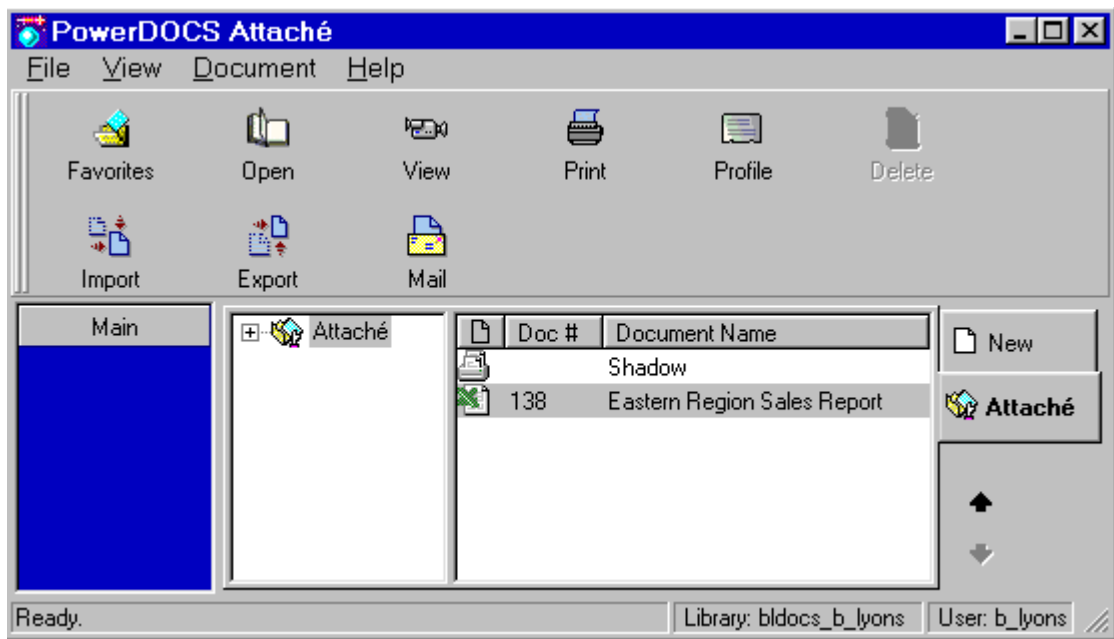


- 4 The document will be downloaded to the local workstation for use with Attaché. After the document(s) are moved to Attaché, a blue lock symbol will appear on the document icon, indicating that the document has been checked out. Documents that are checked out will show a red lock symbol.

Opening Documents

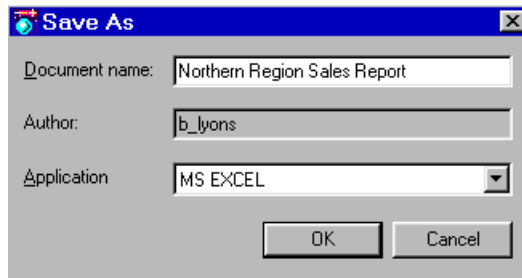
After you have transferred your documents to Attaché and are working in Undocked Mode, you can open and edit the documents you transferred. If you have Shadowing activated, you can also access your Shadow Documents.

- 1 Start PowerDOCS and log in. PowerDOCS will recognize that you are working undocked and display the Offline Login dialog box. Enter your password and click Work Offline.
- 2 Select the Attaché tab and the document you want to open. If you want to view the contents of your Shadow directory, double-click the Shadow folder listed in the right pane.



- 3 Select Document>Open. If necessary, select a version and launch method. If you want to preview the version, click Preview. Close the Preview window when finished.
- 4 Edit the document and save it using File>Save As. For applications integrated through Passive Integration, select DOCS>Save As. You will be prompted to replace the original document or create a new document. If you want to replace the original, select that option and click OK.

- 5 If you want to create a new document based on your changes, click OK. The Attaché Save As dialog box will be displayed. Enter the Document Name and click OK. When you upload the document to the network you will be prompted to complete a full PowerDOCS Document Profile.



Creating Documents

Even though you are working undocked, you can create new documents. When you go back to working in Docked Mode, you will have the opportunity to upload the documents to the library.

- 1 From the PowerDOCS Desktop, select the New tab and launch the desired application.
- 2 If necessary, select File>New from the application's menu bar.
- 3 Create and save your document.
- 4 The Attaché Save As dialog box will appear. Enter the Document Name and click OK. When you upload the document to the network you will be prompted to complete a full PowerDOCS Document Profile.

Importing and Exporting Documents with Attaché

If you have documents that you want to import into PowerDOCS Attaché or export from Attaché, you can still do this when working undocked. To import a file:

- 1 Select File>Import File. From the Open dialog box, select the document you want to import and click OK.
- 2 Make any desired changes to the Import File dialog box. Click OK. When you upload the document to the network you will be prompted to complete a full PowerDOCS Document Profile.

To export a file:

- 1 Select Document>Export. Select a version and click OK. If you want to preview the version you have selected, click Preview. Close the Preview window when you are finished.
- 2 From the Save As dialog box, select the directory into which you want to export the document. Click Save As. A copy of the document will be exported to the specified directory.

Viewing Profiles and Documents

PowerDOCS 3.9 provides two quick ways to view documents or profiles:

- Select View>Add-ons to turn on the viewer. Select Profile or Viewer at the bottom of the viewer pane to display the document's profile or contents.
- Highlight a document from a document list and select Document>View or Document>Display Profile.

During undocked use, the Document Profile displayed will be limited.

Mailing Documents

You can e-mail documents while using PowerDOCS 3.9. PowerDOCS e-mail integration and the PowerDOCS Outlook Client are also available. When saving a document from Outlook, you will be prompted to complete a Document Profile. E-mail documents added to PowerDOCS will be treated like any other document added while undocked.

- 1 Select the document(s) to be mailed.
- 2 Select Document>Mail. If necessary, log in to your e-mail application.
- 3 Address the e-mail and send it.

Deleting Documents

To delete a document stored in the Attaché tab, select the document and press the Delete key. You will be asked to verify the deletion. Click Yes or No as appropriate. You can only delete documents that were imported or created during an offline session.

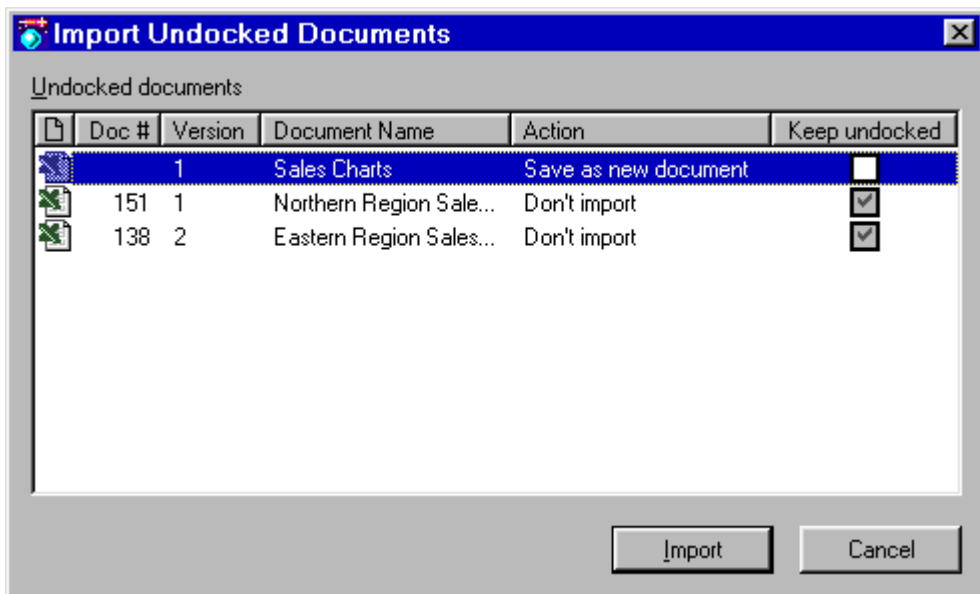
Printing a Document List

To print a list showing the contents of your Attaché tab, select File>Print List. Make any desired changes to the Printer setup and click OK. To make adjustments to the page layout of the list, select File>Page Setup. Make any desired changes and click OK. Detailed information on printing and page setup can be found in Chapter 5 of the *PowerDOCS User's Guide*.

Returning to Docked Mode

When the DOCSFusion Server is available or you switch back to Docked Mode, PowerDOCS 3.9 will recognize this and allow you to import documents into the library as you log in to PowerDOCS.

- 1 Start PowerDOCS and log in. After your password has been accepted, the Import Undocked Documents dialog box will appear. It will list all documents stored in the Attaché tab.



- 2 You have the option to save the documents as:

- A new document.
- A new version or sub-version.
- A replacement for the original stored document.

You may also opt to not import the document and retain it as an Attaché document.

- 3 To select the import type, click the Action field next to the document. Select the desired action from the list.



- 4 To keep the document as an Attaché document, place a check mark in the Keep Undocked field.
- 5 Click Import. The documents will be transferred. If any of the documents were locked when you transferred them to Attaché, the documents will be checked in upon being imported into PowerDOCS.
- 6 If you created any new documents during your offline session, you will be prompted to complete a PowerDOCS Document Profile.

Document Profile

Document Name Sales Charts

Author B_LYONS ... b_lyons

Document Type ...

Description

Access Control

Secure Document Edit

Application MS EXCEL ...
Microsoft Excel

Retention Schedule

Type Keep

History

Created: 6/6/00 b_lyons
Edited: 6/6/00 b_lyons

Enable Content Searching

OK Cancel

Details >>

PowerDOCS User's Guide Roadmap

Chapter #	Chapter Title	PowerDOCS Features
1	Introduction	Provides overview of PowerDOCS and document management.
2	Getting Started with PowerDOCS	Provides breakdown of user interface, including: Desktop, Explorer, tabs, menus, Favorites bar, toolbar, customization, and add-ons.
3	Creating and Profiling Documents	Details different methods of creating documents.
4	Working with Document Versions	Provides information on creating different versions and sub-versions of documents.
5	Searching and Retrieving	Details different methods of searching and retrieving documents, including: profile and content searches, quick searches, assigning and removing security rights, and using multi-value fields.
6	The Document Menu	Provides explanation of every Document menu function.
7	Projects	Explains how to create projects and add documents to projects.
8	Using Applications with PowerDOCS	Discusses different methods of application integration for different types of applications.

PowerDOCS Workstation Requirements

Processor	Recommended: Pentium 200+
Memory	Recommended: 128 MB
Operating System	Microsoft Windows NT Workstation 4.0 with SP 6.0 or later, Windows 95, Windows 98, or Windows 2000
Certified DOCS Open Libraries	DOCS Open 3.8 or higher