iManage

FileSite Installation and User's Guide

Version 8.5

Document Revision 4

19 October 2010

Autonomy

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Contents

Tables

Figures

Preface

The *FileSite Installation and User's Guide* describes how to install and use FileSite, and describes the WorkSite features that are available in Microsoft Office and Adobe Acrobat integrated applications. It also describes the operation of the WorkSite Viewer and Portable programs. It is intended for end users of FileSite.

This preface contains the following sections:

Version

The information in this guide is current as of FileSite version 8.5. The content was last modified October 2010. Corrections or updates to this information may be available through the Autonomy Support site; see "Support and Contact Information" on page 25.

Notational Conventions

This guide uses the following conventions:

Convention	Usage
Bold	User-interface elements such as a menu item or button. For example: Click **Cancel** to halt the operation.
Italics	Document titles and new terms. For example: ■ For more information, refer to the *IDOL Server Administration Guide*. ■ An *action command* is a request, such as a query or indexing instruction, sent to IDOL Server.
`monospace font`	File names, paths, and code. For example: The `FileSystemConnector.cfg file` is installed in `C:\Autonomy\FileSystemConnector\`
`monospace bold`	Data typed by the user. For example: ■ Type **`run`** at the command prompt. ■ In the **User Name** field, type **`Admin`**.
`monospace italics`	Replaceable strings in file paths and code. For example: `user` *`UserName`*

Command-line Syntax Conventions

This guide uses the following command-line syntax conventions.

<table>
<tr><th>Convention</th><th>Usage</th></tr>
<tr><td><code>[optional]</code></td><td>Brackets describe optional syntax. For example:
<code>[-create]</code></td></tr>
<tr><td>|</td><td>Bars indicate “either | or” choices. For example:
<code>[option1] | [option2]</code>
In this example, you must choose between <code>option1</code> and <code>option2</code>.</td></tr>
<tr><td><code>{ required }</code></td><td>Braces describe required syntax in which you have a choice and that at least one choice is required. For example:
<code>{ [option1] [option2] }</code>
In this example, you must choose <code>option1</code>, <code>option2</code>, or both options.</td></tr>
<tr><td><code>required</code></td><td>Absence of braces or brackets indicates required syntax in which there is no choice; you must type the required syntax element.</td></tr>
<tr><td><code>variable</code>
<code><variable></code></td><td>Italics specify items to be replaced by actual values. For example:
<code>-merge filename1</code>
(In some documents, angle brackets are used to denote these items.)</td></tr>
<tr><td><code>...</code></td><td>Ellipses indicate repetition of the same pattern. For example:
<code>-merge filename1, filename2 [, filename3 ...]</code>
where the ellipses specify, <code>filename4</code>, and so on.</td></tr>
</table>

The use of punctuation—such as single and double quotes, commas, periods—indicates actual syntax; it is not part of the syntax definition.

Notices

This guide uses the following notices:

CAUTION A caution indicates an action can result in the loss of data.

IMPORTANT An important note provides information that is essential to completing a task.

NOTE A note provides information that emphasizes or supplements important points of the main text. A note supplies information that may apply only in special cases—for example, memory limitations, equipment configurations, or details that apply to specific versions of the software.

TIP A tip provides additional information that makes a task easier or more productive.

Product Documentation

For more information on the administrative utilities provided with FileSite, refer to the *WorkSite Server Administrator's Guide* and the *WorkSite Desktop Client Customization Guide.*

Support and Contact Information

Read this section to obtain the latest product documentation, request technical support, or contact Autonomy.

Download the Latest Documentation

You can retrieve the latest available product documentation from Autonomy’s Knowledge Base on the Customer Support site.

To download the latest document revisions

1. Type this URL in your Web browser's address field:

   https://customers.autonomy.com

   IMPORTANT Access to the contents of the Customer Support site requires a user name and password. To obtain a user name and password, follow the sign-up instructions on the home page.

2. Click **Log In** and type your e-mail address and password.
3. Click **Sign in**.
4. Click **Knowledge Base**.
5. Type query text or select a category to filter your search for documentation. The most recently added documents display at the top of the results list.

The *version number* associated with a document (for example, version 8.5) is the product version that the document describes. If a document has a *revision number* (for example, Revision 5), the document has been revised since it was first released with the specified product version. The Knowledge Base contains the latest available revision of any document.

Contact Autonomy Technical Support

Autonomy Technical Support exists to provide you with prompt and accurate resolutions to difficulties relating to using Autonomy software products. You can contact Technical Support using any of the following methods:

- Call or e-mail the support group at the location that is nearest to you:

Europe and Worldwide	North and South America
E-mail: tsp-europe@autonomy.com Telephone: 00 800 4837 4890 (UK, Germany, Spain, Netherlands, France) +44 (0) 800 0 282 858 (UK only) Hours: 09:00 to 17:00 (GMT+1)	E-mail: support@autonomy.com Telephone: 1 877 333 7744 1 403 294 1107 (Canada direct) Hours: 07:00 to 18:00 MST (GMT-7)

- Access the Customer Support site at: https://customers.autonomy.com

Access to the contents of the Customer Support site requires a user name and password. To obtain a user name and password, follow the sign-up instructions on the home page.

Contact Autonomy

Contact the location that is nearest to you for general information about Autonomy:

Europe and Worldwide	North and South America
E-mail: autonomy@autonomy.com Telephone: +44 (0) 1223 448 000 Fax: +44 (0) 1223 448 001 Autonomy Corporation plc Cambridge Business Park Cowley Road, Cambridge, CB4 0WZ, UK	E-mail: autonomy@autonomy.com Telephone: 1 415 243 9955 Fax: 1 415 243 9984 Autonomy, Inc. One Market Plaza, Spear Tower, Suite 1900 San Francisco, CA. 94105, US

Document Revision History

See Table 1 for a list of updates to this guide.

Table 1 Revision History

Document Revision	Release Date	Notes
4	19 October 2010	■ Added support for Microsoft Office 2010 32-bit. ■ 8.5 SP2 Release.
3	05 April 2010	■ Added information on "Language Settings" on page 50. ■ 8.5 SP1 Release.
2	21 August 2009	■ Updated information in "New Features in This Release" on page 39. ■ Added information on "Loading Localized KeyView Resource Files" on page 50. ■ Added information to "Sending an E-mail to a Folder" on page 123. ■ Added information on "Inserting a WorkSite Hyperlink" on page 285. ■ Updated information in "Setting More Printer Options" on page 343.
1	12 June 2009	8.5 Release.

CHAPTER 1

Introduction

This chapter contains the following topics:

- “What is WorkSite?”
- “What is FileSite?”
- “Key Features of FileSite”
- “New Features in This Release”

What is WorkSite?

WorkSite™ is a *document-management system* (DMS)—a software product that can manage millions of documents for hundreds or thousands of users. A DMS is used to help organizations overcome problems with managing large numbers of documents, which affect efficiency, accuracy, and information security.

NOTE The term *document* as applied in this guide refers to an electronic file, including not only text files, but also spreadsheets, images, e-mails, and many other types.

WorkSite enables you to:

- Effectively use online document collections that can store millions of documents.
- Organize work into Workspaces corresponding to clients, matters or projects.

- Share Workspaces and documents with other groups or specific users.
- Find and retrieve documents and Workspaces quickly, using powerful searching tools.
- Provide consistent system-wide document security rules.
- Create and track multiple versions of a document.
- Maintain extensive document histories and audit trails.
- Automatically archive and restore documents.
- Integrate records management (that is, physical documents) into the document-management system.

Client-Server Architecture

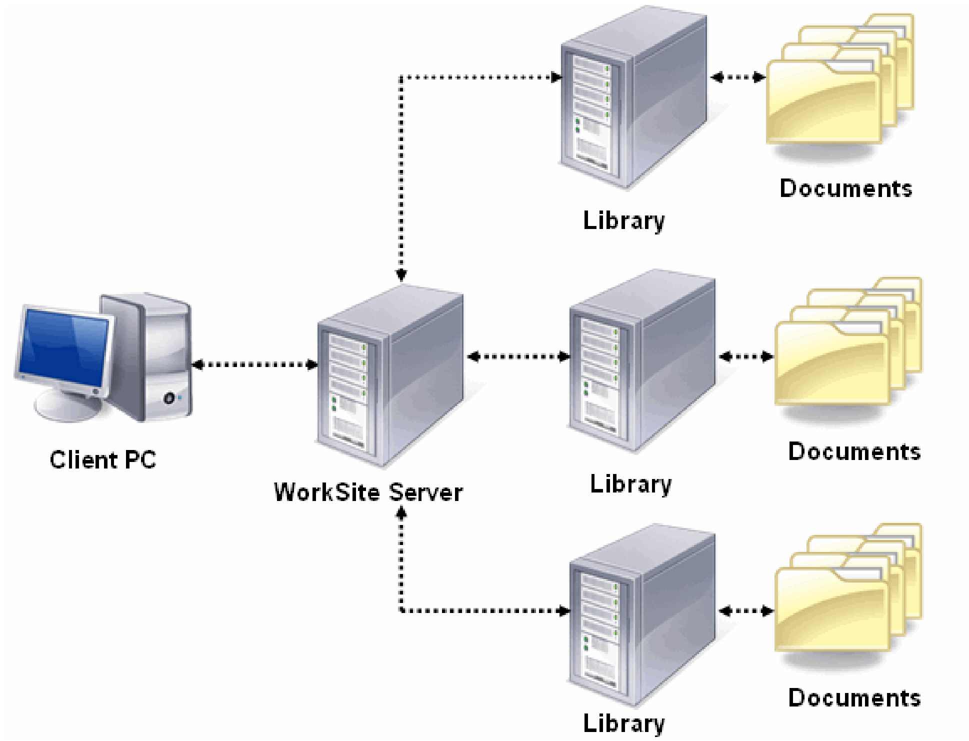
You access WorkSite by logging into a *WorkSite Server*. A *server* is a computer that performs operations requested by other PCs, which are called *clients*. FileSite™ is a client application that runs on a PC and communicates with WorkSite.

The WorkSite DMS consists of the following components:

- A *WorkSite Server*, which handles client requests and manages access to the information in the system.
- A *database,* such as Microsoft SQL Server®, which stores *document metadata* (information about the documents).
- A *file server*, which stores the documents themselves.
- A set of full-text *index collections,* which manage the information used to search for documents.

These components work together to organize and index your documents. From a user's standpoint, the file server and database operate as a single entity, called a *library*. As shown in Figure 1, one WorkSite server can be connected to several libraries at the same time.

Figure 1 WorkSite Client-Server diagram



NOTE Refer to the *WorkSite Server Design Guide* for more information on this topic.

What is FileSite?

FileSite is a desktop application for using WorkSite that is fully integrated with Microsoft® Office® and Microsoft Outlook®. The term integrated means that you use FileSite directly from inside Microsoft Office applications, including managing your e-mail using the familiar Microsoft Outlook interface. FileSite is specially designed to meet the needs of the legal community, but it can also be customized for government organization and other businesses.

Although it provides access to all document types in WorkSite through Microsoft Outlook, FileSite is most often used to manage e-mail. It does this in cooperation with *Microsoft Exchange Server®,* an e-mail and collaboration software product developed by Microsoft.

NOTE FileSite is one of several WorkSite client applications. Others include *DeskSite™*, *OffSite*, and *WorkSite Web*.

FileSite Utilities

The following utilities are also provided with the FileSite application:

- *WorkSite Viewer*, which allows you to view multiple documents at once.
- *WorkSite Portable,* an application that lets users download WorkSite documents to a local computer and work on them when they are not connected to a WorkSite server.
- Integration modules for Microsoft Office and Adobe Acrobat, which allow you to use WorkSite functionality from these commonly used applications.

Key Features of FileSite

Along with the standard DMS features like version control and document versioning, FileSite offers key features in the following areas:

- "E-mail Management"
- "Matter-Centric Collaboration"
- "Building an Electronic Case File"
- "Matter-Centric Navigation"
- "Worklists"
- "Document Profile Information"
- "Search"
- "Relating Documents"
- "Security"
- "Accessibility Features"

E-mail Management

FileSite allows you to save e-mail messages and their attachments to WorkSite by dragging them from Outlook folders and dropping them into WorkSite folders. Once added to WorkSite, e-mails can be stored in the same searchable repository as other documents, and typical document functions can be performed with e-mails.

Matter-Centric Collaboration

Matter-centric collaboration (sometimes called *engagement-centric collaboration*) gives users an online space for contributing and consuming content related to a particular legal matter or engagement. FileSite provides *containers* (such as folders and Workspaces) that help you organize content by matter/engagement.

A matter-centric approach lets users easily and effectively collaborate and exchange information with each other. For example, to assign a matter/engagement to a colleague or practice group, you can simply add it to the appropriate user or group's *My Matters* or *My Engagements* folder.

Building an Electronic Case File

The *Workspace* serves as the main container for all the information you need to handle the case or engagement. In the legal field, it is the electronic equivalent of the expandable paper *case file* or *redweld*. You can organize the content by creating multiple *tabs* and distributing the information accordingly. Each tab allows you to group and categorize different types of information for easier access and use. *Folders* are containers within Workspaces that act as the electronic equivalent to the sub-files within a matter.

Each container in WorkSite has its own security and metadata depending on who requires access. See "Document Grid" on page 81 for more information.

Matter-Centric Navigation

Matter-centric navigation is achieved by using shortcuts to keep all of your matters, favorite containers, or specific Workspaces easily available, eliminating the need to drill down through multiple containers. The WorkSite *Tree Frame* in Outlook contains two customizable link lists—*My Matters* and *My Favorites*—that make it easy to set up matter-centric navigation, which corresponds to your legal practices.

My Matters is a container of shortcuts to your personal list of matters, similar to a personal filing cabinet. Menu options make it easy to share your My Matters folder with others and to subscribe to the My Matters folders belonging to other users—if they are shared. For example, a matter can be automatically assigned to a lawyer when the case is opened, and the lawyer's administrative assistant can subscribe to the lawyer's matters.

See "My Matters" on page 79 for more information.

My Favorites is a customized link list that you create to meet your navigation needs. Within My Favorites, you can place shortcuts to documents, folders, or Workspaces from multiple WorkSite libraries.

See "My Favorites" on page 79 for more information.

Worklists

Each WorkSite Server that you are logged into has a *Document Worklist* and a *Matter Worklist* associated with it. The Document Worklist maintains a list of recently accessed documents. The Matter Worklist contains a list of recently viewed Workspaces. This provides another efficient way to retrieve information that you worked with in the recent past.

See "Folder List Components" on page 77 for more information.

Document Profile Information

A *profile* is a set of data about documents and other WorkSite objects (such as who added the item and when it was added). WorkSite uses this information (called *metadata*) to classify, organize, and locate items in the system.

Document profiles allow you to search for documents you need without having to remember file names or where the documents are stored on the file server. Table 2 lists the information typically contained in a document profile.

Table 2 Document Profile Information Fields

Profile Field	Description
Document Number	Unique number automatically assigned by WorkSite.
Version	Version number of the document.
Description	Descriptive information of the document, up to 254 characters.
Name	Short name of the document, up to 16 characters.
Type	Application used to create the document and open it again. For example, WORD for Microsoft Word.
Database	Library in which the document is stored. For example, DMS1, DMS2, and so on.

Table 2 Document Profile Information Fields

Profile Field	Description
Author	User who created the document.
Operator	User currently working on the document.
Class	User-defined classification of the document. For example, DOC for a document.
Client	Custom field with special properties based on business needs, used to identify the document.
Matter	Custom sub field used to identify the document and dependent on the entry in the Client field.
Custom Fields	Additional fields with special properties based on business needs, used to classify the document.
Creation Date	Date the document was created. **Note**: Server settings enable you to view the create date/time profile property of the documents in FileSite in two ways: File Date. The date/time that a document was created locally, before it was imported into FileSite. System Date. The date/time that a document was created in the server or imported into the server. For more information on server settings, refer to the *WorkSite Server Administrator's Guide.*
Last Edit Date	Most recent date the document was edited. **Note**: Server settings enable you to view the edit date profile property of the documents in FileSite in two ways: File Date. The date that a document was last edited locally, before it was imported into FileSite. System Date. The date that a document was last edited in the server. For more information on server settings, refer to the *WorkSite Server Administrator's Guide.*

Table 2 Document Profile Information Fields

Profile Field	Description
Last Edit Time	Most recent time the document was edited. **Note**: Server settings enable you to view the edit time profile property of the documents in FileSite in two ways: File Date. The time that a document was edited locally, before it was imported into FileSite. System Date. The time that a document was edited in the server. For more information on server settings, refer to the *WorkSite Server Administrator's Guide.*
File Entry	Date the source file was originally created *by the originating application.*
File Edit	Date the source file was last edited *by the originating application.*
Last User	Name of the user who most recently edited the document *in WorkSite.*
Size	Size of the document in number of bytes.
Retain Days	Number of days before the inactive document is eligible for archiving.
Comment	Comment associated with the document, up to 8,000 characters, and fully searchable.
Security / Modify (button)	Creates an ACL of users and groups.
Shared As	Sets the default security levels.

NOTE The **Shared to External Users** icon indicates that a document is shared with external users. See “Understanding External Users and Groups” on page 88 for information about external users and groups.

Because profile fields can be customized, the items listed in Table 2 may not match those in your organization's WorkSite system.

Typically in legal enterprises, the names and purposes of the Custom fields are customized so that Custom1 represents the *Client* and Custom2 represents the *Matter,* in a parent-child relationship. They are used to sort and search for content related to a particular Client-Matter.

Search

FileSite provides powerful searching capabilities to help you find your documents. You can search for documents according to document profile information, the full text of document comments, or the full text of documents themselves. After you perform a search, you can save the search criteria and search results for later reference. You can re-run the search for updates, and also share your saved searches with other users.

The Search function is integrated, so you can retrieve and open documents from WorkSite within Microsoft Office and Adobe Acrobat and Acrobat Reader applications.

See Chapter 6 for more information.

Relating Documents

In addition to grouping documents by their location, you can create *relations* between documents, such as a contract and an addendum. For example, a contract could be related to an addendum to the contract and to other documents used to create the contract.

An icon indicates that a document is related to one or more other documents. See “Relating Documents” on page 174 for more information.

Security

WorkSite’s security model allows you to share information and collaborate on projects while keeping content secure. WorkSite ensures that users have access only to those documents that they are authorized for. Even search results are filtered according to a user’s access rights.

There are two types of security in WorkSite: *role-based security* and *object-based access rights*.

In role-based security, *roles* define the operations that a user can or cannot perform within the WorkSite system. The WorkSite Administrator assigns privileges to a role and assigns a role to every WorkSite user.

Object-based access rights are security settings defined on WorkSite containers. The owner of the container (at the time of creation) sets security by deciding which users require access to the container, and which users should not be allowed access to it. By default, items added to a container inherit the security settings of the container.

See "WorkSite Security Concepts" on page 86 for more information.

Accessibility Features

FileSite is designed to work with special features that provide greater accessibility for users who are visually or hearing impaired, or otherwise physically challenged, in accordance with U.S. Section 508 government regulations. FileSite supports most assistive technologies and has been previously tested with the following versions.

Table 3 Supported Assistive Technology

Assistive Technology	Operating System
Jaws 4.02	Windows 2K Pro
Window Eyes 4.2	Windows/XP
Super Nova Pro 5.x	Windows/2K Pro
IBM Home Page Reader 3.x	Windows 2K Pro
ZoomText 7.1	Windows/NT 4.x
Magic 8.0	Windows 2K Pro

FileSite accessibility features include:

- Red and green icons indicating correct or incorrect entries in required fields.
- Keyboard shortcuts as alternatives to mouse-clicking on dialog boxes and menus.
- Text explanations of graphics and icons.
- The ability to turn off the warning that the search scope is limited to a container on the Search dialog box.

For specific navigational information, see the following sections:

- "Navigating in the Folder List"
- "Navigating in the Document Grid Without a Mouse"
- "Menu Options and Toolbar Buttons"

New Features in This Release

This section describes the new features and improvements made in FileSite 8.5:

- "Support for Microsoft Office 2010"
- "Inserting WorkSite Hyperlinks"
- "Filing Sender's Copy of E-mail to a WorkSite Folder"
- "Saving Attachments"
- "Working Offline"
- "Records-Management Enhancements"
- "Visual Representation of Document Security"
- "Quickview Enhancements"
- "Prevention of Flat Filing"
- "File Fidelity"
- "Identification of Filed Messages in Outlook"
- "Attachment Handling"

Support for Microsoft Office 2010

This enhancement enables the integration of FileSite features with Microsoft Office 2010 32-bit version.

Inserting WorkSite Hyperlinks

In Microsoft Office integration with FileSite, you can now insert a WorkSite hyperlink to a WorkSite document into another WorkSite document using the IWL protocol. See "Inserting a WorkSite Hyperlink" on page 285 for more information.

Filing Sender's Copy of E-mail to a WorkSite Folder

FileSite now files the sender's copy of an e-mail to a WorkSite folder when the same WorkSite folder e-mail address is entered in the **BCC** field of the e-mail. The information entered in the **BCC** field is now preserved. Additionally, FileSite can be configured to set the e-mail's security level to either Public or Private.

Saving Attachments

FileSite now provides greater flexibility for filing one or more attachments.

- You can now save an attachment as a new version of an existing WorkSite document.
- You can now save attachments from multiple e-mails at the same time.

Working Offline

When you have made changes to WorkSite items while working offline, file resynchronization between FileSite and WorkSite occurs automatically in the background the next time you reconnect to WorkSite. See Chapter 10 for more information.

Records-Management Enhancements

Enhancements to records management include the functionality to undeclare a document that is declared as a record. However, the undeclare operation can be performed only within a specified time period from when the document was declared. Once undeclared, you can modify the document’s metadata, and redeclare it. See “Undeclaring a Record” on page 178 for more information.

Visual Representation of Document Security

Icons for the different containers now display keys to indicated that the containers’ security is inherited. See “Inherited Security” on page 86.

Quickview Enhancements

A new e-mail quick viewer for DXL and MSG files enables you to preview documents in the Outlook browse pane without opening them. The viewer provides a clearer view that better emulates Outlook.

Prevention of Flat Filing

Your WorkSite Administrator may not allow users to perform *flat filing* (saving items outside of a specific Workspace or Folder). Preventing flat filing helps to ensure consistent filing by Matter and by Client and simplifies the filing and retrieval of documents from WorkSite.

Flat-filing prevention affects how you perform the following tasks:

- Import
- Save/Save As
- Copy
- Move
- Remove from Folder

If flat filing has been disabled, attempts to save items outside of a specific Workspace or Folder will cause an error message to display.

NOTE Do not enable this feature on the server until all WorkSite applications (desktop clients, Web, Mobility, and server tools) are upgraded to WorkSite 8.5, as this feature is not compatible with earlier versions of the WorkSite applications.

File Fidelity

Server settings enable you to view the *create* and *edit date/time* document profile properties in FileSite in two ways:

- **File Dates**. The date/time that a document was created or edited locally, before it was imported into FileSite.
- **System Dates**. The date/time that a document was created/imported or edited in the server.

By default, the System date settings are enabled in the server. Consult your WorkSite Administrator to change the server settings. For more information, refer to the *WorkSite Server Administrator's Guide*.

NOTE Do not enable this feature on the server until all WorkSite applications (desktop clients, Web, Mobility, and server tools) are upgraded to WorkSite 8.5, as this feature is not compatible with earlier versions of the WorkSite applications.

Identification of Filed Messages in Outlook

FileSite now identifies messages that have been successfully filed to WorkSite. When a message is filed to WorkSite, and a copy of the message remains in a user's mailbox on Exchange, a **Filed** icon appears in Outlook. Similarly, if a filing request fails, a **Filing Failed** icon appears.

Attachment Handling

In 8.5, you can easily save an e-mail attachment to WorkSite as a new document or as a new version of an existing document. See “Importing E-mail Attachments as Separate Documents” on page 158 for more information.

CHAPTER 3

The FileSite Desktop

This chapter describes the different elements of the FileSite desktop. It contains the following topics:

- "Overview"
- "Outlook Shortcut Pane/Bar"
- "Folder List"
- "Document Grid"
- "Document Results Frame"
- "Menu Options and Toolbar Buttons"

See Chapter 4 for more information on the functionalities associated with each element of the desktop.

Overview

The FileSite desktop window is modeled on the Windows Explorer and Outlook user interfaces. While the functionality is the same, the appearance of the FileSite desktop differs between Microsoft Outlook 2003, 2007, and 2010.

The FileSite desktop used with Outlook 2003 or Outlook 2007 contains display frames, menus and toolbars. FileSite functionality is available on the toolbar that FileSite adds to Outlook, and on the **WorkSite** menu. See Figure 19 and Figure 20.

The user interface for Outlook 2010 has a ribbon bar in place of the traditional menu bar. The functionality accessed from the FileSite toolbar and the **WorkSite** menu in previous versions is available on the **Home** and **WorkSite** tabs in the ribbon bar. See Figure 21.

Figure 19 FileSite Desktop, Outlook 2003

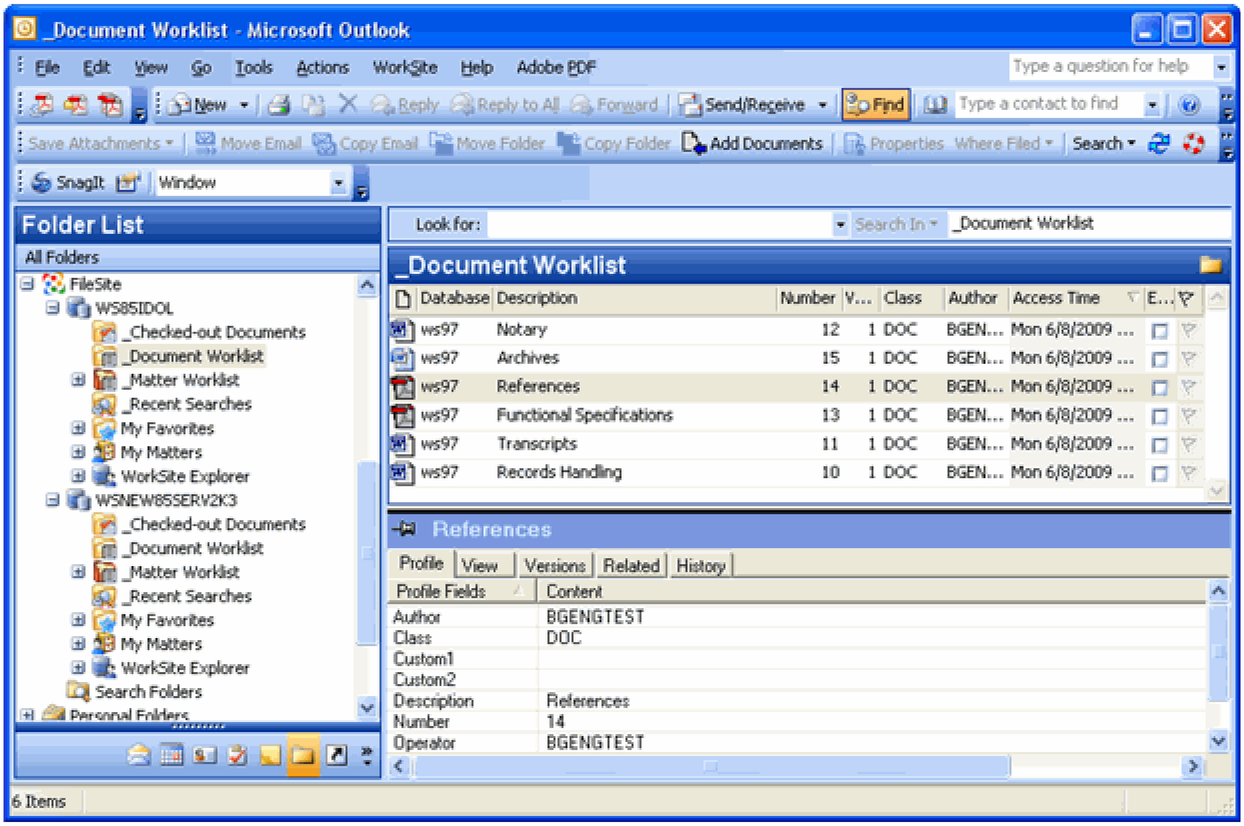


Figure 20 FileSite Desktop, Outlook 2007

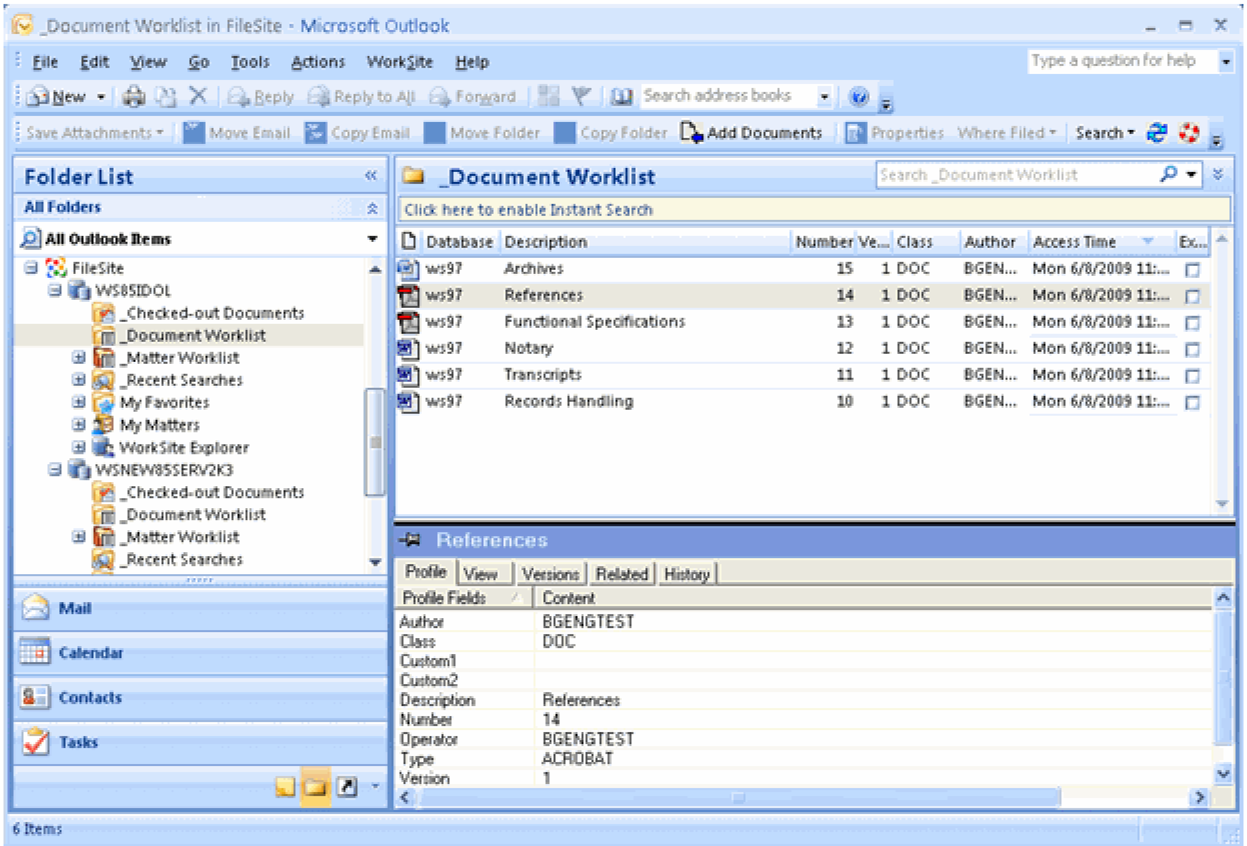
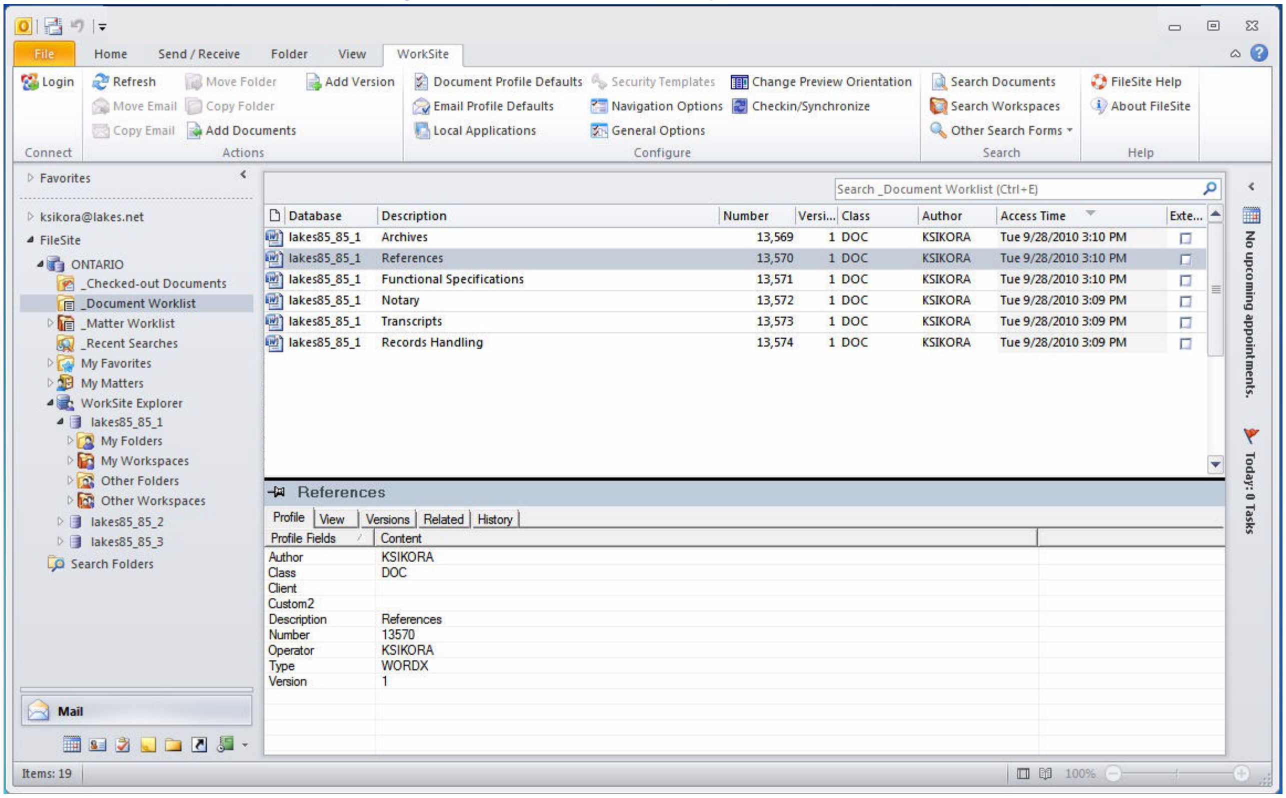


Figure 21 FileSite Desktop, Outlook 2010



NOTE In Outlook 2010, the **Search Folders** function can appear at the bottom of the Outlook tree or between the FileSite node and the WorkSite server node.

NOTE In Outlook 2010, you can resize the WorkSite icons that display in the ribbon bar. Refer to the *WorkSite Desktop Client Customization Guide* for details.

Menu Options and Toolbar Buttons

You use FileSite-specific menu options and toolbars to perform many tasks in FileSite. Table 4 and Table 5 show the keyboard shortcuts and toolbar buttons for frequently used functions in FileSite. Because menus and buttons are customizable by your WorkSite Administrator, your menus may not include all the default options described in the following tables.

Most keyboard shortcuts are a combination of **ALT+S** or **SHIFT+F10**, followed by the mnemonic (underscored letter) that appears on the menu option. When the same mnemonic is used in more than one menu option, you can use the shortcut more than once to get to the desired option. For example, use **ALT+S**, then **D** to select Add Documents. Type the shortcut again to select Document Profile Defaults.

Table 4 WorkSite Menu Options

Menu Option	Keyboard Shortcut (Outlook 2003)	Toolbar Icon
Login	ALT+S+L	–
Add Document	ALT+S+D	
Add Version	ALT+S+V	–
Search Documents	ALT+S+S	
Search Workspaces	–	
Other Search Forms	–	–
Refresh	F5 or ALT+S+R	
Configure Submenu		
▶ Document Profile Defaults	–	–
▶ Email Profile Defaults	–	–
▶ Local Applications	–	–
▶ Security Templates	–	–
▶ Navigation Options	–	–
▶ General Options	–	–
▶ Change Preview Orientation	–	–
▶ Filing Status	–	–
Checkin/Synchronize	ALT+S+C	–

Table 5 Document Menu Options

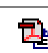
Menu Option	Keyboard Shortcut (Outlook 2003)	Toolbar Icon
Open	SHIFT+F10+O	–
Print	SHIFT+F10+P	–
View	SHIFT+F10+V	–
Forward	SHIFT+F10+W	–
Send Link Submenu		
▶ To This Version	–	–
▶ To Latest Version	–	–
Check Out	SHIFT+F10+K	–
Check In	SHIFT+F10+I	–
Save As	–	–
Move	SHIFT+F10+M	–
Copy Submenu		
▶ Copy	–	–
▶ Copy Document and Open	–	–
▶ Copy as New Version	–	–
▶ Copy as New Version and Open	–	–
Add Version	SHIFT+F10+V	–
Add to Folder	–	–
Refile	SHIFT+F10+F	–
Delete	SHIFT+F10+D	–
Unlock	SHIFT+F10+U	–
Remove from Folder	SHIFT+F10+M	–
Utilities Submenu		
▶ Bulk Security Edit	–	–
▶ Convert to PDF	–	
▶ Send as PDF	–	
Add to My Favorites	–	–

Table 5 Document Menu Options

Menu Option	Keyboard Shortcut (Outlook 2003)	Toolbar Icon
Declare as Record	SHIFT+F10+D	–
UnDeclare as Record	SHIFT+F10+U	–
Document Info Submenu		
▶ Versions	–	–
▶ History	–	–
▶ Related Documents	–	–
▶ Checked Out Information	–	–
▶ Where Used	–	–
Properties	SHIFT+F10+E	
Applications Submenu		
▶ Local Applications Listed	–	–
Remove Relation	–	–

NOTE **Work Online/Offline** is an optional command that allows you to switch from working in online mode to OffSite without closing and relaunching the application. This option is added to the **WorkSite** menu in Outlook when you enable enhanced connection mode switching in FileSite, Microsoft Office Integration, and OffSite. See "Seamless Online/ Offline Transition" on page 250.

Filing Toolbar

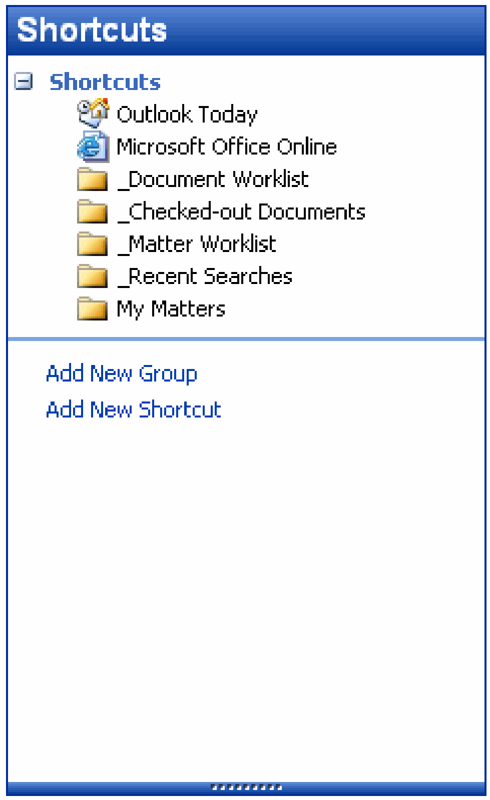
Using the **Filing Toolbar**, WorkSite makes it easy to file e-mails and attachments. See Chapter 5 for more information.

Outlook Shortcut Pane/Bar

The **Outlook Shortcut Pane/Bar** contains icons representing shortcuts to important folders in Outlook. These shortcuts provide easy access to your most frequently used folders. FileSite adds WorkSite-specific shortcuts to this pane.

Refer to Microsoft Office Help for instructions on adding shortcuts to the Shortcut Pane/Bar.

Figure 22 Example Shortcut Pane



Folder List

The Folder List organizes and displays information about matters, folders, recent searches, and servers. It shows the hierarchical structure of all connected servers and libraries, as well as folders that facilitate matter-centric navigation, for example, **My Matters**, **My Favorites**, and the **Matter Worklist**.

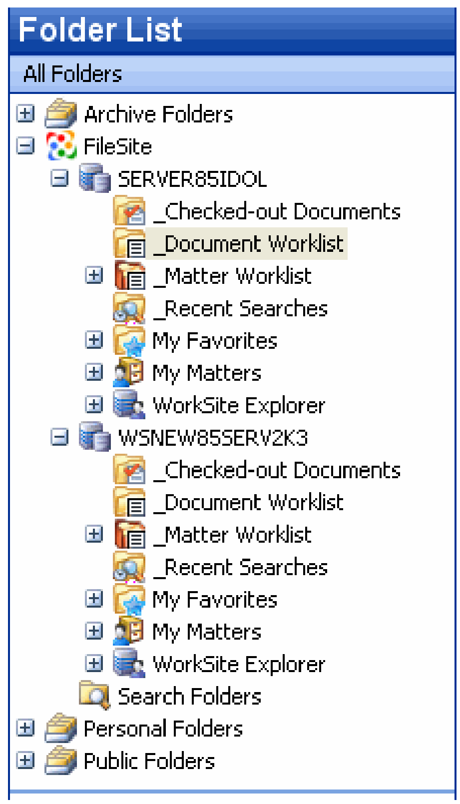
See “Managing the Folder List” on page 89 for more information on performing operations within the Folder List.

You can log into more than one server at a time. Each server you connect to appears as a tab at the bottom of the Folder list. When you click on the tab for a server, the entire hierarchical structure for that server appears.

Folder List Components

The FileSite desktop window's Folder List contains the following components:

Figure 23 Example Folder List



Servers

The **Server** icon is displayed immediately under the **FileSite** hierarchy heading. It represents the WorkSite servers to which you are currently connected. You may be connected to multiple WorkSite servers simultaneously, as shown in Figure 23.

Checked Out Documents

The **Checked-out Documents** icon appears for each WorkSite Server you are connected to. It contains a list of all documents currently checked out by you. The documents are displayed in the Document Grid.

See “Checked-out Documents” on page 90 for more information on performing operations with the Checked-out Documents list.

Document Worklist

The **Document Worklist** icon displays a list of links to the documents you most recently used or edited, from the libraries you have access to. One list is generated for each WorkSite Server you are attached to.

Click the icon to perform a search and display a combined list of your recently accessed documents in the Document Grid. The Worklist displays up to 40 documents per WorkSite library. By default, documents in the worklist are sorted by the date they were last accessed.

See “Document Worklist” on page 91 for more information on performing operations with the Document Worklist.

Matter Worklist

NOTE This container may be captioned as **Project Worklist** or **Engagement Worklist**.

The **Matter Worklist** icon displays a list of the Workspaces for each matter you have recently accessed. There is one Matter Worklist for each WorkSite Server. Each matter in the Matter Worklist is represented by a **Workspace** icon.

A Workspace may be further divided into tabs, represented by the **Tab** icon. You can add document folders or search folders to tabs or directly to Workspaces.

See “Document Grid” on page 81 for more information on each type of container.

Click the **Matter Worklist** icon to perform a search and display your most recently used or edited Workspaces. You can expand the Workspace nodes to view the tabs and folders it contains. The sort order is set by the date last accessed.

See “Matter Worklist Options” on page 63 for more information on how to set the maximum number of items to appear in the Matter Worklist.

Recent Searches

The **Recent Searches** icon displays a list of searches you recently performed. Click the appropriate **Search** icon displayed under **Recent Searches** to re-execute the search. (The search criteria for the most recent searches are stored as properties on the folder.) You can also edit the search criteria on the folder and run a new search. The Recent Searches list only retains searches performed during the current session—it refreshes each time you reopen the application.

See “Recent Searches” on page 92 for more information on performing operations with the Recent Searches folder and the search folders.

My Favorites

The **My Favorites** icon displays a list of shortcuts to any items that you have added to your My Favorites list. You can add Workspaces, folders, and documents to your My Favorites list.

See “My Favorites” on page 93 for more information on performing operations with the My Favorites folder.

My Matters

NOTE This folder may be captioned **My Projects** or **My Engagements**.

The **My Matters** icon displays a list of Workspace shortcuts to matters that you are associated with. You have one My Matters list on each connected WorkSite Server. This folder contains Workspaces you have created, as well as the My Matters folders of other users to which you have subscribed.

See “My Matters” on page 92 for more information on performing operations with the My Matters folder.

WorkSite Explorer

The **WorkSite Explorer** node displays a list of all the WorkSite libraries you have access to. It allows you to navigate through each library.

See “WorkSite Explorer” on page 95 for more information on performing operations with the WorkSite Explorer node.

Library

A **Library** icon appears for each library available to you on a server. Under each library, the following Workspaces and folders associated with it appear:

- **My Workspaces**, represented by the icon, is a list of Workspaces you created.

- **Other Workspaces**, represented by the icon, is a list of Workspaces created by other users that you can access.
- **My Folders**, represented by the icon, is a list of folders you created.
- **Other Folders**, represented by the icon, is a list of folders created by other users that you can access.

WorkSite Containers

Table 6 describes the types of container objects available in WorkSite.

Table 6 Types of containers in WorkSite

Container Type	Description
Category	The My Favorites category and the My Matters category are used to organize matters you are currently working on. For example, you can place all the matters for a single client under one category. Alternately, you can create a category of related matters or similar types of legal cases. A category can contain only subcategories and Workspaces; it cannot contain folders and documents. You can set security at the individual category level. See “Category” on page 96 for more information on commands associated with Categories.
Workspace	A Workspace is the master container and contains all information pertaining to a case. The Workspace contains tabs, folders and subfolders into which documents are saved. Each Workspace has its own security and metadata that can include Client and Matter, Practice, Type of matter, Industry, Jurisdiction, Date Opened and Date Closed. See “Workspace” on page 100 for more information on commands associated with Workspaces.
Tab	The tab is a subdivision of a Workspace that helps you organize your work. A Workspace can have multiple tabs. A tab contains document folders and search folders, but cannot contain documents. You can allow other users access to tabs you create, based on the security you set on the tab. By default tabs inherit security settings from the parent Workspace. See “Tab” on page 107 for more information on commands associated with tabs.
Folder	Folders are containers for static groups of documents. You can create folders and share them with other users. They provide a method for organizing and sharing documents easily.

In addition, there are two different types of folders: document folders and search folders.

- A  *document folder* contains documents that are related and grouped together. By doing this, you can easily organize documents. Clicking a folder icon displays the list of documents in the Document Grid.

  See “Document Folder” on page 111 for more information on commands associated with document folders.
- A  *search folder* has pre-existing search criteria defined and contains documents which satisfy this criteria. Each search folder has its own security, depending on who requires access to the folder. When you create a search folder, you can set folder security to inherit security settings from the parent container. See “Search Folder” on page 123 for more information on commands associated with search folders.

Document Grid

The Document Grid displays either the content of a folder or the result of a search.

Columns in the Document Grid

The Document Grid is presented as a table, sorted into sortable columns. See “Sorting Documents in the Document Grid” on page 129 for more information on how to use columns to sort the display of documents in the Document Grid.

Document Icon Column

The far left column in the Document Grid is the Document Icon column. This column displays icons representing the document type for each document in the grid.

NOTE The Document Grid can be customized to display other columns. See “Customizing the Document Grid” on page 129 for more information.

Rank Column

The Rank column displays a relevancy rank against each result in a list of search results. The ranking is based on a relevance sort that is performed by the WorkSite server.

NOTE The Rank Column appears in the Document Grid *only* when a list of search results is displayed. If the column does not appear, see “Adding Columns to the Document Grid” on page 129.

Document Results Frame

The Document Results Frame displays information about the document selected in the Document Grid. It is divided into five tabs, as shown in Figure 24:

Figure 24 Document Results Frame

Document Profile Tab

The **Document Profile** tab displays the profile information of the document selected in the Document Grid. The profile fields that appear in this tab are determined by registry settings created on your machine by your WorkSite Administrator.

See “Document Profile Tab” on page 134 for information on operations you can perform with the **Document Profile** tab.

Quick View Tab

The **Quick View** tab displays a read-only image of the document selected in the Document Grid. It allows you to view a document without leaving the FileSite desktop.

See “Quick View Tab” on page 134 for information on operations you can perform with the **Quick View** tab.

Related Documents Tab

The **Related Documents** tab displays a list of documents that are related to the selected document.

See “Related Documents Tab” on page 134 for information on operations you can perform with the **Related Documents** tab.

Document Versions Tab

The **Document Versions** tab displays a list of a document's versions.

See “Document Versions Tab” on page 134 for information on operations you can perform with the **Document Versions** tab.

History Tab

The **History** tab displays a list of activities performed on a document. See “History Tab” on page 134 for information on operations you can perform with the **History** tab.

CHAPTER 4

Using the FileSite Desktop

This chapter contains the following topics, which describe the FileSite desktop and the various operations you can perform:

- "WorkSite Security Concepts"
  - "Role-Based Security"
  - "Container-Based Access Rights"
  - "Understanding External Users and Groups"
  - "General Security Rules"
- "Using Elements of the Desktop"
  - "Managing the Folder List"
  - "Managing WorkSite Containers"
  - "Managing the Document Grid"
  - "Managing the Document Results Frame"

See Chapter 3 for an introduction to the elements of the FileSite desktop.

WorkSite Security Concepts

Before you learn about operations performed with elements of the FileSite desktop, it is important to understand the key aspects of WorkSite security. In most cases, when you are unable to access an item in WorkSite, the reason involves the item's security settings or your system privileges.

WorkSite security is designed to enable sharing of information and collaboration while simultaneously keeping content secure. There are two types of security in WorkSite:

- "Role-Based Security"
- "Container-Based Access Rights"

Role-Based Security

Roles define the operations that a user can perform within the WorkSite system. The WorkSite Administrator assigns roles to users and determines what privileges are given to each role. Users cannot change their own role assignments.

Container-Based Access Rights

Workspaces, tabs, and folders have individual security settings. The Owner of the container sets security at the time of creation after deciding which users need access.

There are three ways to set security on a WorkSite container:

- "Inherited Security"
- "Default Security"
- "Access Control List (ACL)"

Inherited Security

By default, most WorkSite containers and documents are set to inherit security settings from the parent container. That is, if you add a folder inside an existing folder, the new folder will inherit the security settings of the folder you put it in. Similarly, if you add a document to an existing folder, your document will inherit the security settings of the folder you put it in.

Icons for the different containers indicate whether their security is inherited. As shown in Table 7, a normal icon indicates that the container has inherited security from the parent container. A key added to the image indicates that the container uses individual security.

Table 7 Example Inherited and Individual Security Container Icons

Icon	Description
	Category folder icon showing *inherited* security
	Category folder icon showing *individual* security (key added)

Default Security

The available default security levels are:

- **Private**: Only the user who created the container, and other users and groups explicitly granted access rights, can access the container.
- **View**: All users can access the container but cannot add or remove items from the container unless explicitly assigned access rights.
- **Public**: All users can access the container unless explicitly denied access, but cannot add or remove items from the container unless explicitly assigned access rights. Users cannot create root level folders in the WorkSite library.

The Owner or a user with full access on the container can edit its default security levels.

Access Control List (ACL)

The Owner of a WorkSite container or a user with full access can assign specific access rights to individual users and groups in an Access Control List (ACL).

The access rights corresponding to each level are:

- **No Access**: Users cannot view the container in the WorkSite library.
- **Read**: Users cannot add, edit or remove items, but they can view the container and its contents.
- **Read/Write**: Users can add items to the container, but they cannot remove the container or change the container's security.

- **Full Access**: Users have full access to the container, with the same rights as the Owner of the container. Apart from being able to add, edit, and delete items from the container, they can also change the security settings on the container.

NOTE When you create an ACL, the access privileges you grant to specific users and groups are *exceptions* to the Default Security level you choose. For example, if a document is set to Public, then all users will implicitly have Read access to it. But a user who has been explicitly granted No Access will not be able to see the document, even though it is Public.

NOTE When you create an ACL for any Workspace item or folder item, including documents, only users and groups that have Read or higher access to the Workspace can be added to this list. In other words, only users and groups that are listed on the Workspace's ACL can be given access rights to the contents of the Workspace.

Understanding External Users and Groups

An *external user* is a special type of WorkSite user account that your WorkSite Administrator can set up. This type of account helps manage user accounts for people outside your organization who require access to your WorkSite system. As with standard users, external users can be organized into *external groups*. For information about external users and groups in your WorkSite system, consult your WorkSite Administrator.

General Security Rules

The following general security rules are in effect in FileSite:

- When a group is granted access privileges to a container or document, the same access rights are applied to all users who are members of the group.
- WorkSite security is based on an *optimistic model.* This means that, whenever access privileges conflict, the greater access privilege is applied. For example, suppose you have Read access to a document because you are a member of Group 1. However, you also have Read/Write access to the document as an

individual user. In this case, because your individual access level is higher, you will have Read/Write access when you open the document.

NOTE In some systems, your WorkSite Administrator can configure WorkSite to resolve conflicts using a *pessimistic* security model. In this case, the *lower* access privilege of the user or group is applied. Contact your WorkSite Administrator for more information.

- Roles take precedence over user/group access rights on WorkSite containers. For example, a user who has Full Access on a document folder generally will have the right to import documents into that folder. However, if a user's role does not allow importing documents, the user will *not* be allowed to import.
- The *Author* (the user who created the document) and the *Operator* (the user currently working on the document) always retain Full Access, regardless of the Default Security level.

Using Elements of the Desktop

This section describes how to configure and use the elements of the FileSite Desktop.

Managing the Folder List

Operations that can be performed within the Folder List are discussed in this section. See "Folder List" on page 76 for an overview of the Folder List and its components.

Displaying the Folder List

In Microsoft Outlook, you can keep the Folder List as your main view. If you set the Folder List view and close Microsoft Outlook, you will see the Folder List when you reopen Microsoft Outlook.

- In Outlook 2003, click the **View** menu and select **Folder List**.
- In Outlook 2007, click the **Go** drop-down menu and select **Folder List**.
- In Outlook 2010, the Folder List view is the default, but you can modify view settings. Click the **View** tab and select the **Navigation Pane** drop-down menu.

Navigating in the Folder List

You can navigate within the Folder List using the mouse or the arrow keys.

Navigating in the Folder List with a Mouse

Nodes representing containers appear in the Folder List wherever there is a branch. Click the plus (+) symbol to expand a node; click the minus (-) symbol to collapse a node.

Navigating in the Folder List Without a Mouse

- Use the **UP** and **DOWN** arrow keys to move the cursor up and down in the tree.
- Use the **LEFT** and **RIGHT** arrow keys to open and close nodes in the tree. The plus (**+**) key expands a node and the minus (**-**) key collapses it.
- Use **ENTER** to select a worklist, folder, or saved search.

NOTE When you select a worklist, folder or saved search, focus automatically shifts to the Document Grid, enabling you to use keyboard shortcuts to navigate in that frame as well. See "Menu Options and Toolbar Buttons" on page 72 for a list of keyboard shortcuts for frequently used functions.

Managing Folder List Components

Operations that can be performed with components of the Folder List are described in this section. See "Folder List" on page 76 for an overview of the Folder List and its components.

Checked-out Documents

Click the **Checked-out Documents** icon to display a list of all documents you currently have checked out. The documents appear in the Document Grid.

Right-click the **Checked-out Documents** icon to access the menu options described in Table 8.

Table 8 Checked-out Documents menu options

Menu Option	Function
Refresh	Refreshes the contents of the Checked-out Documents list.
Outlook's native menu	Opens the Microsoft Outlook menu. Using Outlook's native menu with WorkSite objects can lead to inconsistent results, so it is recommended that you use WorkSite menus.

Document Worklist

Click the **Document Worklist** icon, to display a combined list of your recently accessed documents. The documents appear in the Document Grid.

Right-click the **Document Worklist** icon to access the menu options described in Table 9.

Table 9 Document Worklist menu options

Menu Option	Function
Import	Allows you to import a document into the Worklist. **Note:** This option may be disabled by your *WorkSite Administrator*.
Search Documents	Opens the Search dialog box to search for documents in the Document Worklist.
Refresh	Refreshes the contents of the Document Worklist.
New	Allows you to create new documents.
Outlook's native menu	Opens the Microsoft Outlook menu. Using Outlook's native menu with WorkSite objects can lead to inconsistent results, so it is recommended that you use WorkSite menus.

Matter Worklist

Click the **Matter Worklist** icon to display a list of your recently accessed Workspaces. The documents appear in the Document Grid.

Right-click the **Matter Worklist** icon to access the menu options described in Table 10.

Table 10 Matter Worklist menu options

Menu Option	Function
Refresh	Refreshes the contents of the Matter Worklist.
Outlook's native menu	Opens the Microsoft Outlook menu. Using Outlook's native menu with WorkSite objects can lead to inconsistent results, so it is recommend that you use WorkSite menus.

See "Matter Worklist Options" on page 63 for more information on how to set the maximum number of items to appear in the Matter Worklist.

Recent Searches

Click the **Searches** icon under the **Recent Searches** icon to view a list of your recently performed searches. Documents that fulfill the search criteria are displayed in the Document Grid.

Right-click the **Recent Searches** icon to access the menu options described in Table 11.

Table 11 Recent Searches menu options

Menu Option	Function
Remove all searches	Empties the Recent Searches folder.
Outlook's native menu	Opens the Microsoft Outlook menu. Using Outlook's native menu with WorkSite objects can lead to inconsistent results, so it is recommended that you use WorkSite menus.

Right-click the **Searches** icon to access the menu options described in Table 12.

Table 12 Searches menu options

Menu Option	Function
New Search	Allows you to create a new search. This option is disabled in the Recent Searches right-click menu.
Delete	Allows you to delete the search.
Outlook's native menu	Opens the Microsoft Outlook menu. Using Outlook's native menu with WorkSite objects can lead to inconsistent results, so it is recommended that you use WorkSite menus.

My Matters

My Matters displays a list of shortcuts to your Workspaces. You can subscribe to another user's My Matters folder if the user has granted you Read access. You cannot see items on a Workspace unless you have at least Read access.

Right-click the **My Matters** icon to access the menu options described in Table 13.

Table 13 My Matters menu options

Menu Option	Function
Synchronization Options **Note:** This option appears only if you have installed OffSite.	Displays the Sync Options dialog box to select folders and Workspaces for synchronization and set some parameters for minimizing the synchronization time. For more information, refer to the *OffSite Installation and User's Guide*.
Add Shortcuts	Adds shortcuts from other matters/Workspaces to My Matters.
Subscribe	Allows you to access the My Matters folders of other users.
Refresh	Refreshes the contents of the My Matters folder.
Move	Disabled. You cannot move My Matters.
Delete	Disabled. You cannot delete My Matters.
Rename	Disabled. You cannot rename My Matters.
New	Creates new Categories and Workspaces in My Matters.
Properties	Opens the My Matters Properties dialog box.
Outlook's native menu	Opens the Microsoft Outlook menu. Using Outlook's native menu with WorkSite objects can lead to inconsistent results, so it is recommended that you use WorkSite menus.

My Favorites

My Favorites displays a list of shortcuts to items you selected to add to your My Favorites list. You can add Workspaces, folders, and documents to your My Favorites list. In addition, you can create categories to organize your frequently used items.

Right-click the **My Favorites** icon to access the menu options described in Table 14.

Table 14 My Favorites menu options

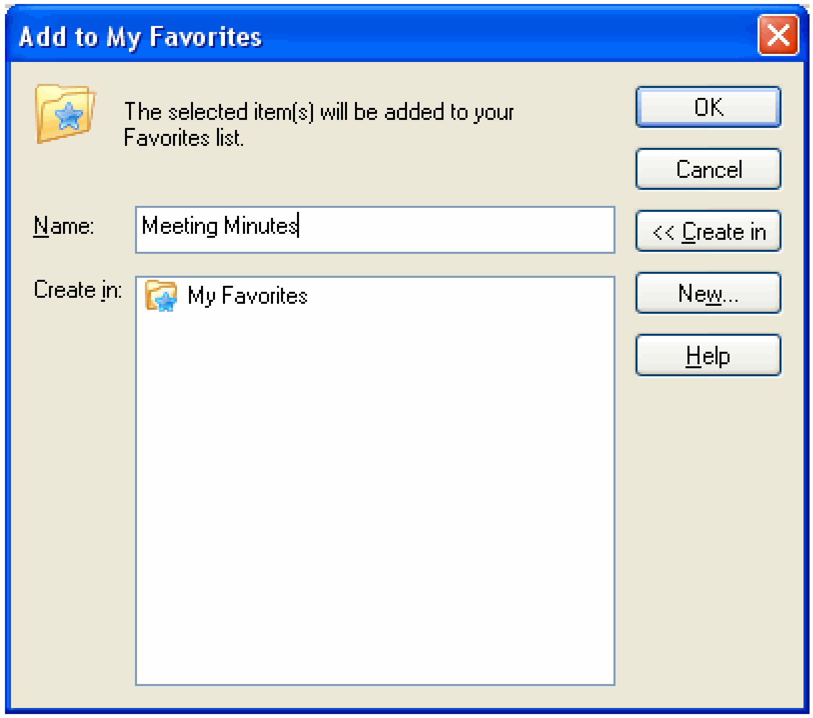
Menu Option	Function
Synchronization Options **Note:** This option appears only if you have installed OffSite.	Displays the Sync Options dialog box to select folders and Workspaces for synchronization and set some parameters for minimizing the synchronization time. For more information, refer to the *OffSite Installation and User's Guide*.
Add Shortcuts	Adds shortcuts from other objects to the My Favorites folder.
Refresh	Refreshes the contents of My Favorites.
Move	Disabled. You cannot move My Favorites.
Delete	Disabled. You cannot delete My Favorites.
Rename	Disabled. You cannot rename My Favorites.
New	Allows you to create new Categories.
Properties	Opens the My Favorites Properties dialog box.
Outlook's native menu	Opens the Microsoft Outlook menu. Using Outlook's native menu with WorkSite objects can lead to inconsistent results, so it is recommended that you use WorkSite menus.

Adding Documents to My Favorites

You can add documents (already in a WorkSite library) to your My Favorites list.

1. Select the document from the Document Grid.
2. Right-click the selected document to open the **Document** menu.
3. Select **Add to My Favorites**. The Add to My Favorites dialog box opens.

Figure 26 Add to My Favorites dialog box



4. Enter a name for the document.
5. Click **OK** to add the document to your **My Favorites** list.

WorkSite Explorer

The **WorkSite Explorer** node displays a list of all the libraries you can access. It allows you to navigate through the folders and Workspaces in each library. Under each WorkSite library, you can expand the following nodes to locate documents:

- My Folders
- Other Folders
- My Workspaces
- Other Workspaces

Right-click the **WorkSite Explorer** icon to access the menu options described in Table 15.

Table 15 WorkSite Explorer menu options

Menu Option	Function
Refresh	Refreshes the contents of the WorkSite Explorer node.
Outlook's native menu	Opens the Microsoft Outlook menu. Using Outlook's native menu with WorkSite objects can lead to inconsistent results, so it is recommended that you use WorkSite menus.

Managing WorkSite Containers

Commands associated with WorkSite containers are discussed in this section. See "Document Grid" on page 81 for an overview of the various WorkSite containers.

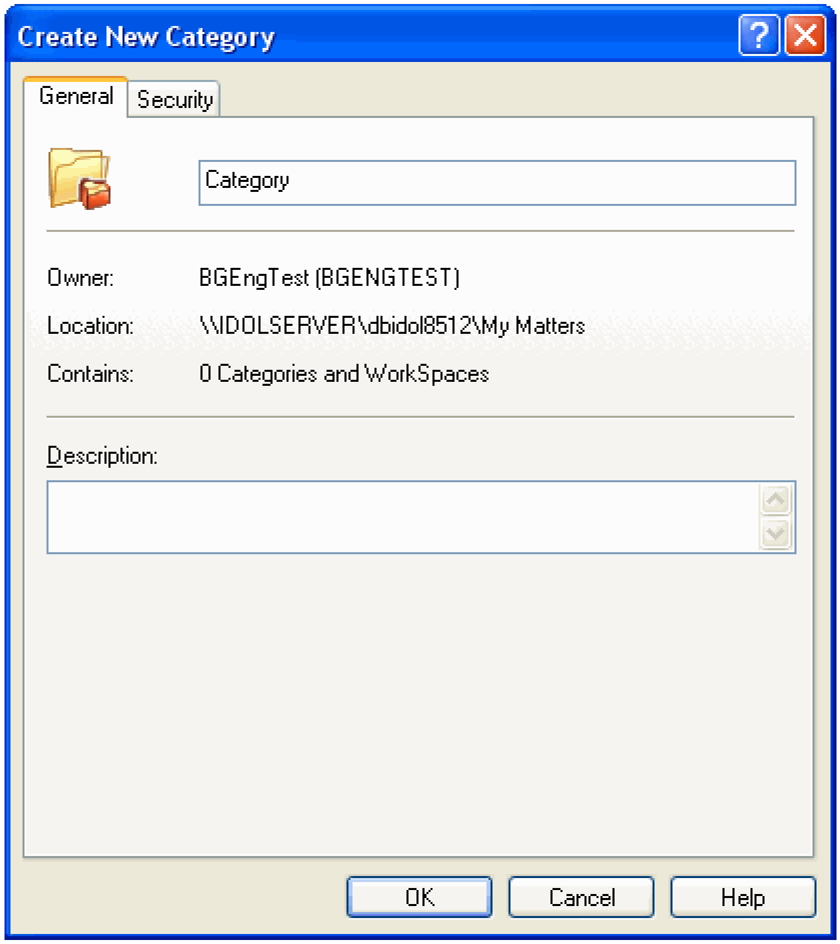
Category

You can create a category in **My Matters**, in **My Favorites,** or within another category. You can set security on a category to make it available to a select list of users and/or groups.

Creating a Category in My Matters

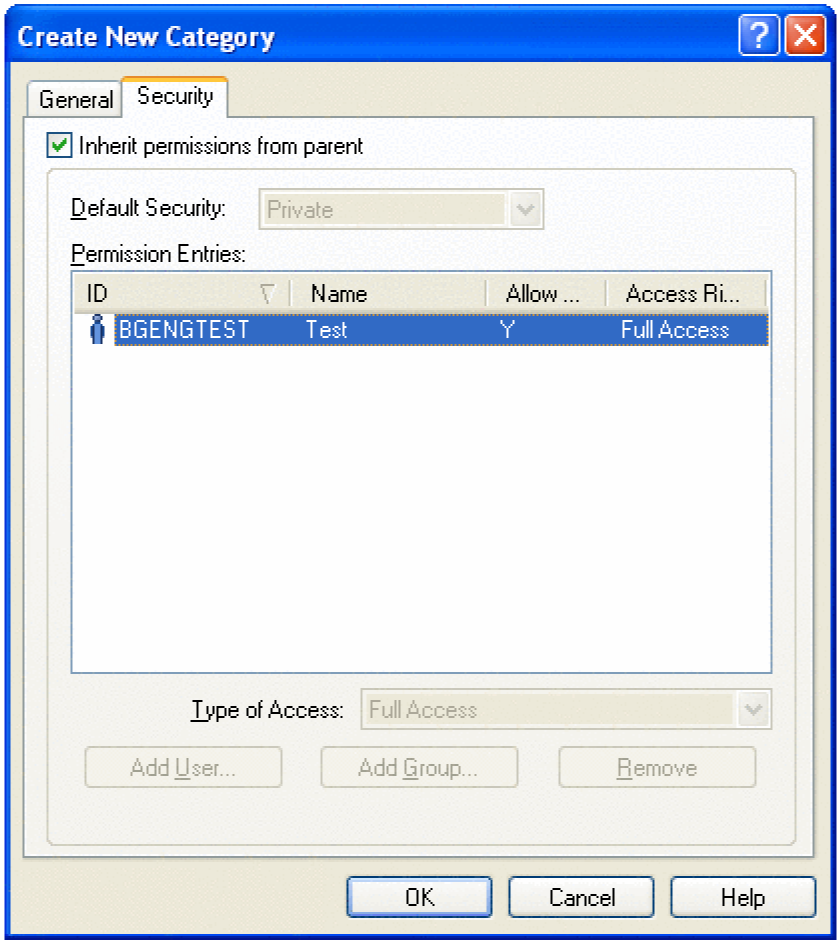
1. Right-click the **My Matters** icon in the Folder List, point to **New** and select **Category**. The Create New Category dialog box opens.

Figure 27 Create New Category dialog box, General



2. Enter a **Name** for the category.
3. Enter a **Description** for the category.
4. To define the security for the category, click the **Security** tab.

Figure 28 Create New Category dialog box, Security



5. When you create a category, it has the same security settings as **My Matters** by default. To change these settings, clear the **Inherit permissions from parent** check box. The **Default Security** list is enabled.

6. To set the Default Security for the category, make a selection from the **Default Security** list. See "Default Security" on page 87 for more information.

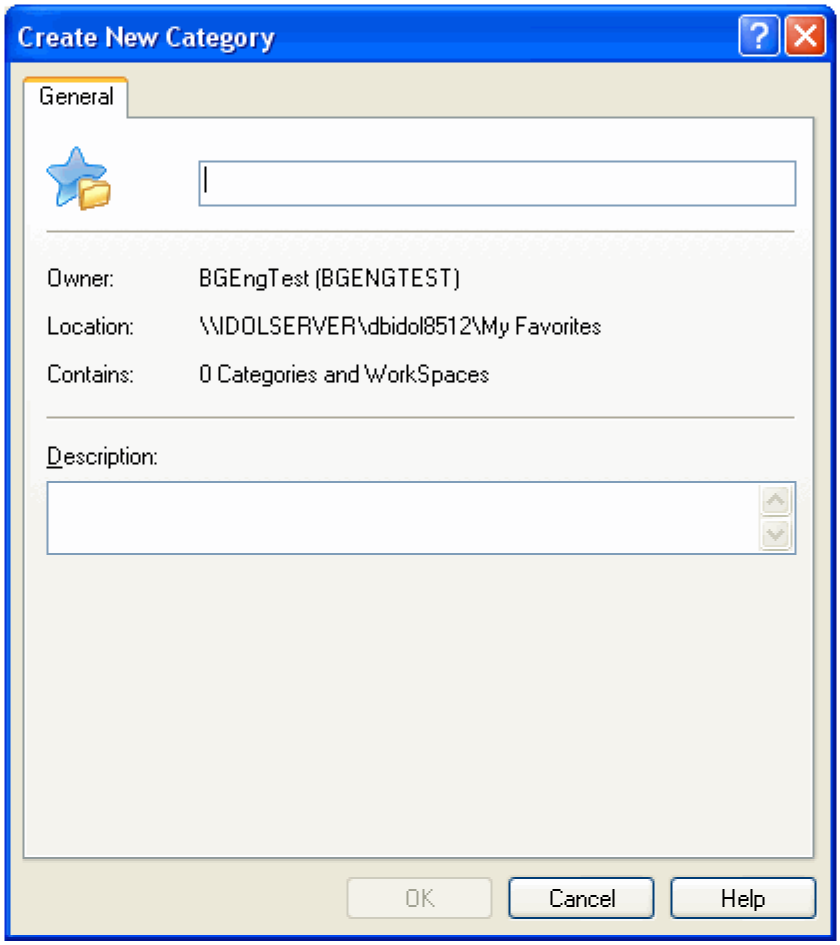
7. To specify greater or lesser access privileges for specific users and groups, make a selection from the **Type of Access** list. The access privileges that you grant to specific users and groups using this list are *exceptions* to the Default Security settings you select for the category. See "Access Control List (ACL)" on page 87 for more information.

NOTE The security settings on a category determine whether a user can see the category, and whether the user can add or remove objects from the category.

Creating a Category in My Favorites

1. Right-click the **My Favorites** icon in the Folder List, point to **New** and select **Category.** The Create New Category dialog box opens.

Figure 29 Create New Category dialog box, My Favorites



2. Enter a **Name** for the category.
3. Enter a **Description** for the category.
4. Click **OK**.

Modifying a Category

Right-click the category in the Folder List to access the menu options described in Table 16.

Table 16 Category menu options

Menu Option	Function
Add Shortcuts	Adds shortcuts from other objects to the category.
Subscribe	Disabled. You cannot subscribe to a category.
Refresh	Refreshes the contents of the category.
Move	Moves the selected category to another category. You can also create a new category to move the selected category into.
Delete	Deletes the category from the WorkSite library. You must have Full Access on the category to perform this operation.
Rename	Renames the category.
New	Creates a new category or Workspace in the selected category.
Properties	Opens the Category Properties dialog box.
Outlook native menu	Opens the Microsoft Outlook menu. Using Outlook's native menu with WorkSite objects can lead to inconsistent results, so it is recommended that you use WorkSite menus.

Workspace

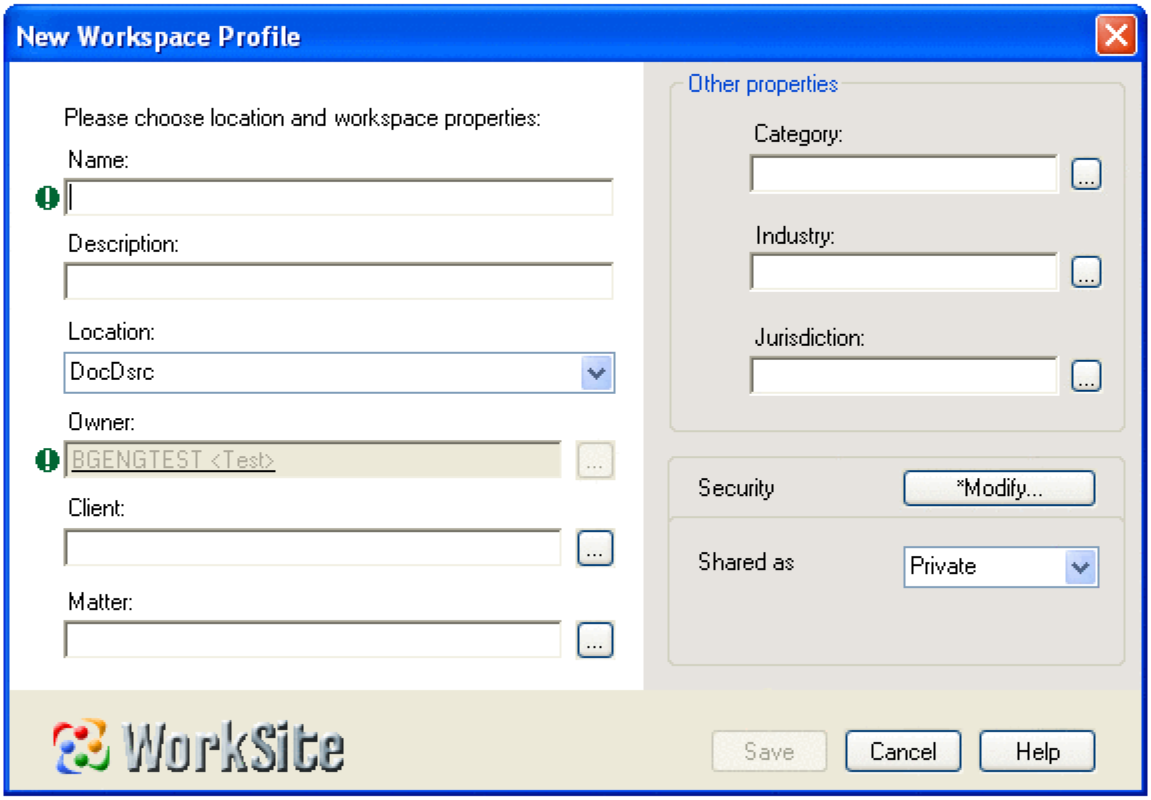
You can create a Workspace in My Matters or in a category. You can also set security on Workspaces created under them. You can subscribe to any user's My Matters folder to which you have access.

Creating a Workspace

1. Right-click the **My Matters** icon in the Folder List, point to **New** and select **Workspace**. The New Workspace Profile dialog box opens.

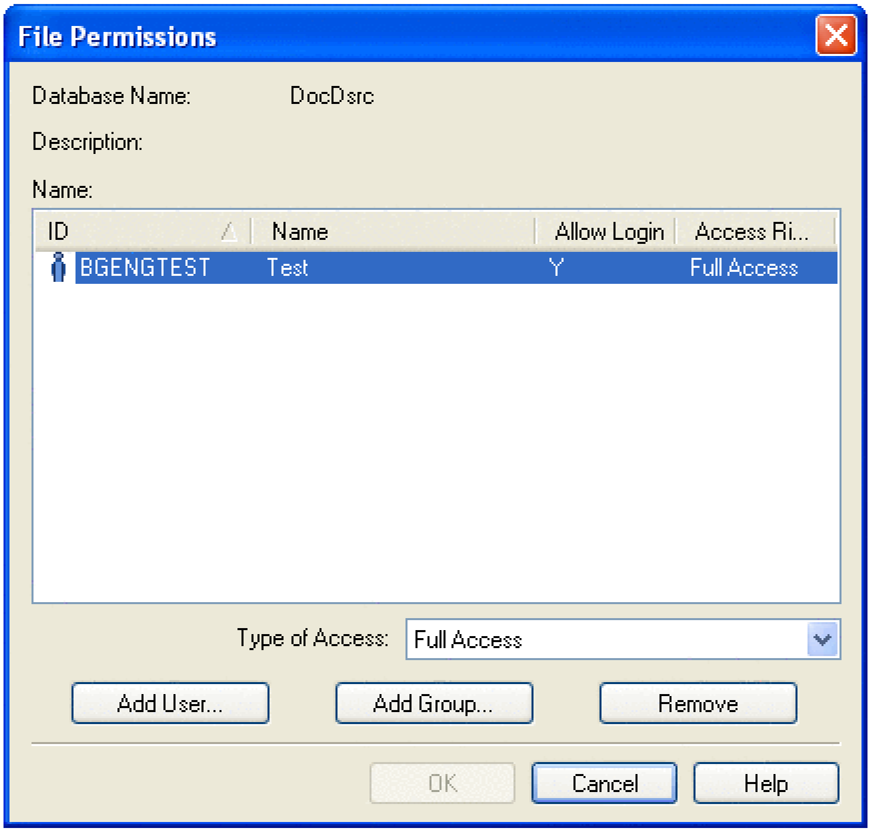
NOTE The dialog box on your system may not contain every field that appears in the default dialog box. Your WorkSite Administrator can customize the profile to meet your business needs.

Figure 30 New Workspace Profile dialog box



2. Enter a **Name** for the Workspace. In many cases this will be a Client/Matter pair.
3. Enter a **Description** for the Workspace.
4. Select a **Location** from the list. The **Location** is the name of the library where the Workspace will reside.
5. You are automatically entered as the **Owner** of the Workspace.
6. Enter or select the **Client** and **Matter** that are associated with the Workspace, if required.
7. Enter or select fields in the **Other Properties** area, such as **Category**, **Industry**, and **Jurisdiction**, if required.
8. To set the Default Security for the Workspace, make a selection from the **Shared as** list. See “Default Security” on page 87 for more information.
9. To define the **Security** for the Workspace, click **Modify.** The File Permissions dialog box opens.

Figure 31 File Permissions dialog box



10. To specify greater or lesser access privileges for selected users and groups, make a selection from the **Type of Access** drop-down list. The access privileges that you grant to specific users and groups using this drop-down list are *exceptions* to the Default Security settings you select for this Workspace. See "Access Control List (ACL)" on page 87 for more information.

NOTE The security settings on a Workspace determine whether a user can see the Workspace and whether the user can add or remove objects from the Workspace.

Modifying a Workspace

Right-click the created Workspace to access the menu options described in Table 17.

Table 17 Workspace menu options

Menu Option	Function
Add Shortcuts	Adds shortcuts from other objects to the Workspace.
Search Documents	Opens the Search dialog box.
Send Link	Opens a new e-mail message with the selected object link as an attachment.
Show Web View	Opens the WorkSite Web page in the document pane.
Show Hidden Tabs	Displays tabs that are hidden. Refresh hides the tabs that have been displayed by this option.
Refresh	Refreshes the contents of the Workspace.
Refile	Applies the Workspace profile and security information to all tabs and folders within it. You have the option of modifying the security of folders that do not inherit security.
Move	Moves the selected Workspace to a category.
Create Shortcut	Opens a browse dialog box and allows you to select a Workspace or folder to add as a shortcut.
Delete	Deletes the Workspace from the WorkSite library. You must have Full Access on the Workspace to perform this operation.
Rename	Renames the Workspace.
New	Creates new document folders, search folders, and tabs.
Add to My Matters	Adds a shortcut to the selected Workspace to your My Matters list.

Table 17 Workspace menu options

Menu Option	Function
Add to My Favorites	Adds a shortcut to the selected Workspace to your My Favorites list.
Properties	Opens the Workspace Properties dialog box.
WorkSite Miner **Note:** This option is added to the menu using a registry key. Contact your WorkSite Administrator for more information.	Opens the WorkSite Miner window with the scope keyword followed by the name of the database in the query box. For more information about using WorkSite Miner, refer to the *Express Search User's Guide*. **Note:** An error message appears in the following situations: ■ If the Express Search agent is not running in the system tray ■ If you try to launch WorkSite Miner when Express Search is busy or when a lookup window or Properties dialog box is open ■ If you invoke it from a WorkSite server that is not detected by the Express Search agent

Changing Workspace Profile Information

You can edit profile information of Workspaces you have created, and you can also edit Workspaces created by others if you have been granted Full access to them.

1. Select the Workspace.
2. Right-click or press **SHIFT+F10** to access the menu.
3. Choose **Properties** from the menu. The Properties dialog box opens.
4. Click **Workspace Properties** to open the Workspace Properties dialog box.
5. Add or change the profile information in the same way you would set the profile information when creating a new Workspace. See “Creating a Workspace” on page 100.
6. When you click **Save** to save your changes, you are prompted to Refile. This will cause all documents and folders in the Workspace to take on the changes you made to the Workspace metadata and security settings. Click **Yes** to refile or **No** to save your changes without refiling the Workspace.

Refiling a Workspace

Workspaces have profile properties. If you have Read/Write access on a Workspace, you can change the properties of the objects it contains using the **Refile** option.

NOTE If you perform a Refile command on a Workspace, all tabs, folders, subfolders, and documents under that Workspace take on the profile information of the Workspace. The transfer of profile information is cumulative. For example, when you refile a Workspace, the profile values of the Workspace are transferred to the tabs and folders and the documents contained in the folders. If the folders have additional properties, these properties are also passed to the documents inside the folders during the Refile operation.

NOTE Not all WorkSite objects can be refiled. For example, you cannot refile shortcuts, search folders, or document folders under search folders. When these objects exist on a Workspace that is refiled, they retain their original properties.

The rules of inheritance when refiling in a Workspace are described in Table 18.

Table 18 Workspace Refiling Rules

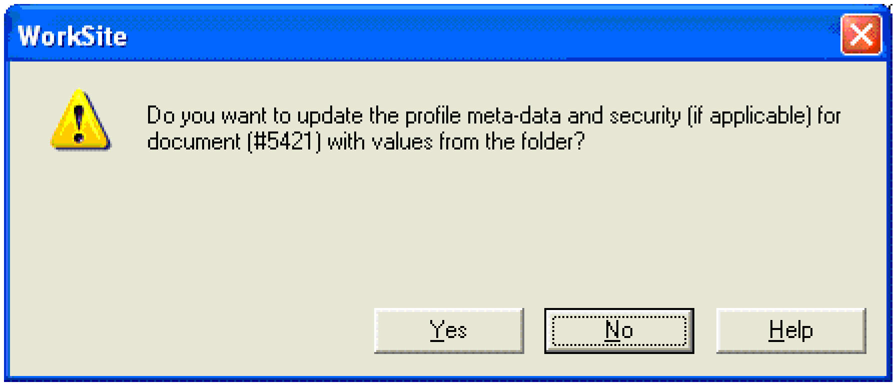
Workspace to Tab	■ Parent Object: Workspace ■ Refiled Object (inherits from parent): Tab ■ Metadata: None ■ Security: Set folder security to Inherited (from parent).
Workspace to Folder	■ Parent Object: Workspace ■ Refiled Object (inherits from parent): Folder ■ Metadata: Folder Metadata = Existing Folder Metadata + Parent (Workspace) Metadata (except CLASS/ SUBCLASS, TYPE, COMMENTS, OPERATOR) ■ Security: Set folder security to Inherited (from parent).

To perform refiling in a Workspace:

1. Right-click the **Workspace** icon in the Folder List to open the menu.

2. Select **Refile**. A message appears asking if you want to apply the container properties to all the objects in the container. See Figure 32.

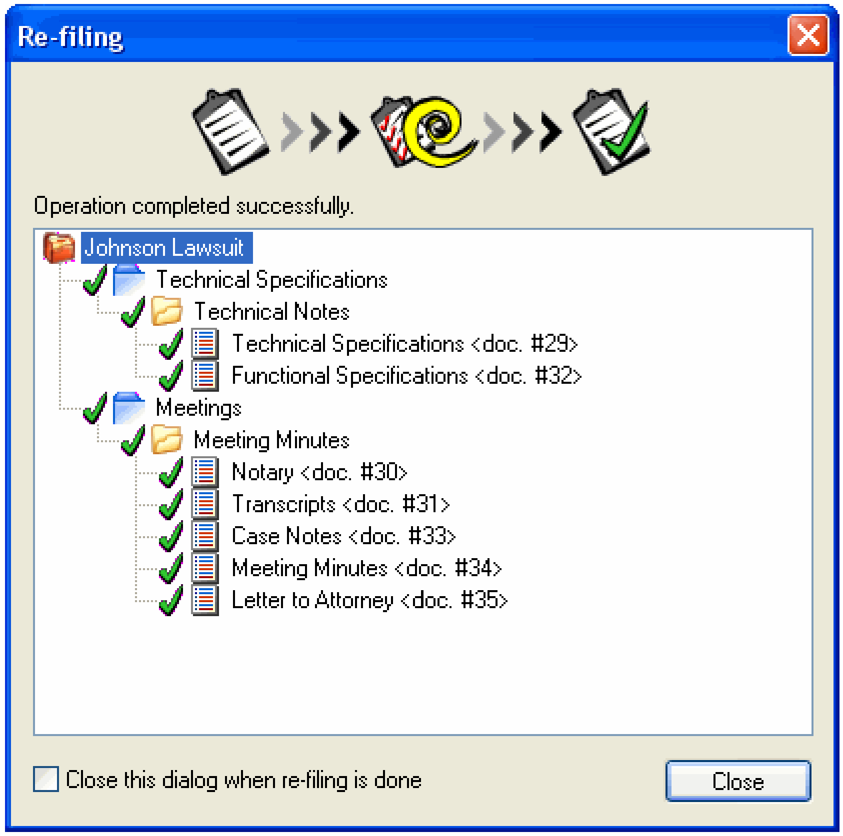
Figure 32 Apply profile from container message



3. Click **Yes** to perform the Refile operation. A Refiling dialog box shows the progress of refiling. If there are many objects to refile, this operation can take a few minutes. See Figure 33.
4. If you select the **Modify security of sub-folders that don't inherit security** option, only the security settings for those folders that are not set to inherit security from the parent are modified during the refiling of their parent container.

NOTE If you have Full Access to the item when you refile, a green check mark appears next to it. A yellow check mark indicates you have Read/Write access. If you do not have access to the item, a red cross mark indicates that it could not be refiled.

Figure 33 Refiling dialog box



5. Click **Close** to close the Refiling dialog box. You can also select the **Close this dialog when refiling is done** option to close the dialog box automatically.

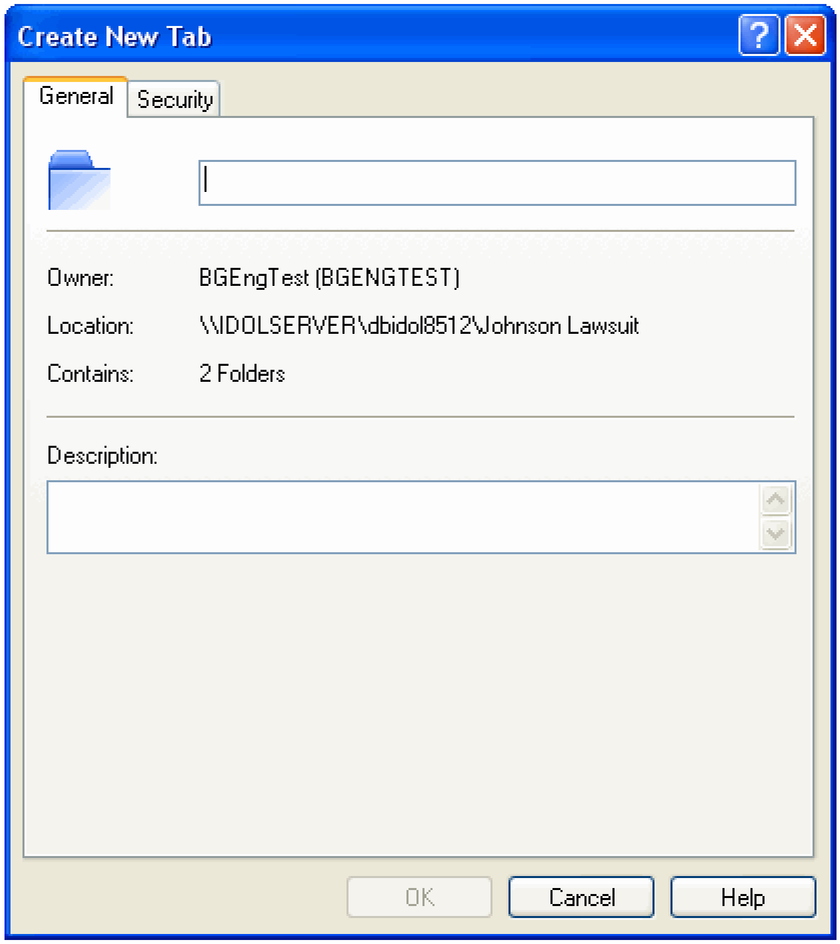
Tab

You can create a tab in a Workspace and make them available to other users based on the security settings on the tab. To create a tab, you must have Full Access to the Workspace in which it is created.

Creating a Tab

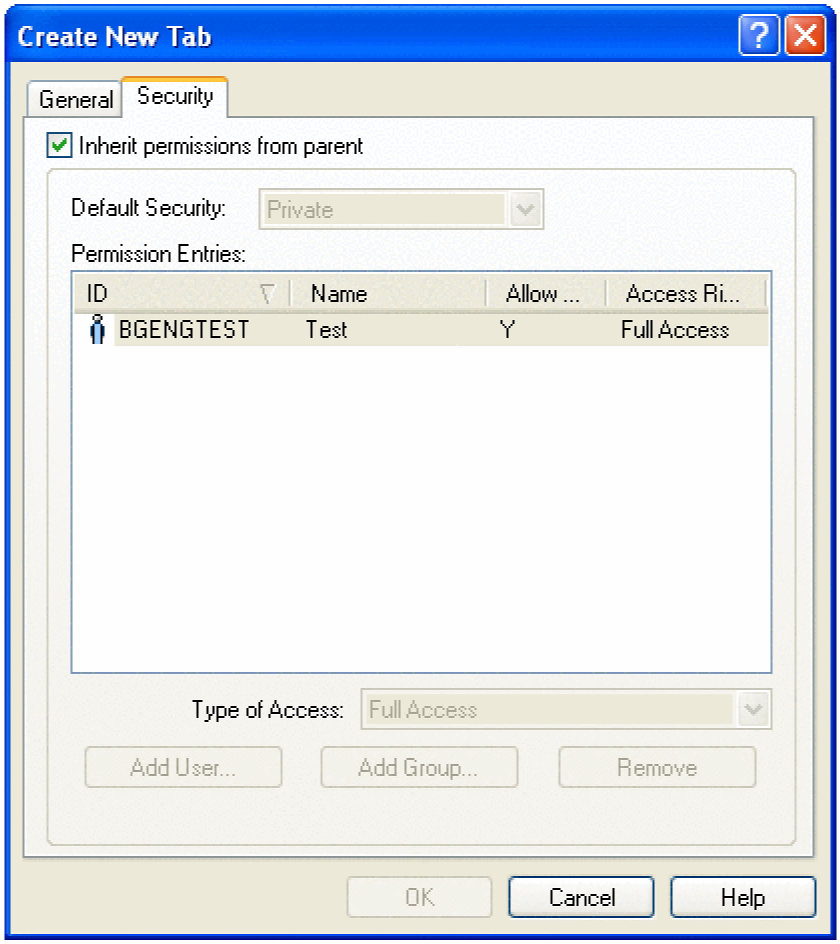
1. Right-click the **Workspace** icon in the Folder List, point to **New** and select **Tab.** The Create New Tab dialog box opens.

Figure 34 Create New Tab dialog box, General



2. Enter a **Name** for the tab.
3. Enter a **Description** for the tab.
4. To define the **Security** for the tab, click the **Security** tab.

Figure 35 Create New Tab dialog box, Security



When you create a tab, it has the same security settings as the Workspace by default.

5. If you wish to change these settings, clear the **Inherit permissions from parent** check box. The **Default Security** list is now enabled.

6. To set the Default Security for the tab, make a selection from the **Default Security** list. See "Default Security" on page 87 for more information.

7. To specify access privileges for selected users and groups, make a selection from the **Type of Access** list. The access privileges that you grant to specific users and groups using this list are *exceptions* to the Default security setting. See "Access Control List (ACL)" on page 87 for more information.

NOTE The security settings on a tab determine whether a user can see the tab and whether the user can add or remove objects from the tab.

Modifying a Tab

Right-click the **Tab** icon to access the menu options described in Table 19.

Table 19 Tab menu options

Menu Option	Function
Search Documents	Opens the Search dialog box.
Add Shortcuts	Adds shortcuts from other objects to the tab.
Send Link	Disabled.
Refresh	Refreshes the contents of the tab.
Refile	Applies the tab security information to all its folders. You have the option of modifying the security of folders that do not inherit security.
Delete	Deletes the tab from the WorkSite library. You must have Full Access on the tab to perform this operation.
Rename	Renames the tab.
New	Creates new document folders or search folders within the tab.
Properties	Opens the tab Properties dialog box.
Outlook’s native menu	Opens the Microsoft Outlook menu. Using Outlook’s native menu with WorkSite objects can lead to inconsistent results, so it is recommended that you use WorkSite menus.

Refiling a Tab

Tabs have generally inherit profile properties from the parent Workspace. If you have Read/Write access on a tab, you can change the properties of its documents and containers using the **Refile** option.

When you edit the properties of a tab, that is, make changes to its metadata or security, you are prompted to refile. This will cause all containers in the tab to take on the changes to the metadata.

The rules of inheritance when refiling in a tab are described in Table 20

Table 20 Tab Refiling Rules

Tab to Folder	■ Parent Object: Tab ■ Refiled Object (inherits from parent): Folder ■ Metadata: Because Tabs do not have Metadata, Folder Metadata = the Tab's Parent Workspace Metadata (except CLASS/SUBCLASS, TYPE, COMMENTS, OPERATOR) ■ Security: Set folder security to Inherited (from parent).

To refile a Tab:

The procedure for performing a Refile operation in a tab is similar to refiling in a Workspace. See "To perform refiling in a Workspace:" on page 105 for more information.

Document Folder

Document folders are used to organize your documents, including e-mail messages.

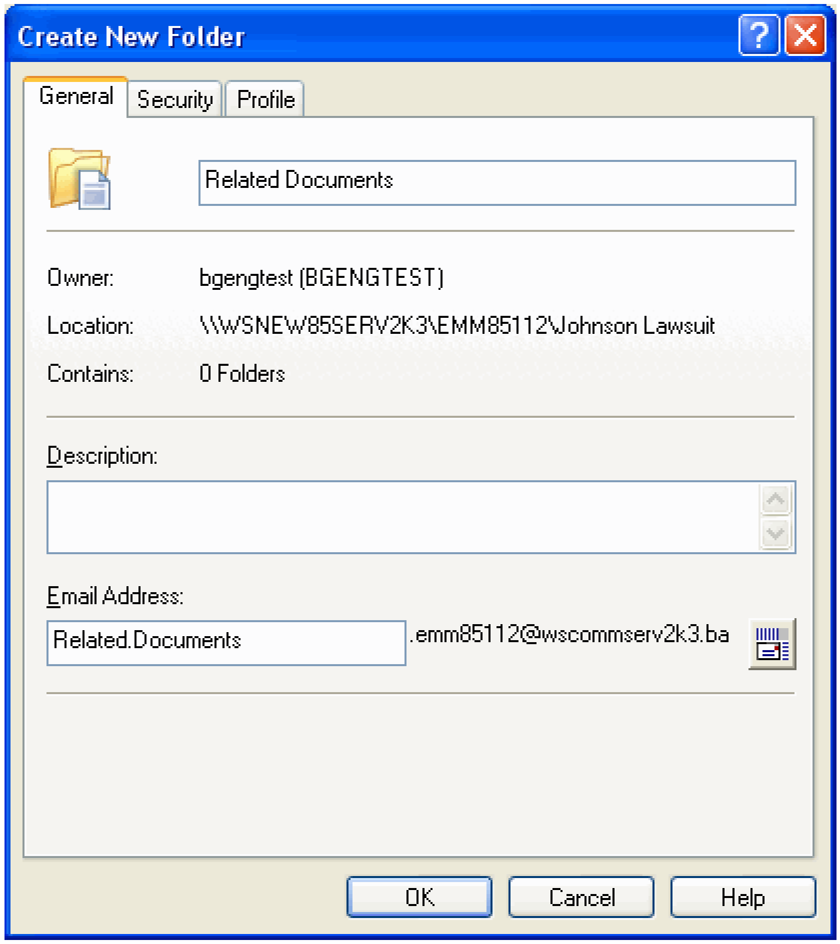
Creating a Document Folder

1. Right-click a **Workspace**, **Tab**, or **Document Folder** icon in the Folder List, point to **New** and select **Document Folder**.
2. To create a subfolder, right-click the **Folder** icon under which you want to create the subfolder. You can also access the folder menu by pressing **SHIFT+F10**.

NOTE You must have authority to create a subfolder within that folder. The Owner of the folder sets the security upon creation and can grant security options to other users. You can create subfolders under other users' folders if you are given authority to do so. Your WorkSite Administrator can disable the ability to create subfolders under other users' folders.

The Create New Folder dialog box opens.

Figure 36 Create New Folder dialog box, General



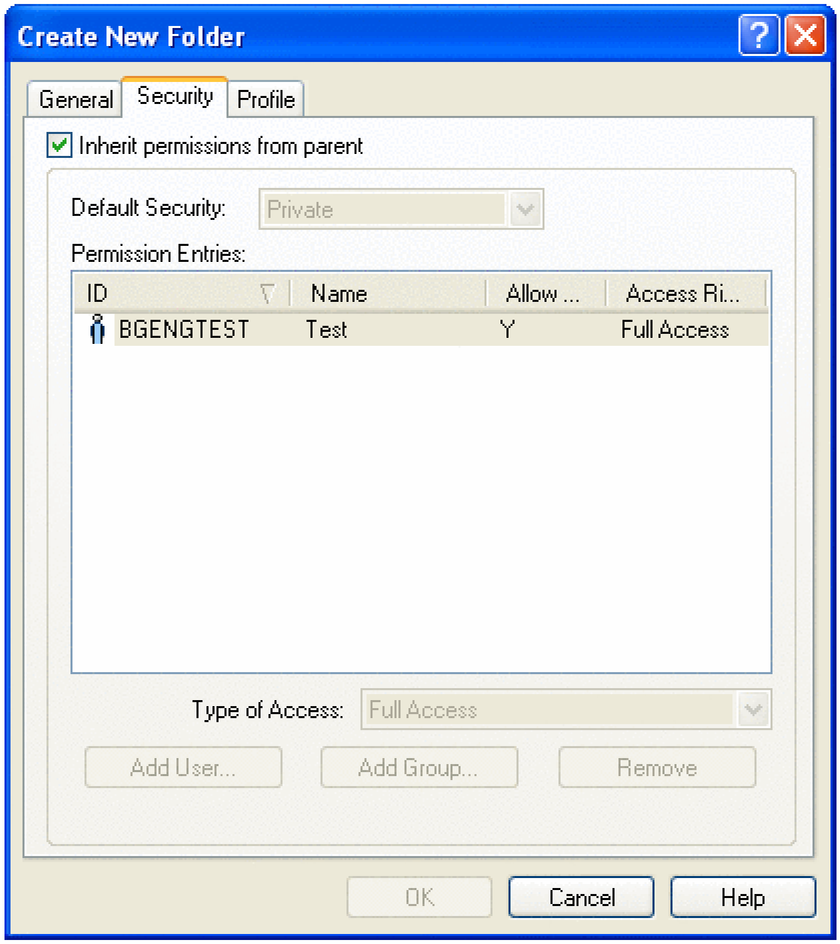
3. Enter a **Name** for the document folder.
4. Enter a **Description** for the document folder.

Generating a Folder E-mail Address

If your WorkSite system includes the optional WorkSite Communications Server, a FileSite folder with an e-mail address can receive e-mails automatically.

1. Click the  **E-mail Address** button for FileSite to automatically create a unique e-mail address for the folder. If you have entered Client/Matter profile information in the folder, this becomes the e-mail address, followed by the name of the WorkSite library and the name of your WorkSite Communications Server domain. For more information about how to use FileSite features with the WorkSite Communications Server, contact your *WorkSite Administrator*.
2. To set **security** on the document folder, click the **Security** tab.

Figure 37 Create New Folder dialog box, Security



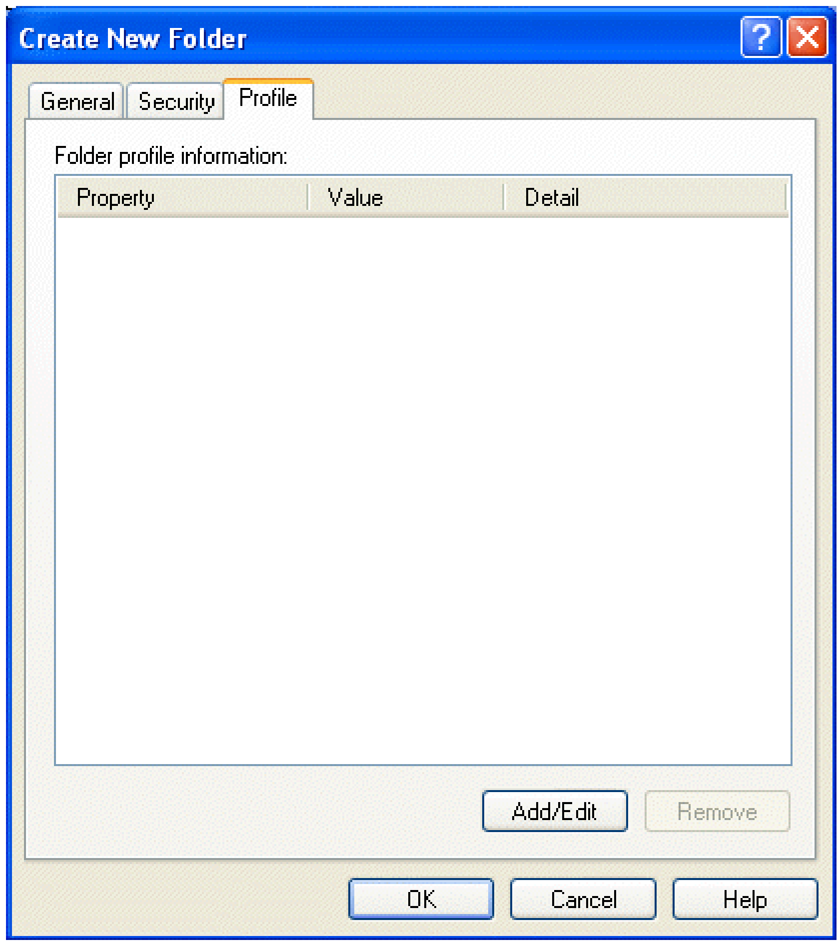
When you create a folder, it has the same security settings as the Workspace by default.

3. If you wish to change these settings, clear the **Inherit permissions from parent** check box. The **Default Security** list is now enabled.
4. To set the Default Security for the folder, make a selection from the **Default Security** list. See "Default Security" on page 87 for more information.
5. To specify access privileges for selected users and groups, make a selection from the **Type of Access** list. The access privileges that you grant to specific users and groups using this list are *exceptions* to the Default security setting. See "Access Control List (ACL)" on page 87 for more information.

NOTE The security settings on a folder determine whether a user can see the folder and whether the user can add or remove documents from the folder.

6. To set the folder profile information, select the **Profile** tab. Documents that you add to the folder after you set the profile data inherit the profile information from the folder.

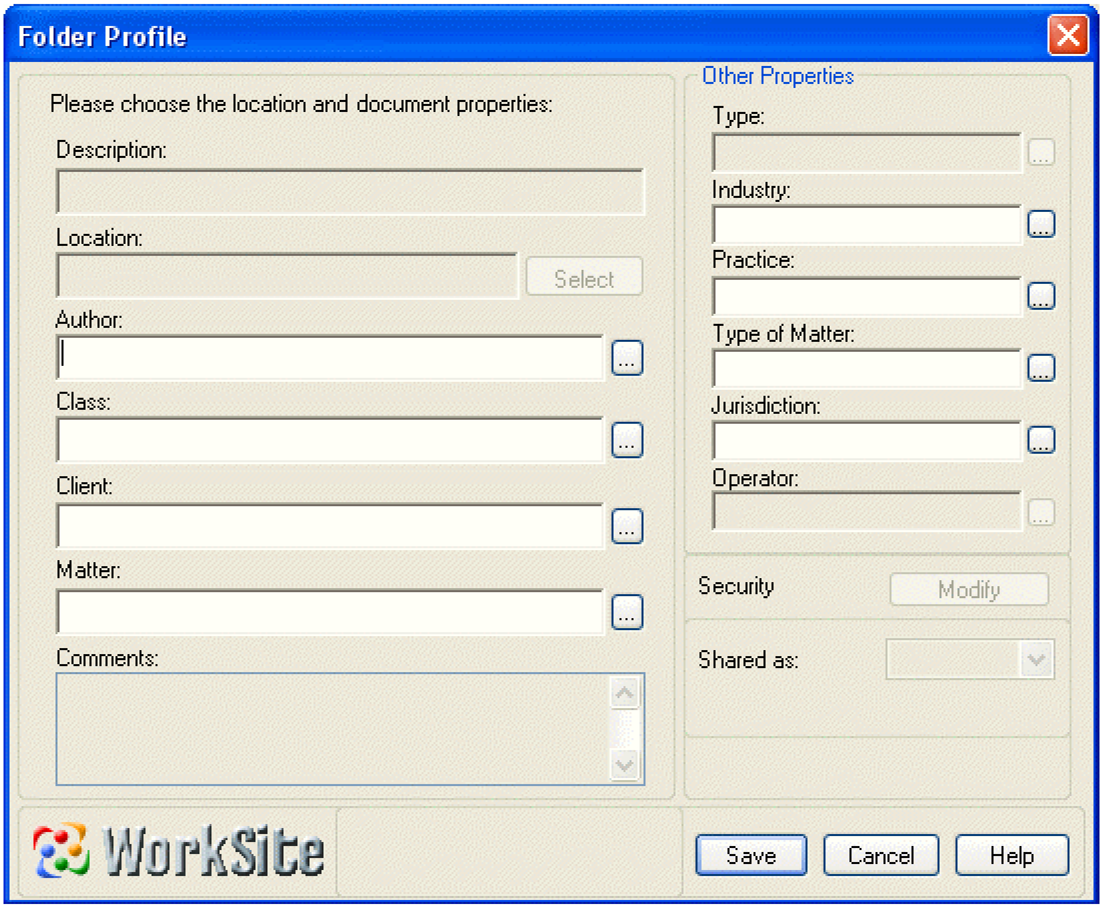
Figure 38 Create New Folder dialog box, Profile



7. Click **Add/Edit** to define the **Document Folder** profile. The Folder Profile dialog box opens.

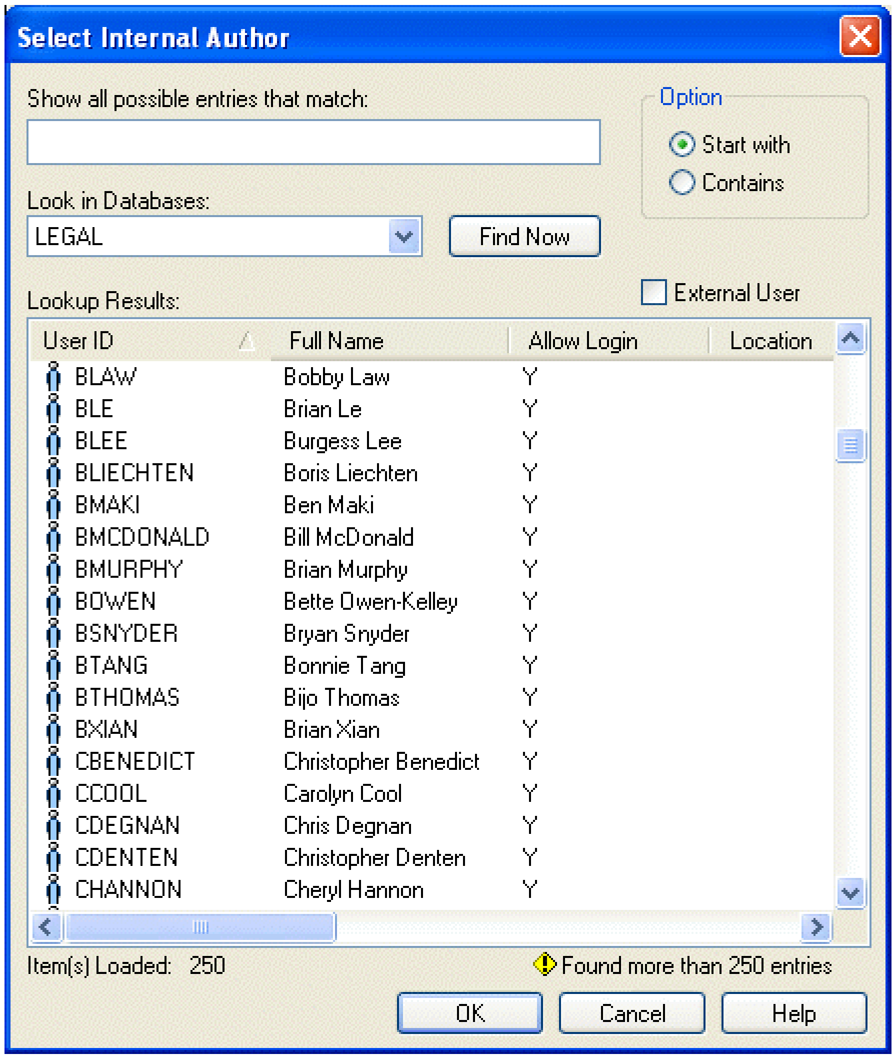
NOTE Your WorkSite Administrator may customize the Folder Profile dialog box on your system to display different fields, based on your company's business needs.

Figure 39 Folder Profile dialog box



8. Enter or select a value for each field, as appropriate. You can use the **Look up** button to select a value. A Look up dialog box opens. Figure 40 is an example of the Look up dialog box for the **Author** field.

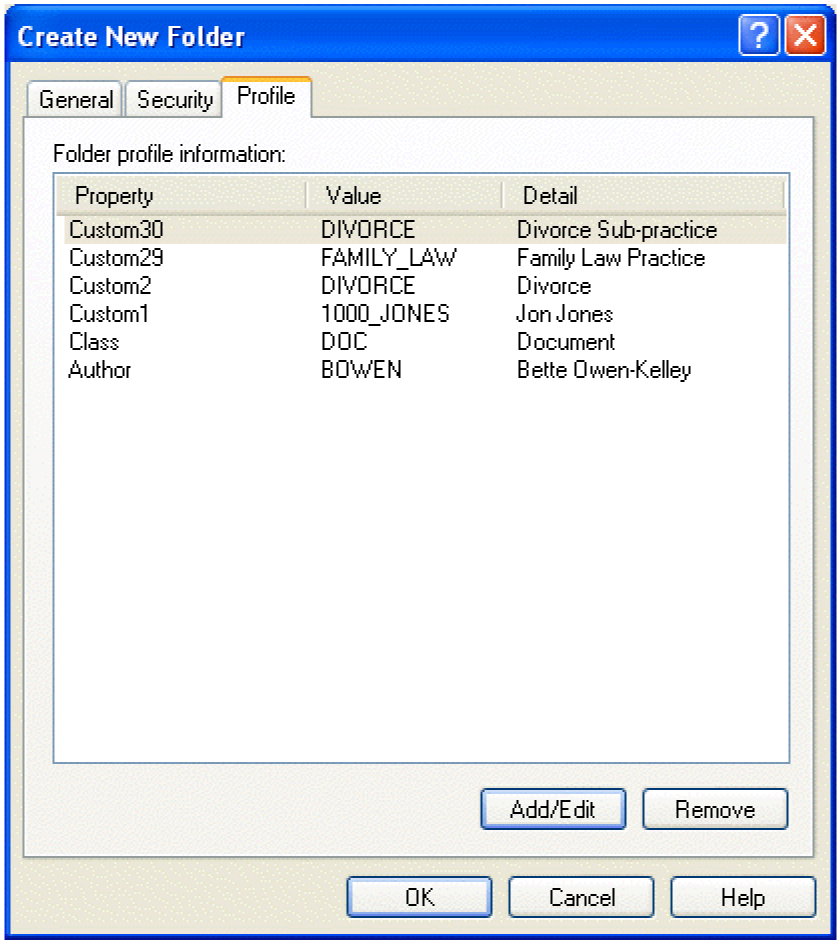
Figure 40 Select Internal Author dialog box



9. Select an appropriate value, click **OK** or press **ENTER** to add the profile selection.

10. Repeat this process until you have chosen all the profile fields you want for the document folder. The profile fields selected are listed under the **Profile** tab.

Figure 41 Create New Folder dialog box, Profile, selected profile information



11. To remove a **Property**, select it and click **Remove**.
12. Click **OK** to create the folder with its profile information or **Cancel** to close the dialog box without creating a folder.

Modifying a Document Folder

Right-click the created document folder to access the menu options described in Table 21.

Table 21 Document Folder menu options

Menu Option	Function
Add Document	Imports a document to the folder.
Add Shortcuts	Adds shortcuts from other objects to the folder.
Search Documents	Opens the Search dialog box.

Table 21 Document Folder menu options

Menu Option	Function
Send Link	Opens a new e-mail message with the selected object link as an attachment.
Refresh	Refreshes the contents of the folder.
Refile	Applies the folder profile and security information to all folders within it. You have two options: ■ Modify security of subfolders that don't inherit security ■ Inherit metadata and security from the parent folder/ Workspace.
Move	Moves the selected folder to a Workspace.
Create Shortcut	Adds a shortcut to the folder from another container.
Delete	Deletes the folder from the WorkSite library. You must have Full Access on the folder to perform this operation.
Rename	Renames the folder.
New	Creates new document folders, search folders, mail messages, and documents.
Add to WorkSite Contacts	Adds the folder to your WorkSite Contacts list. Your system must include the WorkSite Communications Server and the folder must have an e-mail address for this option to function.
Add to My Favorites	Adds the selected folder to your My Favorites list.
Properties	Opens the Folder Properties dialog box.
Outlook's native menu	Opens the Microsoft Outlook menu. Using Outlook's native menu with WorkSite objects can lead to inconsistent results, so it is recommended that you use WorkSite menus.

Changing Document Folder Profile Information

You can edit profile information of your folders and folders created by others on which you have *Full* or *Read-write* access.

1. Select the folder and right-click or type **SHIFT+F10** to access the menu.
2. Choose **Properties** from the menu. The Folder Properties dialog box opens.
3. Select the *Profile* tab. Click **Add/Edit** to open the Folder Profile dialog box.
4. Add or change the profile information in the same way that you would set the profile information when creating a new document folder. See "Creating a Document Folder" on page 111.

5. When you click **Save** to save your changes, you are prompted to **Refile**. Click **Yes** if you wish to Refile. This will cause all documents in the folder to take on the changes you made to the folder metadata or security.
6. Click **No** if you only wish to save your changes without refiling the folder.

NOTE Changing profile information in an existing folder does not change the profiles of documents in the folder unless you Refile. See "Adding Documents to a Folder" on page 120 for more information. New documents that you import into the folder inherit profile information from the folder.

Refiling a Document Folder

The rules of inheritance when refiling in a document folder are described in Table 22.

Table 22 Document Folder Refiling Rules

Folder to Subfolder	■ Parent Object: Folder ■ Refiled Object (inherits from parent): Subfolder ■ Metadata: Subfolder Metadata = Existing Subfolder Metadata + Parent Folder Metadata (except CLASS/ SUBCLASS, TYPE, COMMENTS, OPERATOR) ■ Security: Set subfolder security to Inherited.
Folder to Document	■ Parent Object: Folder ■ Refiled Object (inherits from parent): Document ■ Metadata: Document Metadata = Existing Metadata + Folder Metadata (except TYPE, COMMENTS, OPERATOR) ■ Security: Replace document security with folder security defaults.

To refile a Document Folder:

The procedure for performing a Refile operation in a document folder is similar to refiling a Workspace. See "To perform refiling in a Workspace:" on page 105 for more information.

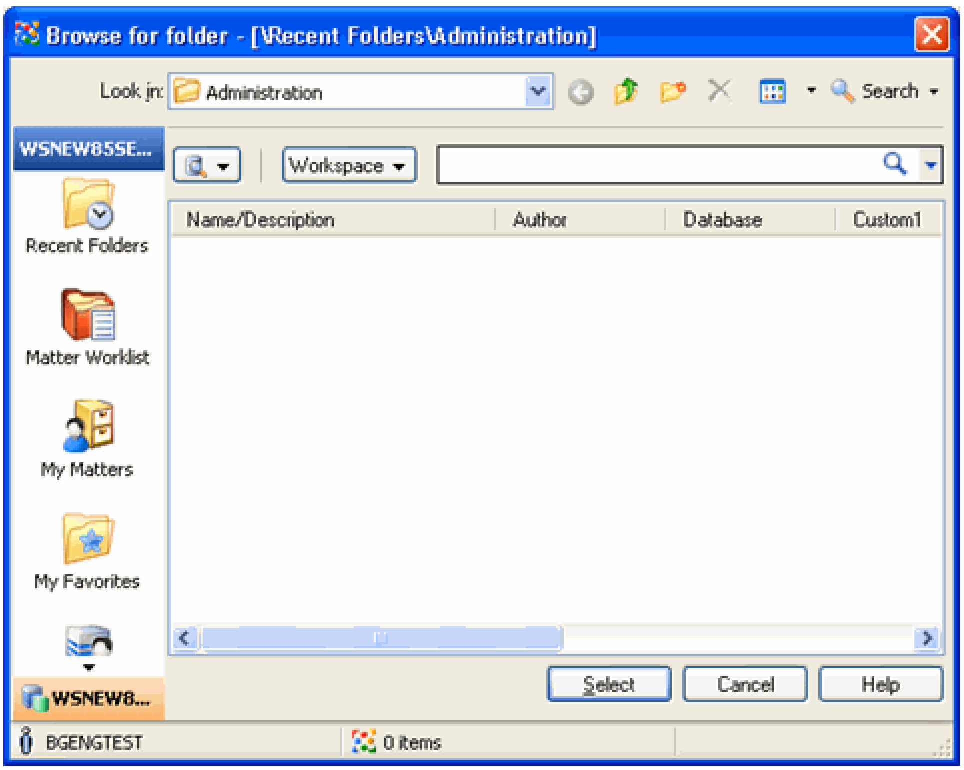
NOTE For a folder that contains at least one document declared as a record, the Refile operation does not modify the document's profile metadata. But, if you have Full Access to the declared document, its security is modified during refiling.

Adding Documents to a Folder

You can add existing WorkSite documents to folders on which you are the Owner or have *Full* access or *Read/write* access.

1. Select the document from the Document Grid.
2. Right-click the selected document to open the **Document** menu.
3. Select **Add to Folder**. The Browse for folder dialog box opens.

Figure 42 Browse for folder dialog box



4. Navigate to the folder where you want to add the document. You can also use the Express Search panel to find the folder. See “Express Search Panel” on page 266 for more information on using this panel.

   Click a container on the Shortcut Bar to display its contents, or select a folder from the **Look in** list.

5. Click **Select** to add the document to the folder.

You can also use drag-and-drop techniques to add documents to a folder.

1. In the Document Grid, select the document(s) you want to add to the folder.

2. Depending on how you execute this operation, you can move, copy, or create a shortcut to a document or group of documents.

Table 23 Adding documents to a folder

If you want to	Then
Move a document	SHIFT+Left mouse-click+drag
Copy a document	CTRL+Left mouse-click+drag

3. With the left mouse click and the appropriate key depressed, move the pointer to the right of the appropriate folder icon in the Folder List.
4. Release the mouse button. Continue from step 4 of the procedure for “Adding Documents to a Folder” on page 120.

Importing Documents to a Folder

1. Select the folder in which you want to import a document.
2. Click the **Add Documents** icon from the toolbar.

   In Outlook 2010, click the **Add Documents** icon from the Actions area of the **WorkSite** tab.

   The Find File To Import to Folder dialog box opens.
3. Navigate to the document you want to import and select it.
4. Click **Open**. The New Profile dialog box opens.
5. Enter information in the fields of the New Profile dialog box.
6. Click **OK**.

Removing Documents from a Folder

Use the **Remove From Folder** option if you want to remove a document from a folder but not delete it from the WorkSite library. To remove a document from the WorkSite library, see“Deleting Documents” on page 170.

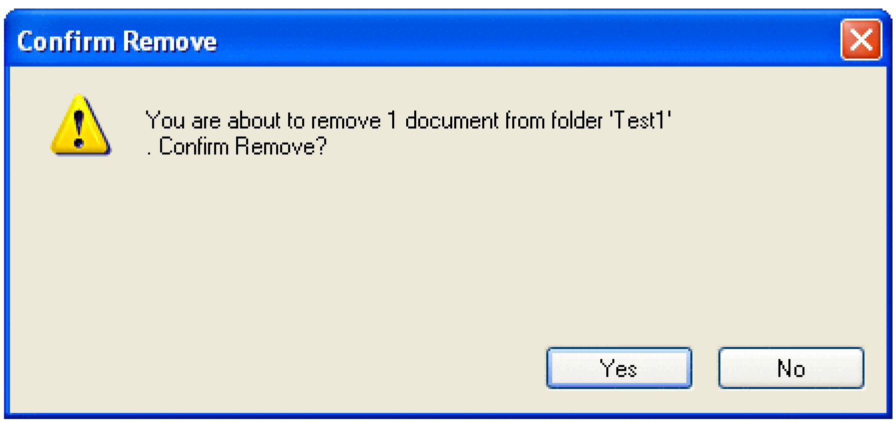
1. Select the document(s) in the Document Grid.
2. Right-click the selected document(s) to open the **Document** menu.

3. Choose **Remove From Folder.** You get a message asking you to confirm the removal of the document. See Figure 43.

NOTE Based on role and access rights, the option to remove documents from folders may be disabled for some users. Contact your WorkSite Administrator for more information.

NOTE When the **Prevent flatspace filing** check box is selected on the WorkSite Server Service Manager, the **Remove From Folder option is disabled** for all users. If the WorkSite server you connect to has more than one database, ensure that the option is enabled for each database. Contact your WorkSite Administrator for more information.

Figure 43 Confirm Remove message



4. Click **Yes** to confirm the removal of the document from the folder.

Adding E-mails to a Folder

You can add one or more e-mail messages from Microsoft Outlook to a FileSite folder. Select the e-mail message, and drag it into a FileSite folder. If the folder has profile data, FileSite uses this information to profile the new e-mail message.

If the **Reuse profile of the first imported email** option is selected in the Options dialog box (see “Import Settings” on page 60), you only need to enter the e-mail profile information once for each folder. FileSite then copies the information from the first e-mail message and applies it to other messages that you import.

Adding the Folder E-mail Address to WorkSite Contacts

1. Select the folder and right-click it to open the folder menu.
2. Choose **Add To WorkSite Contacts**. The folder address appears in the WorkSite Contacts list.

Sending an E-mail to a Folder

You can create new e-mail messages using Microsoft Outlook in the usual way. To send the message to a WorkSite folder, you can enter an address in the **To**, **CC** or **BCC** field of your e-mail message in several ways:

- Type the entire folder e-mail address.
- Cut and paste the folder e-mail address from your WorkSite Contacts list.
- Type a partial address and press **CTRL+K**.

  FileSite automatically fills in the rest of the e-mail address from the WorkSite Contacts list.
- Use the look-up feature in the Microsoft Outlook Address Book.

FileSite files the sender's copy of an e-mail to a WorkSite folder when the same WorkSite folder e-mail address is entered in the **BCC** field of the e-mail. Additionally, your *WorkSite Administrator* can configure FileSite to set the e-mail's security level to either Public or Private. Contact your *WorkSite Administrator* for more information.

Deleting a Folder

1. Select the folder that you wish to delete.
2. Right-click the selected folder to open the **Folder** menu.
3. Select **Delete**. A Confirm Delete dialog box opens, asking you to confirm the deletion of the folder.
4. Click **Yes** to delete the folder.

NOTE Deleting a folder **does not** delete its documents from the WorkSite library.

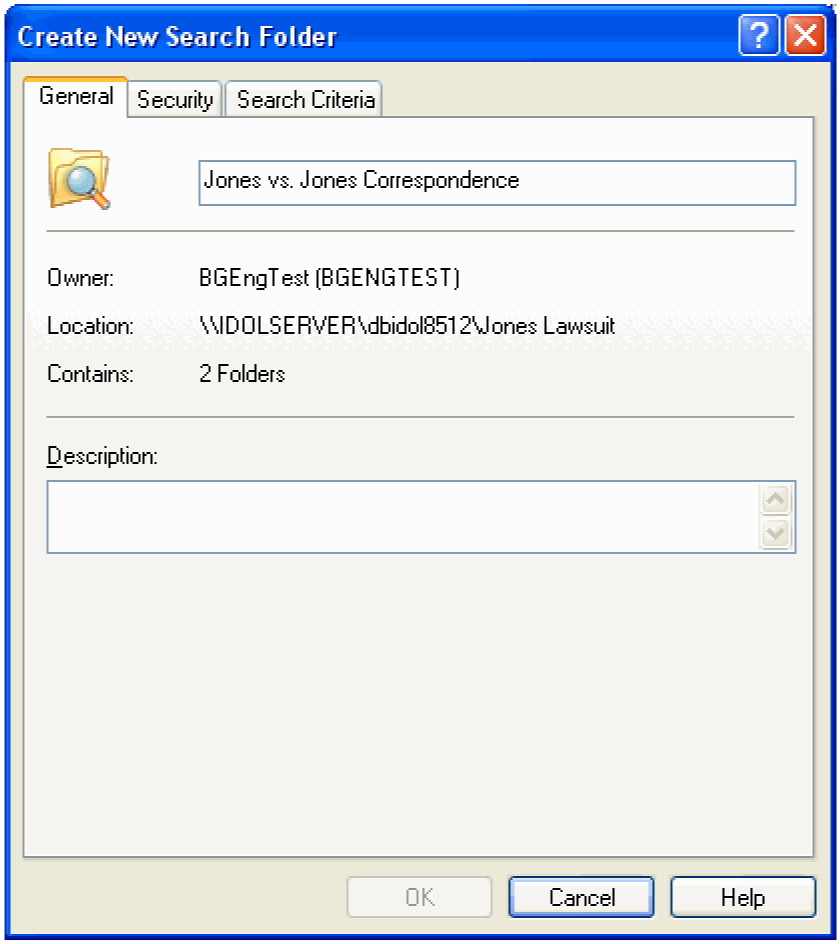
Search Folder

Search folders contain search results based on criteria that can be saved and reused.

Creating a Search Folder

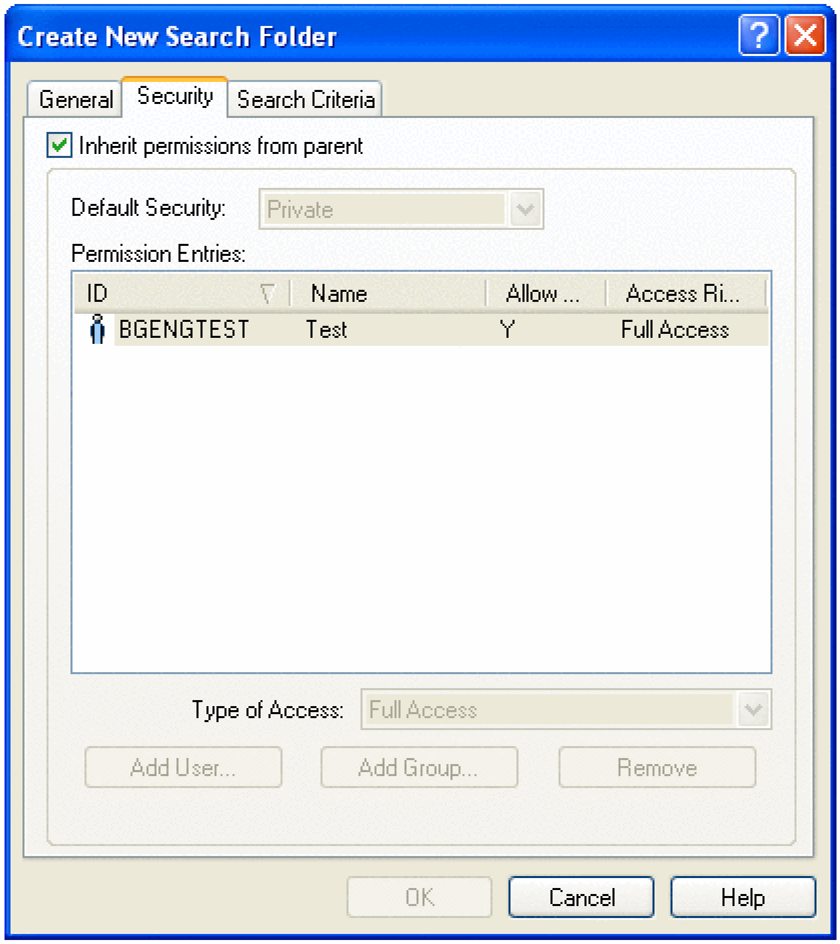
1. Right-click a **Workspace**, **Tab**, or **Document Folder** icon in the Folder List, point to **New** and select **Search Folder**. The Create New Search Folder dialog box opens.

Figure 44 Create New Search Folder dialog box, General



2. Enter a **Name** for the search folder.
3. Enter a **Description** for the search folder.
4. To define the **Security** for the search folder, click the **Security** tab.

Figure 45 Create New Search Folder dialog box, Security



5. When you create a search folder, it has the same security settings as the parent container, by default. If you wish to change these settings, clear the **Inherit permissions from parent** check box. The **Default Security** list is now enabled.

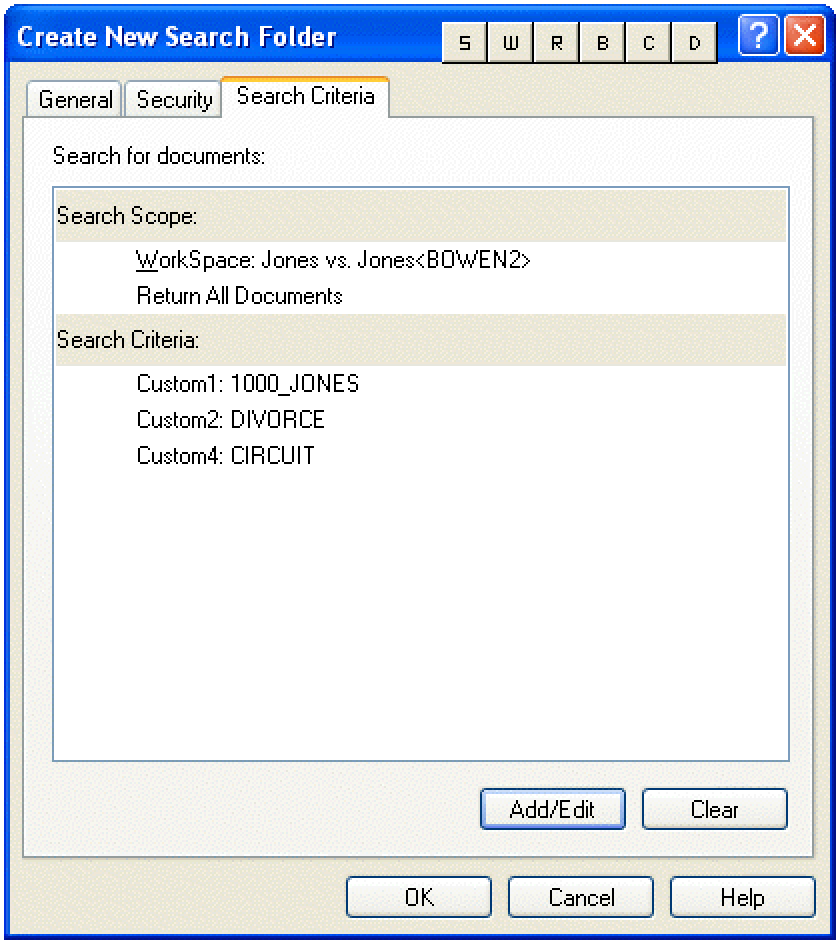
6. To set the Default Security for the search folder, make a selection from the **Default Security** list. See “Default Security” on page 87 for more information.

7. To specify access privileges for selected users and groups, make a selection from the **Type of Access** list. The access privileges that you grant to specific users and groups using this list are *exceptions* to the Default security setting. See “Access Control List (ACL)” on page 87 for more information.

NOTE The security settings on a search folder determine whether a user can see the search folder and whether the user can edit the existing search criteria specified on the folder.

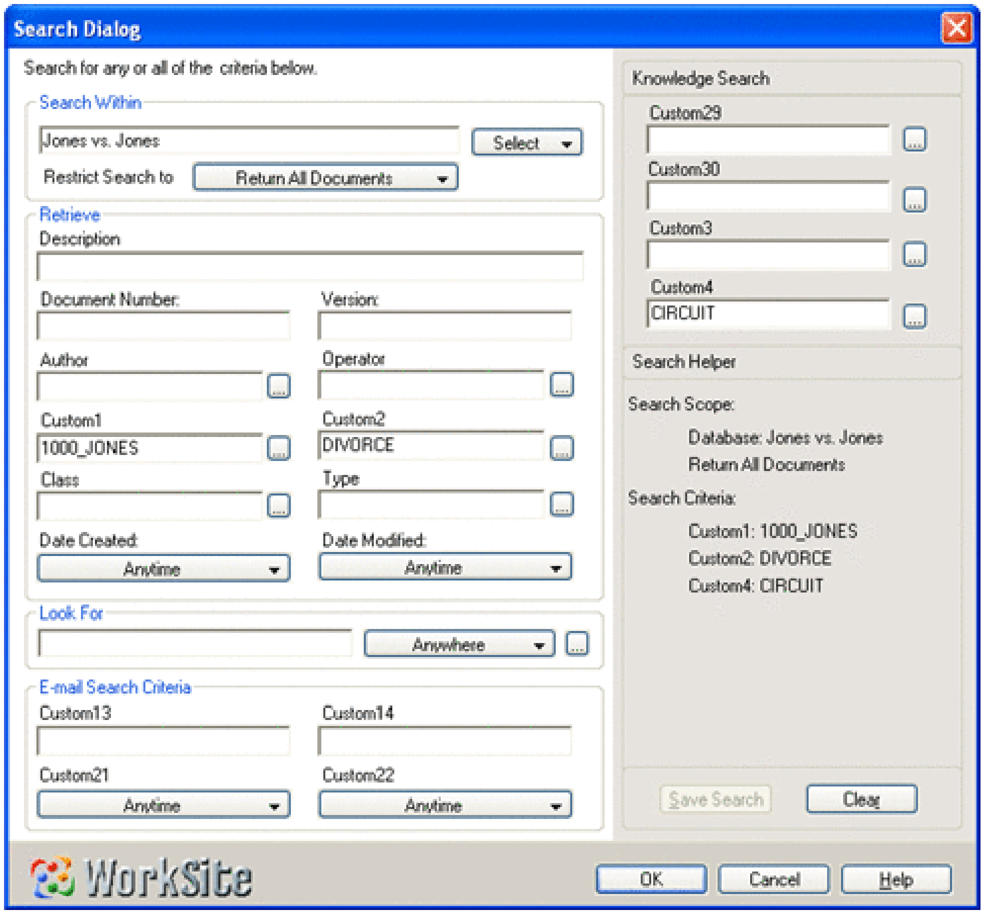
8. To select search criteria for the search folder, click the **Search Criteria** Tab.

Figure 46 Create New Search Folder dialog box, Search Criteria



9. Some search information is already entered. Click **Add/Edit** to make changes to the search criteria. The Search dialog box opens.

Figure 47 Search dialog box



10. Enter any additional search criteria in the appropriate fields, or edit existing information. Click **OK** or press **ENTER** when all values are entered.

    As FileSite is creating the search folder, it is also performing a search based on the criteria you entered. Each time you click the **Search Folder** icon, FileSite performs the search again to see if any additional documents should be included in the results.

Modifying a Search Folder

Right-click the search folder to access the menu options described in Table 24.

Table 24 Search Folder menu options

Menu Option	Function
Import	Imports a document to the folder.
Send Link	Disabled.
Refresh	Refreshes the contents of the folder.

Table 24 Search Folder menu options

Menu Option	Function
Move	Moves the selected folder to a Workspace.
Create Shortcut	Adds a shortcut to the folder from another container.
Delete	Deletes the folder from the WorkSite library. You must have Full Access on the folder to perform this operation.
Rename	Renames the folder.
New	Creates new document folders, search folders, mail messages, and documents.
Add to My Favorites	Adds the selected folder to your My Favorites list.
Properties	Opens the Folder Properties dialog box.
Outlook's native menu	Opens the Microsoft Outlook menu. Using Outlook's native menu with WorkSite objects can lead to inconsistent results, so it is recommended that you use WorkSite menus.

Changing Search Folder Profile Information

In the case of search folders, you can edit their profile information by changing the search criteria that is specified on them.

1. Select the search folder.
2. Right-click the search folder to access the **Search** menu.
3. Select **Properties**. The Folder Properties dialog box opens.
4. Select the **Search Criteria** tab.
5. Add or modify search criteria in the same way that you would set the search criteria when creating a new search folder. See "Creating a Search Folder" on page 123 for more information.
6. Click **OK** to modify the search folder.

Deleting a Search Folder

1. Select the **Search Folder** that you wish to delete.
2. Right-click the selected folder to open the **Folder** menu.
3. Select **Delete**. A Confirm Delete dialog box opens, asking you to confirm the deletion of the folder.

4. Click **Yes** to delete the folder.

NOTE When you delete a search folder, its documents are not deleted from the WorkSite repository.

Managing the Document Grid

Operations that can be performed within the Document Grid are discussed in this section. See “Document Grid” on page 81 for an overview of the Document Grid.

Sorting Documents in the Document Grid

1. Click the column header once to sort it in ascending or descending alphanumerical order.
2. Click the column header again to reverse the sort order.

Selecting Documents in the Document Grid

Clicking a document in the Document Grid selects the document. You can select multiple documents by keeping the **CTRL** key depressed and clicking the desired documents. You can select a range by depressing the **SHIFT** key and then clicking on two documents in the grid; those two documents and all those in between are selected. If you are unable to use the keyboard and mouse simultaneously, we recommend enabling Windows Sticky Keys. Refer to Windows Help for details.

Refreshing the Document Grid

Click the **Refresh** icon from the toolbar (or from the WorkSite section of the **Home** tab in Outlook 2010) to update the information displayed in the Document Grid with the latest information from the WorkSite library. The refresh option is a quick alternative to repeating the search or worklist request.

Customizing the Document Grid

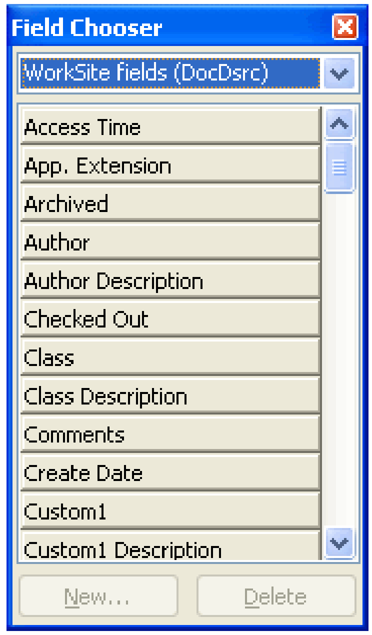
You can customize the Document Grid to display any of the profile fields available in your WorkSite library. You can add, remove, or resize columns, and sort by specified columns of information. The Document Grid can be configured to display or hide document comments in the view. You can also create custom views for displaying WorkSite documents.

Adding Columns to the Document Grid

1. Right-click the column headings in the Document Grid.

2. Select the **Field Chooser** option from the menu. The Field Chooser window opens.

Figure 48 Field Chooser window



3. Select **WorkSite fields** from the list.
4. Choose a profile field from the list displayed.
5. Drag and drop the field into the column headings in the Document Grid, placing it where you want it to appear.

Removing Columns from the Document Grid

1. Right-click the column heading you want to remove.
2. Select **Remove This Column** from the menu. The column is removed from the Document Grid.

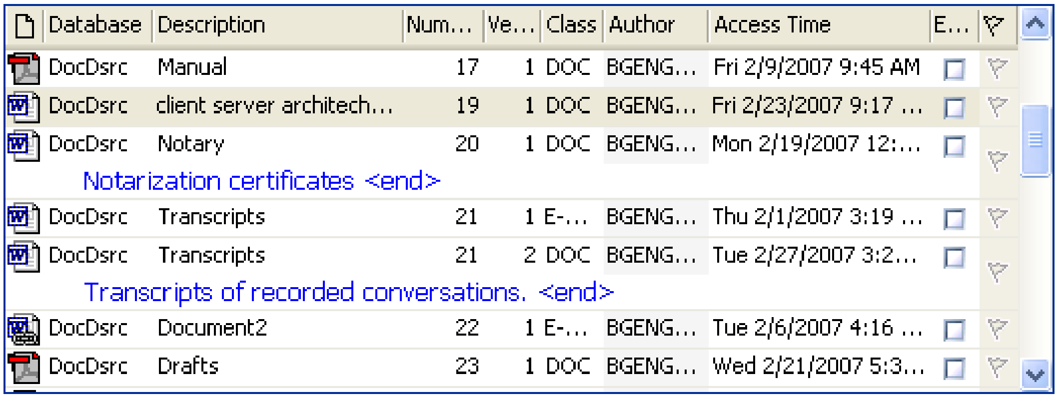
Resizing Columns in the Document Grid

1. Position the mouse pointer on the line between the column headers on the right side of the column that you want to resize.
2. Click and drag the divider between the column headers to resize that column.

Displaying or Hiding Comments in the Document Grid

If a document has comments associated with it, those comments can be displayed in the Document Grid. To display comments, select **AutoPreview** from the **View** menu.

Figure 49 Document Grid, AutoPreview

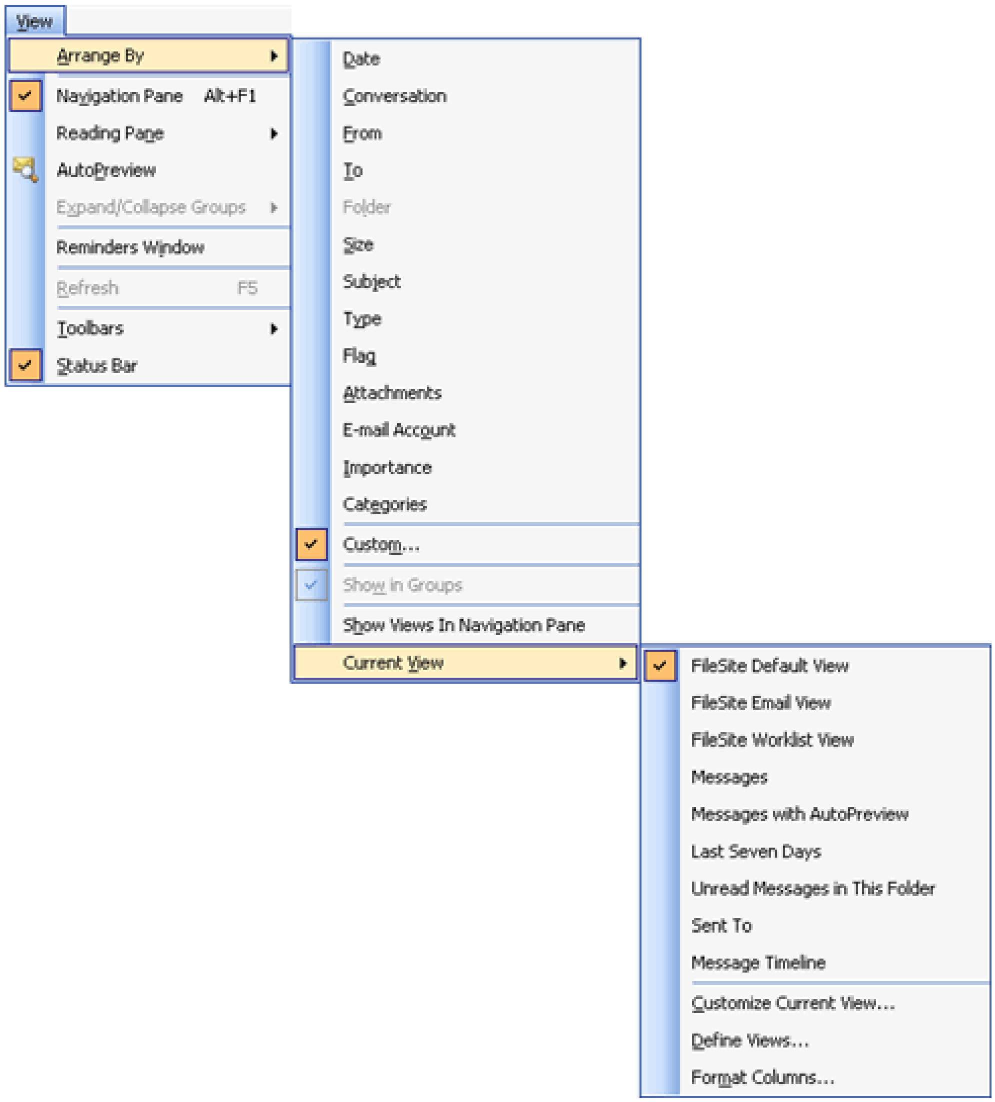


Creating Custom Views

Microsoft Outlook contains a list of predefined views that determine how document information displays in the Document Grid. FileSite views are added to the Outlook **View** menu. The default document view is the FileSite Default View. To view other available views:

1. From the **View** menu, point to **Arrange By**.
2. In the **Arrange By** submenu, point to **Current View**. A list of available views appears. The currently used view is checked, as shown in Figure 50.

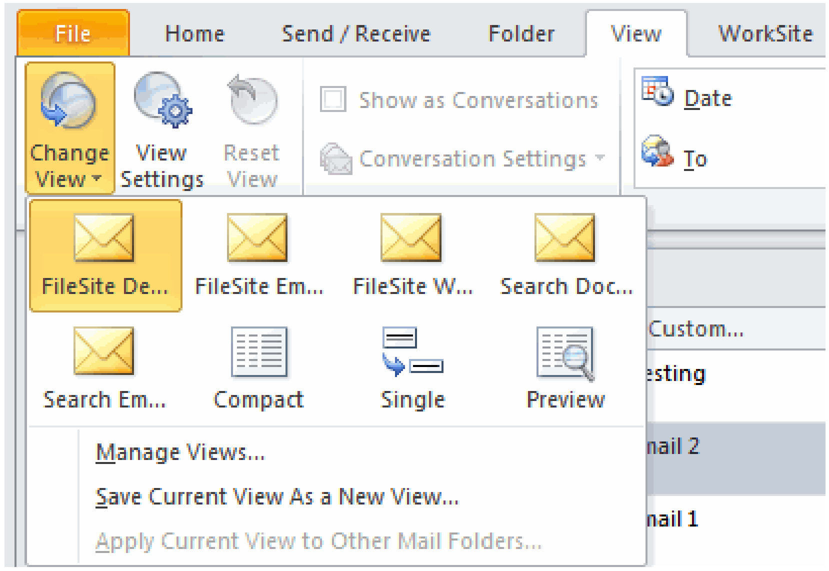
Figure 50 Outlook View Menu Expansion



You can modify this view or create a custom view. Refer to Microsoft Office Help for more information.

In Microsoft Outlook 2010, you can see other available views by clicking the **Change View** drop-down menu on the **View** tab, as shown in Figure 51.

Figure 51 Outlook 2010 Change View Option



Navigating in the Document Grid Without a Mouse

UP and **DOWN** arrow keys move the cursor up and down in the Document Grid. The **PAGE UP** and **PAGE DOWN** keys also move the Document Grid up or down. Use the **HOME** key to go to the top of the list and the **END** key to go to the bottom of the list.

Managing the Document Results Frame

Operations that can be performed within the Document Results Frame are described in this section. See “Document Results Frame” on page 82 for an overview of the Document Results Frame.

The Document Results frame provides information on five tabs about a particular document. To change the location of the Document Results Frame, from the **WorkSite** menu, point to **Configure**, and select **Change Preview Orientation**.

In Outlook 2010, on the **WorkSite** tab, click the **Change Preview Orientation** icon from the Configure area.

The location changes from right to bottom and vice-versa.

Document Profile Tab

You can view a document's profile by selecting a document in the Document Grid and then clicking the **Document Profile** tab. The document's profile information appears in the **Document Profile** tab. The profile fields that appear in this tab are determined by registry settings created on your machine by your *WorkSite Administrator*.

Quick View Tab

To view a document without leaving FileSite, select the document and click the **Quick View** tab. A read-only image of the document appears in the **Quick View** tab.

Related Documents Tab

To see a list of the document's relations, select the document and click the **Related Documents** tab. A list of the document's relations appears in the **Related Documents** tab.

See "Relating Documents" on page 174 for more information on how to create relations between documents.

Document Versions Tab

To see a list of the document's versions, select the document and click the **Document Versions** tab. A list of the document's versions appears in the **Document Versions** tab. You can configure the Document Grid to show only the latest version of the document or to show all versions of the document. See "Advanced Options" on page 66 for information on how to make this setting.

History Tab

To see a list of events in the document's history, select the document and click the **History** tab. A list of activities performed on the document appears in the **Document History** tab.

The kinds and number of activities recorded for this history is determined by your *WorkSite Administrator* but typically includes:

- Opening and closing the document in an integrated application.
- Recording how long the document was open.
- Editing the document's profile.
- Changing the access rights of the document.

- Printing a document and how many pages were printed.
- Checking out, copying and/or checking in the document.
- Viewing the document.
- Sending the document via e-mail.
- Creating a new version of the document
- Locating (in the computer) where the activity took place.
- Recording comments about the activity.

Document Results Frame Push Pin

The **PushPin** allows you to control the relationship between the Document Grid and the Document Results Frame. Depending on the **PushPin** state, the Document Results Frame behaves differently when you click on an item in the Document Grid. You can set the **PushPin** separately for each tab in the Document Results Frame. Your *WorkSite Administrator* can set the default state and disable certain states.

Table 25 PushPin States

PushPin	State	Tab Name	Tab Behavior
	Up	All tabs	Goes blank
	Down	All tabs	Automatically refreshes

To change the state of the **PushPin**, click the **PushPin** icon.

CHAPTER 5

Working with Documents and E-mails

This chapter contains the following information about the document functions you can perform using FileSite:

- “Entering Document Profile Information”
- “Editing Document Profile Information”
- “Searching for Documents”
- “Opening Documents”
- “Viewing Documents”
- “Importing Documents”
- “Importing E-mails”
- “Exporting Documents”
- “Checking Out Documents”
- “Checking In Documents”
- “Copying Documents”
- “Moving Documents”
- “Document Links”
- “Deleting Documents”

Document and E-Mail Functions

Document functions can be performed in the following ways:

- Accessing the **Document** menu with a right-click or **SHIFT+F10** when the document is selected.
- Selecting the desired document and clicking a button in the toolbar. See “Menu Options and Toolbar Buttons” on page 72 for more information on toolbar buttons.

Table 26 provides an overview of the commands available on the **Document** menu.

Table 26 Summary of Document menu commands

Commands	Description	See
Open	Opens the document in its native application. If the application is not already running, it will be launched automatically.	"Opening Documents" on page 148
Open Read Only	Opens a read-only copy of the document in its native application. If the application is not already running, it will be launched automatically.	"Opening Documents" on page 148
Print	Prints the document.	"Printing Documents" on page 173
View	Opens the document in the WorkSite Viewer.	Chapter 9
Forward	Opens an e-mail message with the document attached.	"E-mailing Documents" on page 170
Send Link submenu		"E-mailing Documents" on page 170
▶ To Latest Version	Sends a link to the latest version of the document.	
▶ To This Version	Sends a link to the current version of the document.	
Check Out	Copies the document to your local or network drive and marks them as checked-out in the WorkSite library. This command is available only if the selected document is not checked out, archived or locked. This option is not available in offline mode.	"Checking Out Documents" on page 162
Check In	Copies the checked-out document back to the WorkSite library. This command is available only if the selected document is checked out. This option is not available in offline mode.	"Checking In Documents" on page 163
Save As	Copies the document to your local or network drive. This option is not available in offline mode.	"Exporting Documents" on page 159
Move	Relocates the document to the desired Workspace and folder. This option is not available in offline mode, and from the Document Worklist.	

Table 26 Summary of Document menu commands

Commands	Description	See
Copy Submenu		“Copying Documents” on page 165
▶ Copy	Copies the document.	
▶ Copy Document and Open	Copies the document and opens it in its native application.	
▶ Copy as New Version	Copies the document and creates a new version of it.	
▶ Copy as New Version and Open	Copies the document, creates a new version, and opens it in its native application.	
Add to Folder	Adds the document to the desired folder.	“Adding Documents to a Folder” on page 120
Add Version	Imports a document and saves it as a new version of an existing document.	“Importing New Versions of Documents” on page 155
Refile	Applies the folder profile and security information to the document. This option is not available on search folders.	“Refiling a Document Folder” on page 119
Delete	Permanently removes the document from its folder and the WorkSite library. This command is available only if the selected document is not checked-out, archived or locked. This option is not available in offline mode.	“Deleting Documents” on page 170
Unlock	Releases the document that is marked as “checked-out” or “In use” in the WorkSite library, allowing other users to open it. This command is available only if the selected document is checked-out or locked. This option is not available in offline mode.	“Unlocking Documents” on page 175
Remove from Folder	Removes the document from the folder. This option is not available in offline mode.	“Removing Documents from a Folder” on page 121
Utilities submenu		
▶ Bulk Security Edit	Allows you to edit the security settings of multiple documents at the same time.	“Editing Security on Documents” on page 209
▶ Convert to PDF	Converts an MS Office document to a PDF document.	“WorkSite Add-on Functions” on page 190

Table 26 Summary of Document menu commands

Commands	Description	See
▶ Send as PDF	Converts the document to a PDF document and sends it in an e-mail message.	“WorkSite Add-on Functions” on page 190
Add to My Favorites	Adds a shortcut of the document to your My Favorites list.	“Adding Documents to My Favorites” on page 94
Declare as Record	Declares that the document is a record and records that fact in the document history. Locks document.	“Declaring a Document as a Record” on page 177
UnDeclare as Record	Undeclares a document that is declared as a record, and records that fact in the document history.	“Undeclaring a Record” on page 178
Document Info submenu		“Displaying Document Information” on page 181
▶ Versions	Displays other versions of the document that may exist in the **Document Versions** tab of the Document Results Frame. This option is not available in offline mode.	
▶ History	Displays the activity history for the document in the **History** tab of the Document Results Frame. This option is not available in offline mode.	
▶ Related Documents	Displays a list of documents related to the selected document in the **Related Documents** tab of the Document Results Frame. This option is not available in offline mode.	
▶ Checked Out Information	Displays information about the checked-out document.	
▶ Where Used	Lists the location and path of all folders where the document is placed.	
Properties	Opens the Properties dialog box displaying profile information for the document.	“Entering Document Profile Information” on page 144 and “Editing Document Profile Information” on page 146

Table 26 Summary of Document menu commands

Commands	Description	See
Applications submenu		"Integration with Other Applications" on page 308
▶ Local Applications Listed	Displays a list of local applications integrated with FileSite.	
Remove Relation	Allows you to cancel relations created between documents.	"Removing Relations" on page 175

Using Lookup dialogs

In FileSite, every document has a *profile* that contains information about it. (See "Document Profile Information" on page 34 for more information.) A document's profile information is entered in one of the following dialog boxes, depending on the type of document function performed.

- New Profile dialog box
- New Version Profile dialog box
- Properties dialog box
- Search dialog box

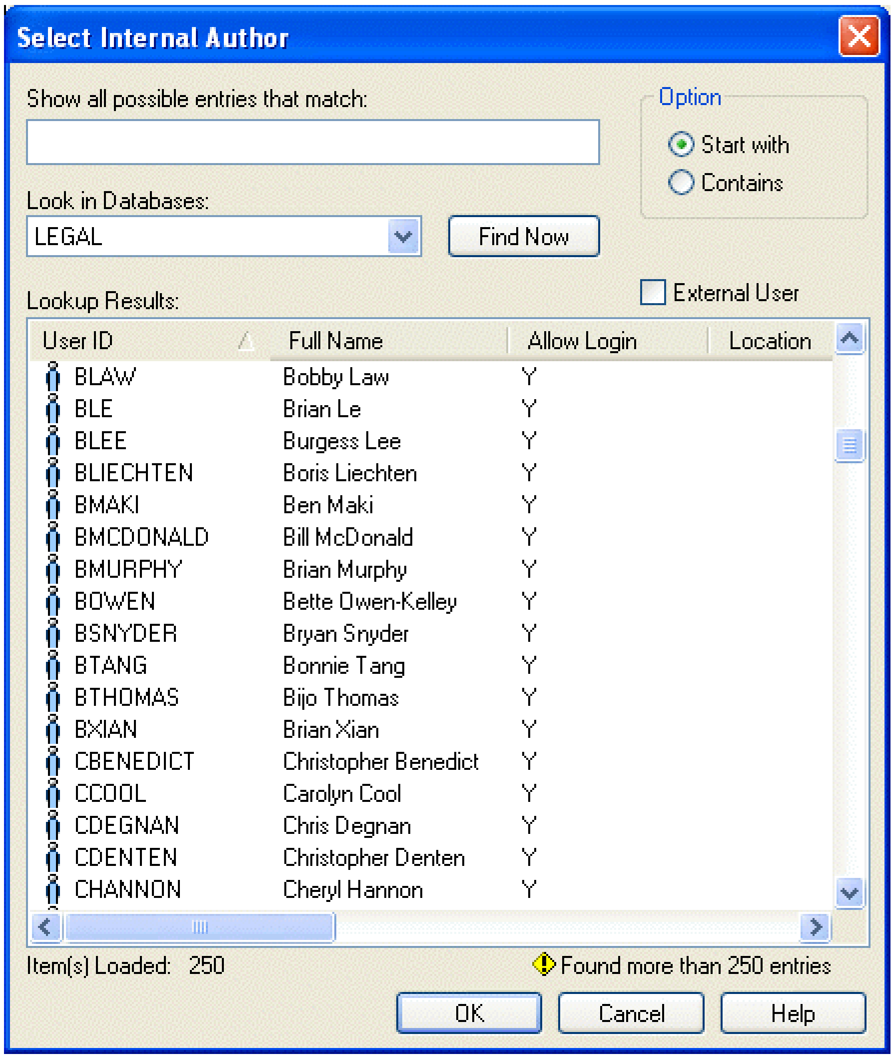
Within each of these dialog boxes, some fields of profile information are required and some are not. Lookup dialog boxes are provided to enter information into these fields easily. When a ... **Lookup** button appears next to a text-entry field, you can use a lookup dialog box to enter values into it.

To use a lookup dialog box to enter values:

1. Click the ... **Lookup** button next to the field. A selection dialog box opens that contains a list of valid entries for that field of profile information. Figure 52 shows an example of a selection dialog box for the **Author** field of profile information.

   To move between fields in the following dialog boxes, use the **TAB** key. There are no keyboard shortcuts, since the fields and their names are customizable.

Figure 52 Select Internal Author dialog box



2. If the list of validated entries is long, enter a search string in the **Show all possible entries that match** field. Select **Start with** (the string occurs only at the beginning of the document) or **Contains** (the string appears anywhere in the document).

3. You can select either internal or external authors. To see the list of external authors, select the **External User option**.

NOTE The **Shared to External Users** icon indicates that a document is shared with *external users* (users outside your organization who need access to some locations in WorkSite). See "Understanding External Users and Groups" on page 88 for information about external users and groups.

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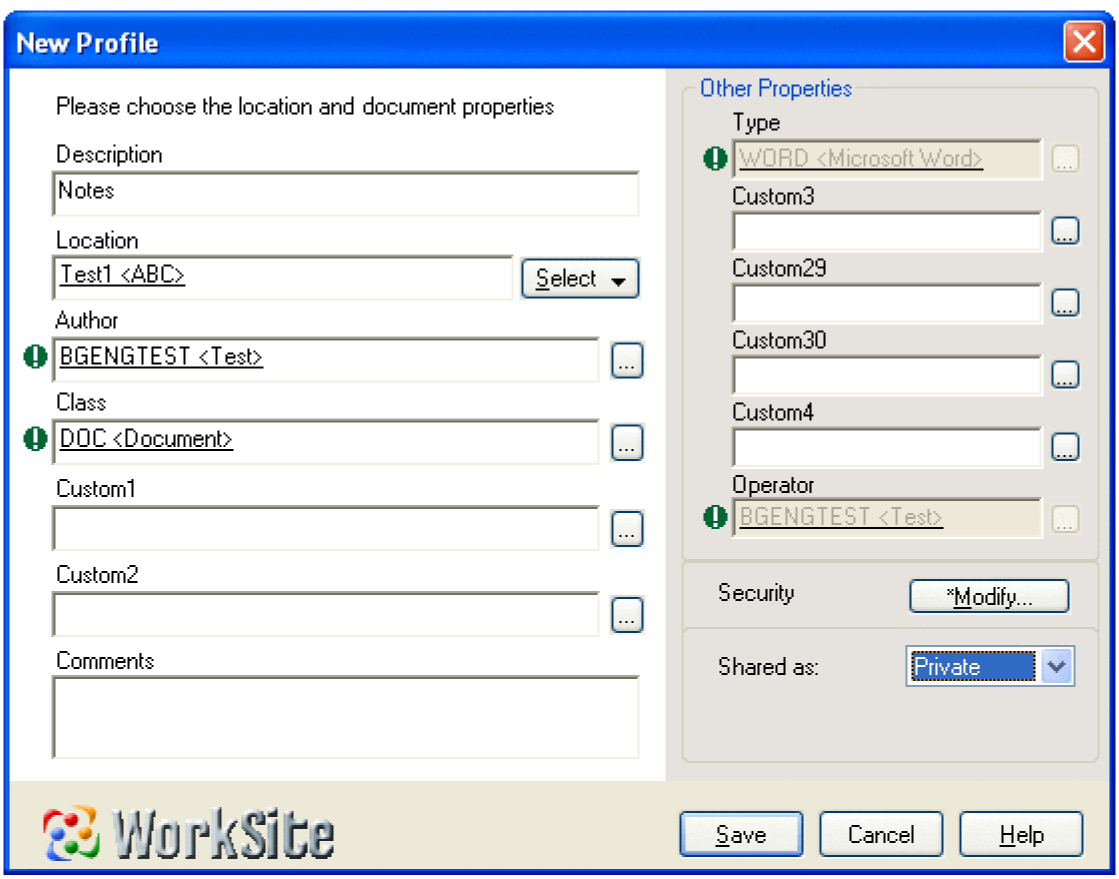
4. Select a WorkSite library from the **Look in Databases** list. Click **Find Now** to search the list. The search results are displayed again.
5. Select an entry from the list and click **OK**. This entry appears in the relevant field of the document's profile record.

Entering Document Profile Information

When you create a new document, a new version of a document, or a copy of a document, FileSite prompts you to enter profile information for it.

The dialog boxes used to enter profile information for a new document, new versions of documents, and copies of documents are all customizable by your WorkSite Administrator. The dialog boxes that appear in your version of FileSite may appear different from the default ones shown here. See Figure 53 for the default appearance of the New Profile dialog box.

Figure 53 New Profile dialog box



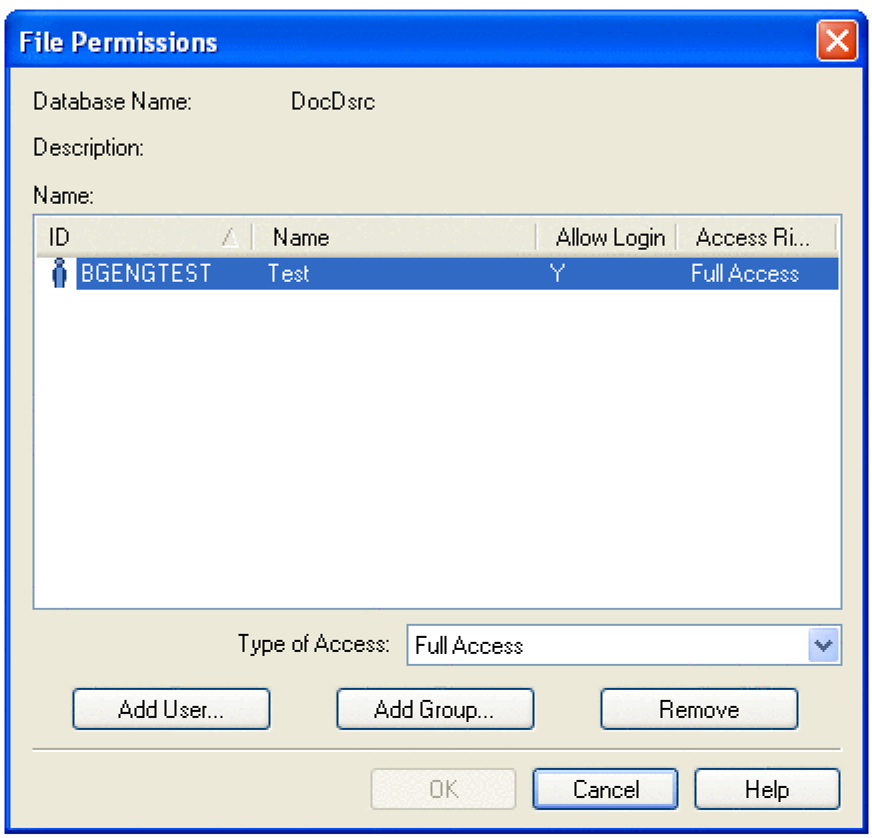
To enter document profile information:

1. Enter appropriate values in the required fields and others of your choice. The icons to the left of the field appear if the field is required or if you have made an invalid entry.
   - The green exclamation point symbol indicates that profile information is required for this field.
   - The red X symbol indicates that the information entered in this text-entry box is not a valid entry for this profile field.

> **NOTE** The warning icons do not appear on the profile dialog box if Accessibility Features are turned on. See "Other Options" on page 65 for more information on how to turn on/off Accessibility Features.
>
> **NOTE** To use a ... **Lookup** button, see "Using Lookup dialogs" on page 142 for more information.

2. To set the Default Security, make a selection from the **Shared as** list. See "Default Security" on page 87 for more information.
3. To define the **Security**, click **Modify**. The File Permissions dialog box opens.

Figure 54 File Permissions dialog box



4. To specify greater or lesser access privileges for specific users and groups make a selection from the **Type of Access** list. The access privileges that you grant to specific users and groups using this list are *exceptions* to the Default security settings you select. See “Access Control List (ACL)” on page 87 for more information.
5. Click **OK** to close the File Permissions dialog box.
6. Click **Save** to close the New Profile dialog box.

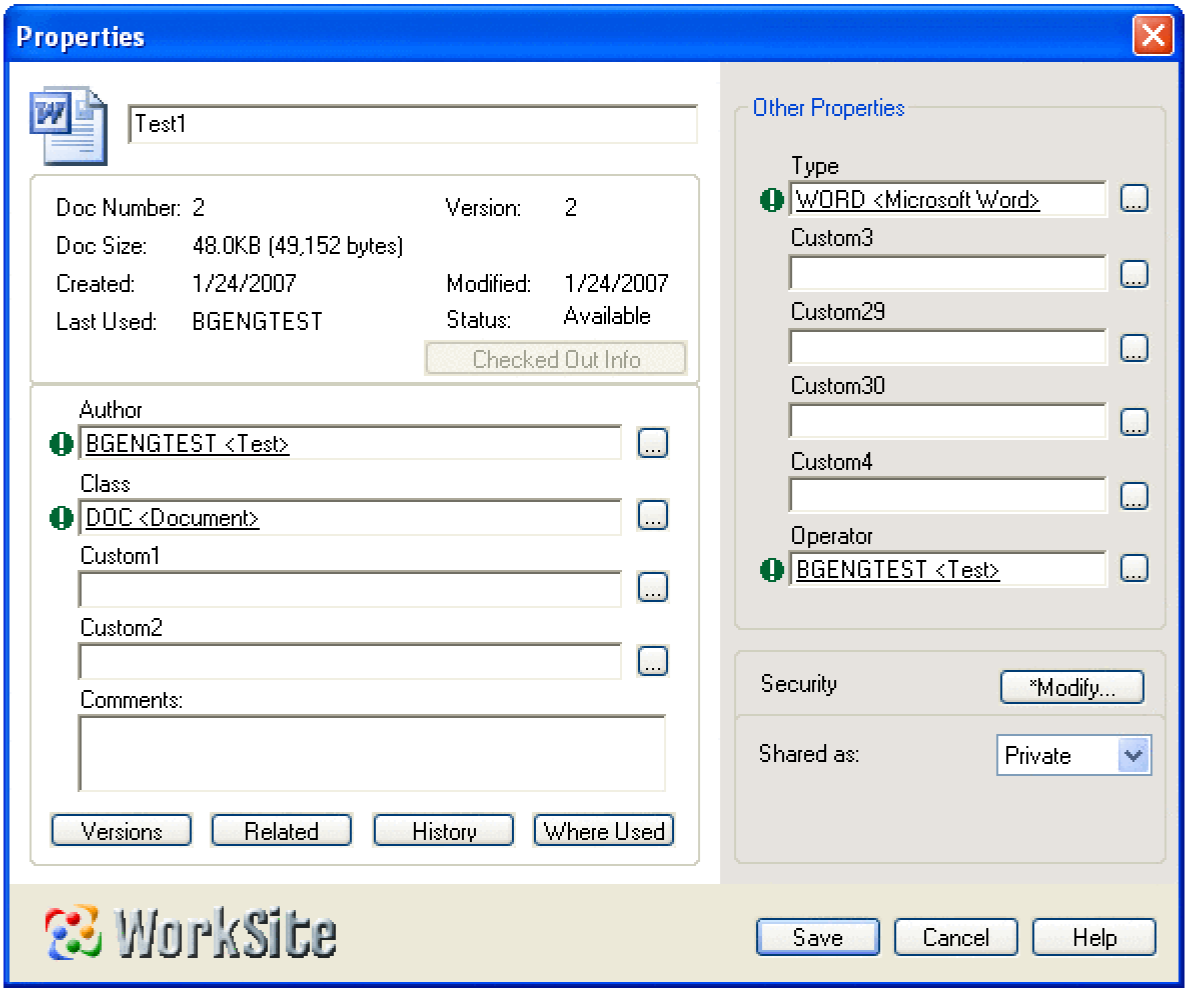
Editing Document Profile Information

You can edit the profile information on your documents or other users’ documents on which you have Full Access or Read/Write Access.

1. Select the document from the Document Grid.
2. Choose **Properties** from the **Document** menu. The Properties dialog box opens.

NOTE The dialog box in Figure 55 shows the default appearance of the Properties dialog box. The dialog boxes used to enter profile information are all customizable by your WorkSite Administrator, so your view of this dialog box may not match.

Figure 55 Properties dialog box



3. Make changes or enter new values in the appropriate fields. See "Entering Document Profile Information" on page 144 for steps on how to enter values in the fields.

NOTE FileSite offers an "autocomplete" feature. When you type the first few characters of the entry and press the **TAB** key**,** FileSite fills in the entry, if possible. You can turn off this feature using a configuration option. See "Other Options" on page 65 for more information.

NOTE Only the Author or Operator or users with Full Access or Read/Write access to a document can edit its profile information.

NOTE Your WorkSite Administrator can enable your system to allow you to enter Child field information (such as **Matter**) without entering Parent field information (such as **Client**).

Searching for Documents

One of your most common tasks in FileSite is to search for documents on which you want to work. You can search for documents by:

- Clicking the **Document Worklist** icon. This displays your combined list of recently accessed documents.
- Clicking the **Document Folder** icon. This displays the documents contained in the current folder.
- Clicking the **Search Folder** icon. This performs a saved search again and returns documents that meet the search criteria previously entered.
- Clicking the **Search Documents** icon and entering new search criteria to look for other documents.

  More detailed information on using FileSite's extensive searching capabilities is available in Chapter 6.

Opening Documents

1. Select a document from the Document Grid.

2. Choose **Open** from the **Document** menu. The keyboard shortcut for the **Open** command is **CTRL+O**.

NOTE To open a read-only copy of the document in its native application, choose **Open Read Only** from the **Document** menu.

FileSite automatically opens the document in the primary application defined for this document type.

Opening Echo Documents

When you work on a WorkSite document, a copy is automatically *echoed* (saved as a backup) in your NRTEcho directory. You cannot open a file in your Echo directory. This feature prevents you from overwriting changes that you made to the document. You must first synchronize the document to incorporate the latest edits into the WorkSite repository. See “Synchronizing Echo Documents” on page 367 for more information.

Opening Documents from an Integrated Application

When an application is integrated with FileSite, controls that are used to access WorkSite features are added to the application’s user interface. For example, you can open documents that are contained in a WorkSite library from inside the application by selecting **WorkSite Open** from the application’s **File** menu.

See Chapter 7 for more information.

Opening Documents from a Non-integrated Application

If you do not see the WorkSite Integrated Desktop when you select **Open** from an application’s **File** menu, then the application is not integrated with FileSite.

To open a document from a non-integrated application:

1. Locate the document in the WorkSite library.
2. Use FileSite’s **Checkout** function to save a local copy of the document on your local or network drive. See “Checking Out Documents” on page 162 for more information.
3. Open the local copy of the document from within the non-integrated application.

4. Work on the document and save it when you are finished.

CAUTION Do not change the filename of the document when you save it, or you will only be able to check it in as a new document.

5. Use FileSite's **Checkin** function to check the documents back into the WorkSite library. See "Checking In Documents" on page 163 for more information.

   NOTE If you are using an application that you think should be integrated with FileSite, but you do not see the WorkSite Integrated Desktop when you select **Open** from the **File** menu in that application, consult your WorkSite Administrator.

Viewing Documents

You can view a document without opening it by using the WorkSite Viewer program or FileSite desktop's **Quick View** tab in the Document Results Frame. You can view most word-processing, spreadsheet, and graphics documents in this way.

NOTE Documents that are being viewed are not locked or marked as "In use". WorkSite Viewer or Quick View makes a temporary copy of the document.

NOTE You can view documents that are "In use" or checked out of the WorkSite library, but you cannot open them.

Viewing Single Documents

You can view only one document at a time in the **Quick View** tab. Choose a document from the Document Grid and click the **Quick View** tab. The document is displayed in the **Quick View** tab of the Document Results Frame.

Viewing Multiple Documents

To view multiple documents simultaneously in read-only format, you must use the WorkSite Viewer program. Choose multiple documents from the Document Grid and select **View** from the **Document** menu. The selected documents open in read-only format in the WorkSite Viewer program.

From WorkSite Viewer, you can also search the full text of documents displayed in the **Viewer** frame, copy sections of documents to the clipboard, or print documents. See Chapter 9 for more information.

Importing Documents

You can use the **Add Document** command in FileSite to add existing documents on your computer to a WorkSite library. Document import is not used for documents that already exist in the WorkSite library.

NOTE Use this function to import only a few documents at a time. FileSite provides an additional administrative utility for importing documents in bulk. Contact your WorkSite Administrator for more information.

Table 27 When to perform a Document Importation

If you are trying to	You should
Return a previously checked-out document to the WorkSite library	Use the **Check in** function
Return an echo copy of a document to the WorkSite library after you've edited it	**Synchronize** the echo document
Synchronize an echo document and you are unable to do so	Use the **Add Document** function to add it to the WorkSite library as a new document

Importing Documents into a WorkSite library

1. Select the folder into which you want to import a document.
2. Select **Add Document** from the **WorkSite** menu or click the **Add Document** button in the toolbar.

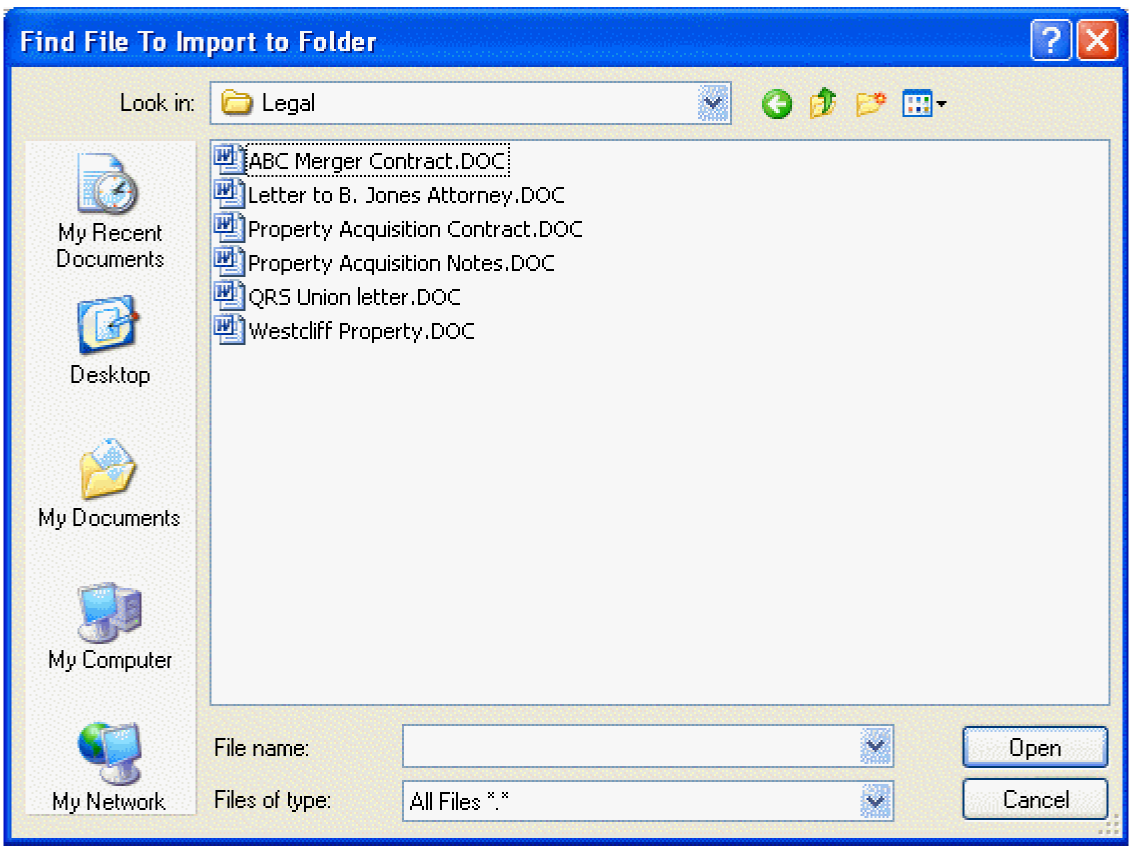
   In Outlook 2010, click the **Add Documents** icon from the **WorkSite** tab.

A standard Windows Find File to Import to Folder dialog box opens.

NOTE The Find File to Import as New Version dialog box displays files and folders in your local or network drive. If the **Delete local files after import** option is selected, FileSite removes documents from your local or network drive after you import them to FileSite. See "Document Options" on page 63 for more information on turning off this option.

To move between fields in the following dialog boxes, use the **TAB** key, arrow keys, or **ALT** key plus underscored letter.

Figure 56 Find File To Import to Folder dialog box



3. Select the file and click **Open**.
4. Depending on how FileSite is configured by your WorkSite Administrator, do one of the following:
   - If FileSite opens the **Save As** dialog box, proceed to Step 5.
   - If FileSite opens the New Profile dialog box, proceed to Step 7.

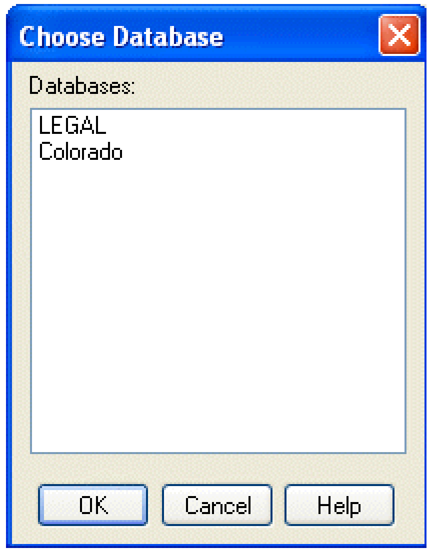
5. In the Save As dialog box, navigate to the Workspace or folder where you want to save the document. You can also use the Express Search panel to find a location. See “Express Search Panel” on page 266 for more information on using this panel.
   - To display the names of documents already in the current location, click **Show Documents in this folder**.
   - Enter the **Author**, **Class**, and **Subclass** (if any) fields.
   - Click **Save**.

   > **NOTE** When the document is added to the folder, the document automatically takes on the folder’s profile properties or metadata. If the folder’s metadata includes all required fields, FileSite automatically creates the profile without further input from you.

6. If the folder’s metadata does **not** include all required fields, the New Profile dialog box opens for you to enter profile information. You can also open the New Profile dialog box by clicking **Detail**.
7. In the New Profile dialog box, select a location for the new document in a WorkSite library. Enter a folder path in the **Location** field, or click **Select** to view a list of options.

   You can select from the following options:
   - Databases and folders you have recently accessed
   - **All Databases**. All libraries you are currently connected to are selected.
   - **Choose Database**. The Choose Database dialog box opens.

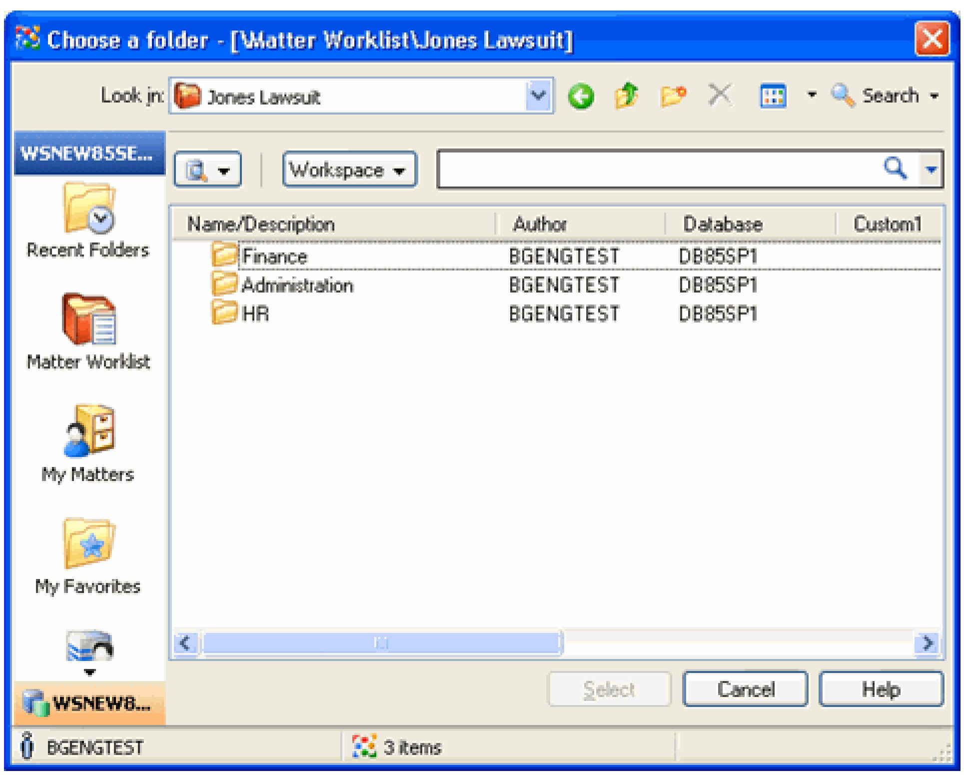
Figure 57 Choose Database dialog box



Select a database from the list and click **OK**.

- **Choose Folder**. If you select this option, the Choose a Folder dialog box opens.

Figure 58 Choose a Folder dialog box



8. Navigate to the Workspace or folder in which you want to save the search. You can also use the Express Search panel to find the Workspace or folder. See "Express Search Panel" on page 266 for more information on using this panel.

   To navigate within this dialog box:

   a. Choose a Folder List component from the bar on the left. Alternately, you can select a container from the **Look in** list. A list of available Workspaces and folders appear in the grid.

   b. Double-click, or select and press **ENTER** to drill into the container until you reach the folder in which you want to save the search. Click **Select**. If the folder has profile properties, these properties are automatically populated in the document's New Profile dialog box.

9. Enter additional information as needed, and click **Save**. The document is imported into the WorkSite library.

NOTE Make sure to supply information marked by the icon.

Importing New Versions of Documents

You can use the **Add Version** command to import a document currently stored on your local or network drive, and save it as a new version of a document that already exists in the WorkSite library.

1. Select the WorkSite document you want to import as a new version.
2. Choose **Add Version** from the **WorkSite** menu.

   In Outlook 2010, click the **Add Version** icon from the **WorkSite** tab.

   The Find File to Import as New Version of # dialog box appears. See Figure 56.
3. Select the file and click **Open**. The New Version Profile dialog box appears, with fields prepopulated with the profile information of the original WorkSite document.
4. Make any necessary changes and click **Save**. FileSite imports a new version of the original document.
5. Select **Refresh** from the toolbar (or from the **WorkSite** tab for Outlook 2010), or click **F5** to see the document displaying a new version number.

Importing E-mails

You can import e-mail messages to WorkSite and place them in a FileSite folder. Simply select the e-mail and drag-and-drop it into the desired folder. You can also import e-mail using the **Move Email** and **Copy Email** toolbar options. For more information, see “Move E-mails to WorkSite” on page 184 and “Copy E-mails to WorkSite” on page 186.

NOTE Before you can import an e-mail, your WorkSite Administrator must set up a MIME document type and an E-MAIL document class. Contact your WorkSite Administrator for more information.

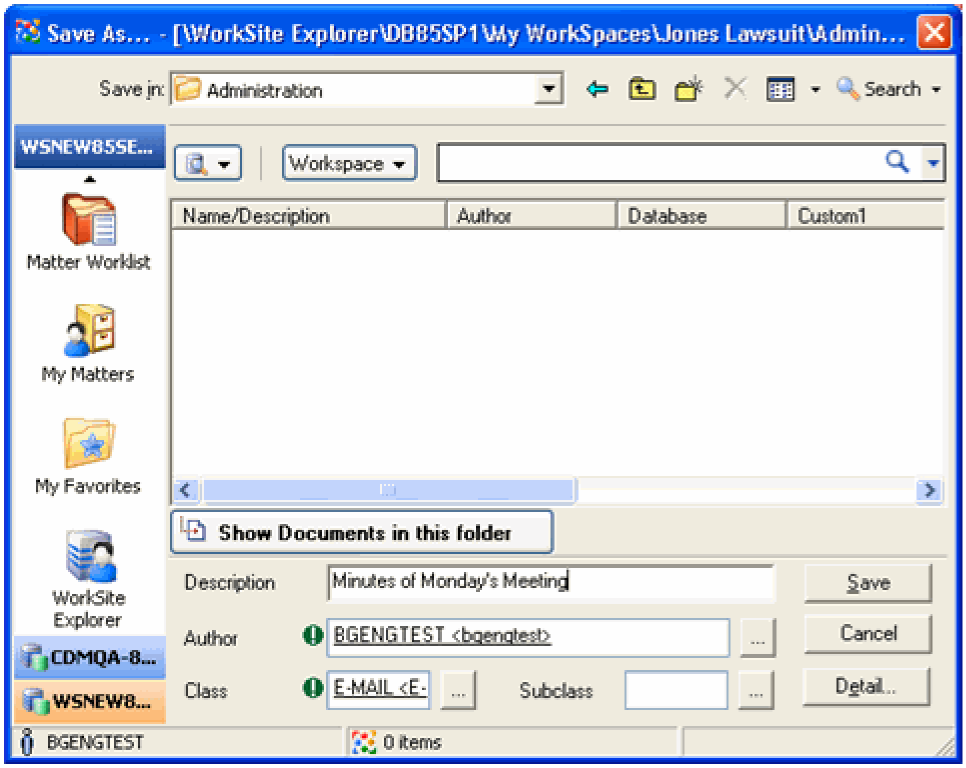
To import an e-mail message:

1. Select the e-mail message from your Inbox, Sent Items folder, or other Outlook folder.
2. Drag and drop the e-mail message to the desired FileSite folder. The Save As dialog box opens (see Figure 59).

NOTE If the **Auto Profile E-mails or Documents via Drag-and-Drop** option is selected in the Options dialog box (see “Import Settings” on page 60), e-mail messages are auto profiled, and the Save As dialog box does not open to enter information about the e-mail message.

NOTE If the **Auto Profile E-mails or Documents via Drag-and-Drop** option is not selected, continue with Step 3.

Figure 59 Save As dialog box



3. In the Save As dialog box, navigate to the Workspace or folder where you want to save the document. You can also use the Express Search panel to find a location. See "Express Search Panel" on page 266 for more information on using this panel.
   - To display the names of documents already in the current location, click **Show Documents in this folder**.
   - Enter information about the e-mail message in any required or optional fields.

NOTE When the e-mail message is added to the folder, it automatically takes on the folder's profile properties or metadata. If the folder's metadata includes all required fields, FileSite automatically creates the profile without further input from you.

---

4. If the folder's metadata does **not** include all required fields, the New Profile dialog box opens for you to enter profile information. You can also open the New Profile dialog box by clicking **Detail**.
5. Enter additional information as needed, and click **Save**. The e-mail message is imported into the WorkSite library.

Importing E-mail Attachments as Separate Documents

You can import e-mail attachments separately as new documents or as new versions of existing WorkSite documents.

1. Select an e-mail message that contains attachments from your Inbox, Sent Items folder, or other Outlook folder.
2. Click the **Save Attachments** toolbar button.

   In Outlook 2010, click the **Save Attachments** icon from the WorkSite area of the **Home** tab.

   > **NOTE** Alternatively, you can open the e-mail message to access similar toolbar functions within the e-mail message window.

3. To save a single attachment, proceed to "Importing a Single Attachment". To save multiple attachments, proceed to "Importing Multiple Attachments".

Importing a Single Attachment

1. In the **Save Attachments** drop-down menu, select the name of an individual attachment.

   To save the attachment as a new document in WorkSite:

   a. Select **New Document**. The Save As dialog box opens. See Figure 59.

   b. Navigate to the desired location in WorkSite.

   c. Click **Save**.

   To save the attachment as a new version of an existing WorkSite document:

   a. Select **New Version**. The Select Document dialog box opens.

   b. Choose the existing WorkSite document.

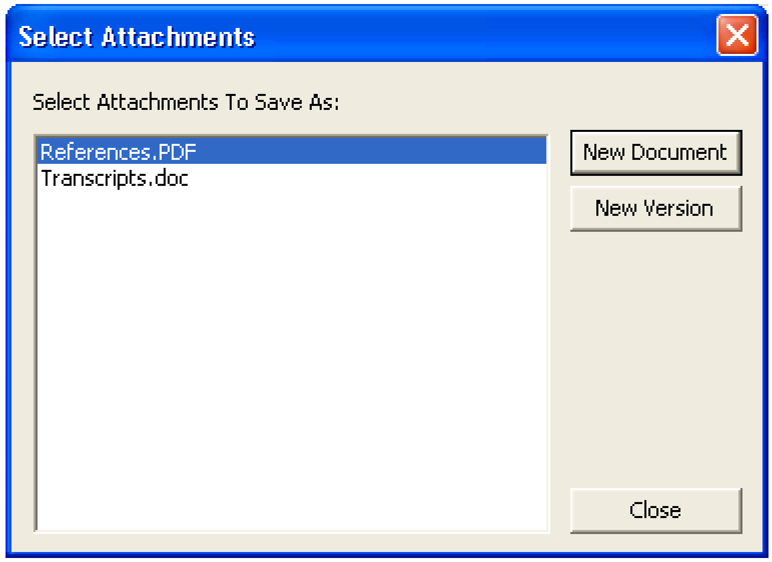
   c. Click **Select**. The New Version Profile dialog box opens.

   d. Enter appropriate values in the relevant fields and click **Save**.

Importing Multiple Attachments

1. In the **Save Attachments** drop-down menu, choose **Select Attachments From List**. The Select Attachments dialog box opens.

Figure 60 Select Attachments dialog box



2. Select one or more attachments. Press the **CTRL** key to select multiple attachments.

   To save the attachment(s) as a new document in WorkSite:

   a. Click **New Document**. The Save As dialog box opens. See Figure 59.

   b. Navigate to the desired location in WorkSite.

   c. Click **Save**.

   To save the attachment as a new version of an existing WorkSite document:

   NOTE When saving the attachment as a new version, you can select only one attachment.

   ---

   a. Click **New Version**. The Select Document dialog box opens.

   b. Choose the existing WorkSite document.

   c. Click **Select**. The New Version Profile dialog box opens.

   d. Enter appropriate values in the relevant fields and click **Save**.

Exporting Documents

The **Save As** command copies a document from the WorkSite library to the local or network drive.

You can only return an exported document to the WorkSite library as a new document. If you are planning to edit a document and then return it to the WorkSite library later, it is advisable to use the **Check Out** function. Also, when you export a document, it is *not* marked in the WorkSite library as “In use”, so other users may access the document and possibly update it while you are editing it.

For example, when you export documents as echo documents, you can edit them and then synchronize them back to the WorkSite library. When you work on the echo copies of these documents, the original documents in the WorkSite library are *not* locked or marked as “In use”. If other users edit the library copy of the document while you are editing the echo copy of the document, you will not be able to synchronize the document back to the WorkSite library. You can import the modified document only as a new document. See Chapter 11 for more information on Echo Documents.

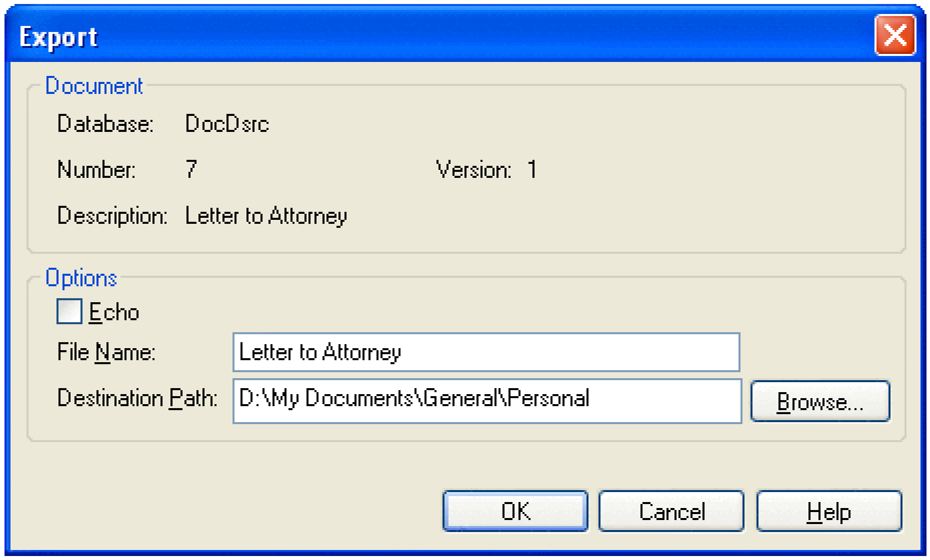
NOTE If you try to export a document that is currently in your Echo directory with changes that have not been synchronized with the document in the WorkSite library, FileSite warns you that you are about to overwrite the document in the Echo directory. This feature prevents you from overwriting changes that you made to the document in the Echo directory. You can, however, export the document to another directory.

Exporting Documents from a WorkSite library

1. Select the document from the Document Grid.
2. Select **Save As** from the **Document** menu. The Export dialog box opens.

   To move between fields in the following dialog box, use the **TAB** key, arrow keys, or **ALT** key plus underscored letter.

Figure 61 Export dialog box



3. The default filename is the WorkSite number and version of the document. If you are exporting only one document, you can enter a new filename in the **File Name** field.

NOTE You may also want to use the document description as the filename. When you set the document option **Use description for export**, FileSite uses the document's Description field as the filename. See "Advanced Options" on page 66.

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4. Enter a destination directory to store the exported document in the **Destination Path** field. You can browse for a local or network directory by clicking **Browse**.
5. If your system is set up to enable Document Echoing, you can export documents as echo documents. Select the **Echo** option. The **Destination Path** field becomes unavailable, because the destination directory is always the `NRTEcho` directory.

NOTE To enable the document echoing option, contact your WorkSite Administrator.

---

6. Click **OK** to export the document.

Checking Out Documents

You can check out individual documents from a WorkSite library for use outside of the WorkSite system.

NOTE Individual document checkout is different from Portable document checkout. See “Working in Portable Mode” on page 348 for more information.

The document’s number and version becomes its filename when it is checked-out. For example, if you check out a Microsoft Word document with a document number of 378446 and a version number of 2, the document will be stored on your local or network drive with a filename of `378446_2.doc`.

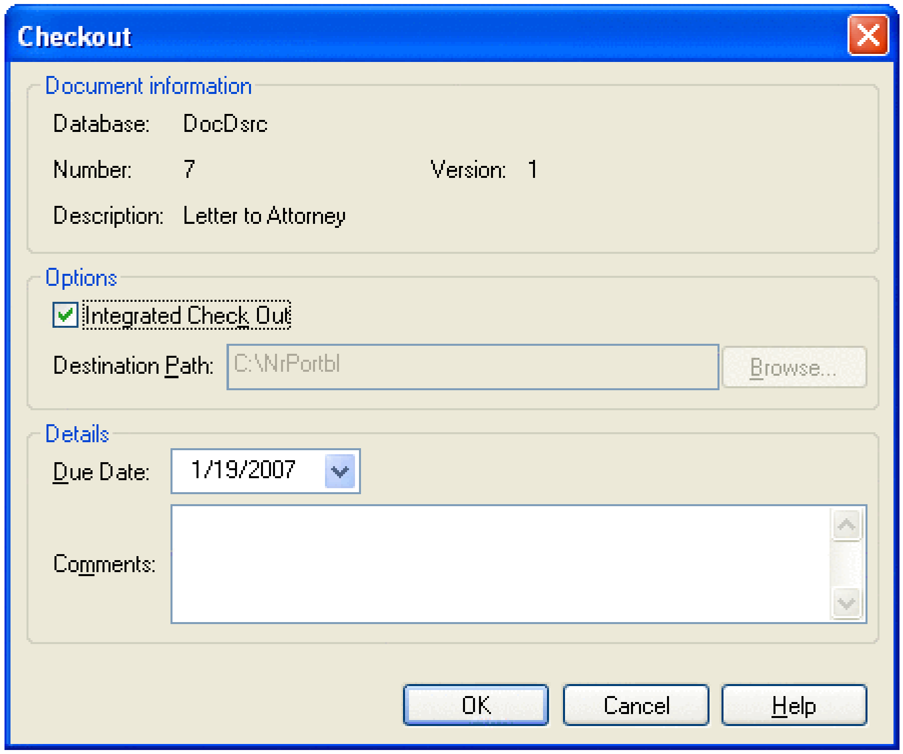
The document’s filename must remain unchanged if you want to be able to check it back into the WorkSite system. *Do not change a checked-out document’s filename*. The same filename is used during the document checkin process. See “Checkedout Info” on page 183 for information about a checked-out document.

To check out a document:

1. Select the document from the Document Grid.
2. **Choose Check Out** from the **Document** menu. The Checkout dialog box opens.

   To move between fields in the following dialog box, use the **TAB** key, arrow keys, or **ALT** key plus underscored letter.

Figure 62 Checkout dialog box



3. If you are checking out the document for *offline* use, select the **Integrated Check Out** option.
4. In the **Destination Path** field, enter the path to the directory where you want to save the checked-out document. If the **Integrated Check Out** option is selected, the document is saved to the `NrPortbl` directory. Click **Browse** to search for another directory on your local or network drive.
5. Enter a **Due Date** for the document to be checked in.
6. Specify the reason for checking out the document in the **Comments** field.
7. Click **OK** to check out the document.

Checking In Documents

You can return modified documents to FileSite using the **Check in** function.

1. Click the **Checkedout Documents** icon in the Folder List. This displays the list of checked-out documents for the selected server in the Document Grid.

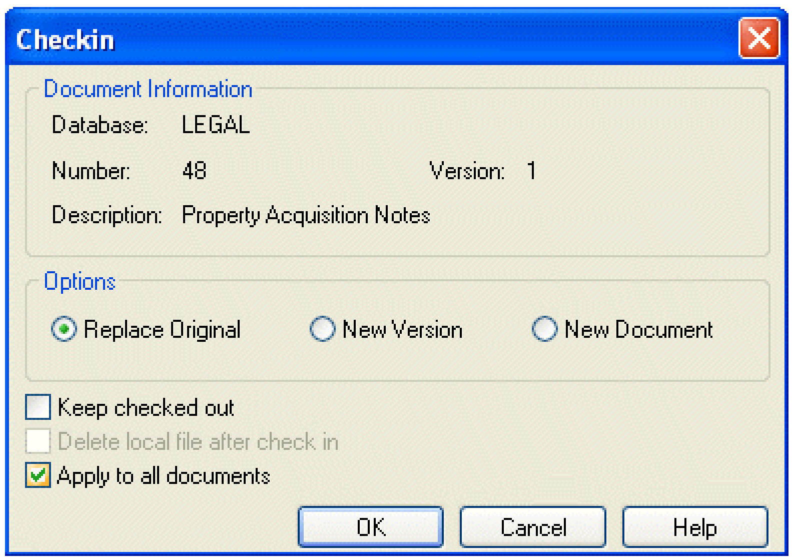
2. Select the document you want to check in.

NOTE You can select multiple documents from the Document Grid by keeping the **CTRL** key depressed and left-clicking the desired documents. If you hold down the **SHIFT** key and then left-click on two documents in the grid, the two documents and all those in between are selected.

3. Choose **Check in** from the **Document** menu. The Checkin dialog box opens.

   To move between fields in the following dialog box, use the **TAB** key, arrow keys, or **ALT** key plus underscored letter.

Figure 63 Checkin dialog box



4. Select one of the following options:

   - **Replace Original**. FileSite replaces the original document with the checked-in document.
   - **New Version**. FileSite checks in the document as a new version of the original document. The New Version Profile dialog box opens. See “Entering Document Profile Information” on page 144 for more information.

- **New Document**. FileSite checks in the document as a new document. The New Profile dialog box opens. See "Entering Document Profile Information" on page 144 for more information.

> **NOTE** Depending on how your system is configured, all checkin options may not be available. Your system may not allow you to modify existing documents. In this case, you can check in documents only as *new documents*.

5. (Optional) You can choose the following options:
   - **Keep checked out**. The document remains checked-out, but your modifications are synchronized with the document in the WorkSite library.
   - **Delete local file after checkin**. The file in the Portable directory is deleted and the document is checked in.
   - **Apply to all documents**. The checkin option you selected (**Replace Original**, **New Version**, or **New Document**) is applied to all documents you selected. This option is available only when you select multiple documents.
6. Click **OK** to check in the document.

> **NOTE** If you checked out a document to the Portable directory (`NrPortbl`) on a different computer, you will receive an error message if you try to check it back in on your desktop computer. You must check in a document on the same computer on which you checked it out.

Copying Documents

You can make a copy of a document that is stored in a WorkSite library by selecting the document from the Document Grid, and then pointing to **Copy** from the **Document** menu.

The **Copy** submenu reveals the following options:

- **Copy.** FileSite makes a duplicate copy of the selected document. Depending on how FileSite is configured by your WorkSite Administrator, this option opens either the Save As dialog box or the New Profile dialog box.
- **Copy Document and Open.** FileSite makes a duplicate copy of the selected document and opens the new copy in its associated application. Depending on how FileSite is configured by your WorkSite Administrator, this option opens either the Save As dialog box or the New Profile dialog box.

- **Copy As New Version.** FileSite makes a duplicate copy of the selected document and creates a new version of the document. This option opens the New Version Profile dialog box.
- **Copy As New Version and Open.** FileSite makes a duplicate copy of the selected document, creates a new version of the document, and opens the new copy of the document in its associated application). This option opens the New Version Profile dialog box.

> **NOTE** The **Copy As New Version and Copy As New Version and Open options are** not available if the document is checked-out.

When you select **Copy** or **Copy Document and Open**, the Save As dialog box opens for you to enter profile information before FileSite adds the copy to the WorkSite library. See “Entering Document Profile Information” on page 144 for more information.

When you select **Copy As New Version** or **Copy As New Version and Open**, the New Version Profile dialog box opens for you to enter profile information before FileSite adds the copy to the WorkSite library. See “Entering Document Profile Information” on page 144 for more information.

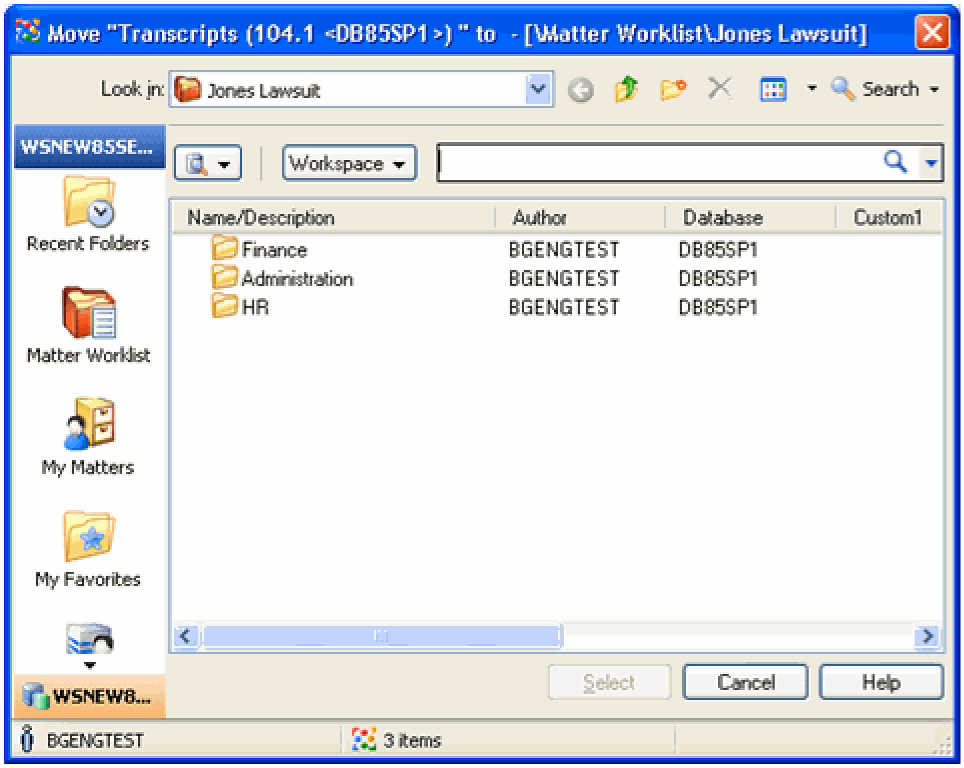
> **NOTE** You can copy a document even when it is “In use” or checked-out. The copy will duplicate the last version of the document that was saved to the WorkSite library. You cannot copy a document as a new version if it is checked-out.

Moving Documents

You can move a document that is stored in a WorkSite library. Moving relocates the document from one container to another. This command is not available in offline mode, and from the Document Worklist.

1. Select the document from the Document Grid.
2. Choose **Move from the Document menu**. The Move dialog box opens.

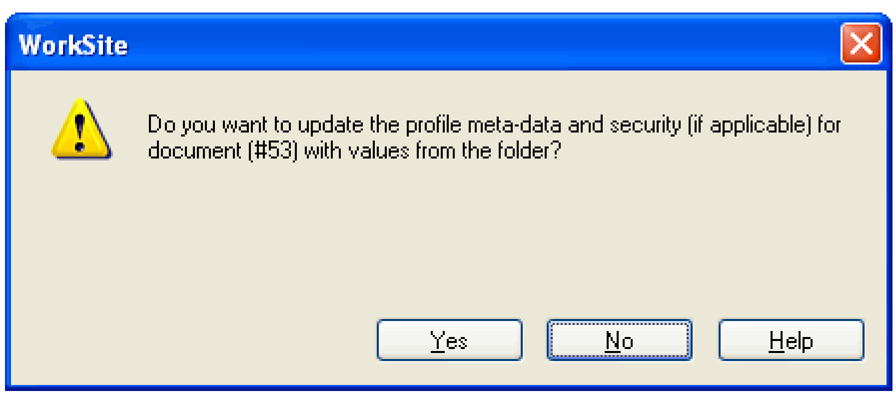
Figure 64 Move dialog box



3. In the Move dialog box, navigate to the Workspace or folder where you want to move the document. You can also use the Express Search panel to find a location. See "Express Search Panel" on page 266 for more information on using this panel.

4. Click **Select**. A message appears asking if you want to apply the folder properties to this document.

Figure 65 Apply profile from folder message



5. Click **Yes** to apply the properties of the destination folder to this document. Click No to preserve the existing properties of the document.

> **NOTE** Autonomy recommends that customers using iManage RecordsManager select the **Prevent flatspace filing** check box on the WorkSite Server Service Manager, because only declared records that are filed within Workspaces are included in the file plan and assigned a retention schedule.

Document Links

Document links can be used as shortcuts to documents in the WorkSite library. They are used to access the actual document instead of sending it in an e-mail or storing it locally on your desktop. To view an example of a document link, see Figure 66.

The name of a document link uses the name of the WorkSite library that contains the document, the document number, the version number, and the extension .nrl.

In order to access the destination document in the WorkSite library, you must be a valid user on the WorkSite library and have access to the destination document.

Document links can be created in the following ways:

- Drag a WorkSite document from FileSite to your local desktop.
- Drag a WorkSite document from FileSite into a document of an integrated word processing application.
- Send a document link in an e-mail message. See “Send Link” on page 171 for more information.

Creating Document Links

To create a link to a WorkSite document on your desktop:

1. In FileSite, select the document from the Document Grid.
2. Drag the WorkSite document to your desktop.
3. A document link icon similar to the one in Figure 66 appears on your desktop. Double-click the icon to view the document using the WorkSite Viewer program.

Figure 66 WorkSite document link icon on desktop

To create a link to a WorkSite document within another document:

1. In FileSite, select the document from the Document Grid.
2. Drag the WorkSite document into a document of a word processing application.
3. A document link icon similar to the one in Figure 66 appears in the document.

   Figure 67 WorkSite document link in a Word document

4. Double-click the icon to view the document using the WorkSite Viewer program.

Copying WorkSite Documents to the Desktop

You can copy a WorkSite document (not a .nrl) to the desktop or into another document of a word processing application.

1. In FileSite, select the document from the Document Grid.
2. Hold down the **CTRL** key, then drag the document to its destination. Be sure to keep the **CTRL** key depressed until the document icon appears on your desktop.

   Figure 68 WorkSite document copied to the local desktop

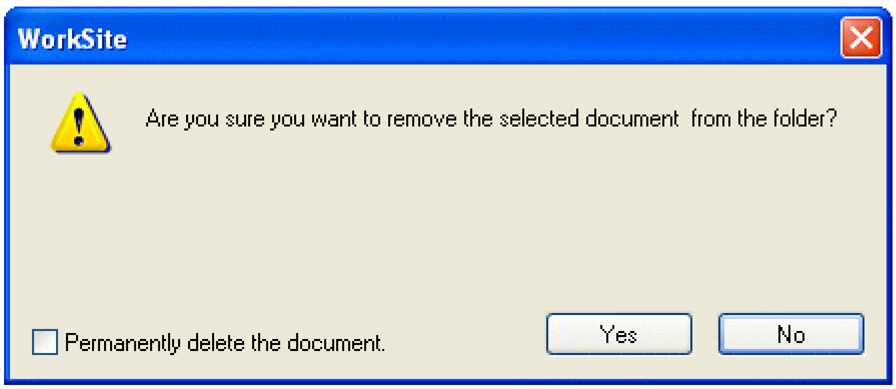
3. Double-click the document icon to view it in its associated application.

Deleting Documents

Deleting a document removes it entirely from the WorkSite library. If you want to remove a document from a folder without permanently deleting it, see "Removing Documents from a Folder" on page 121.

1. Select the document from the Document Grid.
2. Choose **Delete** from the **Document** menu. A message appears asking if you are sure you want to remove the document from the folder.

Figure 69 Document removal message



3. If you click **Yes**, the document is removed from the folder but stays in the WorkSite library. If you want to permanently delete the document from the WorkSite library, select the **Permanently delete the document** check box.

NOTE Only the Author, Operator, or a user with Full Access on a document, or a user whose role permits deleting documents, is allowed to delete it. Based on role and access rights, the **Delete** option may be disabled for some users of FileSite. Contact your WorkSite Administrator for more information.

E-mailing Documents

From the FileSite Desktop, you can send a copy of a document, a link to a WorkSite document, or a URL link to a document through e-mail.

Forward Document

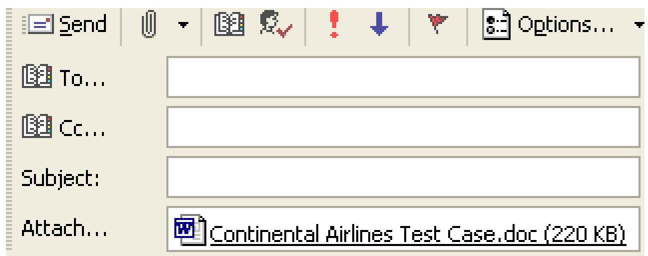
You can e-mail a copy of a WorkSite document as an attachment using the **Forward** option on the **Document** menu.

1. Select the document in the Document Grid.
2. Choose the **Forward** option from the **Document menu**.

   You can also send an attachment by opening a new message in Outlook. Select the WorkSite document you want to attach, then drag the document into your e-mail message while holding down the **CTRL** key.

   A new e-mail message appears with the document attached.

   Figure 70 Document attached to e-mail message



3. Enter the e-mail address of the recipient and click **Send**.

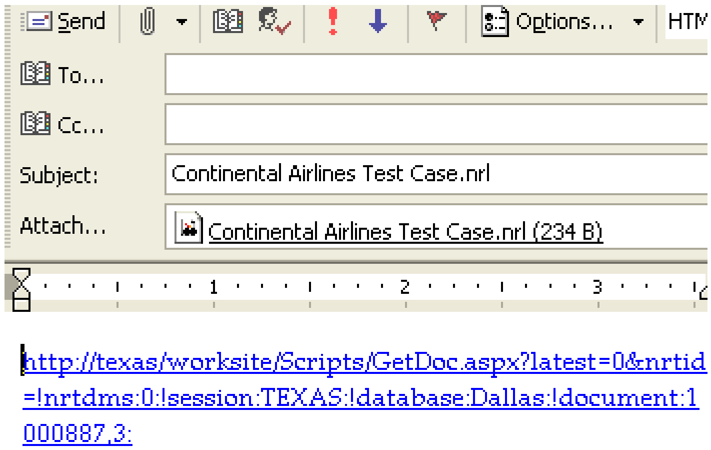
Send Link

You can e-mail a link to a WorkSite document using the **Send Link** option on the **Document** menu.

1. Select the document in the Document Grid.
2. In the **Document menu**, point to the **Send Link** option, and select from the following version options:
   - **To This Version**. Links to current version of the document.
   - **To Latest Version**. Links to the most recent version of the document.

   You can also create a new e-mail message and drag the WorkSite document into the e-mail. It will appear in the **Attachment** field with the .nrl extension.

Figure 71 Document link in e-mail message



3. Enter the e-mail address of the recipient and click **Send**.

NOTE To send a *URL link* to a document, your system must include the WorkSite Web component server.

Inserting WorkSite Links into Outlook Objects

FileSite provides you with the ability to attach a WorkSite link or a copy of a WorkSite document to Outlook tasks, events, contacts, or journal entries. You can attach the WorkSite document or link (.nrl or .url) to an Outlook object using the following methods.

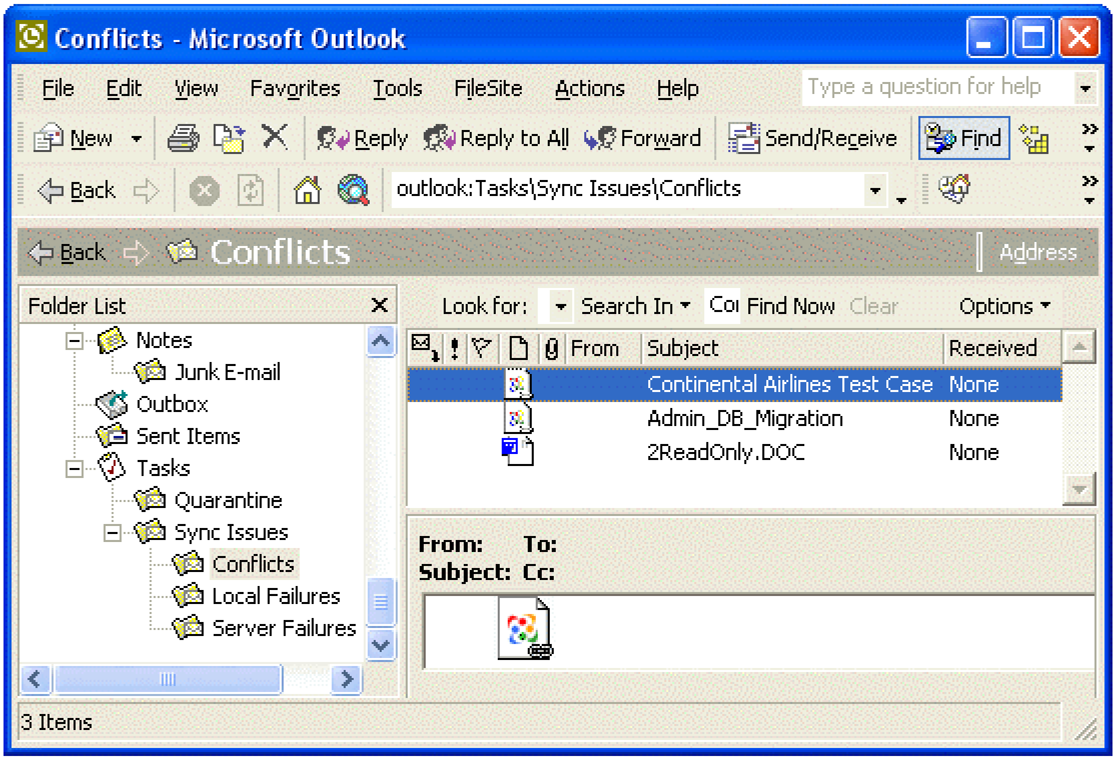
Drag and Drop

1. In FileSite, select the document from the Document Grid.
2. Drag the WorkSite document from the Document Grid to the Outlook folder under Outlook Today in the Folder List.
   - If you want to attach a copy of the WorkSite document, hold down the **CTRL** key while you drag the document. Be sure to hold down the **CTRL** key until the document icon appears.
   - If you want to attach a .nrl or .url link to the document, hold down the **SHIFT** key while you drag the document. Be sure to hold down the **SHIFT** key until the link appears.

The desired WorkSite link or document is attached to the Outlook object.

In the example shown in Figure 72, several WorkSite documents are saved as .nrl links or attachments to an Outlook Task folder.

Figure 72 Example WorkSite links in an Outlook Task folder



NOTE You can also send WorkSite documents from the Microsoft Office or Adobe Acrobat integrated desktop using the options on the **File** menu. To insert documents, links, and attachments, use the options on the **Insert** menu. See Chapter 7.

Printing Documents

You can print a copy of a document directly from FileSite.

1. Select the document from the Document Grid.

2. Select **Print** from the **Document** menu. The document opens in its associated application and prints.

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

Relating Documents

You can create one- or two-directional relations between documents in FileSite. Document relations are one of the ways you can organize and group documents.

NOTE Relations are two-directional by default. You can enable one-way relations using a registry key. For more information, refer to the *WorkSite Desktop Client Customization Guide*.

NOTE Your system can handle either one-way or two-way relationships, but not both.

Depending on how your system is set up, each document you select is related in a one-way or two-way relationship, to the original document. The selected documents, however, are not related to each other. For example, if you want to relate Documents B, C, and D to Document A, Table 28 shows how the documents relate.

Table 28 Document Relations

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

Creating Relations

1. Select the document from the Document Grid. If your system is set for one-way relationships, this becomes the parent document.

2. From the **Document** menu, point to **Document Info** and select **Related Documents**. The Related Documents window opens, listing documents that are related to the selected document.
3. From the Folder List, navigate to the documents you want to relate to this document.

NOTE The documents do not need to be in the same folder as the primary document.

4. Select the documents and drag them into the Related Documents window. You can select multiple documents and drag them all at once.

   The **Related Documents** icon appears in the **Document Icon Column** in the Document Grid for documents that have related documents.
5. You can see the related documents by selecting the primary document in the Document Grid and clicking the **Related Documents** tab in the Document Results Frame.

Removing Relations

1. Select the related document you wish to unrelate from the Document Grid.
2. Choose **Remove Relation** from the **Document** menu. The document is unrelated from the primary document.

Uses for Related Documents

Document relations are used to group documents and their attachments. For example, a contract and its amendments, a contract and riders to the contract and so on. You can also use document relations to link a primary document with the documents that were used to create it, such as a final report with its inserts, which could be spreadsheets, graphics files, tables, figures, and charts.

Unlocking Documents

In some instances, when network connectivity fails or your computer shuts down unexpectedly, you may find that a document that you were working on is marked as “In use” when it is no longer “In use”. You can unlock the document in the WorkSite library and FileSite will release it, making it available for checkout.

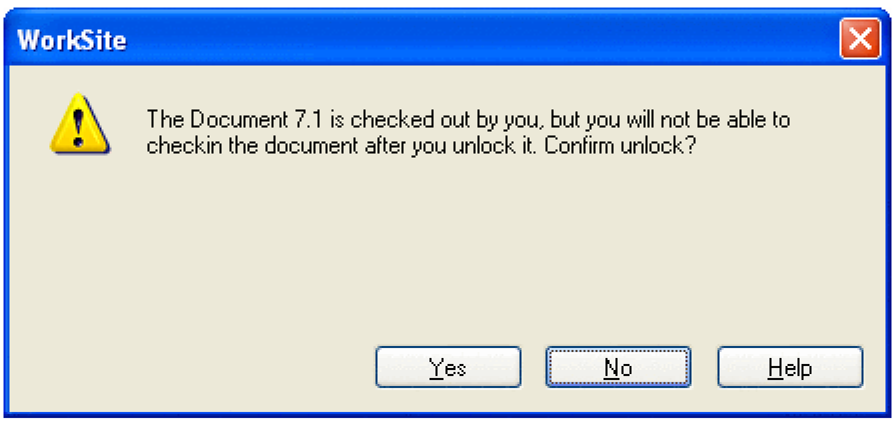
Any copy of the document that exists locally will be “orphaned” from the network version after an Unlock is complete. You can put the local document into WorkSite as a new document or use the **Add Version** option to import it as a new version. You should only use the **Unlock** option to free up documents that are erroneously marked “In use” or checked-out due to a network or system failure.

Only the user who most recently opened or checked out the document can unlock it in the WorkSite library. If you try to open or unlock a document that is currently open or checked out, a message warns that you will not be able to check in the document after you unlock it.

To unlock a document:

1. Select the document from the Document Grid.
2. Choose **Unlock** from the **Document** menu. A message asking you to confirm the Unlock operation appears. See Figure 73.

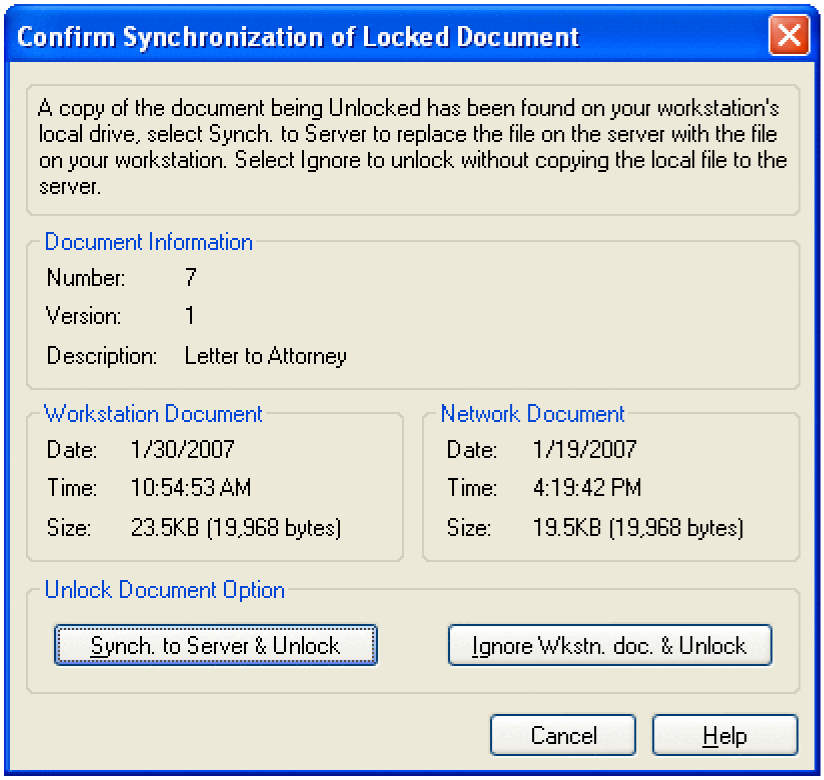
Figure 73 Confirm Unlock message



3. Click **Yes** to unlock the document.
4. If the system detects that the document in question resides on your local or network drive, the Confirm Synchronization of Locked Document dialog box opens.

   To move between fields in the following dialog box, use the **TAB** key, arrow keys, or **ALT** key plus underscored letter.

Figure 74 Confirm Synchronization of Locked Document dialog box



This dialog box offers you two options:

- **Synch. to Server & Unlock**. Checks in the local copy of the document and overwrites the network copy. Use this option if you are sure the local copy is the more appropriate one.
- **Ignore Wrkstn. doc. & Unlock.** Unlocks the network copy of the document and ignores the local copy.

NOTE The **Unlock** option may be disabled for some users of FileSite. Contact your WorkSite Administrator for more information.

Declaring a Document as a Record

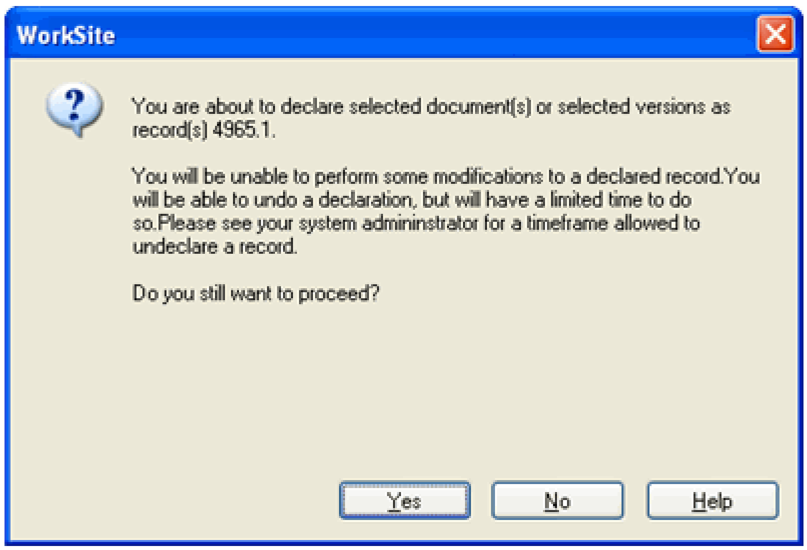
You can declare a document to be a *record*. You can use the **Open** command to open the declared document in its native application, make changes, and subsequently save it back to the WorkSite library as a new document or a new version of the original document.

When you declare a document as a record, the action is recorded in the document's history. See “History Tab” on page 83 for more information on displaying a document's history.

To declare a document as a record:

1. Select the document from the Document Grid.
2. Choose **Declare as Record** from the **Document** menu. A message asking you to confirm the operation appears. See Figure 75. This operation can be rolled back within a specific period of time. For more information, see “Undeclaring a Record” on page 178.

Figure 75 Declare as Record confirmation message



3. Click **Yes** to declare the document as a record.

   When you have declared the document as a record, the **Locked** icon appears against that document in the Document Grid.

Undeclaring a Record

You can undeclare a document that is declared as a Record. Undeclaring a document restores it to its status prior to declaration, and you can change its profile information. However, you can undeclare a document only within a specific period of time from when the document was declared. This time period is determined by the **Grace period to undeclare** setting on the WorkSite Server Service Manager. Contact your WorkSite Administrator for more information. After the expiry of this set time period, you cannot undeclare a document.

NOTE An NRTADMIN user can undeclare documents at any time, that is, irrespective of the expiry of the grace period, or when the **Grace period to undeclare** setting is set to **0**.

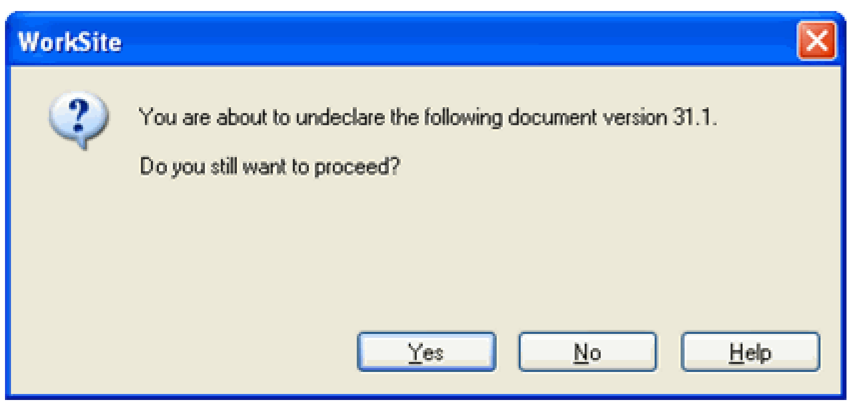
When you undeclare a document, the action is recorded in the document's history. For more information on displaying a document's history, see "History Tab" on page 134.

NOTE Only users with at least Read/Write access to the declared document can undeclare it. Contact your WorkSite Administrator for more information.

To undeclare a document:

1. Select the document from the Document Grid.
2. Choose **UnDeclare as Record** from the **Document** menu. A message asking you to confirm the operation appears. See Figure 76.

Figure 76 Undeclare Record confirmation message



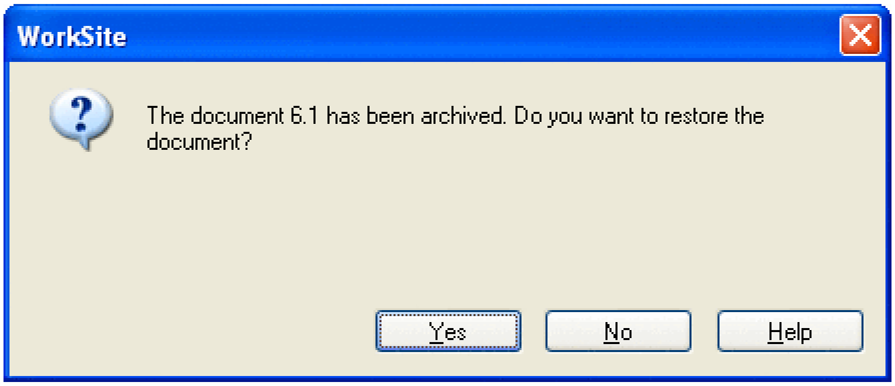
3. Click **Yes** to undeclare the document.

   When you have undeclared the document, the **Locked** icon against it disappears.

Restoring Archived Documents

You can restore archived documents if the proper archive files are available to the server. When you try to open or checkout a document that is marked as "archived", FileSite displays a message asking if you want to restore it.

Figure 77 Document Archived Message



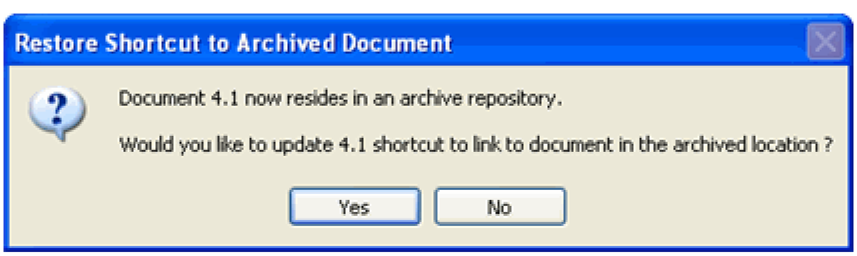
If you click **Yes**, FileSite retrieves the archived document from the archive location. If the archive file is not available to the server, FileSite will mark the file for restoration by your WorkSite Administrator.

Restoring Archived Document Shortcuts

You can restore shortcuts to archived documents by updating the shortcut to link to the document in its archived location.

1. Select the document from the Document Grid.
2. Choose **Restore Shortcut to Archived Document** from the **Document** menu. The Restore Shortcut to Archived Document message appears.

Figure 78 Restore Shortcut to Archived Document Message



3. Click **Yes** to update the shortcut to now link to the document in its archived location.

NOTE WorkSite can restore the link to the archived document only if it resides in a database that is connected to WorkSite.

Displaying Document Information

You can view the following information about a document:

- **Versions**. View a list of a document's versions.
- **History**. View a list of events in the document's history.
- **Related Documents**. View a list of the document's relations.
- **Checkedout Info**. View information about a checked-out document.
- **Where Used**. View information about a document's location in the WorkSite library.

Versions

1. Select the document from the Document Grid.
2. From the **Document** menu, point to **Document Info** and select **Versions**.

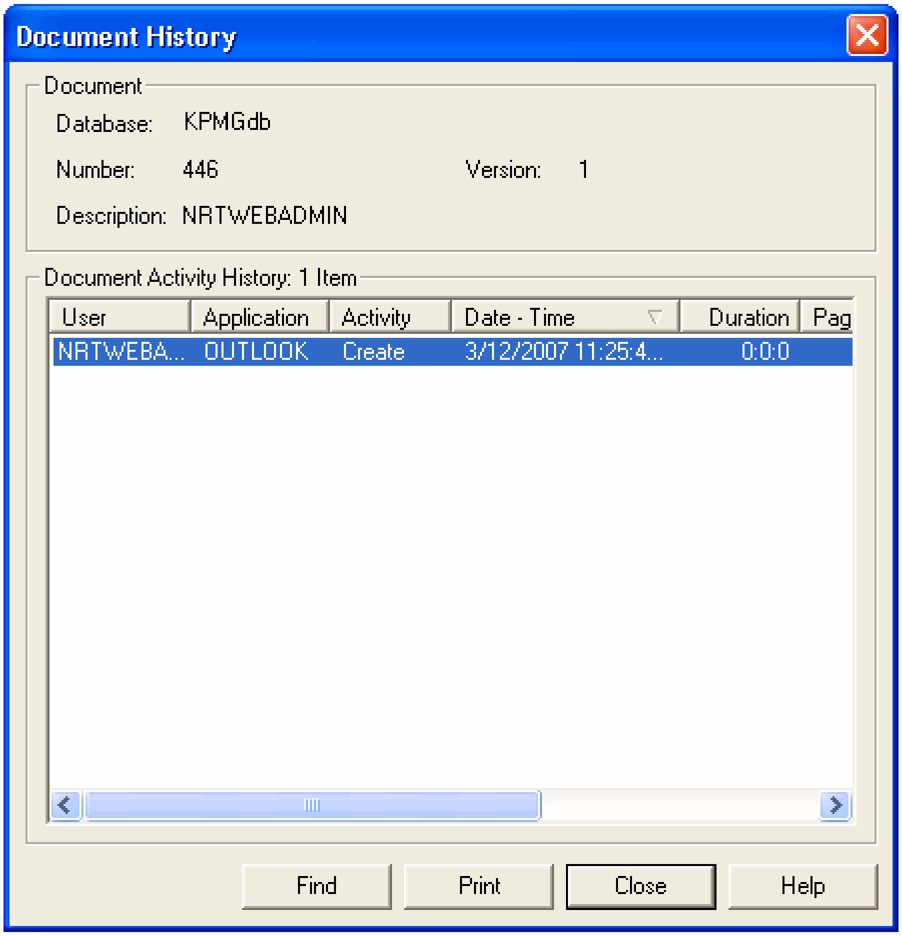
   A list of the document's versions is displayed in the Document Versions window.

History

1. Select the document from the Document Grid.
2. From the **Document** menu, point to **Document Info** and select **History**.

   A list of events in the document's history is displayed in the Document History dialog box.

Figure 79 Document History dialog box



- Click **Find** to open the Find in List dialog box and enter a search string to locate a particular event.
- Click **Print** to open the standard Windows Print dialog box to print the list of the document's history.

Related Documents

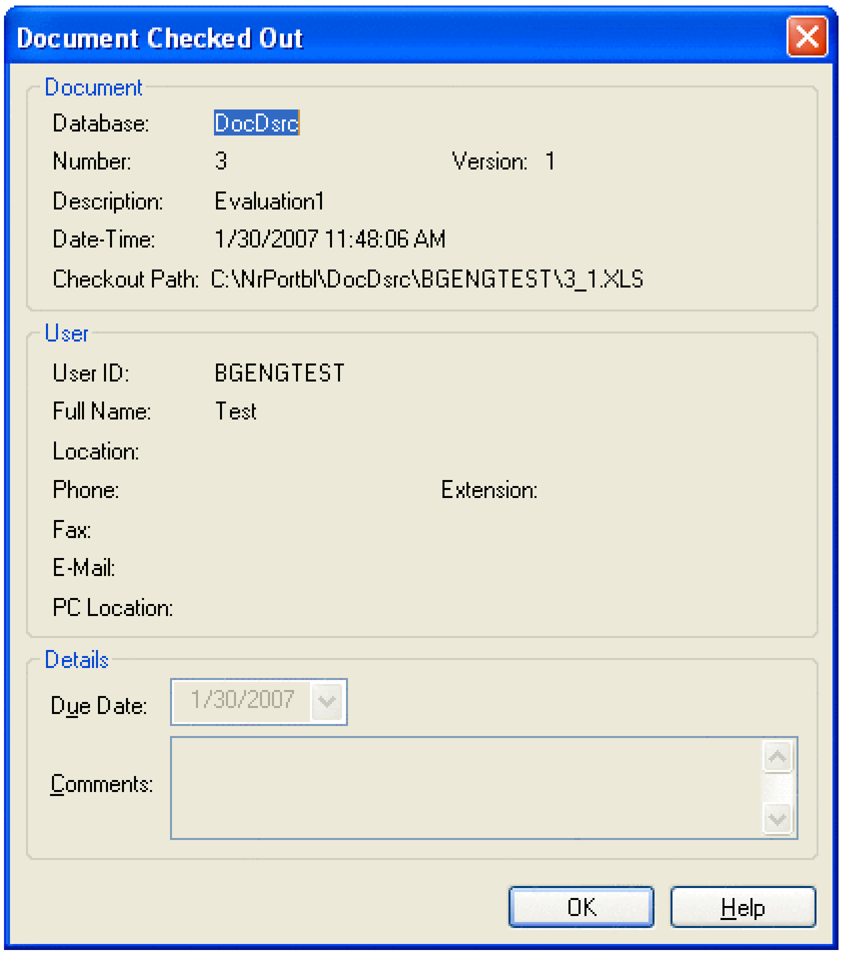
1. Select the document from the Document Grid.
2. From the **Document** menu, point to **Document Info** and select **Related Documents**.

   A list of the document's relations is displayed in the Related Documents window.

Checkedout Info

1. Click the **Checkedout Documents** icon in the Folder List. This displays all your checked-out documents for the selected server in the Document Grid.
2. Select a document from this list.
3. From the **Document** menu, point to **Document Info** and select **Checkedout Info**. The Document Checked Out dialog box opens, displaying the information you need about the checked-out document.

Figure 80 Document Checked Out dialog box



NOTE You cannot edit the information that appears in this dialog box.

Where Used

1. Select the document from the Document Grid.
2. From the **Document** menu, point to **Document Info** and select **Where Used**. The Where Used dialog box opens with information about where the document is located.

Move or Copy from Outlook to FileSite

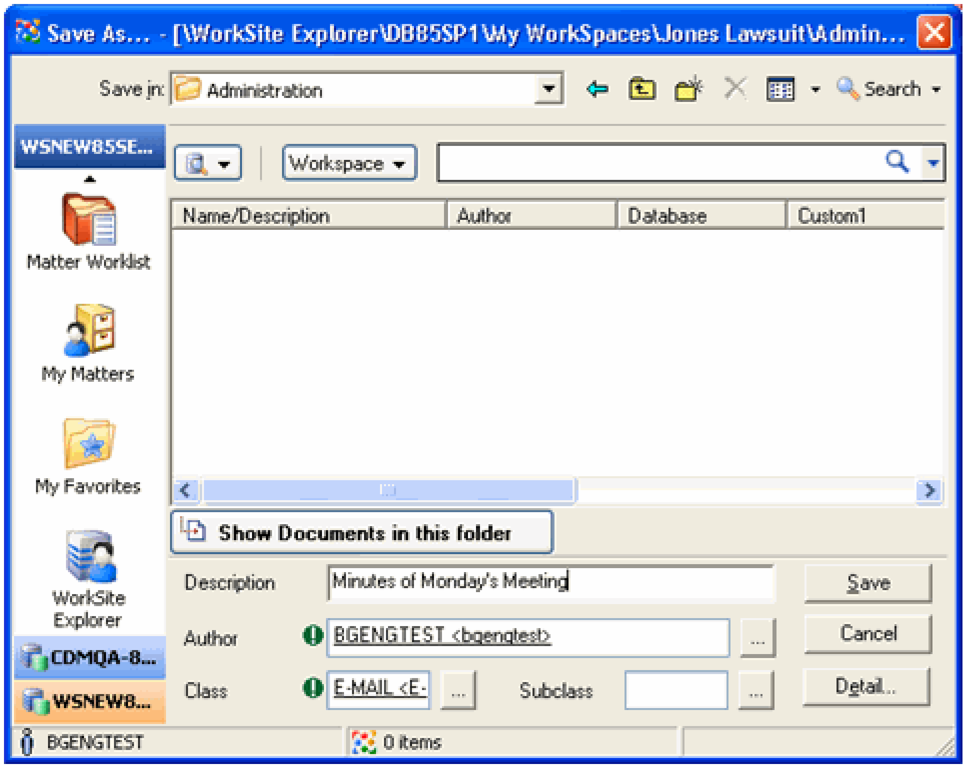
You can copy or move e-mail or folders in Outlook to FileSite libraries using the buttons on the WorkSite toolbar (or from the Actions area of the **WorkSite** tab for Outlook 2010).

NOTE You can also move and copy e-mail to WorkSite using the **Move to Folder** and **Copy to Folder** options in the native Outlook application.

Move E-mails to WorkSite

1. Select one or more e-mail from the Outlook Inbox or other Outlook folder displayed in the Document Grid.
2. Click the **Move Email** icon on the WorkSite toolbar. The Save As dialog box opens.

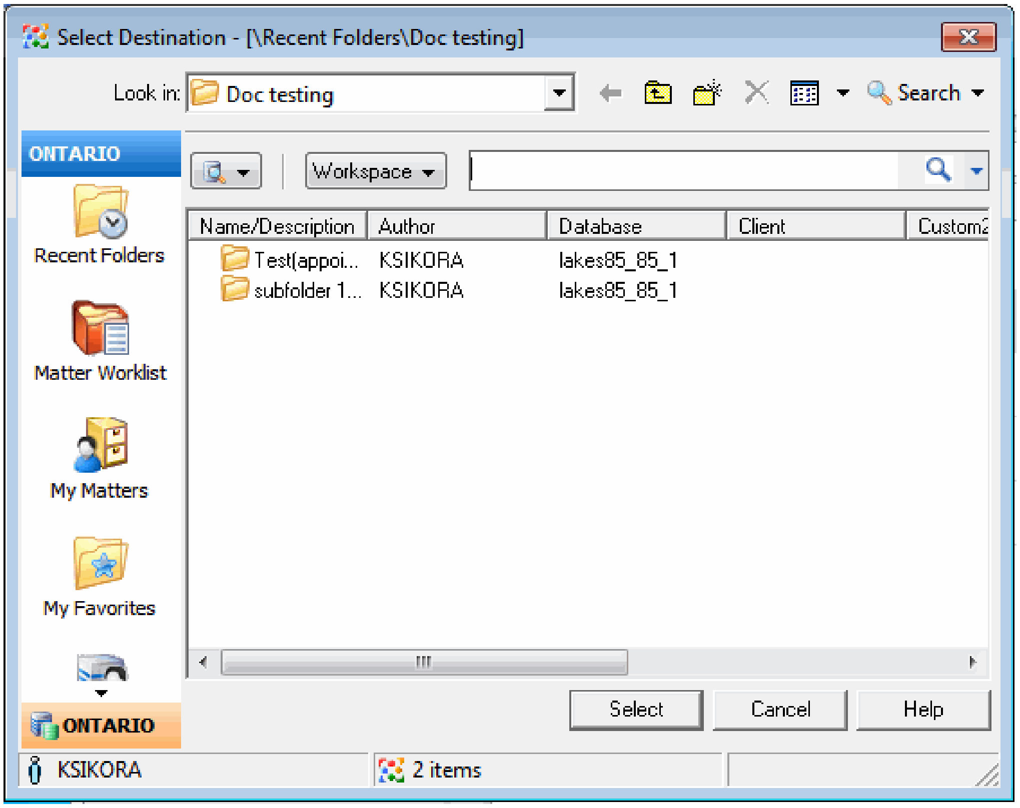
Figure 81 FileSite Save As dialog box



3. Navigate to the FileSite folder in which you want to save the e-mail. You can also use the Express Search panel to find a location. See “Express Search Panel” on page 266 for more information on using this panel.
4. Enter the **Author**, **Class**, and **Subclass** (if any) fields.
5. Click **Save**. The e-mail appears in the Document Grid with the **Locked E-mail** icon indicating it cannot be edited. It is removed from its original location in Outlook.

   In Outlook 2010, click the **Move Email** icon on the **WorkSite** tab of the ribbon bar. The Select Destination dialog box opens.

Figure 82 Select Destination dialog box



Select the folder where you want to move the e-mail and click **Select**. The e-mail is removed from its original location in Outlook and appears in the folder you selected.

Copy E-mails to WorkSite

1. Select one or more e-mails from the Outlook Inbox or other Outlook folder displayed in the Document Grid.
2. Click the **Copy Email** icon on the WorkSite toolbar. The Save As dialog box opens. See Figure 81.
3. Navigate to the FileSite folder in which you want to save the e-mail. You can also use the Express Search panel to find the folder. See “Express Search Panel” on page 266 for more information on using this panel.
4. Enter the **Author**, **Class**, and **Subclass** (if any) fields.
5. Click **Save**. The e-mail appears in the Document Grid with the **Locked E-mail** icon indicating it cannot be edited. The document is not removed from its original location in Outlook.

In Outlook 2010, click the **Copy Email** icon from the Actions area of the **WorkSite** tab. The Select Destination dialog box opens. See Figure 82.

Select the folder where you want to copy the e-mail and click **Select**. The e-mail appears in the folder you selected and is not removed from its original location in Outlook.

Move Folders to WorkSite

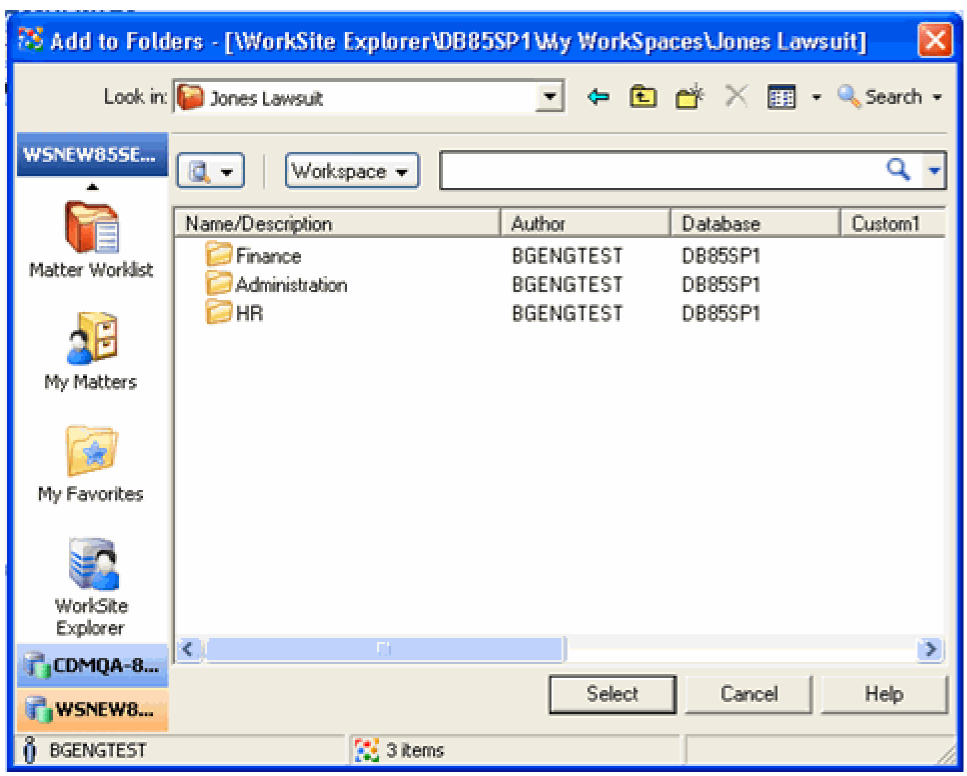
When you move or copy an Outlook folder to a WorkSite library, you first create a new folder and then file the documents from the original folder to the new folder.

1. Select an Outlook folder in the Folder List.
2. Click the **Move Folder** icon on the WorkSite toolbar.

   In Outlook 2010, click the **Move Folder** icon from the Actions area of the **WorkSite** tab.

   The Add to Folders dialog box opens.

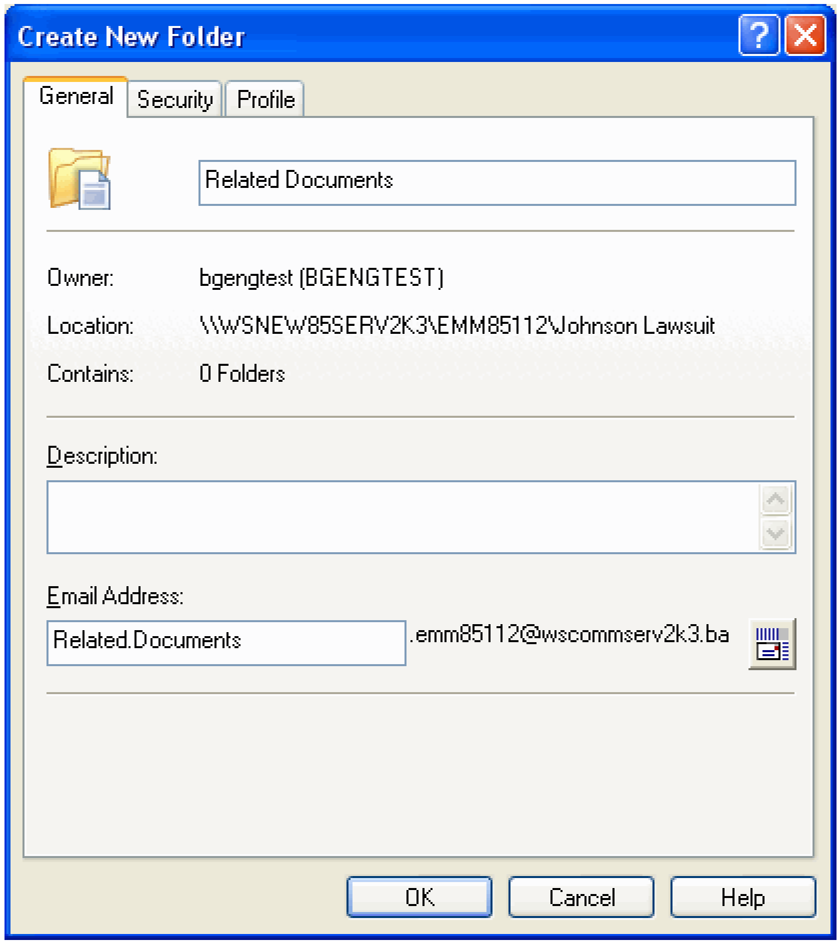
   Figure 83 FileSite Add to Folders dialog box



3. Navigate to the FileSite folder in which you want to save the Outlook folder. You can also use the Express Search panel to find the folder. See “Express Search Panel” on page 266 for more information on using this panel.

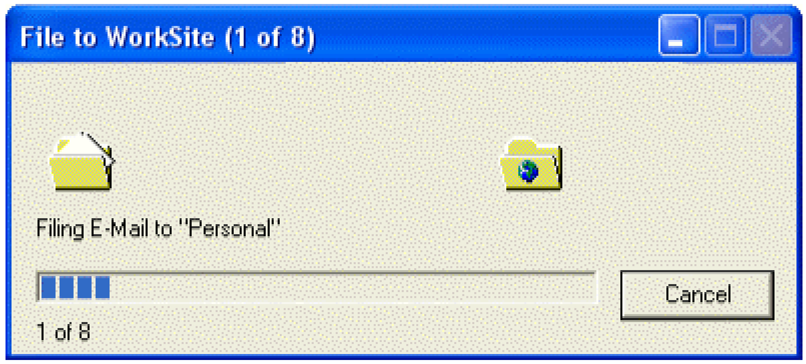
4. Click **Select**. The Create New Folder dialog box opens.

Figure 84 Create New Folder dialog box



5. Enter property and security information in the Create New Folder dialog box. For detailed instructions, see “Document Folder” on page 111.
6. Click **OK**. The File to WorkSite progress window opens.

Figure 85 File to WorkSite progress window



7. When the e-mails are filed in the new folder in FileSite, the New Profile dialog box opens. Enter property and security information for the e-mail documents. For detailed instructions, see "Importing E-mails" on page 156.
8. Navigate to and select the new folder in FileSite. The e-mail displays in the Document Grid with the **Locked E-mail** icon indicating they cannot be edited.

   The folder and its contents are no longer in the Outlook directory.

Copy Folders to WorkSite

1. Select an Outlook folder in the Folder List.
2. Click the **Copy Folder** icon on the WorkSite toolbar.

   In Outlook 2010, click the **Copy Folder** icon on the Actions area of the **WorkSite** tab.

   The Add to Folder dialog box opens. See Figure 83.
3. Navigate to the FileSite folder in which you want to save the Outlook folder. You can also use the Express Search panel to find the folder. See "Express Search Panel" on page 266 for more information on using this panel.
4. Click **Select**. The Create New Folder dialog box opens. See Figure 84.
5. Enter property and security information in the Create New Folder dialog box. For detailed instructions, see "Document Folder" on page 111.
6. Click **OK**. The File to WorkSite progress window opens. See Figure 85.
7. When the e-mails are filed in the new folder in FileSite, the New Profile dialog box opens. Enter property and security information for the e-mail documents. For detailed instructions, see "Importing E-mails" on page 156.
8. Navigate to and select the new folder in FileSite. The e-mail displays in the Document Grid with the **Locked E-mail** icon indicating they cannot be edited.

The folder and its contents remain in the Outlook directory.

WorkSite Add-on Functions

WorkSite Add-ons are optional features that your system may include. You must have Adobe Acrobat 6.04 (Standard or Professional), 7.08, or 8.0 installed on your machine for the PDF Add-ons to work.

NOTE The Add-ons require Adobe Acrobat. They do not appear if you have only Adobe Reader installed on your system.

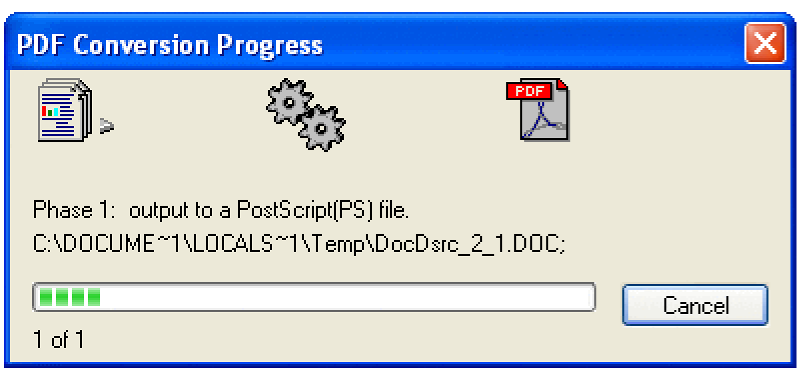
Convert to PDF Add-on

The Convert to PDF Add-on lets you convert Microsoft Office documents to PDF documents. You can also convert a document and send it in an e-mail message in a single operation.

To convert a Microsoft Office document (Word, Excel, or PowerPoint) to PDF:

1. Select the document you want to convert.
2. From the **Document** menu, point to **Utilities** and choose **Convert to PDF**. You can also click the **Convert to PDF** icon on the toolbar. The PDF conversion process begins. A progress message appears.

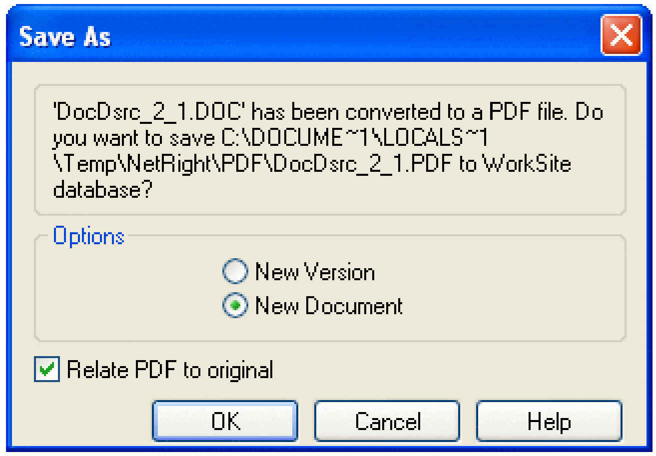
   Figure 86 PDF Conversion Progress dialog box

3. When the conversion process is complete, the PDF Save As dialog box opens.

   To move between fields in the following dialog box, use the **TAB** key, arrow keys, or **ALT** key plus underscored letter.

Figure 87 PDF Save As dialog box



4. Choose from the following options:
   - **New Document**. Saves the PDF to the WorkSite library as a new document.
   - **New Version**. Saves the PDF as a new version of the original document.

NOTE The **New Version option** is not available in Portable mode.

5. If you choose to save the PDF as a New Document, you can select the **Relate PDF to original** option. The PDF document will relate to the original document in a one-way or two-way relationship depending on how your system is configured. See "Relating Documents" on page 174 for more information on creating relations between documents.

NOTE The **Relate PDF to original** option is not available in Portable mode.

6. Click **OK** after you have made your selections. The New Document Profile dialog box or the New Version Profile dialog box opens, depending on the option you selected.
7. Enter the information in the profile dialog box. See "Entering Document Profile Information" on page 144.

Send as PDF Add-on

The Send as PDF Add-on lets you send the converted document in an e-mail message.

1. Select the document you want to convert and send in an e-mail.
2. From the **Document** menu, point to **Utilities** and choose **Send as PDF**. You can also click the **Send as PDF** icon on the toolbar. The PDF conversion process begins. A progress message appears. See Figure 86.
3. After the PDF conversion process is complete, FileSite opens a new e-mail message and adds the PDF document to the message as an attachment.
4. Enter e-mail addresses in the **To** and **Cc** fields and click **Send**.

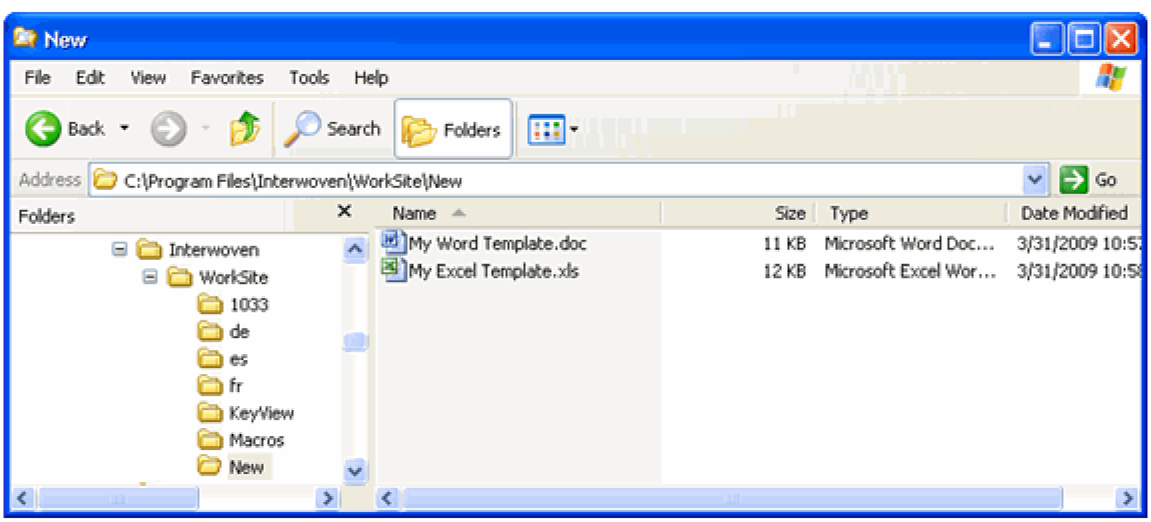
Creating New Documents

You can create a new document directly from FileSite. Because your FileSite system is integrated with the Microsoft Office Suite, you have the ability to create a new Word document, Excel spreadsheet, or PowerPoint presentation. See Figure 89.

You or your WorkSite Administrator can create “template” documents and place them in a folder under the WorkSite directory on your machine or on the LAN. If the templates reside on your machine, the path is:

```
C:\Program Files\Interwoven\WorkSite\
```

Figure 88 New folder containing example Word and Excel templates



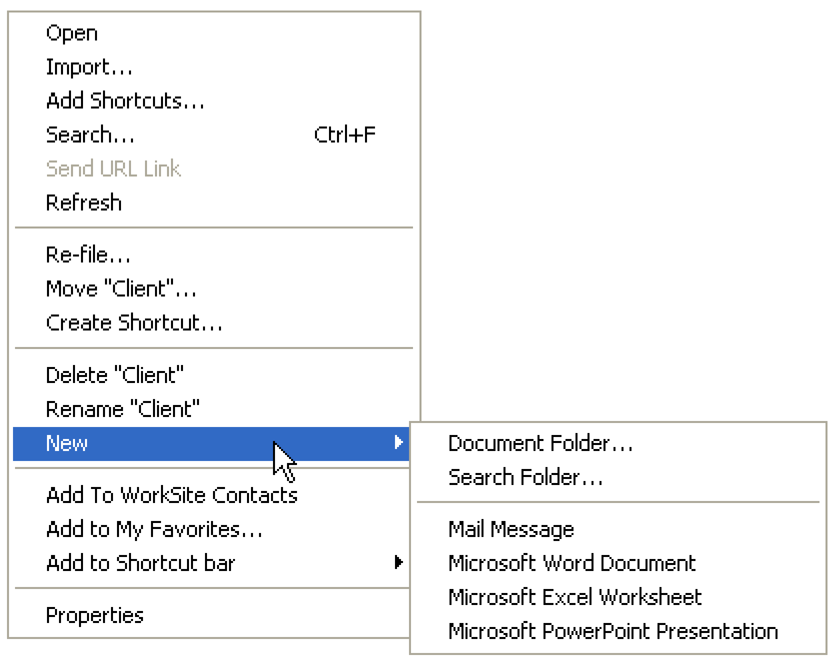
If there is a form, basic document, or presentation that you use frequently, you or your WorkSite Administrator can put it in this folder. This is the first place FileSite looks when you want to create a new document.

To create a new document:

1. Right-click the **Document Worklist** icon or a document folder icon in the Folder List, point to **New** and make a selection from the following options in the **New** submenu:
   - Mail Message
   - Microsoft Word Document
   - Microsoft Excel Worksheet
   - Microsoft PowerPoint Presentation

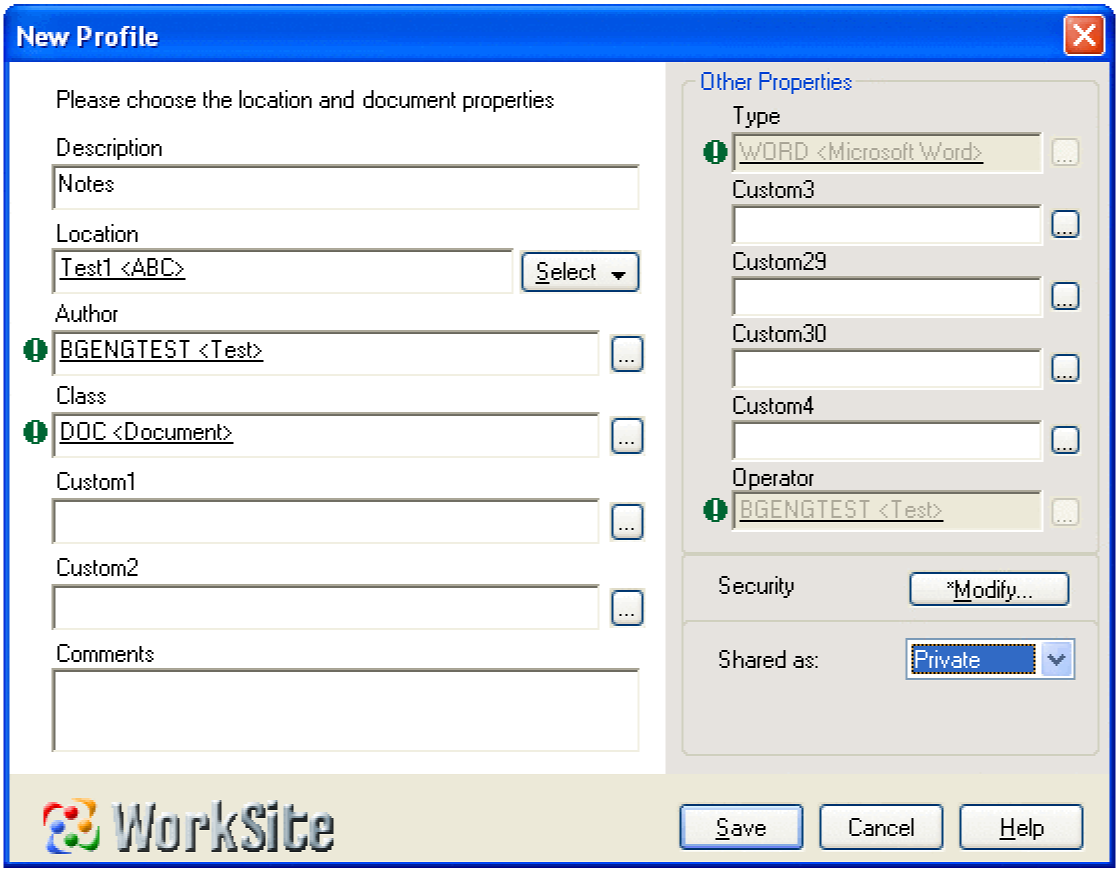
   NOTE The **New** submenu is customizable from your computer's registry. Your WorkSite Administrator can add items, for example, document templates from other applications, such as WordPerfect or Visio.

   Figure 89 New submenu

2. When you select an item from the **New** submenu, FileSite opens the New Profile dialog box.

Figure 90 New Profile dialog box



3. Fill in the fields of the dialog box. See "Entering Document Profile Information" on page 144 for detailed steps.
4. Click **Save** to save the document and open it in its native application.
5. Add content to the document and save. The document will appear under the selected document folder or worklist.

Creating New Document Defaults

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

If you have defined security templates, you can include one in the New Profile dialog box. See “Working with Security Templates” on page 202 for more information on creating security templates.

NOTE If a document folder is selected when you import or create a new document, the default values appear in the document profile dialog box, along with the property information that is set on the folder.

To create a new document default profile:

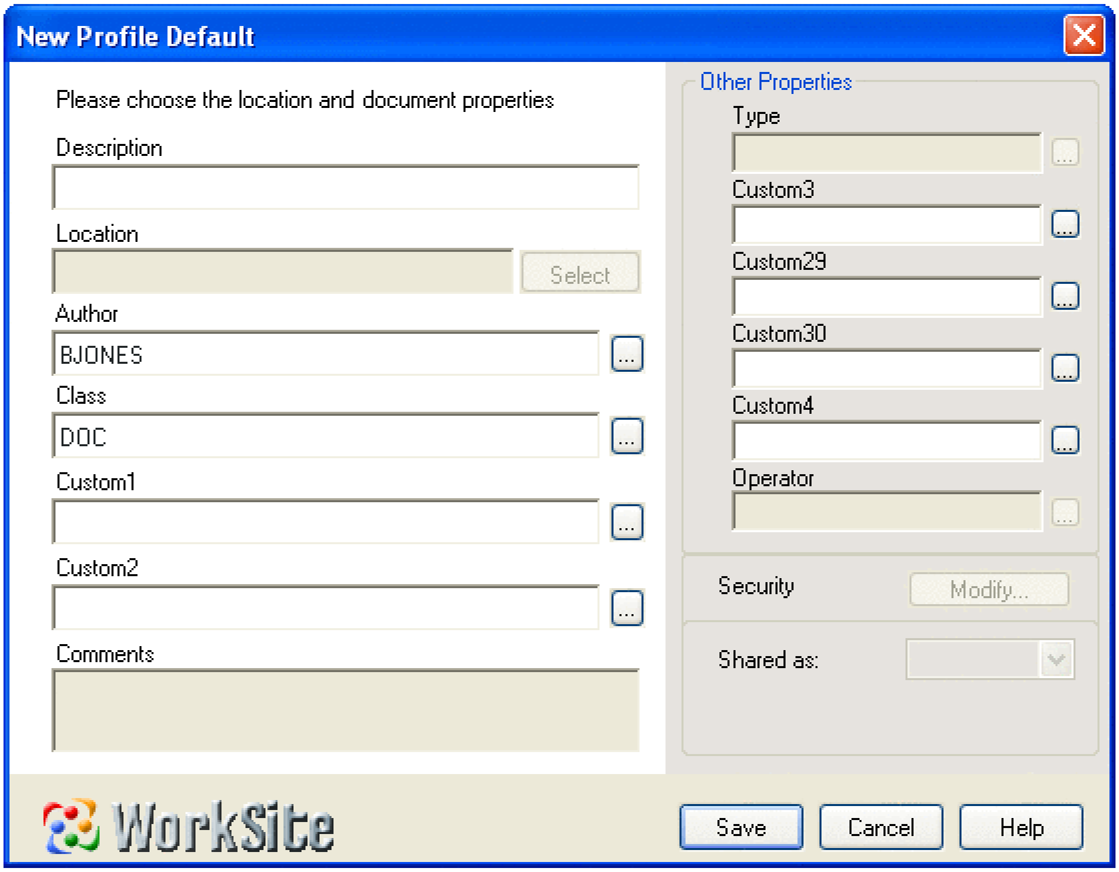
1. From the **WorkSite** menu, point to **Configure**, and select **Document Profile Defaults**.

   In Outlook 2010, on the **WorkSite** tab, click the **Document Profile Defaults** icon from the Configure area.

   The New Profile Default dialog box opens. See Figure 91. The information that you enter in this dialog box will appear automatically in the new document’s profile dialog box.

   To move between fields in the following dialog box, use the **TAB** key. Because the fields and their names are customizable, there are no keyboard shortcuts on profile dialog boxes.

Figure 91 Example New Profile Default dialog box



2. Enter default profile information. In Figure 91, default values are entered in the **Author** and **Class** fields. See “Entering Document Profile Information” on page 144 for instructions.

   NOTE The New Profile Default dialog box can be customized by your WorkSite Administrator and may be significantly different than the dialog box shown in Figure 91.

3. When you select certain security settings, they are automatically selected in the New Profile dialog box each time you add a new document to the WorkSite library.

4. Click **Save** to store the default information and close the New Profile Default dialog box.

NOTE Although the values that you enter in the *New Profile Default* dialog box appear automatically for each new document you create, you can modify these values when you create or edit a document. See "Editing Document Profile Information" on page 146 for more information. You *do not* have to use the default values.

Keyword Variables in Default Profiles

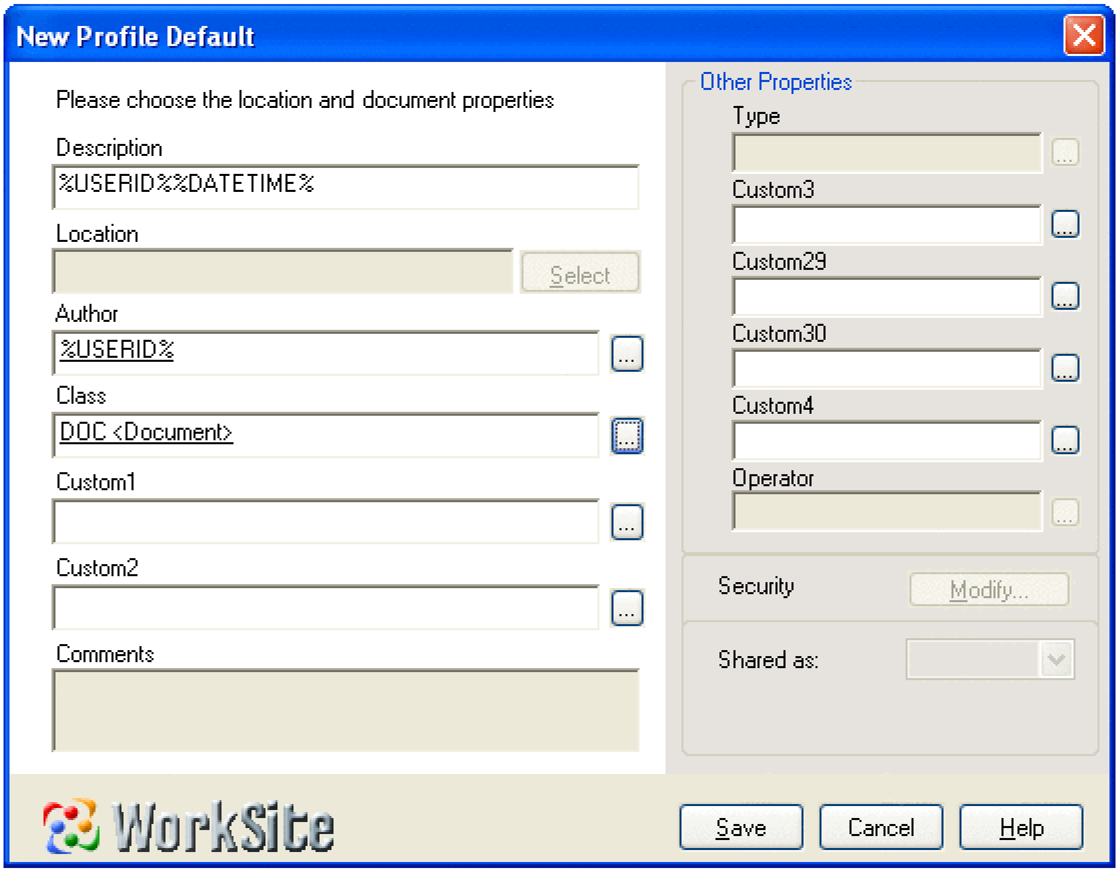
You can specify keyword variables for the current date, time, date and time, and user name in the *New Profile Default* dialog box.

Table 29 List of Supported Variables

Keyword Variable	What it does
%DATE%	Inserts current date
%TIME%	Inserts current time
%DATETIME%	Inserts current date and time
%USERID%	Inserts name of user currently logged in to the WorkSite library

Figure 92 shows an example of a New Profile Default dialog box where the default **Description** field will be the name of the current user followed by the date and time. The **Author** field is also set to the current user. The **Class** field defaults to DOC.

Figure 92 New Profile Default dialog box, variables entered



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

Default Profile Properties for Documents

FileSite has five required fields of profile information: Description, Type, Class, Author and Operator. The following table shows how FileSite handles these profile fields when documents are imported into folders. See “Creating New Document Defaults” on page 194 for more information on creating default document profiles.

Table 30 Default Profile Properties, Documents

Profile Field	Imported Document
Description	File name of the document.
Type	Autodetected if file type is known or defaults to ANSI/UNKNOWN.
Class	Obtained from folder profile defaults or default set on your system (usually DOC).
Operator	User who imports the document.
Author	Obtained from folder profile defaults or same as Operator.

Creating E-mail Profile Defaults

You can create a virtual template of default e-mail profile information that appears in the Default Email Profile dialog box. This option allows you to streamline the profiling of e-mail messages.

You can set fields of profile information to standard values that typically do not change, so you do not have to enter the same information each time you create or import e-mail into the WorkSite library.

If you have defined security templates, you can include one in the Default Email Profile dialog box. See “Working with Security Templates” on page 202 for more information on creating security templates.

To create a new e-mail profile default:

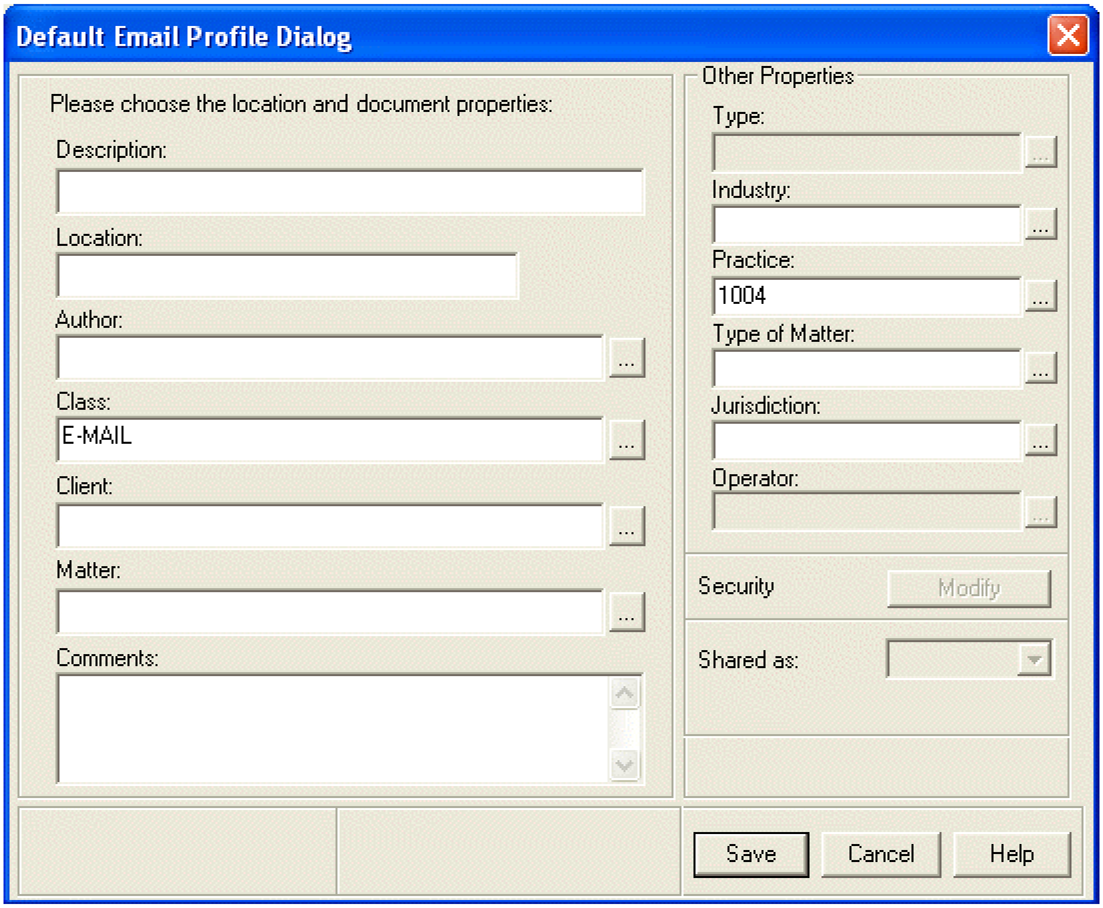
1. From the **WorkSite** menu, point to **Configure**, and select **Email Profile Defaults**.

   In Outlook 2010, on the **WorkSite** tab, click the **Email Profile Defaults** icon from the Configure area.

   The Default Email Profile dialog box opens. See Figure 93. The information that you enter in this dialog box will appear automatically in the dialog box used to enter property information for new e-mail messages that are saved to WorkSite.

To move between fields in the following dialog box, use the **TAB** key. Because the fields and their names are customizable, there are no keyboard shortcuts on profile dialog boxes.

Figure 93 Example Default Email Profile dialog box



2. Enter default profile information. See "Entering Document Profile Information" on page 144 for instructions.

NOTE The Default Email Profile dialog box can be customized by your WorkSite Administrator and may be significantly different than the dialog box shown here.

3. When you select certain security settings, they are automatically selected in the Default Email Profile dialog box each time you add a new e-mail message to the WorkSite library. You can always enter custom security settings for an e-mail message, if desired.

4. Click **Save** to store the default information and close the Default Email Profile dialog box.

NOTE Although the values that you enter in the Default Email Profile dialog box appear automatically for each new e-mail message you create, you can modify these values whenever you create a new e-mail message. See “Editing Document Profile Information” on page 146 for more information. You *do not* have to use any of the default values set.

Keyword Variables in Default E-mail Profiles

You can specify keyword variables for the current date, time, date and time, and user name in the Default Email Profile dialog box. See Table 29 for a list of supported variables.

Default Profile Properties for E-mails

FileSite has five required fields of profile information: Description, Type, Class, Author and Operator. The following table shows how FileSite handles these profile fields when e-mail messages are imported into folders with e-mail addresses. See “Creating E-mail Profile Defaults” on page 199 for more information on creating default e-mail profiles.

Table 31 Default Profile Properties, E-mails

Profile Field	E-mail
Description	Subject of the e-mail.
Type	Autodetected if file type is known or defaults to ANSI/ UNKNOWN.
Class	Obtained from folder profile defaults or default set on your system (usually e-mail).
Operator	User name in **From** field of the e-mail.
Author	Obtained from folder profile defaults or same as Operator.

Working with Security Templates

NOTE The **Security Template** option in the **FileSite** > **Configure** submenu may be disabled on your system by your WorkSite Administrator.

By default, document security is determined by the security settings on the folder in which it is created or dragged and dropped. In earlier versions of WorkSite, document security was set by applying a class-based *security template,* or list of predefined security settings. Your **FileSite** > **Configure** submenu may include the **Security Template** option, but keep in mind that you can only use security templates if you are NOT using folder security.

There are two types of security templates you can apply:

- **Local Security Template**. You can create a local security template in FileSite and apply it to your documents. See “Creating a Local Security Template” on page 202 and “Applying a Security Template” on page 205 for more information.
- **Author-based Security Template**. Your WorkSite Administrator can create lists of predefined security settings and assign these templates to users. When the user imports or creates a new document in WorkSite, the security settings assigned to the user are automatically applied to the document profile. See “Applying an Author-based Security Template” on page 207 for more information.

  NOTE Contact your WorkSite Administrator for more information on creating Author-based security templates.

Creating a Local Security Template

In FileSite you can create local security templates that can be applied to new documents.

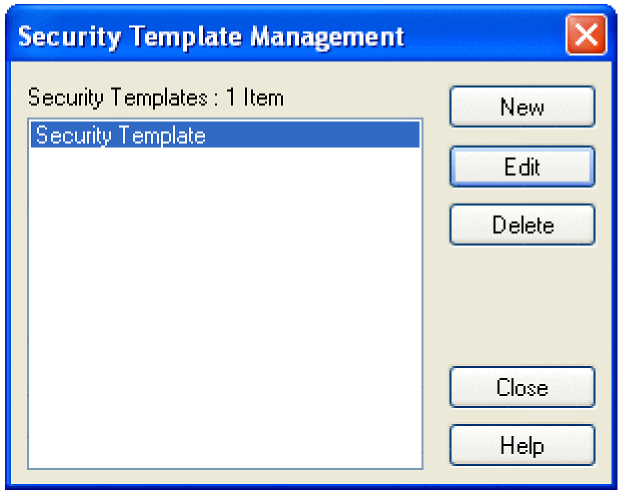
1. From the **WorkSite** menu, point to **Configure**, and select **Security Templates**.

   In Outlook 2010, on the **WorkSite** tab, click the **Security Templates** icon from the Configure area.

   The Security Template Management dialog box opens. See Figure 94.

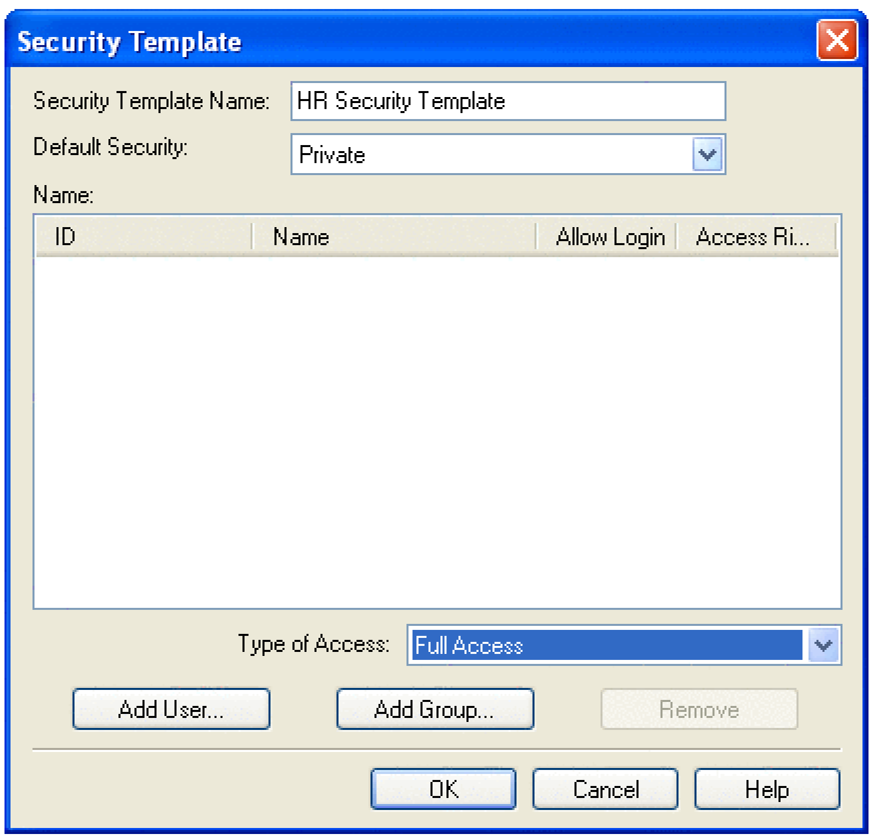
To move between fields in the following dialog boxes, use the **TAB** key, arrow keys, or **ALT** key plus underscored letter.

Figure 94 Security Template Management dialog box



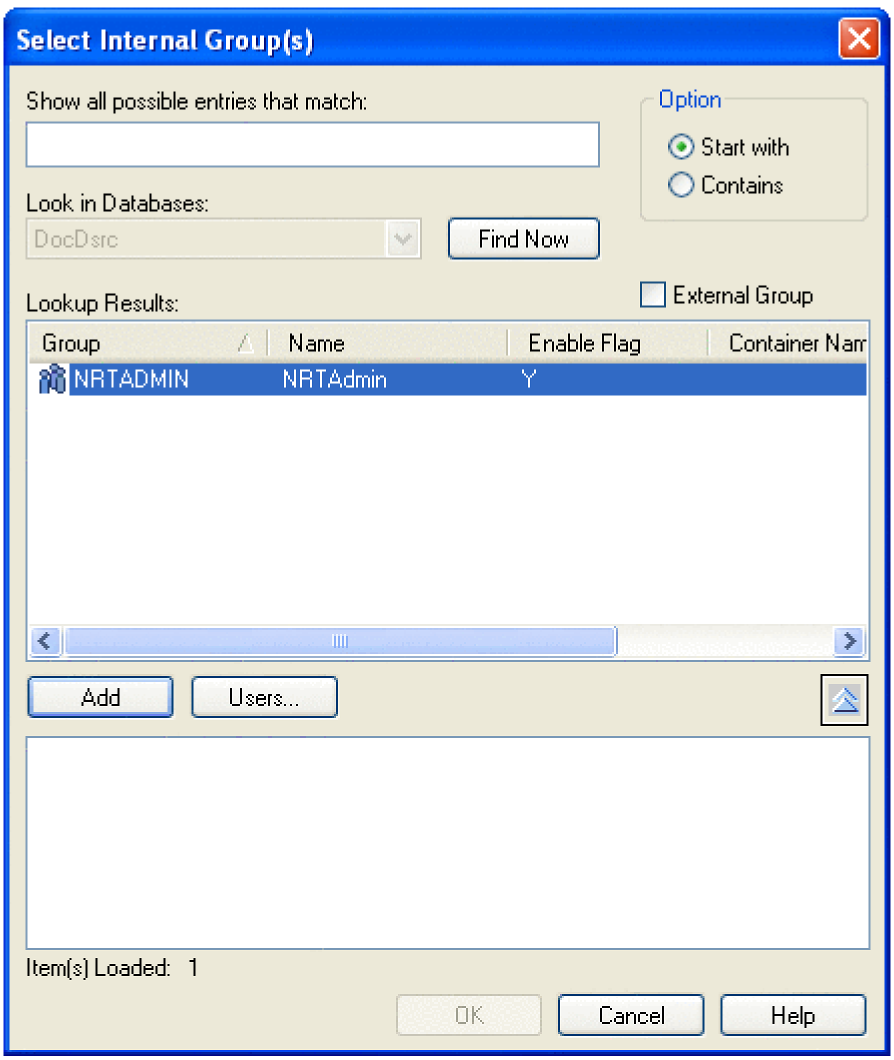
2. Click **New**. This launches the Security Template dialog box.

Figure 95 Security Template dialog box



3. Enter a name for the template in the **Security Template Name** field. After you enter the template name the other fields become available.
4. Select a default level of security from the **Default Security** list to assign security access to users who are not accounted for in your explicit access control list. Author and Operator are automatically given Full Access. The default security defaults to **Private**. See "Default Security" on page 87 for more information on security levels.
5. Select the level of access from the **Type of Access** list for the users and groups you specifically name in the template. See "Access Control List (ACL)" on page 87 for more information on security levels.
6. Click **Add User** or **Add Group** to add specific users or groups to the template. If you click **Add Group**, the Select Internal Group(s) dialog box opens.

Figure 96 Select Internal Group(s) dialog box



7. Select one or more groups or users from the list. You may select from a list of external users or groups by selecting the **External Group** or **External User option.**
8. Click **Add** to add them to the security template.
9. Click **Users** to see a list of users that included in the highlighted **Group**. The Users of Group dialog box opens.

Figure 97 Users of Group dialog box

10. Click **OK** to close the dialog box. The users and groups are listed in the Security Template dialog box.
11. To remove a user or group from the template list, select the user or group and click **Remove**.
12. Click **OK** to save the security template.

Applying a Security Template

You can apply a security template to:

- A new document you add to the WorkSite library

- An existing document in the WorkSite library

NOTE Only the Author, Operator or a user with Full Access on the document can apply a security template to it.

NOTE You can modify the access control lists when you add a document to a WorkSite library. However, if you assign an *author-based* security template, you cannot modify the security settings assigned to that Author.

Applying a Local Security Template

To apply a local security template to a new document:

1. In the New Profile dialog box or the New Version Profile dialog box (depending on whether you are adding a new document or a new version of an existing document), there is a **Security Template** list. This list contains the security templates available to you. Select a security template from this list to apply to the new document.

   NOTE If the **Security Template** list does not appear in the New Profile dialog box or the New Version dialog box, your WorkSite Administrator must enable this feature.

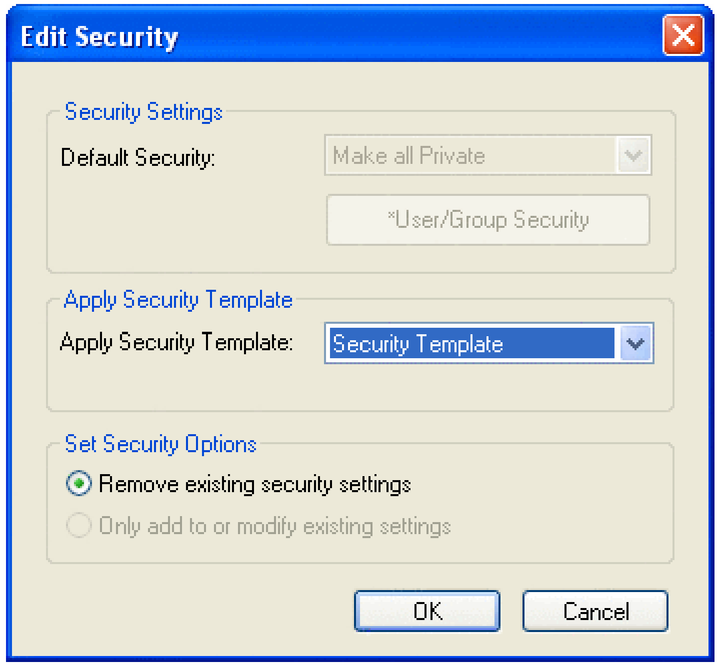
2. Click **Save** to add the document to a WorkSite library.

To apply a local security template to an existing document:

1. Select the document(s) to which you wish to apply the security template from the Document Grid.
2. From the **Document** menu, point to **Utilities** and select **Bulk Security Edit**. The Edit Security dialog box opens.

   To move between fields in the following dialog box, use the **TAB** key, arrow keys, or **ALT** key plus underscored letter.

Figure 98 Edit Security dialog box



3. In the **Default Security** list, select the **<no change> option.**
4. Select the security template from the **Apply Security Template** list.
5. Choose an option in the **Set Security Options** area:
   - **Remove existing security settings**. Replaces the current settings in the document with the new settings from the template.
   - **Only add to or modify existing settings. K**eeps the current settings on the document, but you can add or change specific settings. The settings you select will change but all other settings will remain as they were.
6. Click **OK** to apply the security template. You get a message confirming the successful update of the document's security.

NOTE After you apply the security template, if you want to change the security settings you can use the **Properties** option in the **Document** menu. See "Editing Document Profile Information" on page 146 for more information.

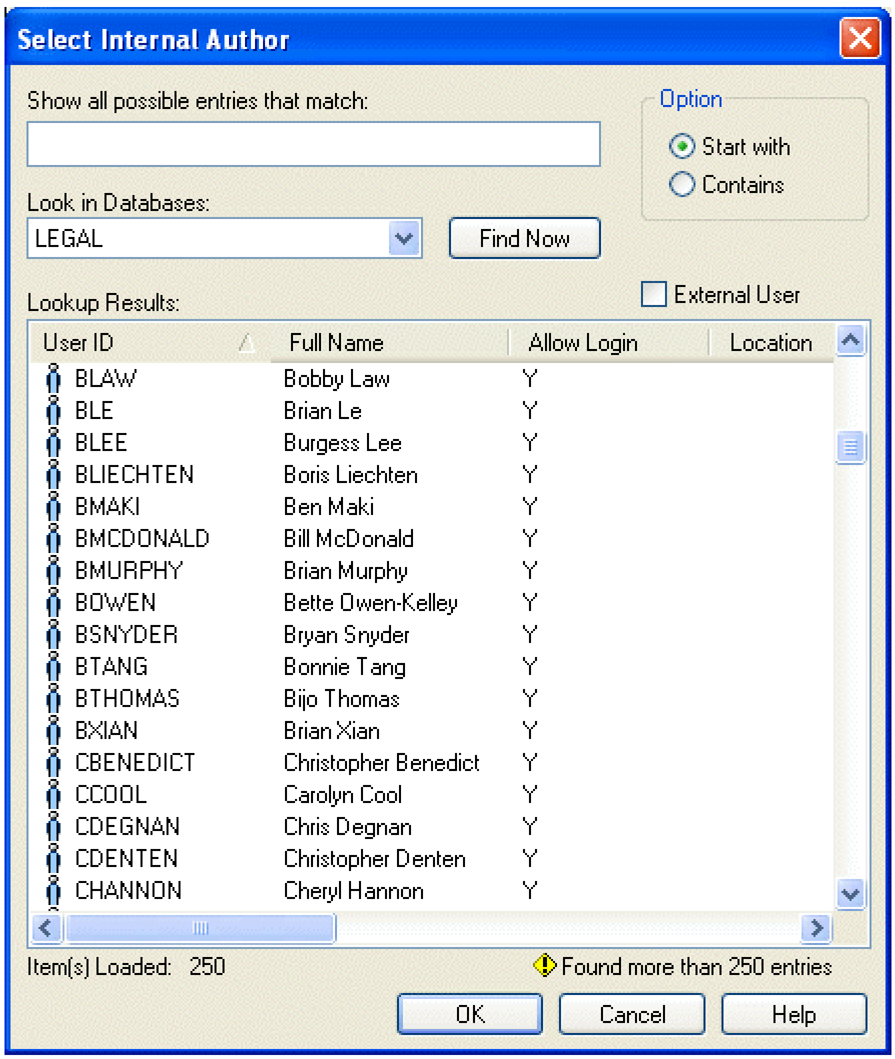
Applying an Author-based Security Template

1. In the New Profile dialog box or the New Version Profile dialog box (depending on whether you are adding a new document or a new version of an existing

document), click the ... **Lookup** button that appears next to the **Author** field. The Select Internal Author dialog box opens.

NOTE The lookup dialog box can display only 250 valid entries for that field of profile information in the WorkSite library. If there are more than 250 valid entries, use the **Find** option at the top of the dialog box to locate your entry. When you enter a value in the **Find** field, FileSite searches all valid entries for matches.

Figure 99 Select Internal Author dialog box



2. Select the user to whom your WorkSite Administrator has assigned an author-based security template. The security settings defined in that template are applied to the new document.

3. Click **Save** to add the document to a WorkSite library.

Editing Security on Documents

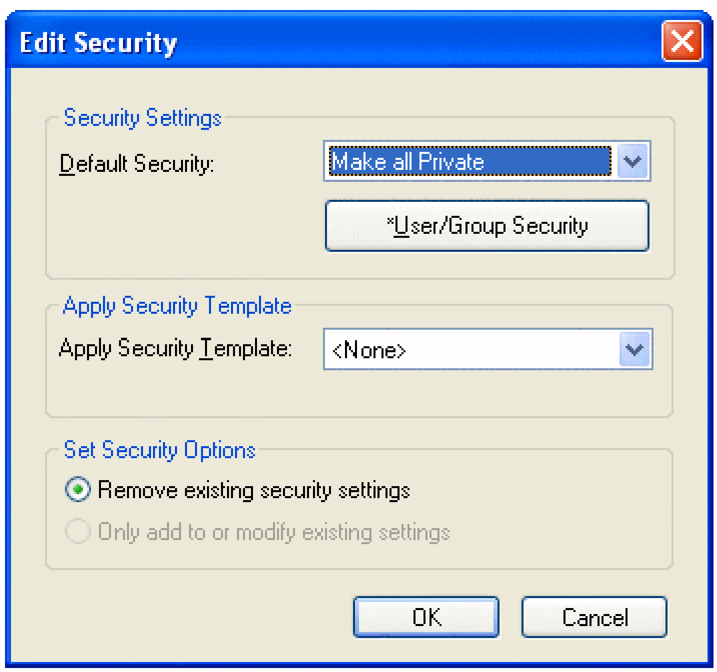
There may be times when you need to edit the security for a large group of documents at the same time, for example, if a new employee joins your group. You can edit the security settings on two or more documents in the same operation. This feature functions only on documents that are currently checked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

To edit security settings on multiple documents:

1. Select the documents whose security you want to edit from the Document Grid.
2. From the **Document** menu, point to **Utilities** and select **Bulk Security Edit**. The Edit Security dialog box opens.

   To move between fields in the following dialog boxes, use the **TAB** key, arrow keys, or **ALT** key plus underscored letter.

   Figure 100 Edit Security dialog box



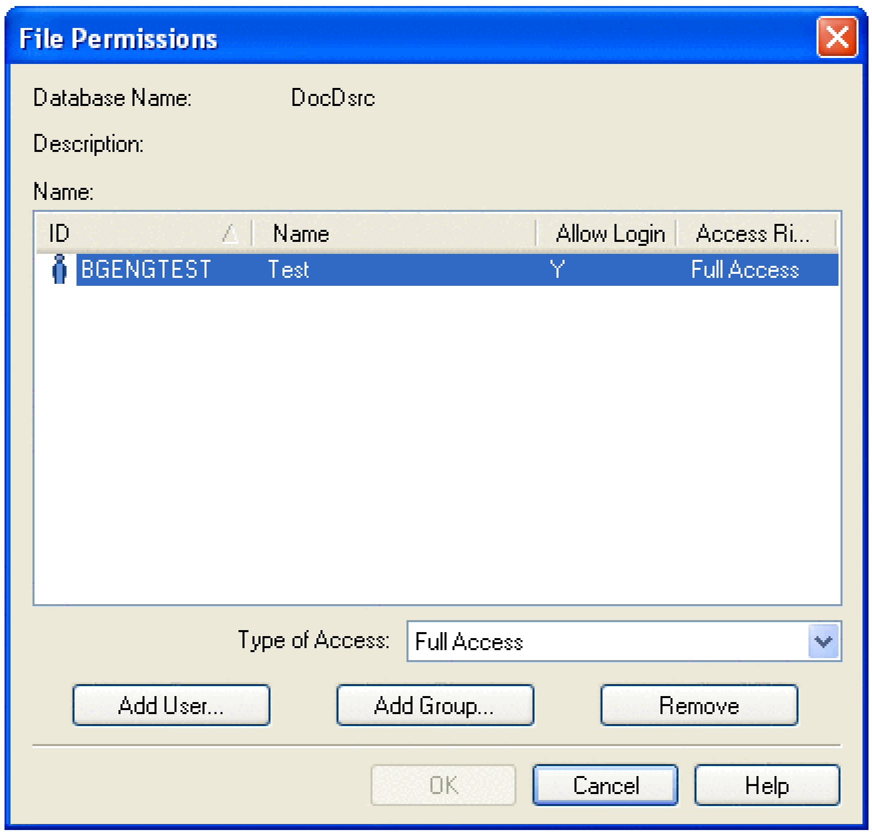
3. Select the Default Security for all the documents from the **Default Security** list. You can select from the following options:
   - **<no change>**

- **Make all Public**
- **Make all Private**
- **Make all View**

See "Default Security" on page 87 for more information on default security settings.

4. Click **User/Group Security** to add Users and/or Groups who require explicit access other than the default security. The File Permissions dialog box opens.

Figure 101 File Permissions dialog box



5. To specify access privileges for selected users and groups, make a selection from the **Type of Access** list. The access privileges you grant to specific users and groups are *exceptions* to the Default Security settings. See "Access Control List (ACL)" on page 87 for more information.
6. Click **OK** to close the File Permissions dialog box.
7. If you wish, you can apply an existing security template to the documents. Select a security template from the **Apply Security Template** list.
8. Choose an option in the **Set Security Options** area:

- **Remove existing security settings**. Replaces the current settings in all documents with the new settings from the security template.
- **Only add to or modify existing settings**. **K**eeps the current settings on the document, but you can add or change specific settings. The settings you select will change but all other settings will remain as they were.

9. Click **OK** to edit the security. You get a message confirming the successful update of the document's security.

Application Setup in FileSite

The local application table contains information that is used by FileSite to launch applications and to associate particular document types with appropriate applications.

CAUTION *Do not* attempt to edit the local copy of the application table *unless* you understand the way applications are integrated with WorkSite. Contact your WorkSite Administrator before proceeding.

You may need to change the local copy of the application table in the following circumstances:

- 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.

FileSite Features for Microsoft Outlook 2007 or 2010

When you use FileSite with Microsoft Outlook 2007 or Microsoft Outlook 2010, there are some special features that are not available with earlier versions of Outlook. This section describes the following features:

- "Inserting a WorkSite Attachment"
- "Creating Outlook Folders in FileSite"
- "Dragging and Dropping Outlook Items to FileSite"

Inserting a WorkSite Attachment

When you create a new e-mail or other item in Outlook 2007 or Outlook 2010, the New Message dialog box has a ribbon bar in place of the traditional menu bar. The WorkSite tab on the ribbon bar offers the option of attaching a WorkSite document to the new item.

1. Click **Insert WorkSite Attachment** on the Message ribbon bar. The WorkSite Integrated Insert dialog box opens, allowing you to select a document to attach.

Figure 102 Example New Message dialog box

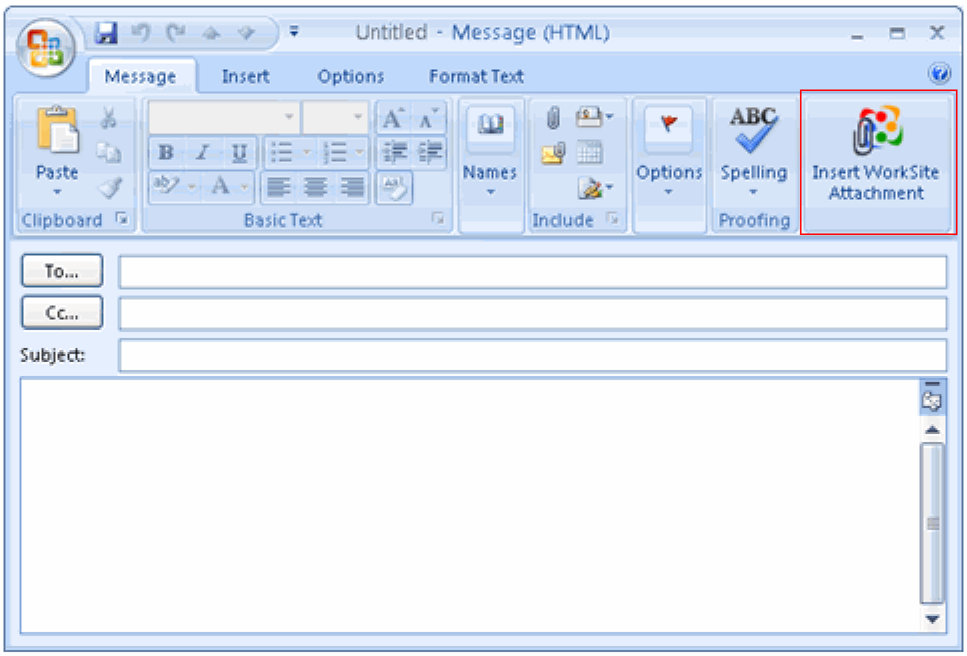
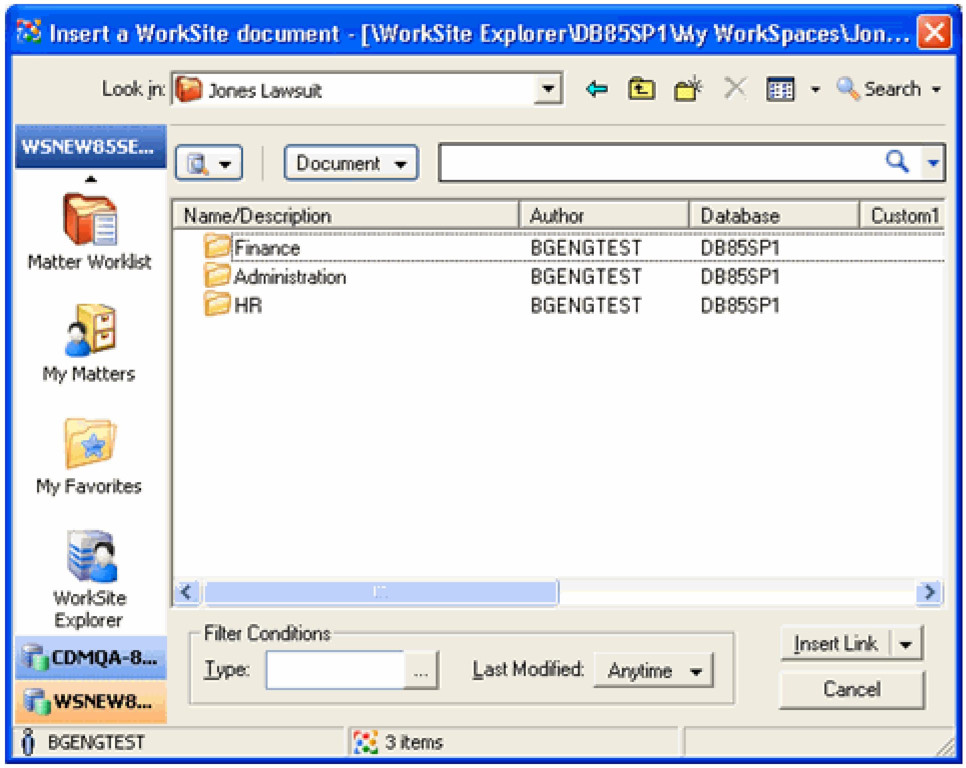


Figure 103 Insert a WorkSite document dialog box



2. Navigate to the document. You can also use the Express Search panel to find the document. See "Express Search Panel" on page 266 for more information on using this panel.
3. Select the document.
4. Select an option from the **Insert Link** menu:
   - Insert Link
   - Insert Copy

   The .nrl link or the document is attached to the item.

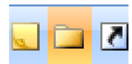
NOTE The **Insert WorkSite Attachment** command is available when you create a new Mail Message, Task, Task Request, or Contact.

Creating Outlook Folders in FileSite

You can replicate your Outlook folders in FileSite and use drag and drop functionality to save Outlook tasks, contacts, notes and other items to the WorkSite library.

The special folders that you create under the **FileSite** node in the navigation pane are visible only when the full folder list is displayed. They will not appear if you are displaying e-mail only. To display all folders, click the folder list icon at the bottom of the navigation pane.

Figure 104 View options on navigation pane



To create folders for Outlook items, follow the instructions for creating a new document folder (see “Creating a Document Folder” on page 111). You can give the folder any name, but it must include the folder type in parentheses. When the folder appears in the navigation pane, its icon will indicate the type of Outlook items it contains.

To create additional folders for Outlook items, indicate the following types of items in parentheses in the folder name:

Table 32 Outlook Folder Types

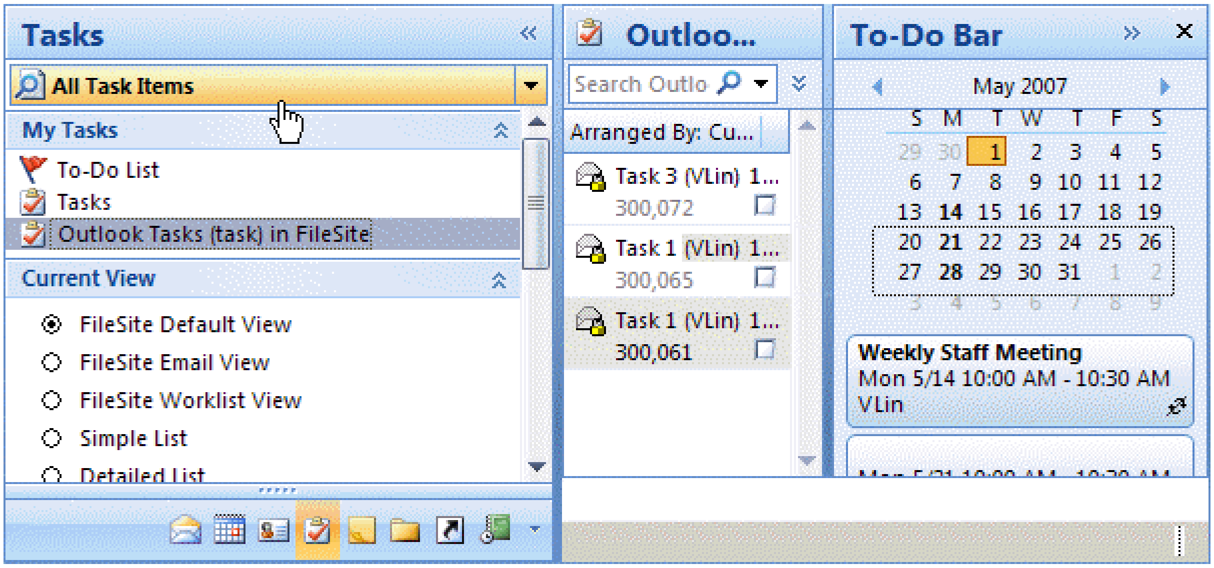
If the Outlook folder contains...	Include in the folder name in FileSite...
Appointments	(appointment)
Calendars	(calendar)
Contacts	(contact)
Journal Entries	(journal)
Notes	(stickynote)
Tasks	(task)

NOTE The Outlook Calendar, Note, and Task folders described in this section are *not* the same as the collaboration folders for Tasks, Notes, and Events that are available in the WorkSite Web application.

Dragging and Dropping Outlook Items to FileSite

After creating folders for Outlook items in FileSite, you can drag the corresponding items from Outlook and drop them in the FileSite folders. You are prompted to enter profile information. All items dragged from Outlook folders are saved in FileSite as documents of type E-MAIL. When you display items of a particular type, for example, Tasks, Outlook displays two Tasks folders in the navigation pane: the Outlook folder and the FileSite folder.

Figure 105 Example Tasks folders displayed in Outlook navigation pane



You can see in Figure 105 that the items in the FileSite folder (shown in the center pane) are links to e-mail. When you click a link in a FileSite folder, the e-mail opens and displays information about the item.

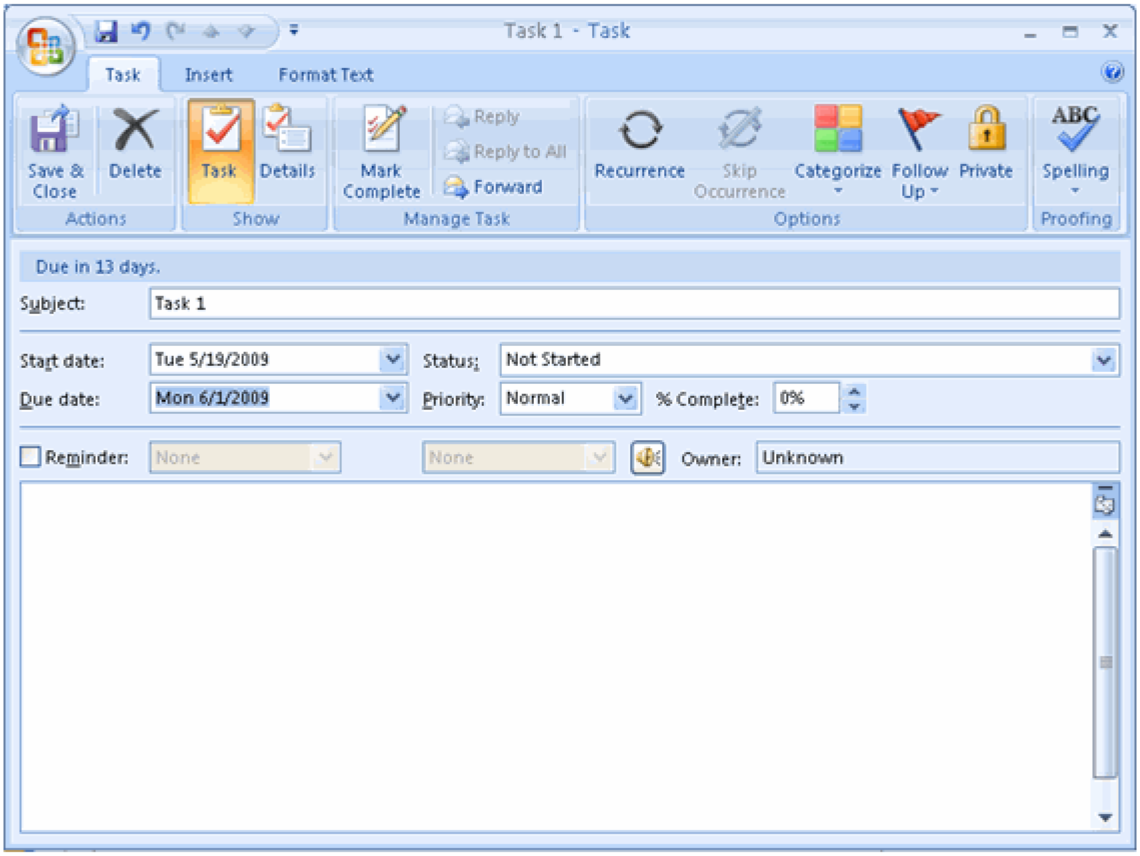
Tasks

You can drag tasks from the Outlook **To-Do Bar** or **To-Do List** and save them to the WorkSite library as documents of type E-MAIL. When you perform this operation, a new e-mail message containing information about the task opens, and you are prompted to enter profile information and save to FileSite. You can also send the e-mail to a colleague or group.

NOTE The special folders are visible in the navigation pane only when the Folder List is displayed. If you do not see the Tasks (task) folder, click the **Folder List** icon at the bottom of the navigation pane to display all folders.

You can view tasks by clicking the Tasks (task) folder in FileSite or by clicking the **Tasks** icon at the bottom of the navigation pane. See Figure 105. Display the contents of the FileSite folder and click a task. This opens the corresponding Task form.

Figure 106 Example Task dialog box



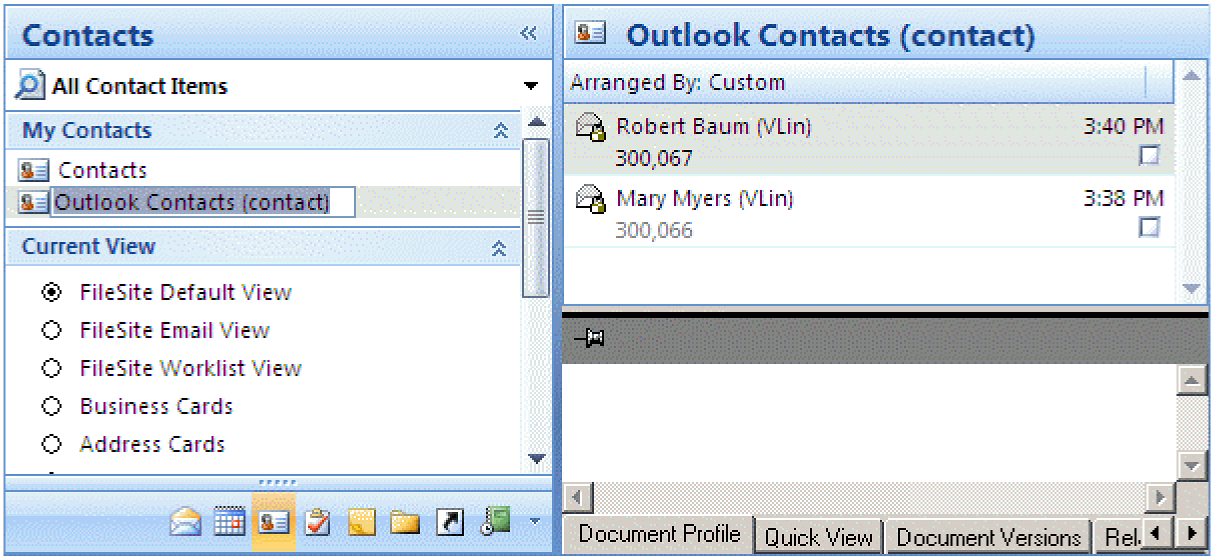
Contacts

You can drag contacts from the Outlook Contacts list and save them to the WorkSite library as documents of type E-MAIL. When you perform this operation, a new e-mail message linked to the contact form opens, and you are prompted to enter profile information for the e-mail and save it to FileSite. You can also send the e-mail to a colleague or group.

NOTE The special folders are visible in the navigation pane only when the Folder List is displayed. If you do not see the Contacts (contact) folder, click the Folder List icon at the bottom of the navigation pane to display all folders.

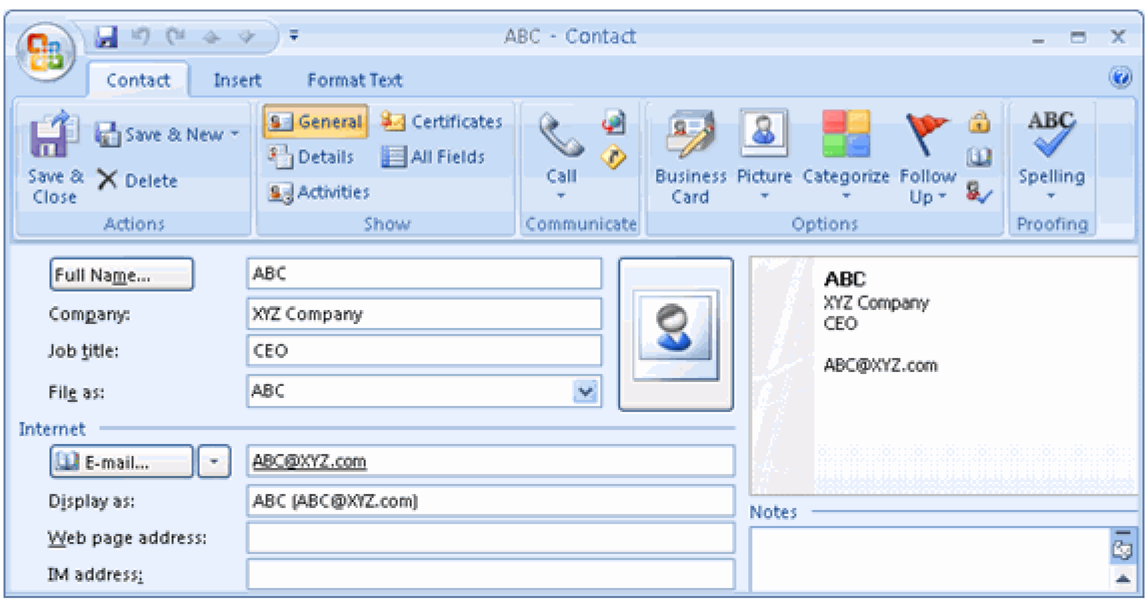
You can view contacts by clicking the Contacts (contact) folder under the FileSite node or by clicking the Contacts icon at the bottom of the navigation pane and opening the **Contacts (contact) Folder in FileSite**.

Figure 107 Example Contacts displayed in the Outlook navigation pane



Display the contents of the FileSite folder and click an e-mail link. This opens the corresponding Contact form.

Figure 108 Example Contact dialog box



Calendars and Appointments

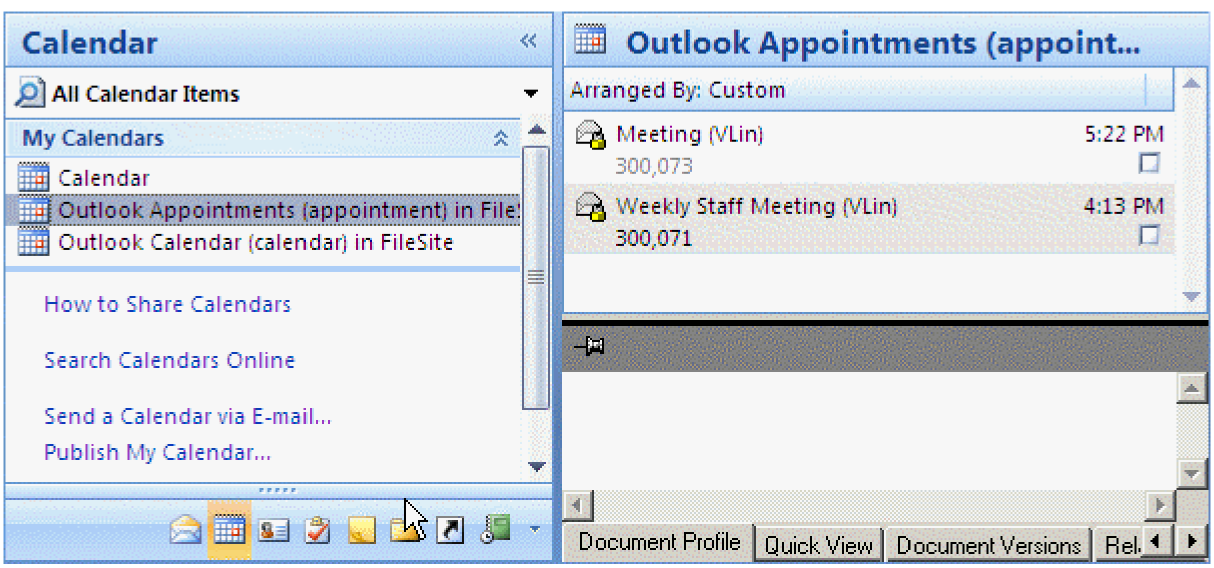
You can drag appointments from the Outlook Calendar or **To-Do Bar** and save them to the WorkSite library as documents of type E-MAIL. When you perform this operation, a new e-mail message containing information about the appointment opens, and you are prompted to enter profile information and save to FileSite. You can also send the e-mail to a colleague or group.

NOTE The special folders are visible in the navigation pane only when the Folder List is displayed. If you do not see the Calendars (calendar) or Appointments (appointment) folder, click the **Folder List** icon at the bottom of the navigation pane to display all folders.

You cannot move a recurring appointment (for example, a weekly meeting) to an Appointment (appointment) folder in FileSite. You must copy each occurrence of a recurring appointment and drag the copies into the FileSite folder. You cannot receive responses from invitees to the appointment in the FileSite folder.

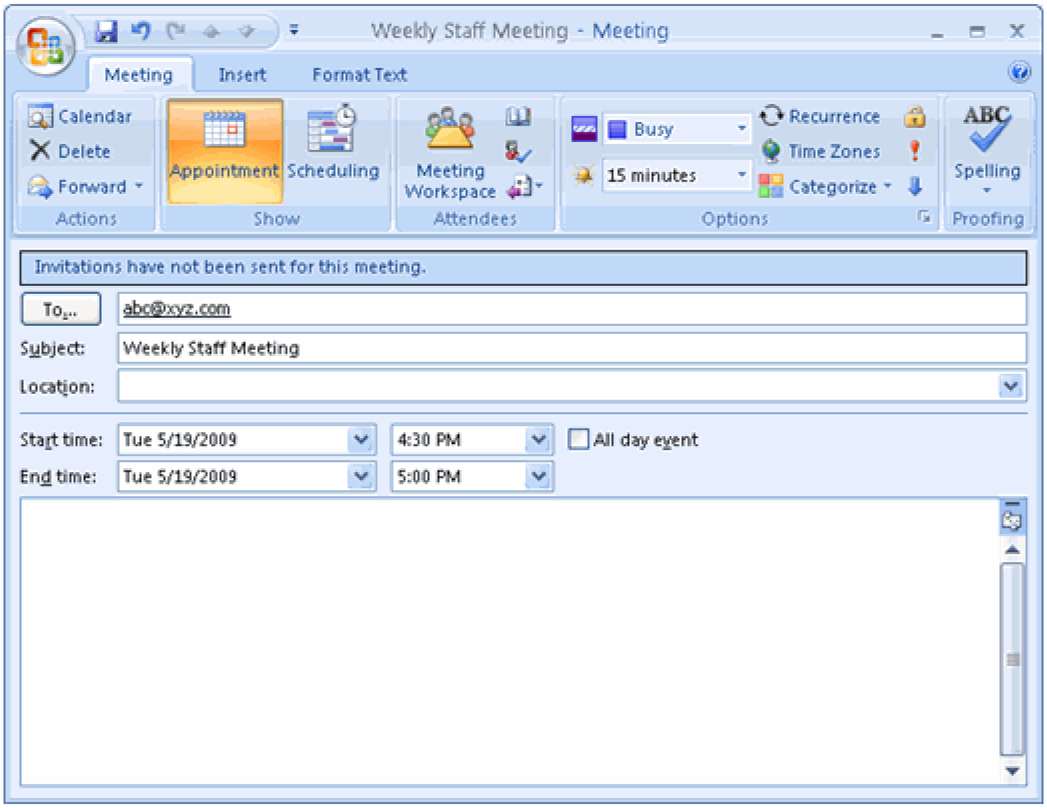
You can view appointments and calendars by clicking the Calendar (calendar) or Appointments (appointment) folder in FileSite. or by clicking the **Calendar** icon at the bottom of the navigation pane and then opening the **Calendar (calendar) in FileSite** or **Appointments (appointment) in FileSite** folder listed under **All Calendar Items**.

Figure 109 Example Calendars and Appointments displayed in the Outlook navigation pane



Display the contents of the FileSite folder and click an e-mail link. This opens the corresponding Meeting form.

Figure 110 Example Meeting dialog box



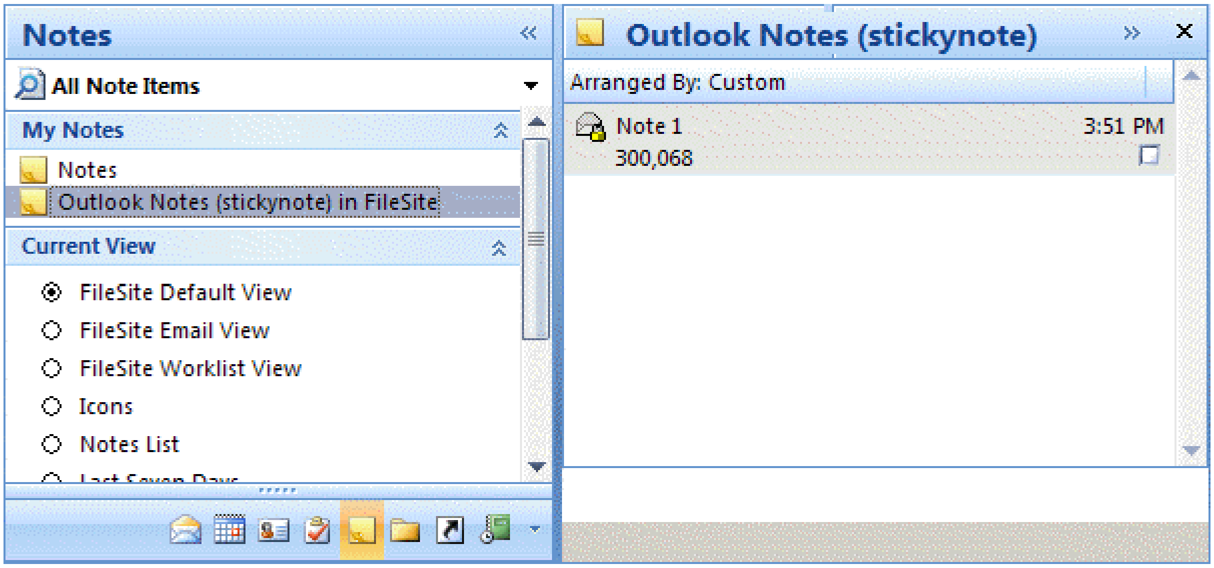
Notes

You can drag notes from the Outlook Contacts list and save them to the WorkSite library as documents of type E-MAIL. When you perform this operation, a new e-mail message linked to the actual note opens, and you are prompted to enter profile information for the e-mail and save it to FileSite. You can also send the e-mail to a colleague or group.

NOTE The Notes (stickynote) folder is visible in the navigation pane only when the Folder List is displayed. If you do not see it, click the **Folder List** icon at the bottom of the navigation pane to display all folders.

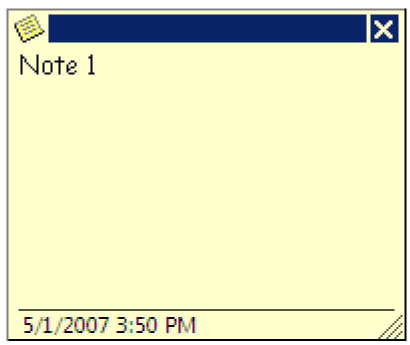
You can view notes by clicking the Notes (stickynote) folder in FileSite or by clicking the **Notes** icon at the bottom of the navigation pane and opening the **Notes (stickynote)** Folder in FileSite.

Figure 111 Example Notes displayed in the Outlook navigation pane



Display the contents of the FileSite folder and click an e-mail link. This opens the corresponding Note.

Figure 112 Example Note



Journal Entries

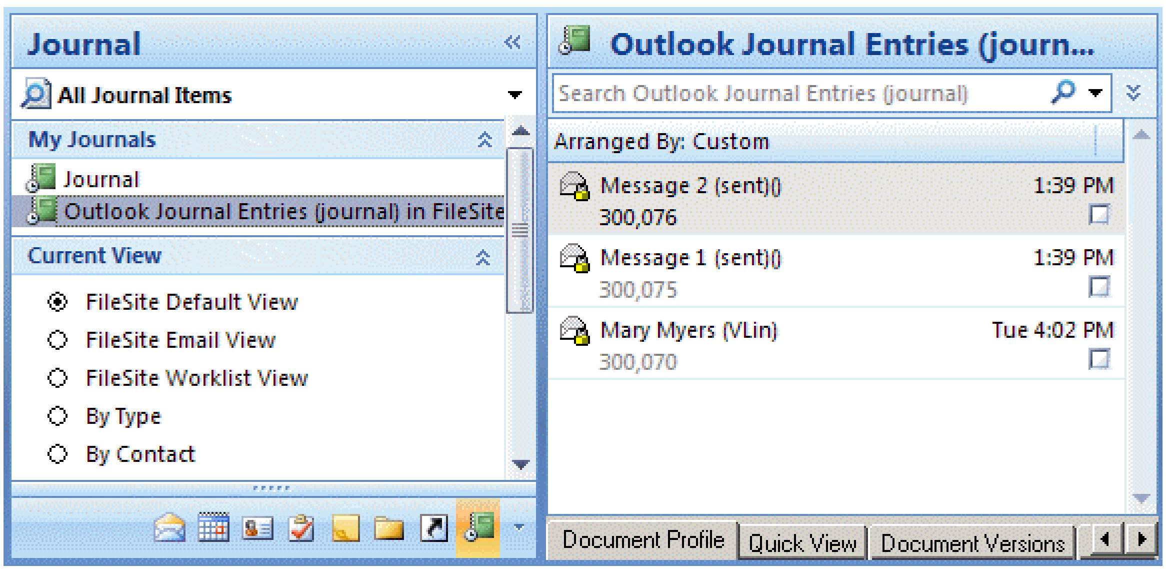
You can use the Outlook Journal to track actions related to specific contacts and display them in a timeline view. For example, you could keep a record of all phone calls and e-mail to a particular client.

Drag notes from the Outlook Contacts list and save them to the WorkSite library as documents of type E-MAIL. When you perform this operation, a new e-mail message linked to the journal entry opens, and you are prompted to enter profile information for the e-mail and save it to FileSite. You can also send the e-mail to a colleague or group.

NOTE The Journal Entries (journal) folder is visible in the navigation pane only when the Folder List is displayed. If you do not see it, click the **Folder List** icon at the bottom of the navigation pane to display all folders.

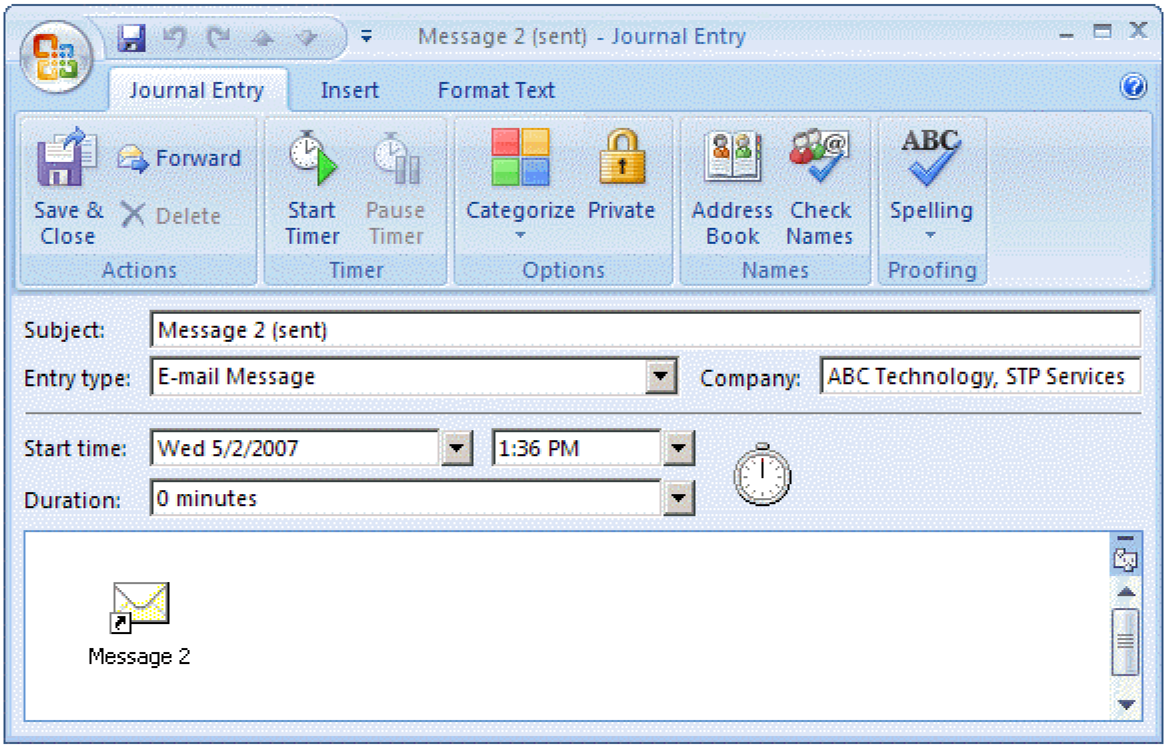
You can view journal entries by clicking the Journal Entries (journal) folder in FileSite or by clicking the **Journal** icon at the bottom of the navigation pane and opening the **Journal Entries (journal)** Folder in FileSite.

Figure 113 Example Journal folders displayed in the Outlook navigation pane



Display the contents of the FileSite folder and click an e-mail link. This opens the corresponding journal entry form. In the example shown in Figure 114, the action recorded was an e-mail sent to two clients.

Figure 114 Example Journal entry dialog box



To see the actual message that was sent to the clients, click the e-mail message link in the body of the journal entry.

CHAPTER 6

Searching in FileSite

Overview

This chapter contains the following topics describing FileSite's searching capabilities:

- "WorkSite Search Capability"
  - "Searching on Profile Information"
  - "Full-text Searching"
- "Performing Searches"
  - "Microsoft Outlook Search"
  - "Saved Search"
  - "WorkSite Container Searches"

NOTE Express Search is a separate search utility. Refer to the *WorkSite Express Search User's Guide* for more information.

WorkSite Search Capability

FileSite can perform fast and powerful searches for Workspaces, folders, and documents based on profile information and/or full-text information. You can save a FileSite search by creating search criteria as properties on a search folder. A new search is performed each time you open the search folder. You can also perform Microsoft Outlook's native searches.

Searching on Profile Information

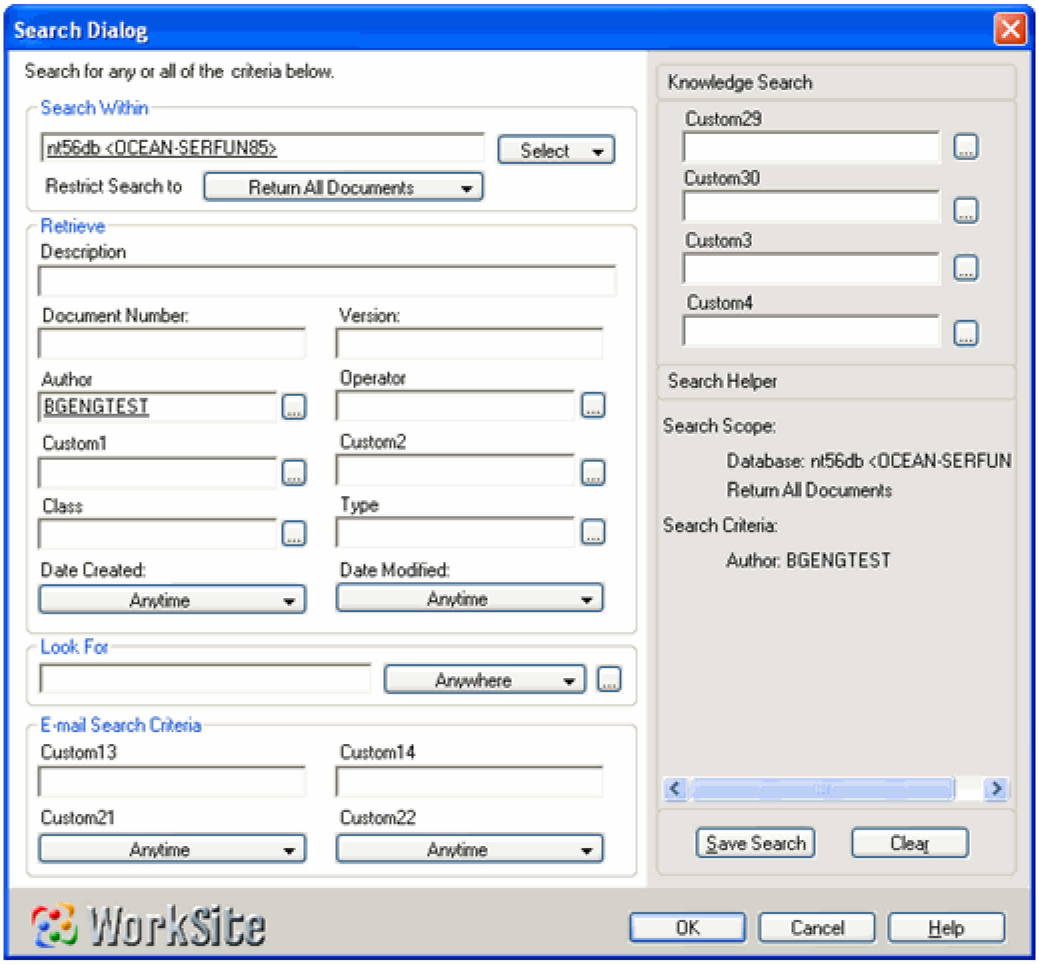
When you perform a search based on a document's profile information, you can enter search criteria for certain fields of profile information. FileSite returns documents whose profile information matches the criteria. This type of search is sometimes called a *query-by-form* search. The fields of profile information are entered in the Search dialog box.

Search Dialog Box

The *Search dialog box* is used to enter search criteria for any type of search, including full-text or document profile information.

NOTE The Search dialog box can be customized by your WorkSite Administrator. Figure 115 shows the default appearance of the Search dialog box.

Figure 115 Search dialog box



At a glance you can see the information your search covers using the **Search Helper** area. It shows the **Search Scope** (selections made in the **Result Filter** and **Search Within** fields) and the **Search Criteria** (a summary of the profile information you have entered).

Full-text Searching

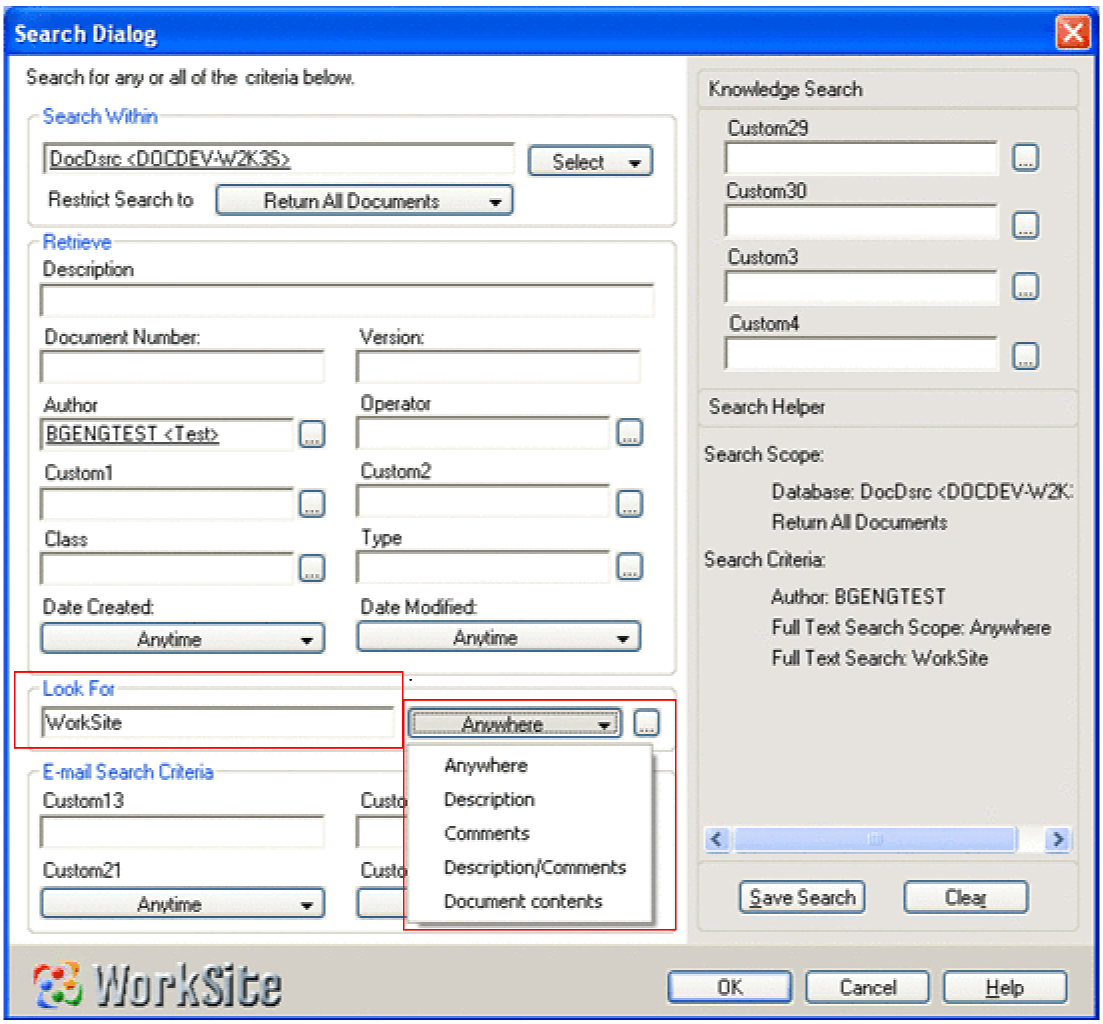
Full-text searching locates documents based on the occurrence of search terms or strings in the text of the document. These can be individual words, partial words, phrases, or sequential words. You can search for occurrences of these terms either in the contents of documents or in the text of certain profile fields, such as **Comment** or **Description**, and custom fields such as **From** and **To**.

A full-text search can be performed in conjunction with a search on profile information. The search returns documents that meet both the profile search criteria *and* contain the words or phrases specified by the full-text search criteria.

NOTE By default, full-text searches are *not* case-sensitive.

You can enter full-text search criteria in the **Look For** field (at the bottom of the Search dialog box). See Figure 116. You can also select whether to search through the entire body of the document or on certain profile fields by selecting an option from the list adjacent to the **Look For** field.

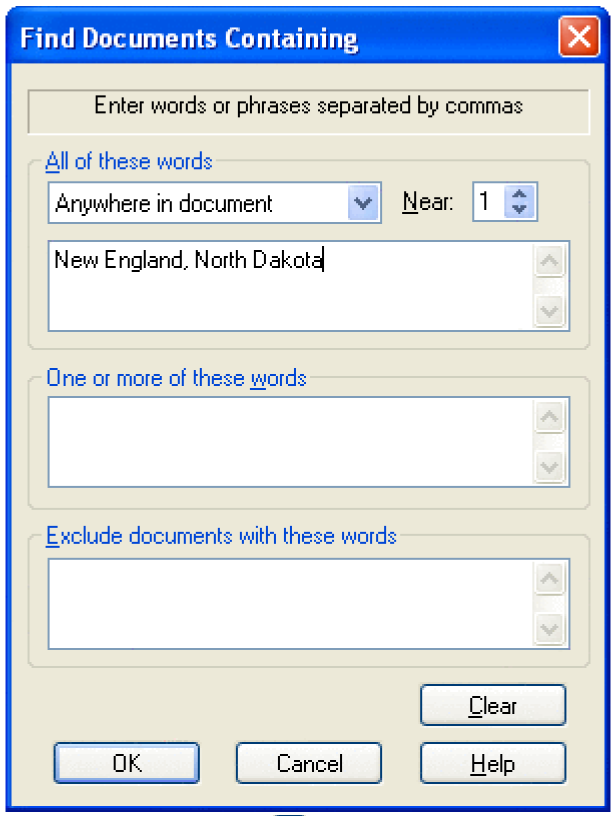
Figure 116 Search dialog box, full-text information



Simplified Full-text Search

A Simplified full-text search dialog box is available for users who are not familiar with Boolean logic or full-text query language. See Figure 117. This dialog box allows you to enter key terms or phrases and to construct a simple full-text search query automatically.

Figure 117 Simplified full-text search dialog box



Access this dialog box by clicking the **Lookup** button next to the **Look For** field in the Search dialog box.

Use this intuitive dialog box to create simple full-text search queries by entering words or phrases separated by commas into the appropriate fields.

- In the first field, enter a list of terms which must *all* appear in the document in order for it to appear in your search results.
- In the second field, enter a list of terms only *one* of which must appear in the document for it to appear in your list of search results.
- In the third field, enter terms that should *exclude* a document from the search results if they appear in that document.

The **All of these words** list at the top of the Simplified full-text search dialog box lets you set the proximity with which the terms you enter must appear near each other.

- The **Anywhere in document option returns** documents in which the terms appear anywhere in the document, not necessarily within any proximity of each other.
- The **Near each other** returns documents in which the terms must appear within a defined proximity of each other.

The **Near** field enables you to set the proximity between terms in numeric values.

Search Syntax

A *search query* is made up of search *terms* and *operators*. Terms are individual words, partial words, and phrases that you use to perform full-text searches. Multiple terms can be combined using operators.

NOTE WorkSite ignores stop words, that is, common words such as, “a”, “an”, and “the” that are included in search queries. To forcibly include stop words in your search query, enclose them in quotes.

Search Operators

Operators allow search terms to be combined to restrict your search. In FileSite, the search syntax and operators are different when searching profile information and full-text information.

Table 33 lists the operators that work only on profile fields.

Table 33 Profile Field Operators

Search Operator	Description	Example
> (Greater Than)	The greater than sign is used to find documents that contain a value in a particular profile field that is greater than a specified minimum value.	To select documents with a document number greater that 2500, enter: `> 2500` in the **Document Number** field.
>= (Greater Than or Equal To)	The greater than or equal to sign finds documents that contain a value in a particular profile field that is greater than or equal to a specified value.	To search for documents with a document number greater than or equal to 2800, enter: `>= 2800` in the **Document Number** field.
< (Less Than)	The less than sign is used to find documents that contain a value in a particular profile field that is less than a specified maximum limit.	To search for documents with a version number less than 3, enter: `< 3` in the **Version Number** field.
<= (Less Than or Equal To)	Like the greater than or equal to sign, the less than or equal to sign combines the searching power of the less than and equal to signs.	To search for documents with a version number less than or equal to 3, enter: `<= 3` in the **Version Number** field.

Table 34 lists the search operators supported for full-text searches. All operators must be entered in all UPPERCASE letters.

Table 34 Full-text Search Operators

Search Operator	Description	Example
" "	The double quotation marks operator locates documents that contain an exact word or phrase. It is used to perform a literal search. You can use double quotation marks with any of the other operators described in this table. When search terms are included in quotes, WorkSite Indexer stems the search terms by default. Stopwords (common words like *and, or, the*) are removed from queries using quotes.	To find documents that contain the phrase new york, enter: `"new york"` If you do not use quotation marks, your results will include matches for new, and york.
AND	The AND operator locates documents containing both the terms on either side of it.	To find documents that contain the words England and North, enter: `England AND North`
OR	The OR operator finds documents that contain at least one of the terms to which it is applied. It enlarges the search scope and is normally used to look for terms that have similar meaning or refer to similar subjects.	To find documents with one or both of the words red and green, enter: `red OR green`

NOT	The NOT modifier is used with the AND and OR operators, to exclude documents that contain a given term.
	
	Note: In order for the NOT modifier to work, you must first enter a positive search criteria.
		To find documents that contain the words mushrooms and olives but not the word anchovies, enter:
		
		`mushrooms AND olives AND NOT anchovies`
		
		The following example query would not return any results:
		
		`NOT anchovies`

~	Adding a tilde before a search term returns results which match the case of the search term. The `AdvancedSearch` and `AdvancedCaseSearch` parameters must be enabled for WorkSite Indexer to process case sensitive searches.	To find documents that contain the word President, enter: `~President` Occurrences of president or PRESIDENT would be ignored.
?	The question mark (?) replaces any single alphanumeric character. Note: You can use more than one question mark within a term. Note: If you want a wildcard character to be interpreted as text and not as a wildcard, precede the character with a backslash (\).	`b?rn` would match the words born, barn, or burn. `sh??e` would match the words shore and shade.

Search Operator	Description	Example

*	The asterisk (*) is used as a wildcard operator to represent any number of alphanumeric characters (including none).
	Note: When using the asterisk wildcard, try to narrow the potential scope of the wildcard entry as much as possible.
	Note: If you want a wildcard character to be interpreted as text and not as a wildcard, precede the character with a backslash (\).B
		To find documents about automobiles, enter:
		`auto*`
		Matching documents include words such as auto, automobile, and automotive, but also include autobiography, autocracy, and autograph. A more specific query would be:
		`auto OR automo*`
		Searching for *vert* would return matches for the words convertible, inverted, vertigo, and covert.

( )	Parentheses group terms and operators allowing you to control the evaluation of search operators. Items grouped in the parentheses are evaluated first.	`document AND (cluster OR redundancy)` would return documents which contain document and either cluster or redundancy.
BEFORE	The specified term or expression must appear before another term or expression in the search results.	`red BEFORE green` would return only those documents in which the term red appears before the term green.
AFTER	The specified term or expression must appear after another term or expression in the search results.	`red AFTER green` would return only those documents in which the term *red* appears after the term *green*.

EOR
XOR
	Only one of the terms is permitted to appear in the document. If both terms appear in the document, it is not returned in the search results.	To find documents that contain either *cat* or *dog*.
		`cat EOR dog`
		`cat XOR dog`
		Documents which contain both cat and dog are not returned.

NEAR*n*	Only returns documents in which the second term is within *n* words of the first term-that is, the terms are *n* or fewer words apart. If you do not specify *n*, it defaults to 5.	To find documents with the words *red* and *green* within seven words of each other, enter: `red NEAR7 green`

Search Operator	Description	Example
DNEAR*n*	Only returns documents in which the second term is within n words of the first term, in the specified order. If you do not specify n, it defaults to 5.	To find documents in which the term *green* follows the term *red*, and is no more than 2 words away from the term red. `red DNEAR2 green`
WNEAR*n*	Weighted NEAR. The WNEAR operator promotes relevance when terms are less than the specified *n* words distance. The closer together the words are in the document, the higher the relevance of the document. If you do not specify *n*, it defaults to 5. Documents in which the terms do not occur within *n* words of each other are returned with normal relevance. WNEAR will return search results which contain either of the two terms.	In this query, extra relevance is given to documents in which the terms *dog* and *cat* appear 7 or fewer words apart. `dog WNEAR7 cat` Documents which contain either *dog* or *cat* will be returned, but with lower relevance.
YNEAR*n*	The YNEAR operator is similar to the WNEAR operator, except that only documents which include both terms will be returned. YNEAR promotes relevance when terms are less than the specified *n* words distance. The closer together the words are in the document, the higher the relevance of the document. If you do not specify *n*, it defaults to 5. Documents in which the terms do not occur within *n* words of each other are returned with normal relevance. Note: This is the default operator.	In this query, extra relevance is given to documents in which the terms *dog* and *cat* appear 7 or fewer words apart. `dog YNEAR7 cat` Only documents which contain both *dog* and *cat* will be returned.
XNEAR*n*	Only returns documents in which the second term is exactly *n* words from the first term.	This query only returns documents in which the term dogs follows the term cats and is exactly two words away from the term cats. This means that documents which contain cats and dogs are returned, while documents that contain dogs and cats or cats, dogs are not returned. `cats XNEAR2 dogs`

Searching for Word Variations with Stemming

When a full-text search is performed, WorkSite stems the search terms, and finds words that have the same stem. For example, a search for the word *lovely* is stemmed to the word *love*; and returns results such as *lovely*, *love*, *loved*, and so on.

Performing Searches

There are three main types of searches you can perform using FileSite.

- “Microsoft Outlook Search”
- “Saved Search”
- “WorkSite Container Searches”
  - **Database Search**. A search performed on a document library you are currently logged into.
  - **Workspace Search**. A search for Workspaces or for content on a Workspace.
  - **Folder Search**. A search for content in a folder.

NOTE Using the FileSite desktop, you can search only for the content within a folder, not for a folder itself. Using the WorkSite Integrated Desktop search function, you can search for the content within a folder or the actual folder. See “Search” on page 265 for more information.

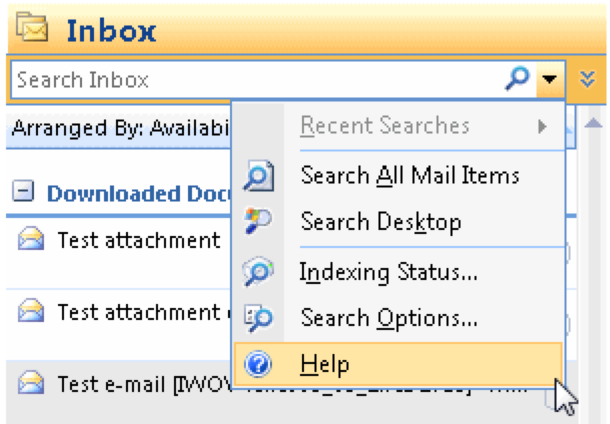
Microsoft Outlook Search

FileSite supports the use of Microsoft Outlook’s native searching functions to search for FileSite documents. From the **Tools** menu, point to **Find** and choose the **Find** or **Advanced Find** option to perform the search.

Figure 118 Microsoft Outlook 2003 Quick Search toolbar

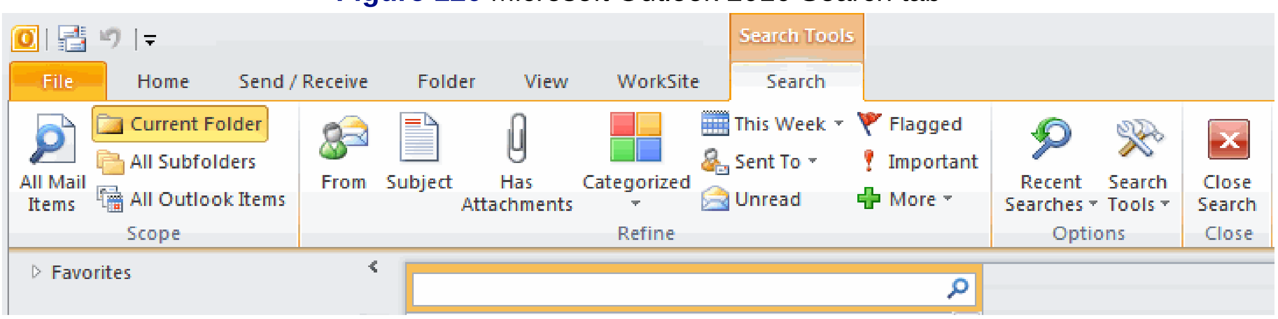
In Outlook 2007, click the **Instant Search** box located under the Inbox heading to perform an Outlook search. Click the drop-down menu for search options.

Figure 119 Microsoft Outlook 2007 Instant Search toolbar



In Outlook 2010, click the **Instant Search** box located under the Inbox heading to enable the **Search** tab and select search options

Figure 120 Microsoft Outlook 2010 Search tab



Refer to Microsoft Outlook Help for detailed instructions on how to perform this search.

NOTE Using Outlook's native search can lead to inconsistent results, so it is recommended that you use WorkSite search options.

Saved Search

A saved search is a search folder with pre-defined search criteria. When you create the folder, FileSite places all documents that fulfill the search criteria into the folder automatically. Every time you select the search folder in the Folder List, the search is performed again and any additional documents that meet the search criteria are displayed as contents of the folder. You can share these search folders with other users by adding them to the access control list.

Performing a saved search involves the following steps:

- Creating a search folder. See “Creating a Search Folder” on page 123 for more information.
- Viewing the search results. When you select a search folder in the Folder List, FileSite re-runs the search to see if any additional documents meet the search criteria on the search folder.

NOTE You can also modify the search criteria you entered when you created the search folder. See “Changing Search Folder Profile Information” on page 128 for more information.

WorkSite Container Searches

You can search in WorkSite libraries and other containers for WorkSite objects.

Database Search

In FileSite, you can perform searches on one or more WorkSite databases/ libraries that you are currently logged into. The search results appear in the Document Grid.

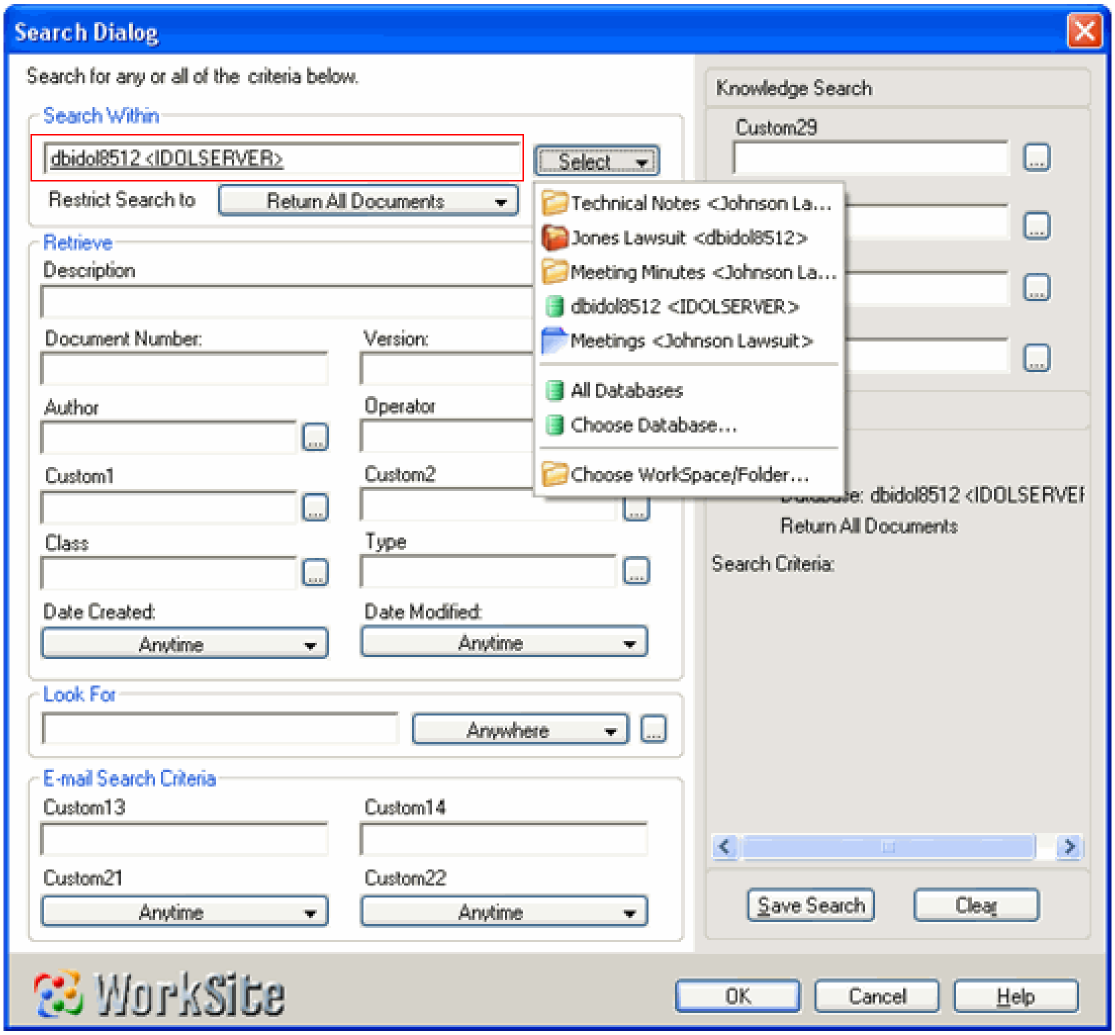
1. From the **WorkSite** menu, point to **Other Search Forms**.

   In Outlook 2010, on the **WorkSite** tab, click the **Other Search Forms** icon from the Search area.

   A submenu appears with a list of available libraries.

2. Select the WorkSite library you wish to search from the submenu. The Search dialog box opens with the **Search Within** field populated with your selection.

Figure 121 Search dialog box, database selected



3. To expand your selection of libraries, click **Select** to open the list as shown in Figure 121. Select **All Databases** to perform a search on all the libraries available to you.

NOTE If serialized database searching is enabled by your WorkSite Administrator, WorkSite searches each library one at a time and displays a dialog box, which enables you to cancel the search in between each library search. However, this dialog box is displayed only when searching a large volume of documents.

4. Specify profile information or full-text search criteria, or both. Click **OK.** The search results are displayed in the Document Grid under the **Recent**

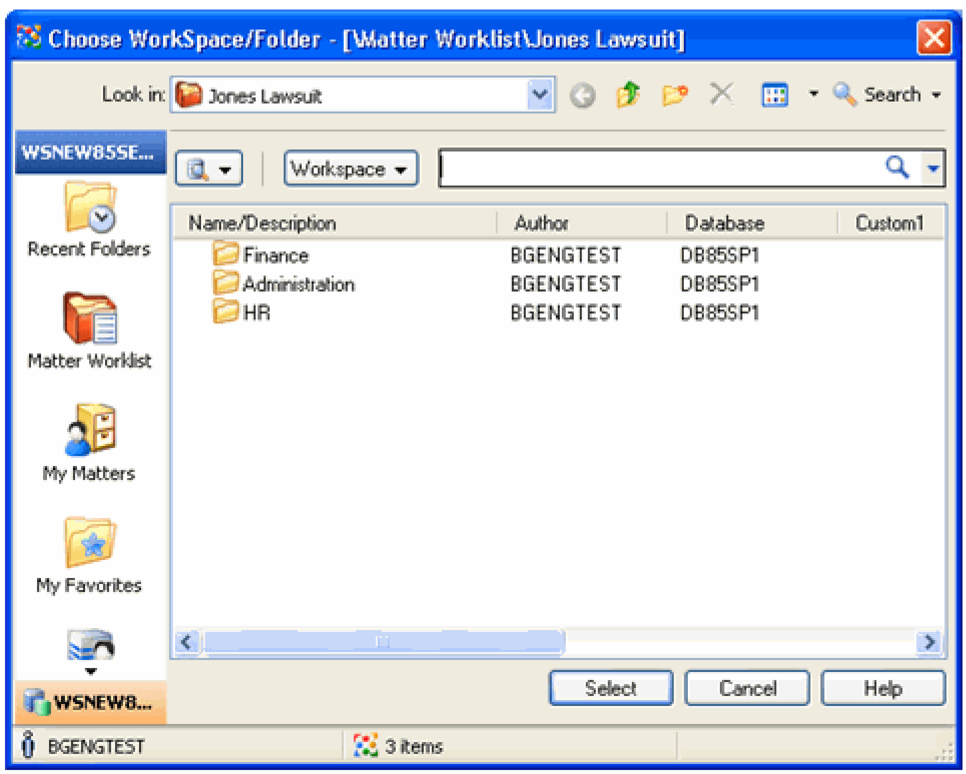
Searches folder. Search results are saved in Recent Searches only for the duration of the session.

NOTE You can also perform a search on a specific WorkSite library by expanding the **WorkSite Explorer** node in the Folder List to display a list of available libraries. Right-click the **library** icon and select **Search Documents** from the menu, or click the **Search Documents** icon on the toolbar (or on the WorkSite area of the **Home** tab in Outlook 2010). The Search dialog box opens, and you can enter search criteria.

Saving a Database Search

1. To save this search, click **Save Search**. The Choose WorkSpace/Folder dialog box opens.

   Figure 122 Choose WorkSpace/Folder dialog box



2. Navigate to the Workspace or folder in which you want to search. You can also use the Express Search panel to find a location. See “Express Search Panel” on page 266 for more information on using this panel.

a. Choose a Folder List component from the shortcut bar on the left. Alternately, you can also make a selection from the **Look in** list. A list of available Workspaces and folders appear in the grid.

b. Double-click or select and press enter to drill down into the WorkSite container until you reach the Workspace or folder in which you want to save the search.

3. Click **Select**. The Create New Search Folder dialog box opens. See “Creating a Search Folder” on page 123 to continue.

Workspace Search

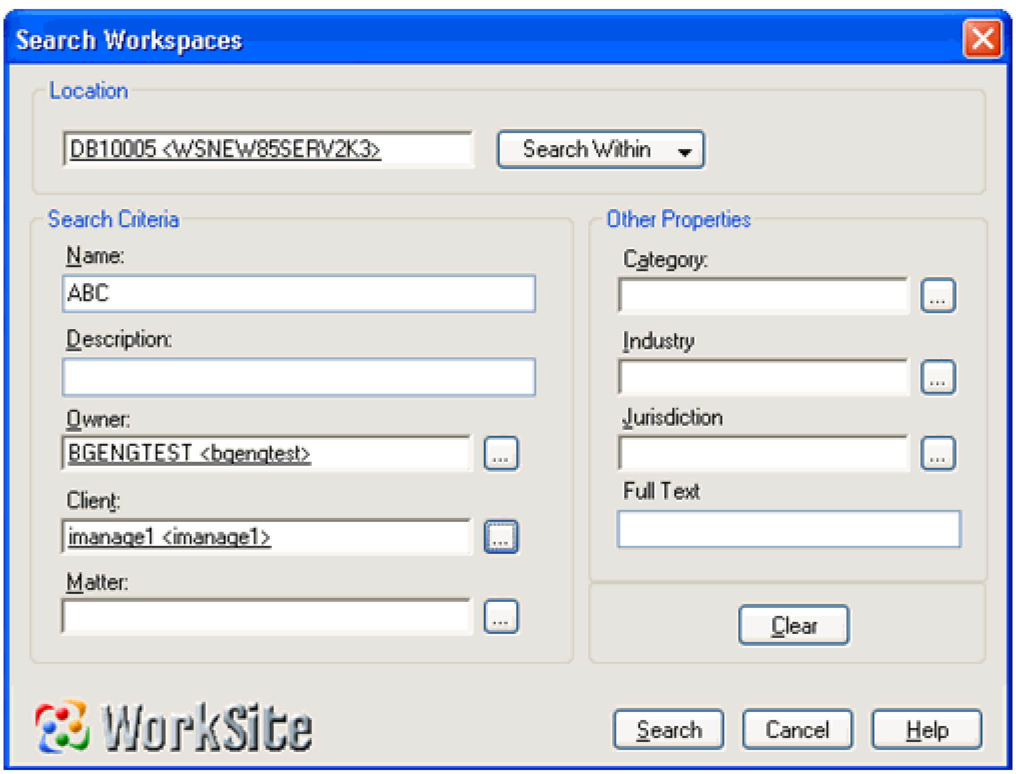
You can search for Workspaces using FileSite. The Workspaces found are added to your Matter Worklist.

1. From the **WorkSite** menu select **Search WorkSpaces**, or click the **Search WorkSpaces** icon on the toolbar.

   In Outlook 2010, click the **Search WorkSpaces** icon on the **WorkSite** tab or from the WorkSite area on the **Home** tab.

   The Search Workspaces dialog box opens.

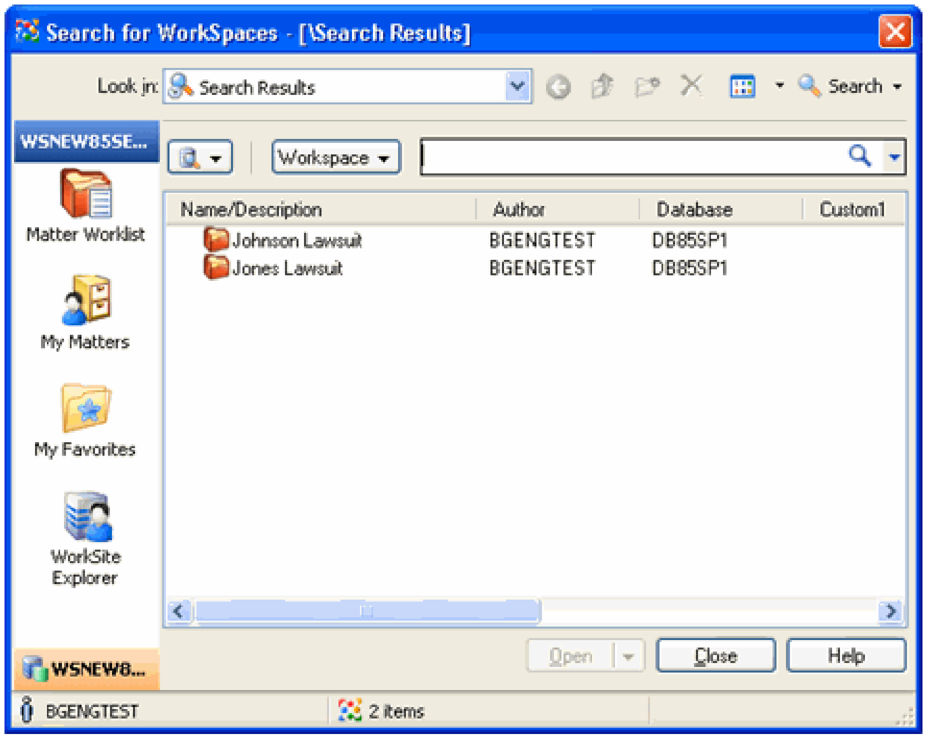
Figure 123 Example Search Workspaces dialog box



2. Enter profile information search criteria. You can also enter full-text search criteria in the **Full Text** field.

3. Click **Search**. The search results appear in a search results window, as shown in Figure 124.

Figure 124 WorkSpace Search Results



4. Double-click a Workspace in the list, or select a Workspace and click the **Open** button drop-down arrow to display the options in the list:

   - **Open**. The Search Results dialog box closes and you will see the selected Workspace under the **Matter Worklist** in the Folder List. This enables you to drill into the Workspace and perform actions on the documents inside the Workspace.
   - **Add to My Matters**. The Add to My Matters dialog box opens. You can add the selected Workspace to your My Matters list. If you wish, you can change the name of the Workspace.
   - **Add to My Favorites**. The Add to My Favorites dialog box opens. You can add the selected Workspace to your My Favorites list. If you wish, you can change the name of the Workspace.

Searching Within a Workspace

1. Under the Matter Worklist, right-click the Workspace you want to search and select **Search Documents** from the menu. You can also select the Workspace and click the **Search Documents** icon in the toolbar.

   In Outlook 2010, click the **Search Documents** icon from the WorkSite area of the **Home** tab.

   The Search dialog box opens with the **Search within** field populated with your selection.

2. Enter profile information or full-text search criteria, or both. Click **OK** to perform the search. The search results are displayed in the Document Grid and saved to the **Recent Searches** folder for the duration of the session.

NOTE Only documents to which you have Full, Read/write, or Read access rights are returned in your search. Documents to which you have no access rights are not listed when you perform a search.

Saving a Workspace Search

The procedure for saving a Workspace search is similar to saving a database search. See “Saving a Database Search” on page 237.

Folder Search

You can search within multiple folders or confine your search to a single document folder. The search results appear in the Document Grid.

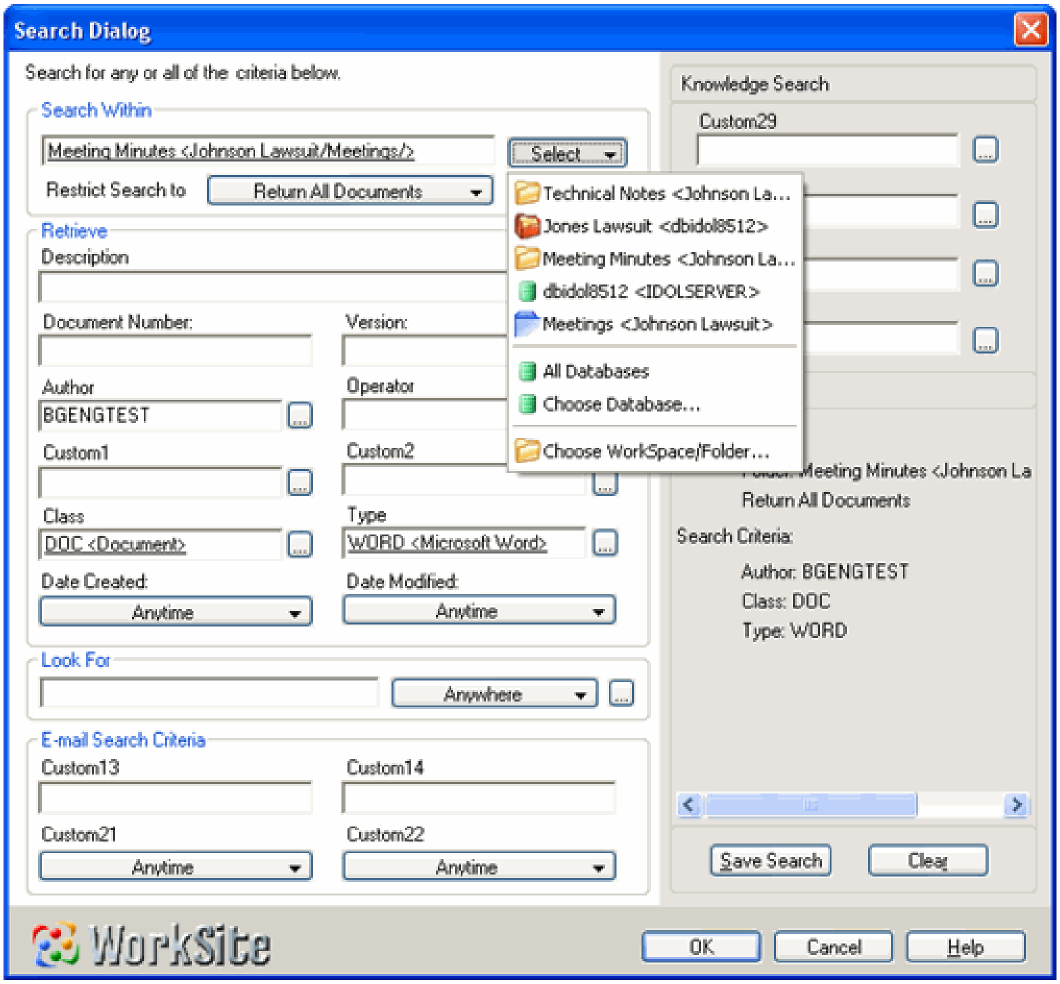
NOTE Using the FileSite desktop, you can search only for the content within a folder, not for a folder itself. Using the WorkSite Integrated Desktop in an integrated application, you can search for the content within a folder or for the folder itself. See “Search” on page 265 for more information.

1. In the Folder List, right-click the folder you want to search and select **Search Documents** from the menu. You can also select the folder and click the **Search Documents** icon on the toolbar.

   In Outlook 2010, click the **Search Documents** icon from the WorkSite area of the **Home** tab.

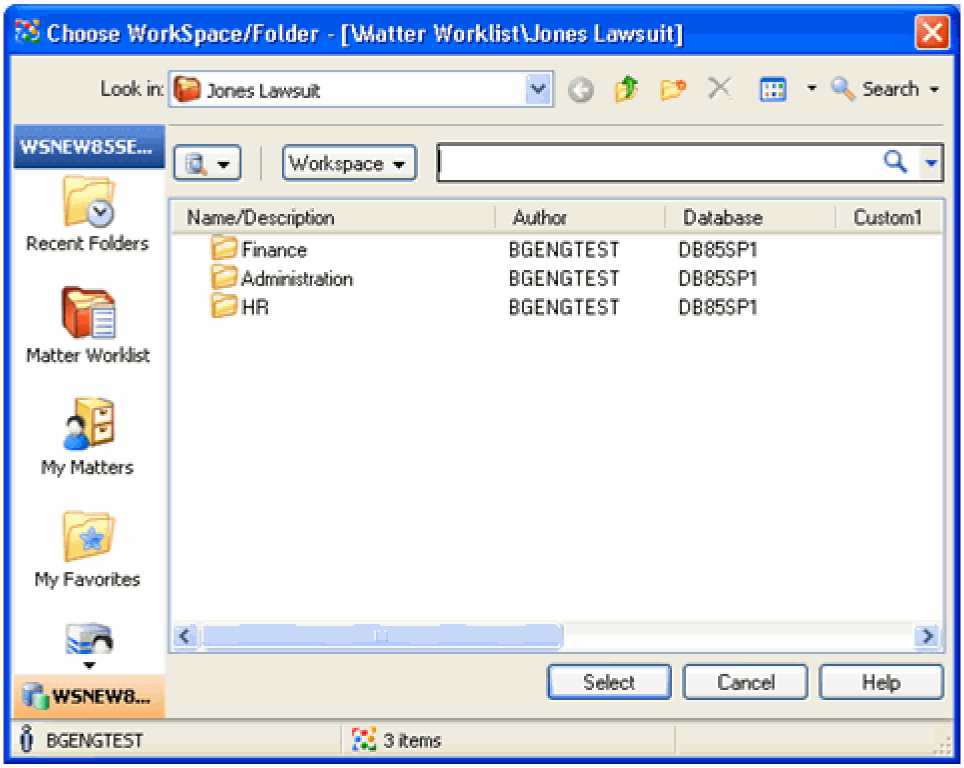
   The Search dialog box opens with the **Search within** field populated with your selection.

Figure 125 Search dialog box, folder selected



2. If you wish to select another folder, click **Select** to open the list as shown in Figure 125. Select the **Choose WorkSpace/Folder** option. The Choose WorkSpace/Folder dialog box opens.

Figure 126 Choose WorkSpace/Folder dialog box



3. Navigate to the folder you want to search. You can also use the Express Search panel to find a location. See “Express Search Panel” on page 266 for more information on using this panel.

   a. Choose a Folder List component from the bar on the left. Alternately, you can make a selection from the **Look in** list. A list of available Workspaces and folders appears in the grid.

   b. Double-click, or select and press enter to drill down into the WorkSite container until you reach the folder in which you want to search. Click **Select**.

4. Enter profile information or full-text search criteria, or both. Click **OK** to perform the search. The search results are displayed in the Document Grid and saved to the **Recent Searches** folder for the duration of the session.

NOTE Only documents to which you have Full, Read/write, or Read access rights are returned in your search. Documents to which you have no access rights are not listed when you perform a search.

Saving a Folder Search

The procedure for saving a folder search is similar to saving a database search. See “Saving a Database Search” on page 237.

CHAPTER 7

Integrated Applications

Overview

This chapter contains the following information to describe WorkSite's integration with other applications:

- "Introduction"
- "Microsoft Office Integration"
    - "Enhanced Application Integration"
    - "Classic Application Integration"
    - "Additional Microsoft Office Integration Functions"
- "Adobe Acrobat Integration"
- "Integration with Other Applications"

Introduction

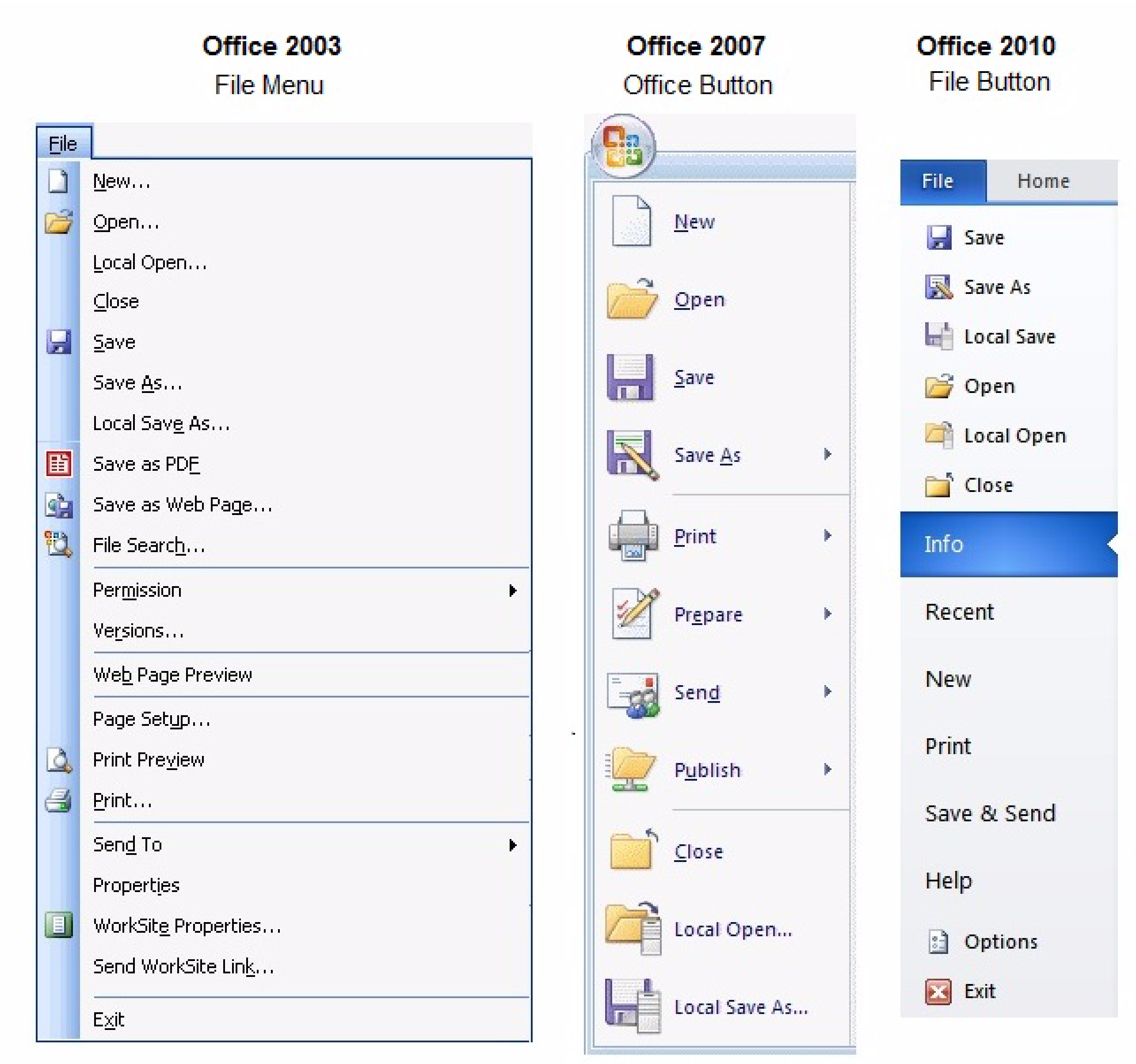
Application integration is the seamless integration of WorkSite with applications like Microsoft Office. It allows users to perform WorkSite functions directly from the application they are using and eliminates the need to switch to FileSite to perform certain WorkSite tasks. FileSite is actively integrated with most major Windows applications.

Microsoft Office Integration

NOTE FileSite and Microsoft Office Integration for WorkSite now support Microsoft Office 2007 and Microsoft Office 2010, which have a new look and feel. In both versions, the traditional menu bar has been replaced with a *ribbon bar*. WorkSite functionality for these versions is available from the tabs on the *ribbon bar* or from the later version's File menu equivalent - the **Office** button for Office 2007, or the **File** button for Office 2010, as shown in Figure 127 on page 247. For steps that reference the Office 2003 **File** menu, the File menu equivalent is implied for later versions of Office.

NOTE The procedural steps and example screenshots throughout this chapter use Microsoft Office 2003 as the base version. For procedural steps or screenshots that are identical or similar for Office 2007 or Office 2010, no alternate steps or screenshots are included, so the screenshots in some instances may differ slightly. For procedural steps or screenshots that differ significantly for Office 2007 or Office 2010, alternate steps and/or screenshots are included following the steps and screenshots for Office 2003.

Figure 127 Office 2003 File Menu and later version equivalents



FileSite can be integrated with Microsoft Office applications in two ways: *active integration* or *passive integration*. The functionality associated with these two methods of integration is essentially the same. However, they differ in terms of the changed menu options available under the integrated application's **File** menu:

- With *active integration*, FileSite replaces some of the application's **File** menu to provide access to WorkSite commands.

- With *passive integration*, FileSite adds separate menu commands to the **File** menu.

The appearance and functionality of the WorkSite Integrated dialog boxes that appear when using the menu options may also differ.

Getting Started in the Integrated Application

The behavior of the integrated application at startup depends on how your system is configured and whether other WorkSite components are running. The Microsoft Office Integration Module can prompt you to select a connection mode at startup or can automatically start in online mode.

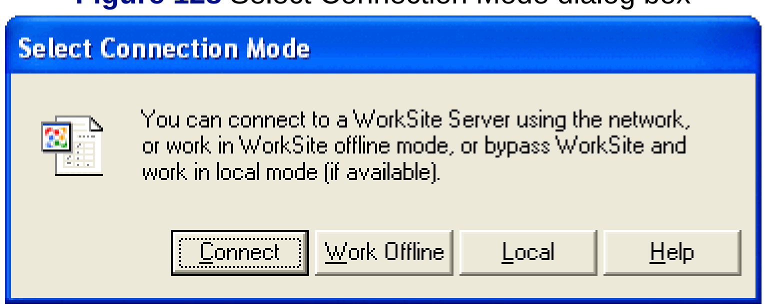
Choice of Connection Mode

When you launch an integrated application, you are prompted to select the connection mode under the following circumstances:

- No servers are registered for use in FileSite. This occurs when you start an integrated application for the first time after installing FileSite.
- No connection can be made to the registered servers.
- The **Prompt User for Connect Mode** feature is enabled. Contact your WorkSite Administrator for more information on enabling or disabling this feature.

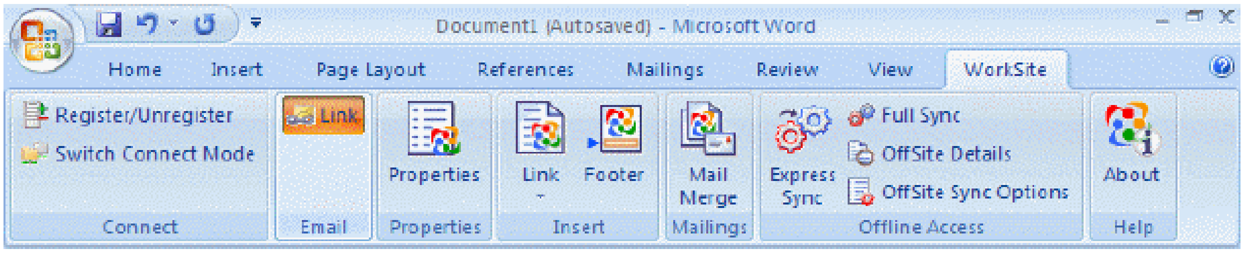
The Select Connection Mode dialog box opens.

Figure 128 Select Connection Mode dialog box



In Office 2007 or Office 2010, open the Select Connection Mode dialog box from the **WorkSite** tab on the Office application's ribbon bar.

Figure 129 Example WorkSite tab on Office application ribbon bar



Choose from the following options:

- **Connect**. Select this option to log into the registered servers. If you have not previously connected to a WorkSite Server, the Register and Login dialog box opens. See "Registering a Server" on page 54 for more information. When you are connected to a WorkSite Server, you can use all the features of FileSite and access all documents in libraries to which you have access rights.
- **Work Offline**. Select this option to access the WorkSite neighborhood in the offline mode. This mode lets you work on portable checked-out documents stored in the `NrPortbl` directory, as well as echo documents stored in the `NRTEcho` directory. When you later connect to the registered servers, you can check the documents back into the WorkSite library and synchronize the documents with those in the library. See Chapter 10 for more information.
- **Local**. Select this option to create and use documents available on your local or network drives. When you are finished, you can keep the documents on your local or network drive or switch to online mode to import the documents into WorkSite libraries.

NOTE When using the online and offline modes with active integration, you can still access files on your local or network drives using the **Local Open** and **Local Save As** commands.

NOTE With passive integration, the Microsoft Office application's **Open**, **Save**, and **Save As** options are not affected by FileSite and can be used to access files on your local or network drives.

Automatic Online Mode

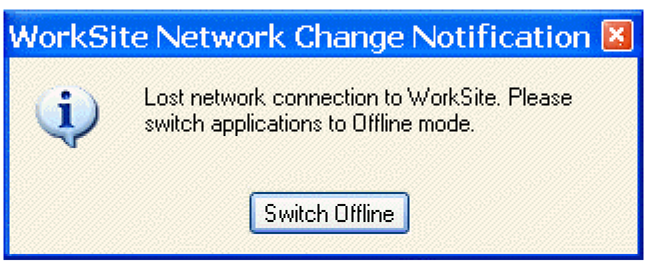
After you start an integrated application and register the servers, the Integration module starts in online mode automatically. If one of the conditions listed in "Choice of Connection Mode" on page 248 is true, the integration module fails to start automatically and you are prompted to select a connection mode.

Seamless Online/Offline Transition

Applications integrated with FileSite now support the following features to provide a seamless online/offline transition:

- Mode switching no longer requires closing FileSite and launching it in a different mode. FileSite now supports explicit switching of modes via a **Switch Online/Offline** menu item on the **WorkSite** menu (or **WorkSite** tab for Outlook 2010). This feature requires iManage OffSite. Mode switching can take place while the application is open.
- If multiple WorkSite applications (namely FileSite and integrated applications like Word, Excel, PowerPoint and Adobe) are running simultaneously, the modes of all the applications can be switched simultaneously by initiating the switch from any WorkSite application.
- On change of status of network connectivity, an attempt is made to check whether the WorkSite Server is available. If the connection to the WorkSite Server is lost or restored, the user is notified via a message in the system tray and is prompted to switch connection mode. For example, if a user is working in online mode and the connection to the network is lost, the user will be notified and prompted to switch to offline mode.

Figure 130 Prompt to Switch Offline



The WorkSite icon in the system tray displays a red X, indicating that there is no connection to the WorkSite Server: 

NOTE After switching to Offline mode, the message in the system tray will not change until the connection to the WorkSite Server is restored. It will then prompt the user to switch Online.

When a user is working offline and a server connection becomes available, the following prompt appears in the system tray:

Figure 131 Prompt to Switch Online

When the connection is restored, the WorkSite icon in the system tray displays a green arrow:

NOTE After switching to Online mode, the message in the system tray will not change until the connection to the WorkSite Server is lost. It will then prompt the user to switch Offline.

NOTE There may be certain circumstances when the mode switch will not be performed successfully, for example, when a WorkSite dialog is open in the application or when the user is working offline with modified documents open in OffSite. In the latter case, the user should save the document(s) and then switch connection modes.

By default, the collaborative mode switching feature is disabled in FileSite. The execution of the **Switch Online/Offline** option in the WorkSite Office integration menu can be performed as in earlier versions. You must close and relaunch all open WorkSite applications to switch connection modes.

NOTE To enable seamless transition from online/offline modes, see "Seamless Online/Offline Transition" on page 250.

NOTE Your WorkSite Administrator can enable a **Work Online/Offline** option on the **WorkSite** menu (or **WorkSite** tab for Outlook 2010).

Delayed Login Option

Microsoft Office integration with FileSite can be configured to delay logging into a WorkSite Server until you need to open a WorkSite document or save a document to WorkSite. This avoids unnecessary delays when you are working locally in your Office application.

NOTE The Delayed Login feature is enabled when you turn on the enhanced mode switching functionality. See “Seamless Online/Offline Transition” on page 250 for instructions. To manually create the Delayed Login key in the registry on your computer, refer to the *WorkSite Desktop Client Customization Guide*.

Pre-Profiling Template

The pre-profiling template allows you to define profile information for a document during its initial creation.

In an integrated application, the Integrated Save As dialog box usually appears when the document is saved. With the pre-profiling template enabled, the Integrated Save As dialog box appears when the document is initially created. This allows you to define profile information and designate a WorkSite location for the document at the time of creation.

When you click **New** from the integrated application’s **File** menu, the Integrated Save As dialog box appears. On this dialog box, you can enter profile information for the document. When you click **OK**, the profile information is saved and the document exists, in a checked-out state, in the designated WorkSite location. When you close the document, a typical WorkSite check-in function is performed.

To enable this feature for Microsoft Word or Microsoft Excel, download the appropriate .zip file located in `$worksite_install_path$\macros`. Installation instructions are included in each .zip file.

NOTE This feature is only available for Microsoft Word and Microsoft Excel version 2007 or 2010.

NOTE For the pre-profiling template to function as expected, you must have an active connection to the WorkSite Server. You can either disable the Delayed Login feature (see “Delayed Login Option”) or manually log in to the WorkSite Server after launching Word or Excel.

NOTE For this feature to function correctly, macros must be enabled in the integrated application.

Menus with WorkSite Options

When integrated with FileSite, WorkSite commands are available on the **File** menu, the **Edit** menu, and the **Insert** menu. A **WorkSite** menu is added to the application's menu bar.

In Office 2007 Integration or Office 2010 Integration, WorkSite commands are available on the **Home** tab, the **Insert** tab, the **Mailings** tab, and the **Review** tab. A **WorkSite** tab is added to the application's ribbon bar.

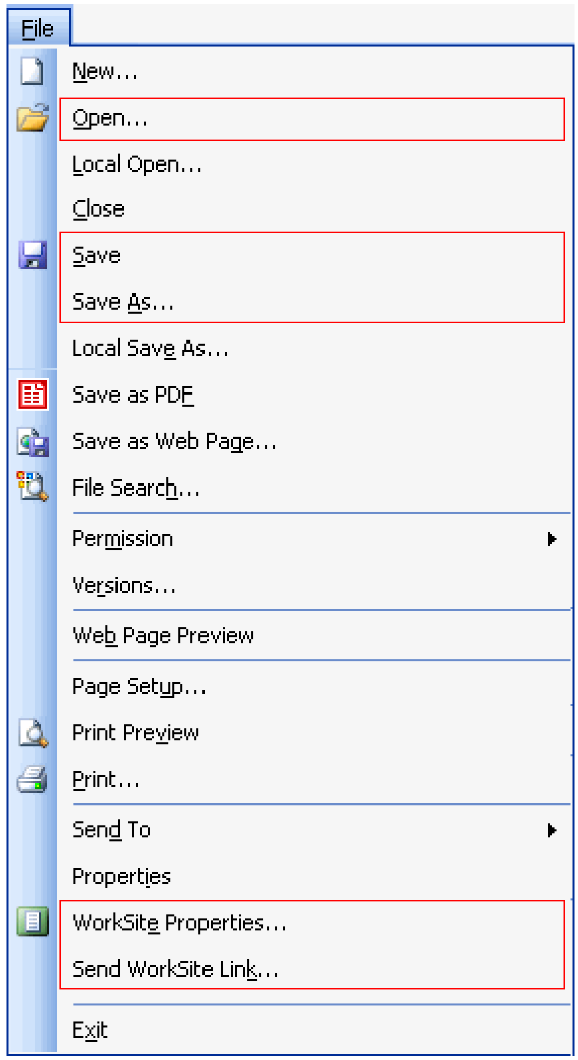
File Menu

The options available on the integrated application's **File** menu are determined by the mode of integration.

Active Integration

When an application is actively integrated with FileSite, its **File** menu changes to provide access to WorkSite documents. Certain functions such as **Open**, **Close**, **Save**, and **Save As** are changed. Also, new commands such as **Local Open**, **Local Save As**, **Send WorkSite Link**, and **WorkSite Properties** are added to the menu. Figure 132 illustrates an example of the Microsoft Word **File** menu when actively integrated with FileSite.

Figure 132 Example File menu, Active Integration



NOTE In Office 2007 Integration or Office 2010 Integration, the **Properties** and **Send Link** options are available on the **WorkSite** tab and on the WorkSite area of the **Home** tab.

Open

The **Open** command launches the WorkSite Integrated Open dialog box.

See "Enhanced Application Integration" on page 262 and "Classic Application Integration" on page 277 for more information on the functionality of the WorkSite Integrated Desktop.

Local Open

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

NOTE **Local Open** may be disabled in selected applications by your WorkSite Administrator.

Save and Save As

The **Save** and **Save As** commands behave differently in the Classic and Enhanced modes of integration.

In the Enhanced mode of integration, the **Save** and **Save As** commands open the WorkSite Integrated Save As dialog box if the document is being saved for the first time. If the document already exists on a local drive, the **Save** command simply saves the document, and the **Save As** command opens the Save As Options dialog box.

In the Classic mode of integration, the **Save** and **Save As** commands open the Save As Options dialog box if the document is being saved for the first time. If the document already exists on a local drive, the **Save** command simply saves the document, and the **Save As** command opens the Save As Options dialog box.

See “Enhanced Application Integration” on page 262 and “Classic Application Integration” on page 277 for more information on the functionality of the WorkSite Integrated Desktop.

Local Save As

The **Local Save As** command opens a standard Windows Save As dialog box. Use this dialog box to save your file on your local or network drive. The **Local Save As** command is a convenient method of saving the file independently of FileSite and any libraries to which you may be connected. It is equivalent to using the **Export** function in FileSite.

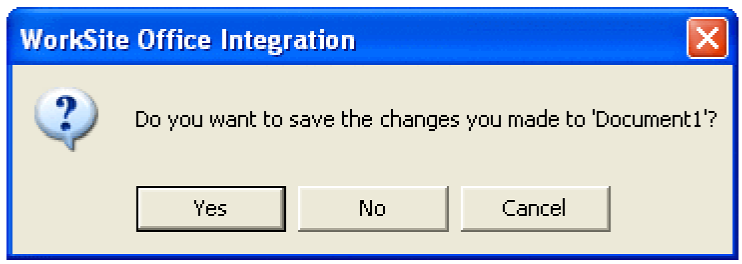
If you use the **Local Save As** option to save a WorkSite document to a local drive, modifications you make before saving are not reflected in the original document in the WorkSite library.

NOTE **Local Save As** may be disabled in selected applications by your WorkSite Administrator.

Close

When you click × **Close** to close a document in an integrated application, you can save the document if the contents have changed since the document was opened. Figure 133 shows an example of the message that appears when you close a document in an integrated application.

Figure 133 Example Close message



If you select **Yes** from this message box, FileSite responds as if you selected **Save** from the **File** menu. If the document is not already in a WorkSite library, or does not have profile information already saved, you are prompted to enter profile information for the new document.

Print

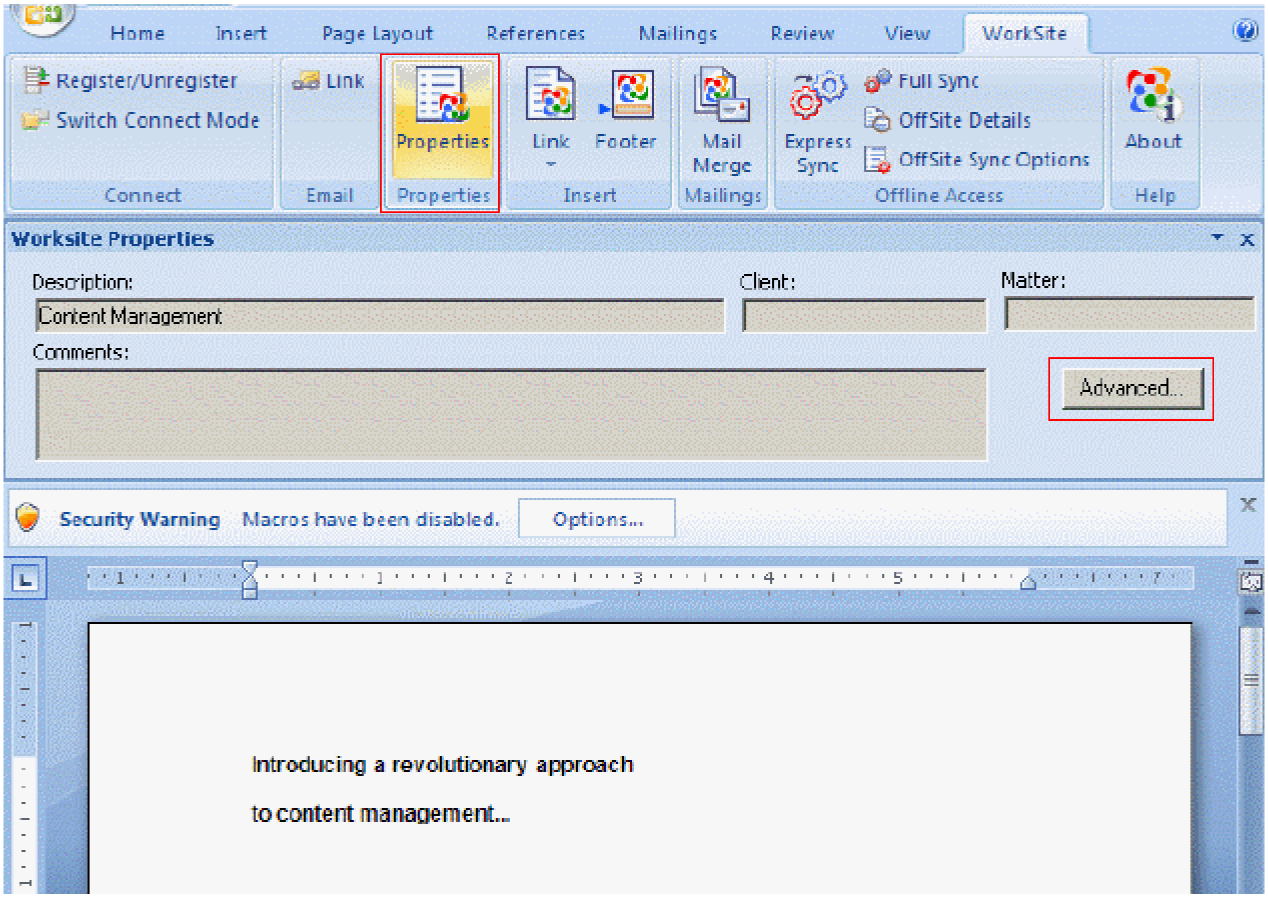
Printing documents in integrated applications functions the same as printing them in non-integrated applications. When you print a WorkSite document in Microsoft Word, the document's activity history is updated to show that the document was printed, how many pages were printed, and who printed the document.

WorkSite Properties

When you select **WorkSite Properties** from the **File** menu, the Properties dialog box for viewing or editing document profile information appears. See Figure 135.

In Office 2007 or Office 2010, the **Properties** option is on the **WorkSite tab** on the ribbon bar. It is also available on the **Home** tab. With a WorkSite document open, click **Properties** to display the basic properties quick view shown in Figure 134. To modify properties that do not appear in the quick view above the document, click the **Advanced** button to open the Properties dialog box shown in Figure 135.

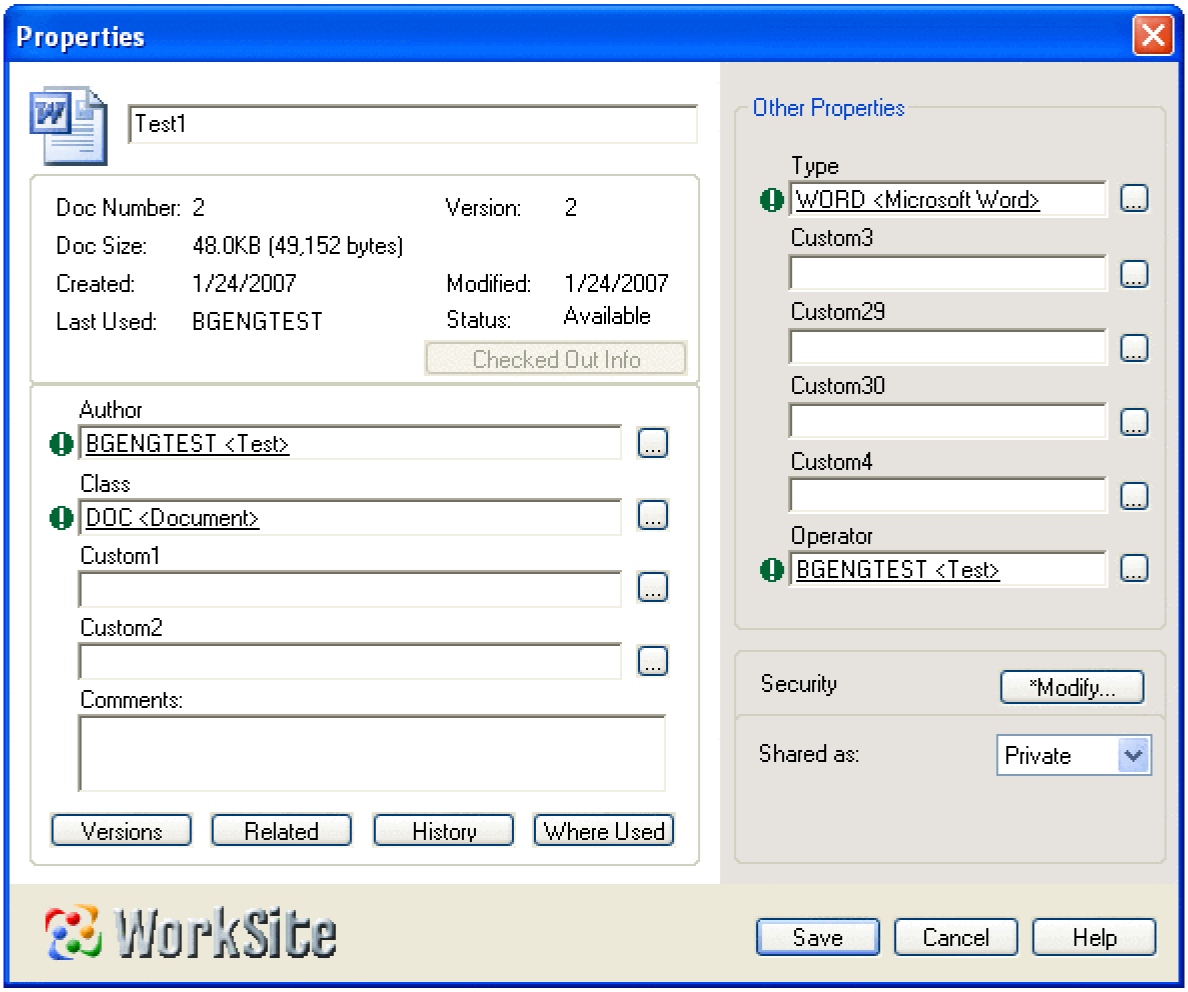
Figure 134 WorkSite Properties quick view



Users who have Read access to a document cannot change the information displayed in the Properties dialog box. Users with Read/Write access can change certain fields, such as the **Comments** field. Only the Author and Operator of a document have the full authority to change the access privileges on the document.

NOTE The dialog box used to enter profile information is customizable by your WorkSite Administrator. The dialog boxes that appear in your version of FileSite may differ from the default shown in Figure 135.

Figure 135 Properties dialog box, Default appearance



Send WorkSite Link

When a WorkSite document is open in an integrated application, and you select **Send WorkSite Link** from the **File** menu, a new e-mail message appears with a WorkSite link (as an .nrl file) to the currently active document included as an attachment. The link can then be sent to any user who can normally access the document.

In Office 2007 Integration or Office 2010 Integration, the **Send Link** option is available from the **WorkSite** tab and the **Home** tab on the ribbon bar.

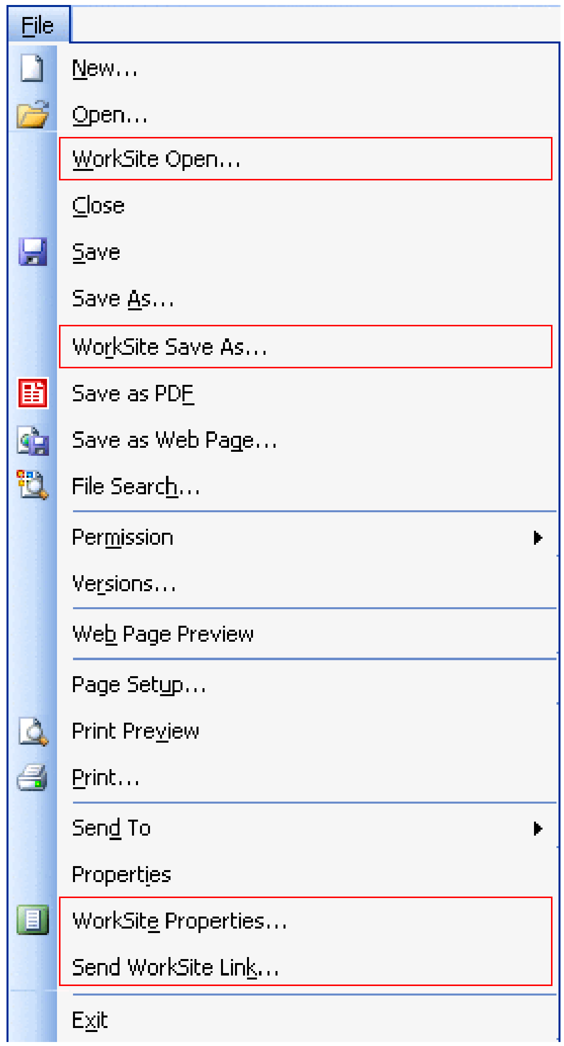
Figure 136 Example Send Link on the WorkSite ribbon bar

Passive Integration

The Passive Integration option can be set by your WorkSite Administrator according to the needs of your system. When the Passive Integration option is set, the functionality of the **Open** and **Save** operations remains unchanged. Separate menu options to perform a **WorkSite Open** and **WorkSite Save As** are added to the **File** menu.

Most menu options are similar to those described in Active Integration. The differences are detailed in this section.

Figure 137 File menu, Passive Integration



Open

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

WorkSite Open

The **WorkSite Open** command launches the WorkSite Integrated Open dialog box. See “Enhanced Application Integration” on page 262 and “Classic Application Integration” on page 277 for more information on the functionality of the WorkSite Integrated Desktop.

Save As

The **Save As** command opens a standard Windows Save As dialog box. Use this dialog box to save your file on a local or network drive. When you use this option, you save the file independently of FileSite and any libraries to which you may be connected. If your document originated from a WorkSite library, the **Save As** option does not automatically update the original copy of the document with any changes you may have made.

WorkSite Save As

The **WorkSite Save As** command behaves differently in the Classic and Enhanced modes of integration.

In the Enhanced mode of integration, the **WorkSite As** command opens the WorkSite Integrated Save As dialog box. In the Classic mode of integration, the **WorkSite As** command opens the Save As Options dialog box.

See "Enhanced Application Integration" on page 262 and "Classic Application Integration" on page 277 for more information on the functionality of the WorkSite Integrated Desktop.

Enhanced and Classic Application Integration

Both active and passive integration with Microsoft Office applications are available in two formats:

- Enhanced Application Integration
- Classic Application Integration

These formats determine the configuration of the Integrated Desktop. You can use this interface to view your WorkSite folders and Workspaces and perform operations on WorkSite documents, such as view, check out, check in, and edit profile.

Your WorkSite Administrator can set the integration format to either Classic Application Integration or Enhanced Application Integration.

The Enhanced Application Integration mode is enabled in the application by default. This integration format supports a matter-centric approach to document management. It allows you to profile documents by dragging them into folders. Documents inherit the profile information set for each folder. If the folder's profile contains sufficient information to profile the document, you can save documents in the WorkSite repository without being prompted to enter document profile information. The Enhanced Application Integration Open and Save As dialog boxes also contain features that make it easy to locate and save documents to WorkSite. See "Enhanced Application Integration" on page 262 for more information.

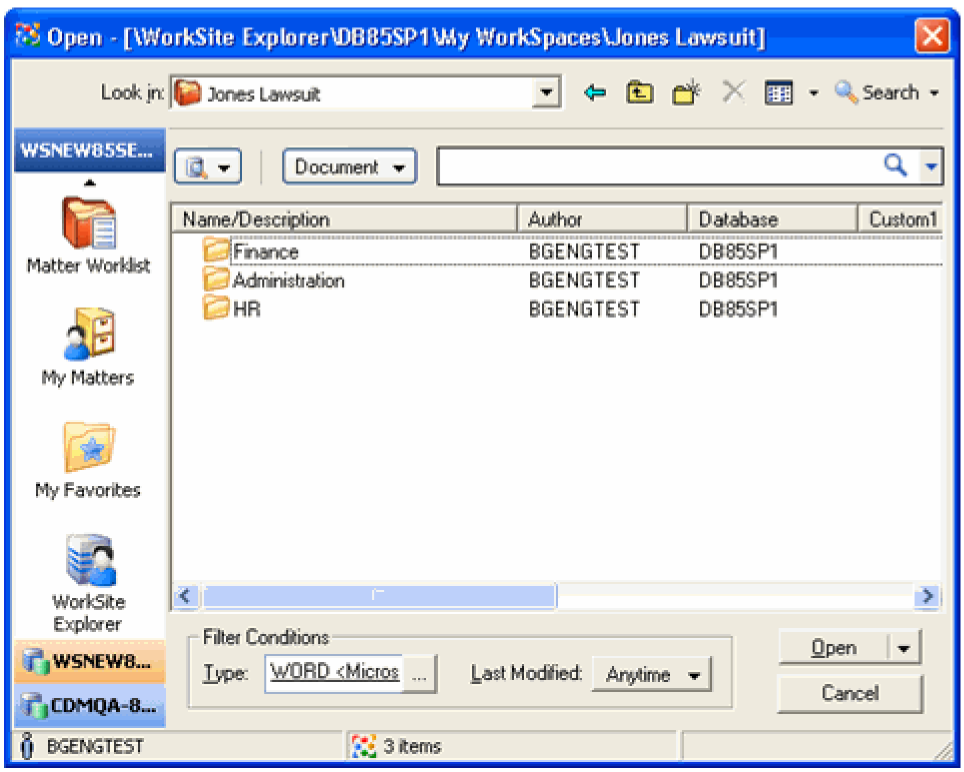
In the Classic Application Integration desktop, you are always prompted to enter document profile information when saving content to WorkSite from an integrated application.

See "Classic Application Integration" on page 277 for more information.

Enhanced Application Integration

When you open a WorkSite document from within an integrated application, the WorkSite Integrated Desktop appears instead of the standard Windows dialog boxes that normally appear when you perform certain functions such as **Open**, **Save** or **Save As** from the **File** menu.

Figure 138 WorkSite Integrated Desktop, Enhanced mode



Elements of the Enhanced Integrated Desktop

Shortcut Bar

On the left side of the Enhanced Integrated Desktop is the Shortcut Bar. It contains shortcuts to Recent Folders, Checked-out Documents, Document Worklist, Matter Worklist, My Matters, My Favorites, and the WorkSite Explorer.

You can also select containers and navigate to their subfolders from the **Look in** list. Click any icon in the Shortcut Bar to display its subfolders. Documents contained in a selected folder are listed in the **Document Grid**.

Document Grid

All the documents or containers selected in the **Shortcut Bar** are displayed in the Document Grid. To see the contents of a container, double-click it. You can organize the list in ascending or descending order by clicking the column headings.

You can narrow the focus of documents in the Document Grid by making selections from the following options in the **Filter Conditions** area:

- Type
- Last Modified

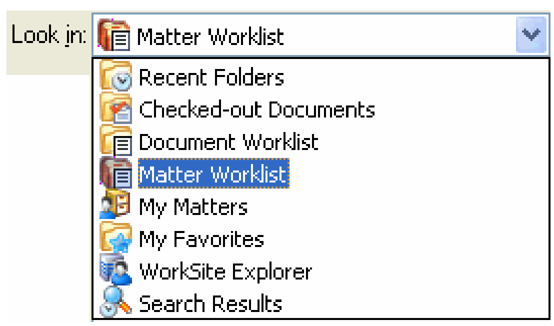
Toolbar

The toolbar of the Enhanced Application Integration desktop has controls for navigating within the desktop.

Look in

Choose a container from the **Look in** list (as shown in Figure 139) to start looking for the document you want to open.

Figure 139 Look in list



Back

Click the **BACK** arrow to navigate to the last list you looked at.

Up One Level

Click the **Up One Level** icon to access a container higher in the tree structure.

Create New Folder‘

Click the **Create New Folder** icon to create a new folder in the current container.

Delete

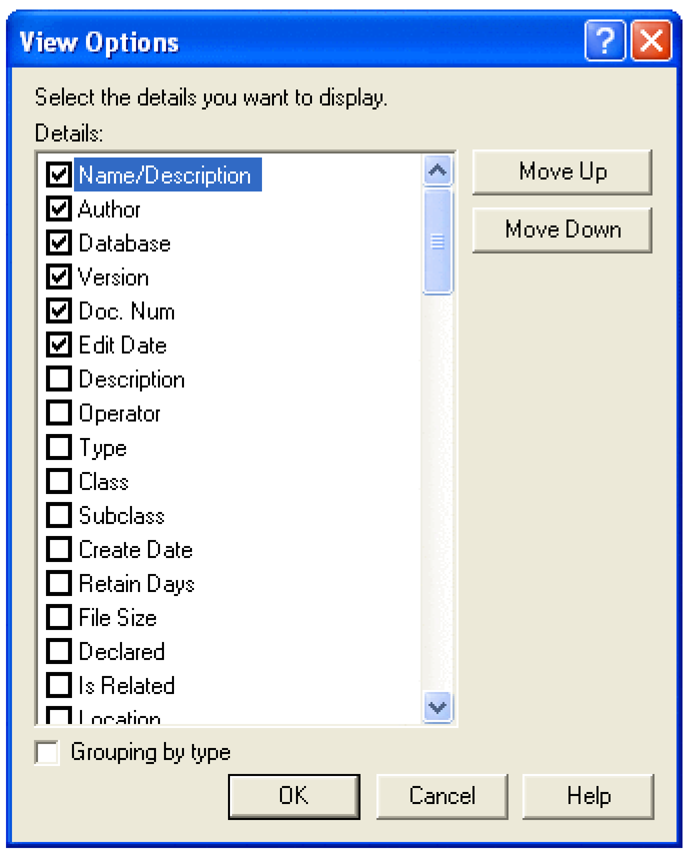
The **Delete** icon is enabled when you have Full Access to the document that is selected in the Document Grid. To delete a document, select the document from the Document Grid and click the **Delete** icon. Users who have Read/Write access can remove a document from the folder but cannot delete it from the WorkSite library.

View Menu

The **View Menu** button allows you to toggle between showing the column heading or not. You can also customize the information that appears in the Document Grid by clicking the down **View Menu** button drop-down arrow to display a list of options:

- **List**. Displays a list view of the documents or containers selected.
- **Detail**. Displays a detailed view of the documents or containers selected.
- **Option**. Opens the View Options dialog box.

Figure 140 View Options dialog box



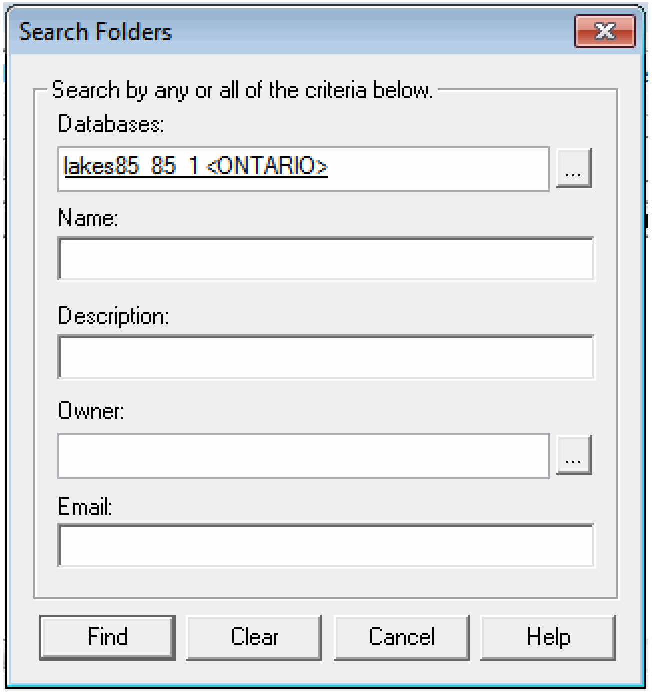
Select the options you want to display in the column heading. You can change the order of the headings by selecting a heading and using the **Move Up** or **Move Down** buttons. Click **OK** when you have completed your selections.

Search

Click the **Search** button drop-down arrow to perform a standard WorkSite search. You can select from a list of options:

- **Express Search Panel**. Displays the Express Search panel. See “Express Search Panel” on page 266 for information on using this panel to perform searches.
- **Advanced Workspace Search**. Opens the Search Workspaces dialog box. See “Workspace Search” on page 238 for details on using the Search Workspaces dialog box.
- **Advanced Folder Search**. Opens the Search Folders dialog box. Using this dialog box, you can search for a particular folder and access the contents within that folder.

Figure 141 Search Folders dialog box



Enter search criteria in the dialog box fields and click **Find**. Your search results are returned in the WorkSite Integrated Desktop dialog box.

NOTE When performing a folder search based on an e-mail address, use only the *folder id*, not the entire e-mail address. For example, if the folder's e-mail address is `folder1.databasename@domain.com`, the folder id is `folder1`. A search for the entire e-mail address will return no results.

NOTE For details on searching within folders using the FileSite desktop, see "Folder Search" on page 240.

- **Advanced Document Search**. Opens the Search Dialog box.

Each Search Dialog box is customizable by your WorkSite Administrator, so the options available may vary. See Chapter 6 for detailed information on performing WorkSite searches.

Express Search Panel

The Express Search panel contains the following options:

- Database Scope
- Type Selection

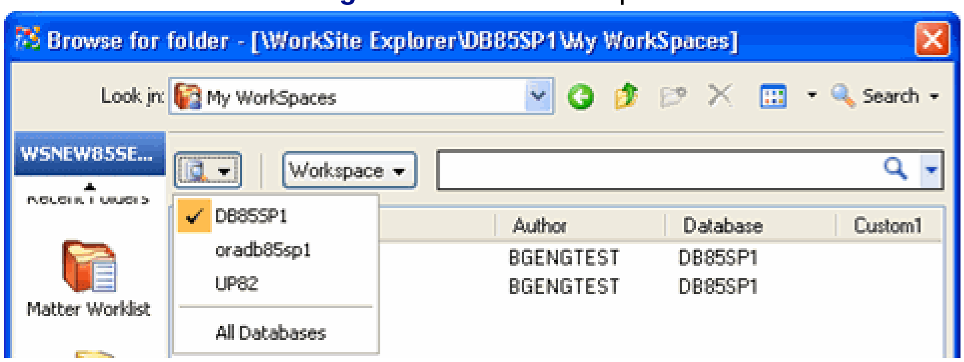
- Recent Search

Database Scope

You can use the **Database Scope** option to scope your search queries to a particular database. You can also select all the available databases for your search.

Express Search detects all the databases connected to your WorkSite Server setup. To select a database, click the **Database Scope** drop-down menu. The available databases are listed and the primary database is selected by default. The currently selected database is marked with a check mark as shown in Figure 142.

Figure 142 Default Scope



To choose a different database, click the desired database. A check mark appears next to the selected database. To clear this selection, click the database once more. To choose all available databases, select the **All Databases** option.

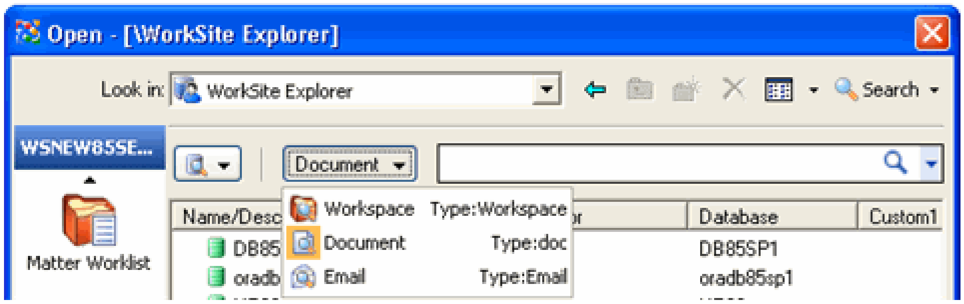
Selecting the **All Databases** option clears all the individual database selections in the menu. Clearing the **All Databases** option selects the primary database in the menu.

NOTE If you run a search query using the Scope keyword, this query takes precedence over the databases that were selected from the drop-down menu. However, the databases selected from the drop-down menu are retained as your default scope.

Type Selection

You can use the **Type Selection** drop-down menu to select the desired search type (see Figure 143).

Figure 143 Type Selection



You can choose from the following options:

- **Type:Workspace**. `type:workspace` is added to the query box and the search query. When executed with other parameters, it returns Workspaces in the results.
- **Type:Document**. `type:doc` is added to the query box and the search query. When executed with other parameters, it returns all document types.
- **Type:Email**. `type:email` is added to the query box and the search query. When executed with other parameters, it returns e-mails.

NOTE Results are not displayed for the search queries '`type:workspace`', '`type:email`' and '`type:document`', unless they are executed with other parameters. For example, `type:workspace createdate:last month`.

NOTE If you enter `type:email` in the query box while Type:Workspace was previously selected from the drop-down menu, then `type:email` takes precedence. The same rule applies to other options in the drop-down menu. For example, if you enter `type:email custom1:legal` while Type:Workspace was selected from the drop-down menu, then the type control is refreshed to Email.

To run a search query:

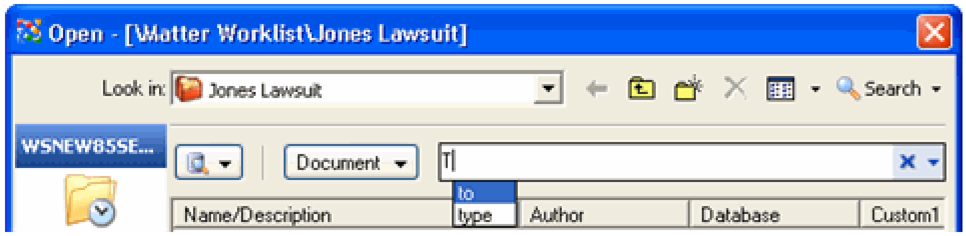
1. In the query box, enter a search term or use the autocomplete feature to add a search query.

   The autocomplete feature suggests keywords in a list as soon as you start entering text in the query box.

2. If a value in the list of suggestions matches your criteria, click the value or press the **DOWN** arrow key to select the value and press **ENTER**. The value appears in the query box with a list of suggestions (if any) for this entry.

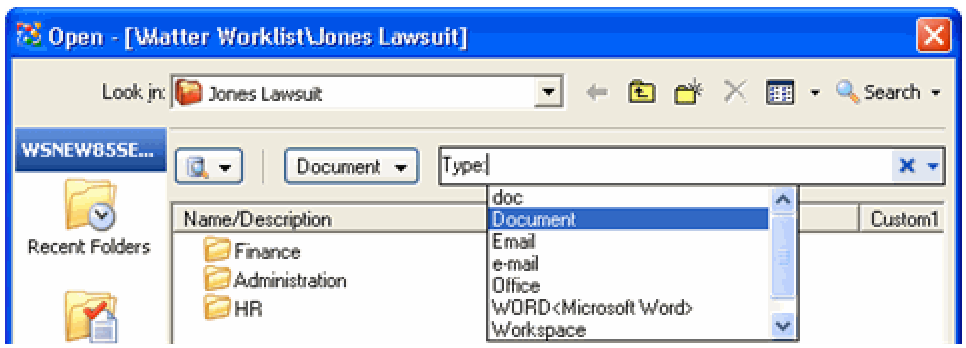
For example, search for Workspaces using the keyword ‘type’. When the letter ‘t’ is entered, the suggestions ‘to’ and ‘type’ are displayed (see Figure 144).

Figure 144 Autocomplete feature



3. Select **type** from the list. ‘Type’ appears in the query box with a colon (:), and a list of values for ‘Type’ are displayed (see Figure 145).

Figure 145 Autocomplete feature (suggestion selected)



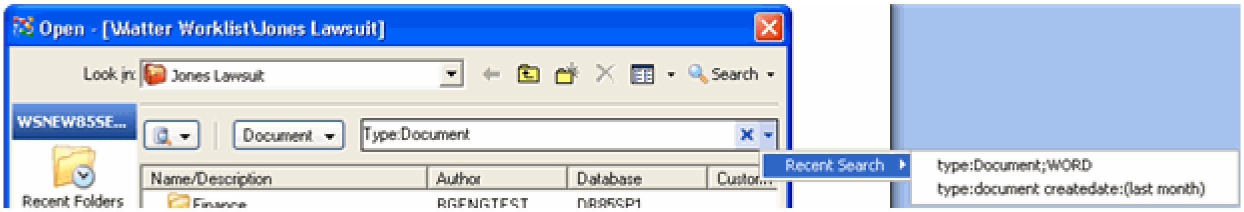
4. Select **Workspace** from the list.
5. Enter ‘c’ and select **createdate**, then choose **last month** from the list of suggestions. The search query is executed and the results are displayed in the Document Grid.

NOTE Any search query entered is automatically executed based on the number of seconds set in the **Miner Preferences** section of the Preferences dialog box. The Preferences dialog box is accessed using Express Search. For more information, refer to the *WorkSite Express Search User’s Guide*.

Recent Search

You can use the **Recent Search** option to access the last ten search queries that you executed (see Figure 146).

Figure 146 Recent Search



The **Recent Search** option follows these rules:

- If you clear the query box using the **X** button (to the right of the query box), the search query is added to the top of the **Recent Search** list and the tenth (last) search query is removed from the list.
- If you delete the search query without using the **X** button to clear the query box, the search query always replaces the top most search query in the **Recent Search** list.

To access your recent search queries, click the **DOWN** arrow button next to the query box and select **Recent Search** as shown in Figure 146. The last ten search queries that you executed are displayed. To execute a search query again, select the search query from the list. The query box is populated with the search query.

Quick Search Panel

The Quick Search panel does not appear by default. Contact your WorkSite Administrator to enable it in the WorkSite Integrated Desktop. Refer to the 8.2 *FileSite Installation and User's Guide* for more information on using the Quick Search panel.

NOTE Autonomy recommends using the more advanced Express Search panel for searching documents. See "Express Search Panel" on page 266 for more information.

Quick Open Panel

The Quick Open panel does not appear by default. Contact your WorkSite Administrator to enable it in the WorkSite Integrated Desktop. Refer to the 8.2 *FileSite Installation and User's Guide* for more information on using the Quick Open panel.

NOTE Autonomy recommends using the more advanced Express Search panel for searching documents. See "Express Search Panel" on page 266 for more information.

Working with Documents in the Enhanced Integrated Desktop

You can perform all the typical document functions from the Enhanced Integrated Desktop by right-clicking the document in the Document Grid and selecting the desired option from the menu. Some commonly used document functions are discussed here:

- "Opening Documents"
- "Viewing Documents"
- "Editing Document Profile Information"
- "Saving Documents"
- "Checking Out Documents"
- "Checking In Documents"
- "Exporting Documents"
- "Removing Documents from a Folder"
- "Deleting Documents"
- "Unlocking Documents"
- "Displaying Document Information"

For more information on other document functions, see Chapter 5.

Opening Documents

The Enhanced Integrated Desktop is used to access documents in WorkSite. You can reach it by selecting **Open** from the application's **File** menu. Select a document from the Document Grid and right-click the selection or click the **Open** button drop-down arrow to display the following list of options:

- **Open**. Opens the original document in the WorkSite library.
- **Open Read-only**. Opens a read-only copy of the document.
- **Open a Copy**. FileSite launches the New Profile dialog box for you to enter the new document's profile information.
- **Open a New Version**. FileSite launches the New Version Profile dialog box for you to enter the new version's profile information.
- **Open and Repair**. Opens and repairs the corrupted document.

- **Local Open.** Opens the local copy of the document stored on your local or network drive.

NOTE You can also use the Express Search panel to open a document in its native application. In the query box, enter doc.num: <Document number of the document> version: <Version number of the document>, and press **Enter**. The Enhanced Integrated Desktop closes and the document is opened in its native application.

Viewing Documents

To view a document, select the document from the Document Grid and right-click or press **SHIFT+F10**. Select **View** from the menu.

The **View** command launches a read-only version of the selected document in the WorkSite Viewer application. See Chapter 9 for more information. Viewing documents is useful to verify that you have selected the correct document before you check it out.

Editing Document Profile Information

To edit or view a document's profile information, select the document from the Document Grid and right-click or press **SHIFT+F10**. Select **Properties** from the menu.

The Properties dialog box displays the document's current profile information. You can edit the information displayed and then record your changes. See “Editing Document Profile Information” on page 146 for more information.

In Office 2007 or Office 2010, the **Properties** option is on the WorkSite ribbon bar. With a WorkSite document open, click **Properties** to display and edit the document's properties. To modify properties that do not appear in the quick view above the document, click the **Advanced** button to open the Properties dialog box shown in Figure 135.

Saving Documents

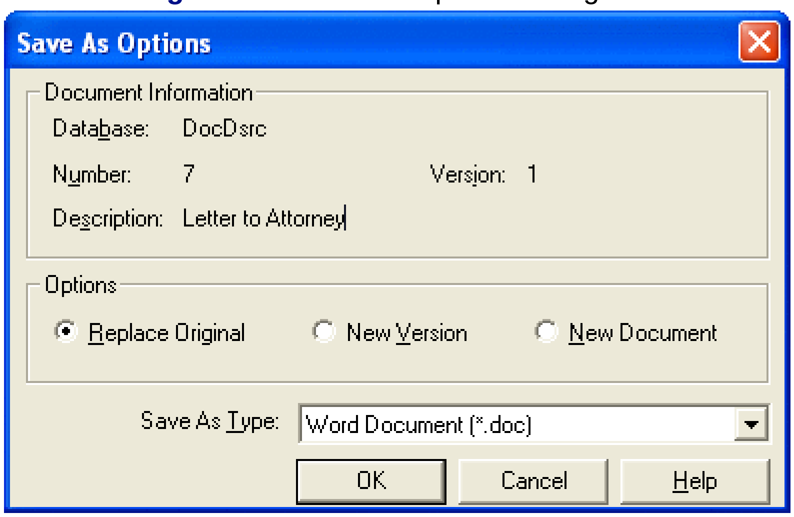
1. To save a new document, select **Save** or **Save As f**rom the **File** menu of the integrated application. The WorkSite Integrated Save As dialog box appears (see Figure 148).

To save an existing WorkSite document that is open in the integrated application, when you select **Save As**, the Save As Options dialog box appears (see Figure 147).

NOTE In Office 2007 Integration or Office 2010 Integration, you cannot modify the value in the **Save As Type** field when you replace an original WorkSite document.

NOTE In Office 2007 or Office 2010 Integration, when you update the file format to the later version and save the document as a New Version or New Document, the value in the **Save As Type** field is changed accordingly.

Figure 147 Save As Options dialog box

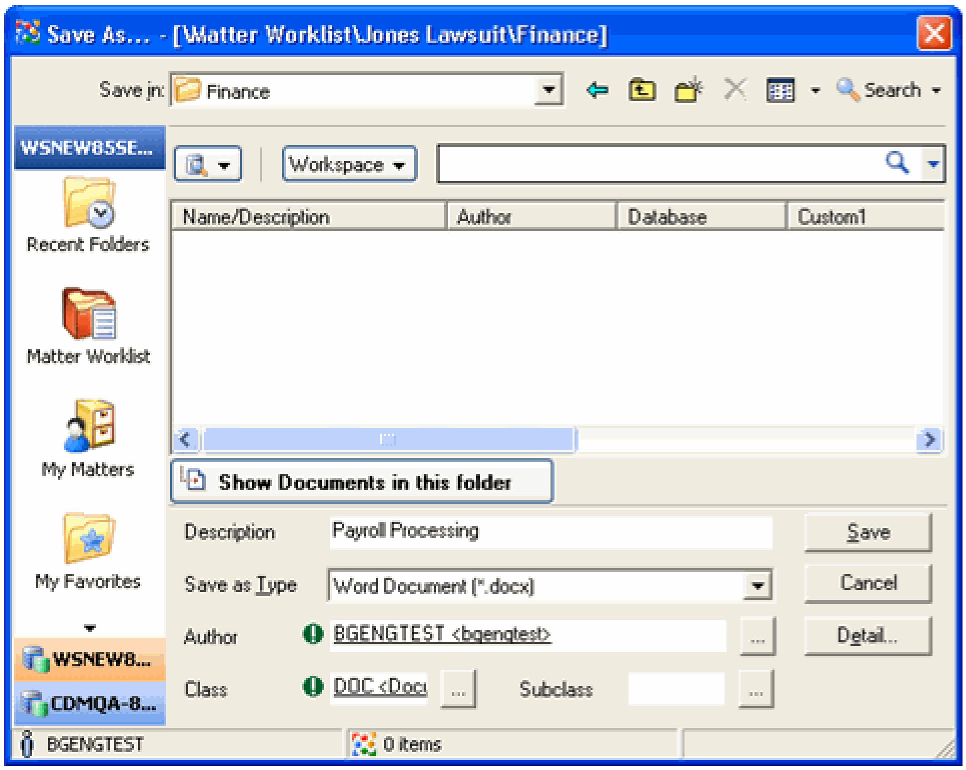


Select from the following options:

- Replace Original
- New Version
- New Document

When you click **OK**, the WorkSite Integrated Save As dialog box appears (see Figure 148).

Figure 148 Integrated Save As dialog box, Enhanced mode



2. Navigate to the Workspace or folder where you want to save the document. You can also use the Express Search panel to find a location. See “Express Search Panel” on page 266 for more information on using this panel.

   - To display the names of documents in the current location, click **Show Documents in this folder**.
   - Enter the appropriate information in the **Author**, **Class**, and **Subclass** (if applicable) fields.
   - Click **Save**.

NOTE When the document is added to the folder, it automatically inherits the folder’s profile properties or metadata. If the folder’s metadata includes all required fields, FileSite automatically creates the profile without requiring further input.

3. If the folder’s metadata does **not** include all required fields, the New Profile dialog box opens for you to enter profile information. You can also open the New Profile dialog box by clicking **Detail**.

4. Click **Save** to save the document to the WorkSite library.

NOTE Your WorkSite Administrator may set up your system so that the **Author**, **Class**, and **Subclass** fields do not appear in this dialog box. In that case, click **Detail** to complete these fields.

Checking Out Documents

To edit a document, you must first check it out of the WorkSite library and temporarily store it on your local or network drive.

To check out a document, select the document from the **Document Grid** and right-click or press **SHIFT+F10**. Select **Checkout** from the menu.

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

See "Checking Out Documents" on page 162 for more information.

Checking In Documents

To check in a document that is marked "checked-out", select the document from the Document Grid and right-click or press **SHIFT+F10**. Select **Checkin** from the menu. The Check In Options dialog box replaces the document that you previously checked out.

See "Checking In Documents" on page 163 for more information.

Exporting Documents

To export a copy of a document to your local or network drive, select the document from the Document Grid and right-click or press **SHIFT+F10**. Select **Export** from the menu.

See "Exporting Documents" on page 159 for more information.

Removing Documents from a Folder

To remove a document from a folder, select the document from the Document Grid and right-click or press **SHIFT+F10**. Select **Remove from folder** from the menu.

See “Removing Documents from a Folder” on page 121 for more information.

NOTE The **Remove from folder** menu option does *not* remove a document from the network or a particular library. Removing a document from the network or library requires the **Delete** command. Not everyone who has the **Remove from folder** menu option permission has the Delete permission. Contact your WorkSite Administrator for more information.

Deleting Documents

When you delete a document, you have the option of removing it from the folder or permanently deleting it from the WorkSite library.

To delete a document, select the document from the Document Grid and right-click or press **SHIFT+F10**. Select **Delete** from the menu. Only the Author or Operator of a document can delete it. See “Deleting Documents” on page 170 for more information.

Unlocking Documents

To unlock a document, select the document from the Document Grid and right-click or press **SHIFT+F10**. Select **Unlock** from the menu. See “Unlocking Documents” on page 175 for more information.

Displaying Document Information

You can view the following information about a document:

- “Versions”
- “History”
- “Related Documents”
- “Checkedout Info”

Versions

To view a list of the document’s versions, select the document from the Document Grid and right-click or press **SHIFT+F10**. Select **Versions** from the menu. See “Document Versions Tab” on page 134 for more information.

History

To view a document’s history, select the document from the Document Grid and right-click or press **SHIFT+F10**. Select **History** from the menu. See “History Tab” on page 134 for more information.

Related Documents

To view a document's relations, select the document from the Document Grid and right-click or press **SHIFT+F10**. Select **Related Documents** from the menu.

Document relations are one of the ways you can organize and group documents, in addition to folders and document classifications. See "Related Documents Tab" on page 134 for more information.

Checkedout Info

To display information about a checked-out document, select the document from the Document Grid and right-click or press **SHIFT+F10**. Select **Checkedout Info** from the menu. The Document Checked Out dialog box opens with the checked out information. See "Checkedout Info" on page 183 for more information.

Classic Application Integration

WorkSite documents can be accessed directly through an integrated application. The WorkSite Integrated Desktop appears instead of the standard Windows dialog boxes that normally appear when you perform certain functions, such as **Open** from the **File** menu.

Elements of the Classic Integrated Desktop

This section describes the elements of the Classic Integrated Desktop.

Figure 149 Open dialog box on the Classic Integrated Desktop

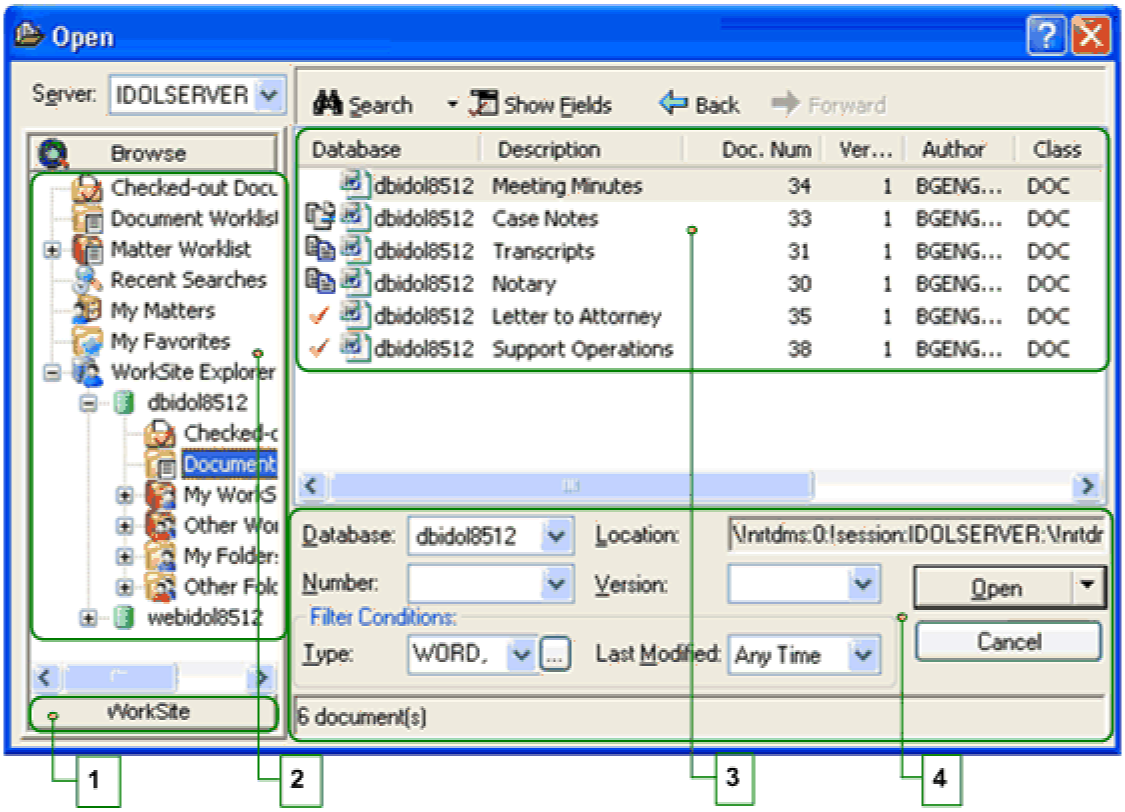


Figure 149 consists of the following elements:

- 1 - Shortcut Frame
- 2 - Tree Frame
- 3 - Document Grid
- 4 - Document Information

Tree Frame

On the left side of the Classic Integrated Desktop is the *Tree Frame*. It contains the organizational structure of all servers, libraries, WorkSite Workspaces, folders, worklists and saved searches. It is similar to the Folder List appearing in the FileSite desktop. See “Folder List” on page 76 for more information.

Click any icon in the Tree Frame to display its subfolders. Documents contained in a selected folder are listed in the *Document Grid*.

Shortcut Bar

The *Shortcut Bar* contains the Tree Frame for the WorkSite Server you are logged into. The WorkSite shortcut bar exists as a default and cannot be deleted. You can create a shortcut bar beneath the Browse Bar and add folders to it.

To create a shortcut bar:

1. Right-click the WorkSite shortcut bar. Select **Add Group** from the menu.
2. Enter the name of the new group.

To delete a shortcut bar:

1. Right-click the shortcut bar you wish to delete.
2. Select **Remove Group** from the menu.

To insert folders into the shortcut bar:

1. In the Tree Frame, right-click the folder to be added to a shortcut bar.
2. Select **Add to Shortcut bar from the menu**.
3. Select the shortcut bar in which you wish to insert the folder.

Server Selection List

The *Server Selection* list allows you to select the servers currently available to you. Click the list to open the menu and select the server from the list.

Document Grid

All the documents of a selected folder in the Tree Frame are displayed in the Document Grid. Click the column headings to organize the list in ascending or descending order.

Make selections from the following options in the *Document Selection* area to narrow the focus of documents in the Document Grid:

- Database
- Document Number
- Document Version
- Document Type
- Last Modified

Toolbar

The options on the Classic Integrated Desktop are described in this section.

Search

Click **Search** to perform a standard WorkSite search. The Search dialog box opens. See Chapter 6 for detailed information on performing WorkSite searches.

Show Fields

The **Show Fields** icon allows you to configure the columns that appear in the Document Grid. Click the **Show Fields** icon to open the Select Fields to Display in Grid dialog box. Choose the fields to display as columns in the Document Grid from this dialog box.

Forward and Back Buttons

Use the **Forward** and **Back** buttons to navigate through folders in the tree in the order in which you visited them.

Working with Documents in the Classic Integrated Desktop

You can perform all the usual document functions from the Classic Integrated Desktop by right-clicking the document in the Document Grid and selecting a command from the context menu.

All commands in the Classic Integrated Desktop are similar to the Enhanced Integrated Desktop except the **Open**, **Save**, and **Save As** commands.

See “Working with Documents in the Enhanced Integrated Desktop” on page 271 for information on the other document functions.

Opening Documents

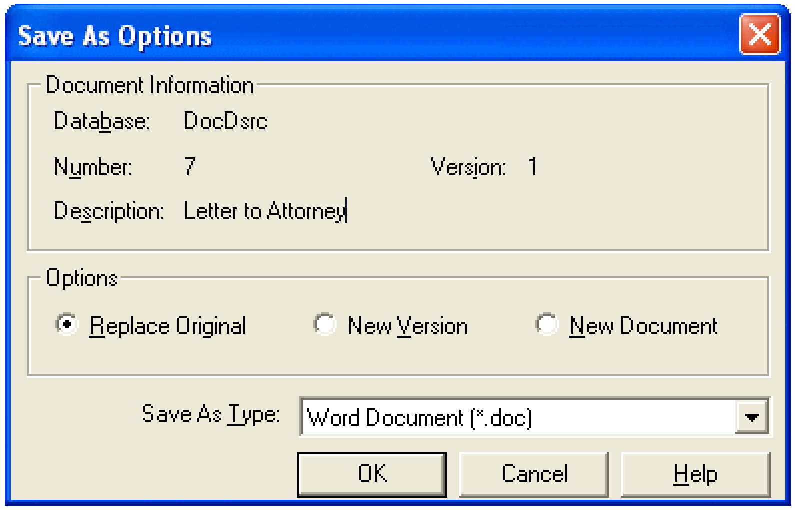
To use the Classic Integrated Desktop to access a document in WorkSite, select the document in the Document Grid and click **Open** at the bottom of the desktop. By default, FileSite opens the document when you click the **Open** button. Other options are available from the **Open** menu:

- **Open**. Opens the original document in the WorkSite library.
- **Open Read-only**. Opens a read-only copy of the document.
- **Open a Copy**. FileSite generates a copy of the document and launches the New Profile dialog box for you to enter the new document’s profile information.
- **Open a New Version**. FileSite creates a new version of the document and launches the New Version Profile dialog box for you to enter the new version's profile information.
- **Open and Repair**. Opens and repairs the corrupted document.
- **Local Open.** Opens the local copy of the document stored on your local or network drive.

Saving Documents

If you create a new document or a local file and choose **Save** or **Save As** from the **File** menu, the Save As Options dialog box appears.

Figure 150 Save As Options dialog box, Classic mode



To move between fields, use the **TAB** key, arrow keys, and **ALT** key plus underscored letter.

There are three options for saving a document:

- **Replace Original.** Replaces the original document. This option functions the same as selecting **Save** from the **File** menu. If you have Read access to the document, you cannot use this option. Instead, save the document as a **New Version** of the original document or as a **New Document**.
- **New Version.** FileSite automatically assigns a new version number to the document and the New Version Profile dialog box opens to enter the new version's profile information.
- **New Document.** Launches the New Profile dialog box for you to enter the new document's profile information.

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

If the active document does not exist in FileSite when you select the **Save As** command, then FileSite saves it as a new document.

NOTE The **Save As** command in an actively integrated application functions the same as the **WorkSite Save As** command in a passively integrated application.

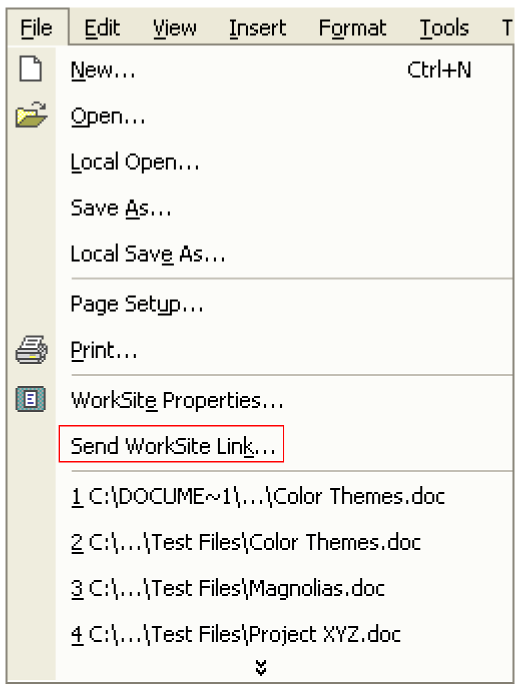
Working with WorkSite Links in Office Integration

In the integrated application, you can perform various linking functions with WorkSite documents using WorkSite commands on the application's menu.

File Menu

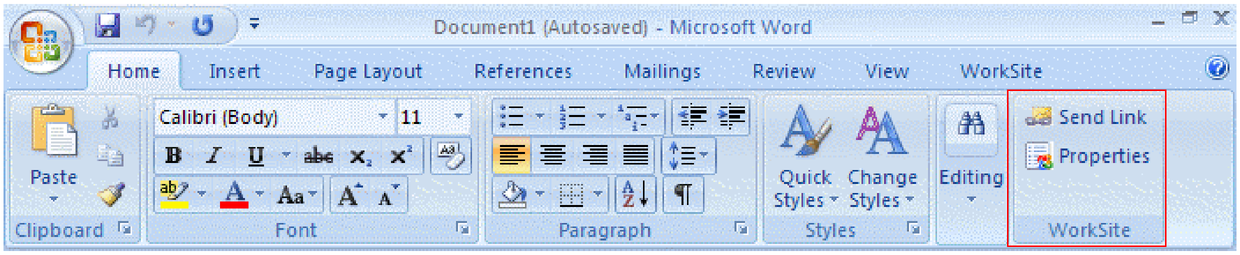
From the **File** menu, select **Send WorkSite Link** to send an e-mail containing a link to the open WorkSite document.

Figure 151 Microsoft Word integrated File menu



In Office 2007 Integration or Office 2010 Integration, the **Send Link** option appears on the **Home** tab and the **WorkSite** tab of the ribbon bar.

Figure 152 Example Send Link option on Home ribbon bar

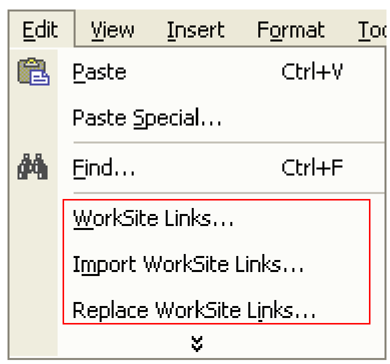


Edit Menu

From the **Edit** menu, you can perform the following operations in WorkSite documents containing linked objects (see Figure 153):

- Importing Documents containing Linked Objects
- Editing Links in Documents containing Linked Objects
- Replacing Links in Documents containing Linked Objects

Figure 153 Edit menu

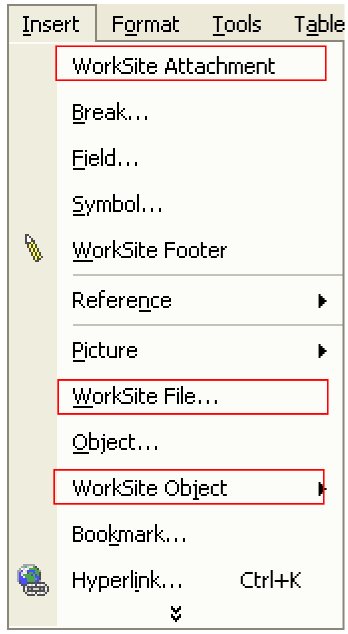


Insert Menu

From the **Insert** menu, you can perform the following linking functions:

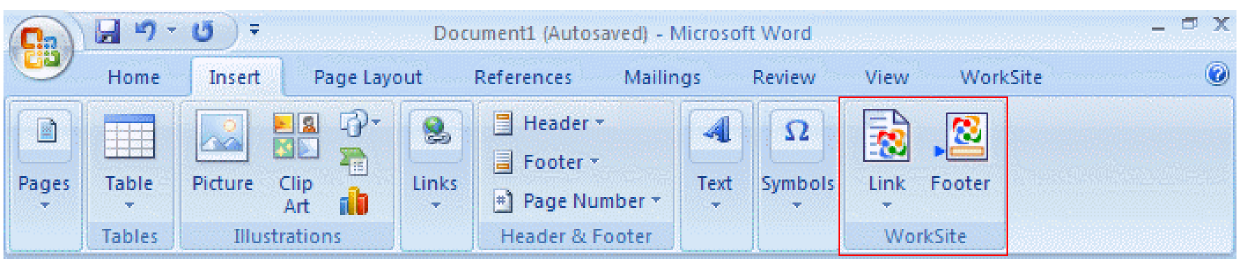
- Inserting links in documents
- Inserting files in documents
- Inserting hyperlinks in documents

Figure 154 Insert menu



In Office 2007 Integration or Office 2010 Integration, the WorkSite commands **Insert Link** and **Insert Footer** are located on the **Insert** tab of the ribbon bar.

Figure 155 Example WorkSite Link and Footer on Insert ribbon bar



The **WorkSite Link** button has the following options:

- **Insert Link**. Inserts the entire content of the WorkSite document as a WorkSite OLE link into another WorkSite document.
- **Insert Link As Icon**. Insert a link to a WorkSite document as an icon into another WorkSite document. Click the icon to view the document.
- **Insert Hyperlink**. Inserts a hyperlink to a WorkSite document into another WorkSite document. Roll over the hyperlink to view the document's properties in a tooltip. See "Inserting a WorkSite Hyperlink" on page 285.
- **Insert Text from File**. Insert selected text from a WorkSite document into another WorkSite document.

- **Edit Links**. Edit the links in a WorkSite document containing linked objects.
- **Import Links**. Import a WorkSite document containing linked objects.
- **Replace Links**. Replace the links in a WorkSite document containing linked objects.

Figure 156 Example Insert Link menu on WorkSite ribbon bar

See Chapter 8 for more detailed information.

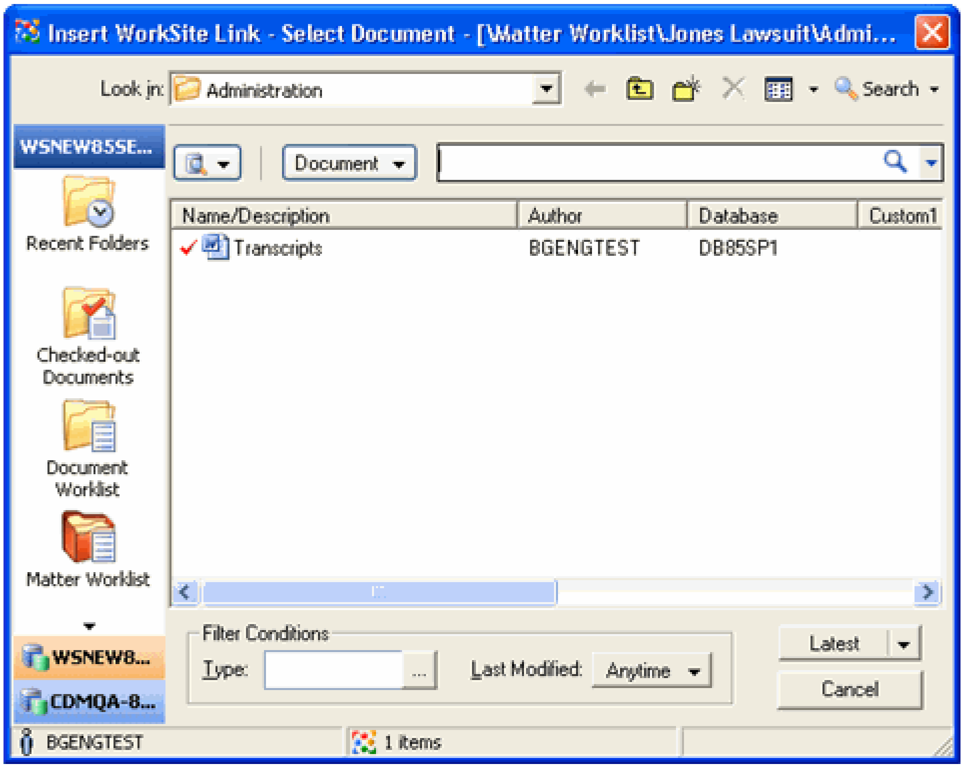
Inserting a WorkSite Hyperlink

In Microsoft Office integration with FileSite, you can insert a hyperlink to a WorkSite document into another WorkSite document.

1. Open the document in which you want to insert the hyperlink.
2. Place the cursor where you want to insert the hyperlink, or select the text you want to hyperlink.
3. From the **Insert menu**, point to **WorkSite Object**, and select **Insert Hyperlink**. The Insert WorkSite Link dialog box appears.

   In Office 2007 or Office 2010, select **Insert Hyperlink** from the **Insert Link** menu on the **WorkSite** tab (see Figure 156).

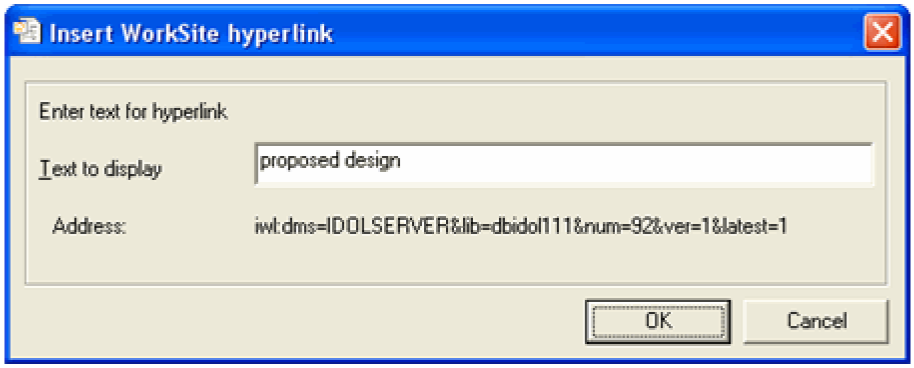
Figure 157 Insert WorkSite Link dialog box



4. Navigate to the document you want to hyperlink to your document.
5. You can hyperlink any version of the document. Click the **Latest** button drop-down arrow to display the following options:
   - **Latest**. Inserts a hyperlink that will always point to the most current version of the document to which you have access rights.
   - **This Version**. Inserts a hyperlink that will always point to the selected version of the document.

   When you select **either version option**, the Insert WorkSite Hyperlink dialog box appears.

Figure 158 Insert WorkSite Hyperlink dialog box



6. If you selected the text you want to hyperlink in Step 2, the text appears in the **Text to display** field. You can modify the hyperlink text to be displayed.
7. Click **OK**. The hyperlink to the WorkSite document appears.
8. Roll over the hyperlink to display the linked document's properties in a tooltip. Use **CTRL+click** to open the linked document in its native application.

Inserting a WorkSite Footer

In Microsoft Office integrated applications, you can insert a footer into a WorkSite document. From the **Insert** menu, select **WorkSite Footer**. A footer with the following information displays:

Document Name: Document Number–Version Number

NOTE Other footer information, such as Author, Page Number, file path information, and so on can be inserted using standard options available in Microsoft Word.

If the **Document Name** field is empty, only the **Document Number** and **Version Number** are displayed.

In Office 2007 Integration or Office 2010 Integration, the **Footer** option is available from the **Insert** ribbon bar. See Figure 156 on page 285.

Performing a WorkSite Mail Merge

To perform a mail merge, you must have a main document and a data source document. The main document is a form that contains the text that will appear in the final document. The document includes merge fields to indicate where variable information from the data source document should be inserted.

The data source document holds a table that contains the specific information to complete the form in the main document. When the main document and the data source document are merged, they create a third document that inserts each row of the table in the data source document into the merge fields on the main document form. The third document contains as many forms as there are rows in the data source table. You can store all three documents in WorkSite.

When you are performing a mail merge in Word using FileSite, certain scenarios can occur as indicated in Table 35.

Table 35 Mail Merge Scenarios

If...	Then...
Your main document is in WorkSite, but your Data Source document is not.	Create the Data Source document, if necessary. Import it into WorkSite. Then follow the procedure given in *"Performing a Mail Merge Using WorkSite Documents"*
Your data Source document is in WorkSite, but your Main document is not.	Follow the procedure given in *"Performing a Mail Merge Using Newly Created Documents"*
Your main document and Data Source document are both in WorkSite.	Follow the procedure given in *"Performing a Mail Merge Using WorkSite Documents"*

NOTE You may need to switch to the Microsoft Word Mail Merge Wizard to complete the Mail Merge process. The following procedures indicate when this is necessary.

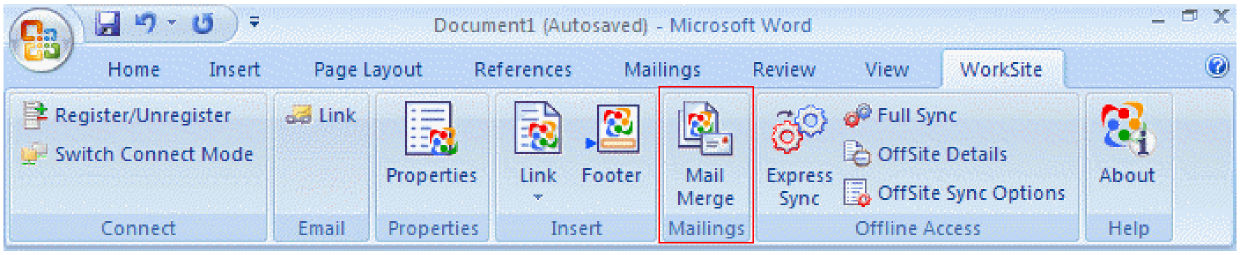
Performing a Mail Merge Using WorkSite Documents

NOTE You may want to display the Microsoft Word Mail Merge toolbar and use the buttons when performing a WorkSite Mail Merge.

1. Launch Microsoft Word, and select **WorkSite Mail Merge** from the **Tools** menu.

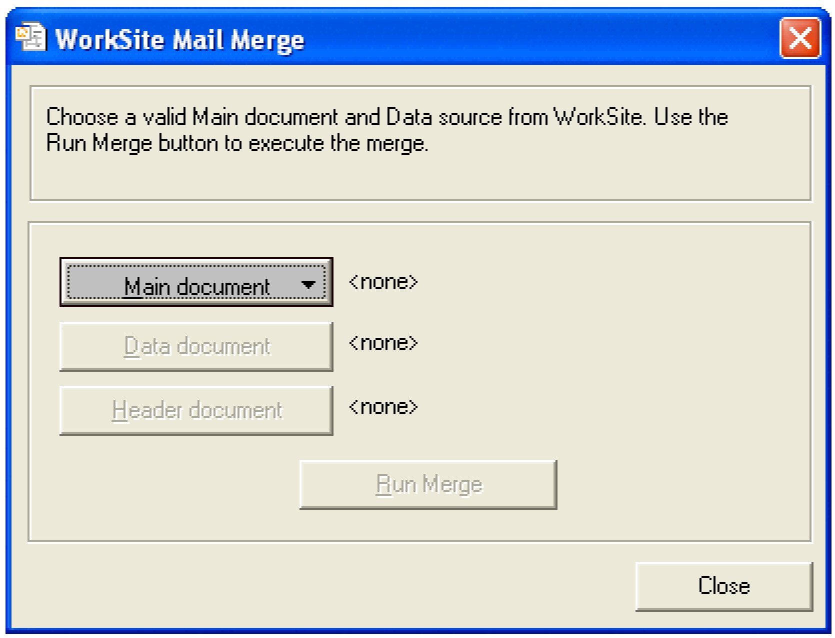
   In Office 2007 Integration or Office 2010 Integration, the **Mail Merge** option is available from the **WorkSite** tab of the ribbon bar.

Figure 159 Example WorkSite ribbon bar, Mail Merge option



The WorkSite Mail Merge dialog box appears.

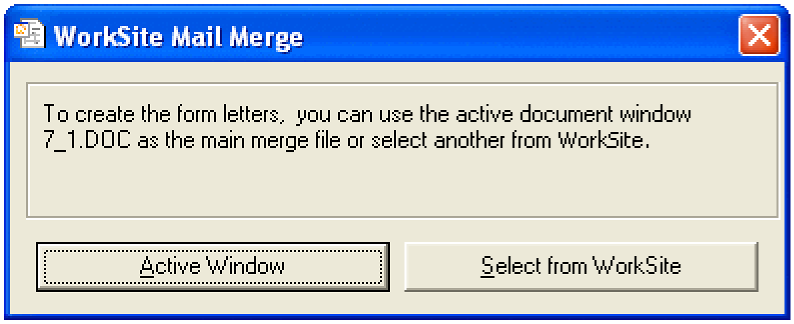
Figure 160 WorkSite Mail Merge dialog box



2. Click the **Main document** button drop-down arrow, and choose the kind of main document you want to use.
   - Form letters
   - Mailing labels
   - Envelopes
   - Catalog
   - Select **Restore to Normal Word Document** to restore the document selected as the main document to a non-mail merge document.

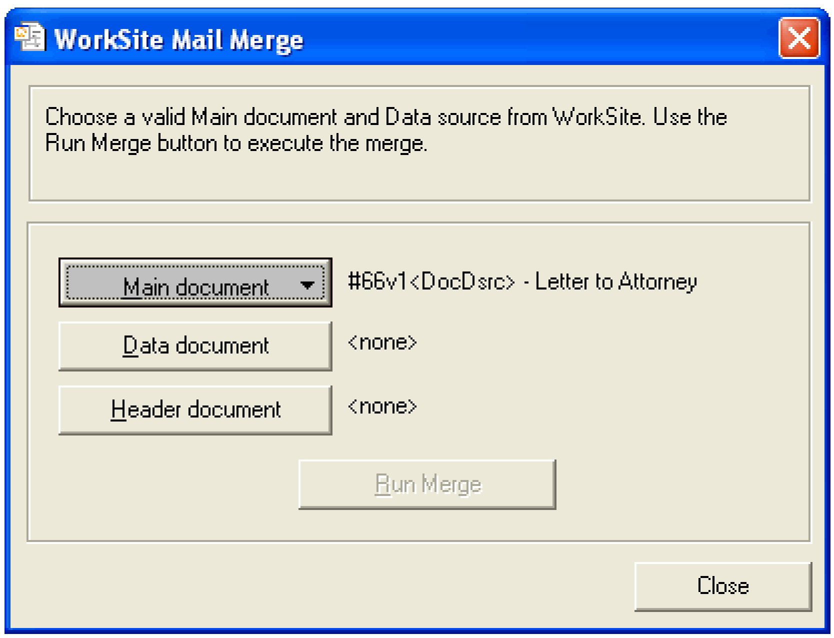
   The following dialog box opens.

Figure 161 WorkSite Mail Merge dialog box, Main document selection



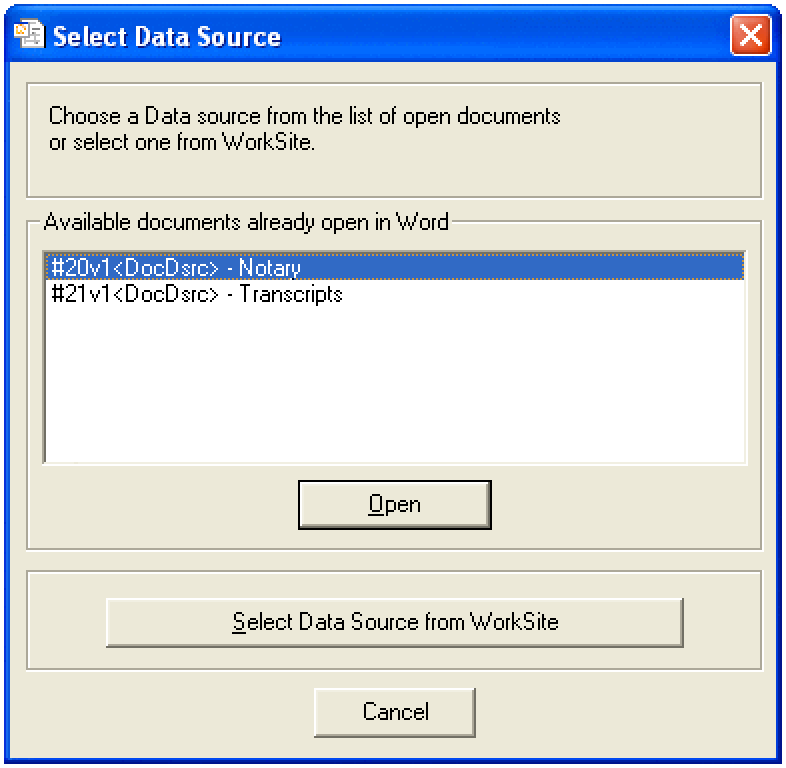
3. If your Main document is in WorkSite, click **Select from WorkSite**. The WorkSite Integrated Open dialog box opens.
4. Browse and open the document from the WorkSite Integrated Open dialog box. The WorkSite Mail Merge dialog box opens with the selected document name appearing against the **Main document** button, as shown in Figure 162.

Figure 162 WorkSite Mail Merge dialog box, Main document selected



5. Click **Data document** on the WorkSite Mail Merge dialog box. The Select Data Source dialog box opens.

Figure 163 Select Data Source dialog box

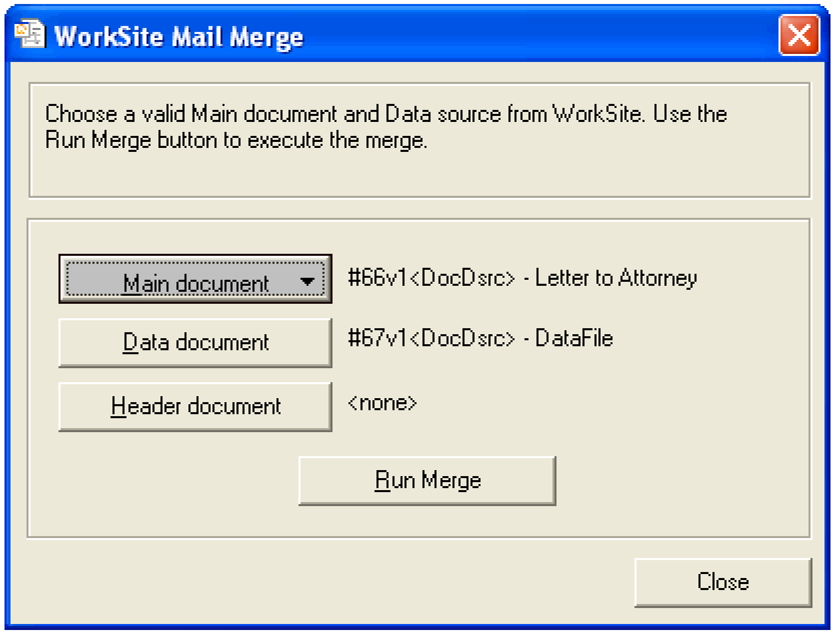


6. Select a Data Source using one of the following methods:

   - Select one of the available documents already open in Word and click **Open**.
   - Click **Select Data Source from WorkSite**. The WorkSite Integrated Select Data Source dialog box appears.

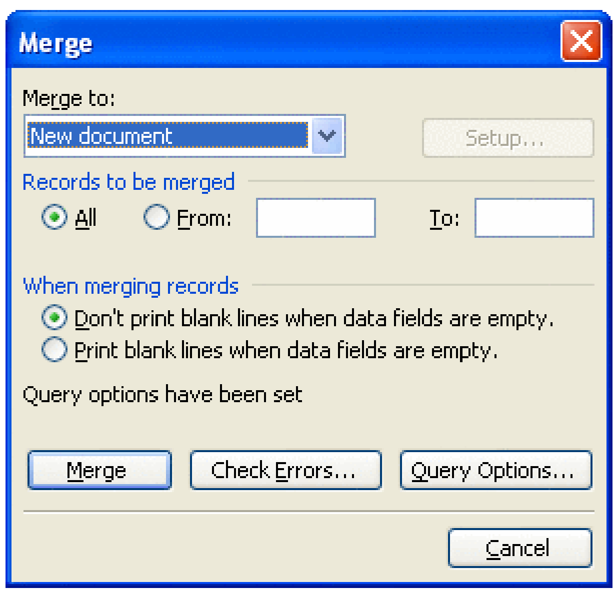
   Browse and open the document from the WorkSite Integrated Select Data Source dialog box. The WorkSite Mail Merge dialog box appears with the selected document name appearing against the **Data document** button, as shown in Figure 164.

Figure 164 WorkSite Mail Merge dialog box, Data document selected



7. (Optional) If you are using a Header document that is stored in WorkSite, click **Header document** on the WorkSite Mail Merge dialog box and open it.
8. Click **Run Merge** on the WorkSite Mail Merge dialog box to open the Merge dialog box.

Figure 165 Merge dialog box



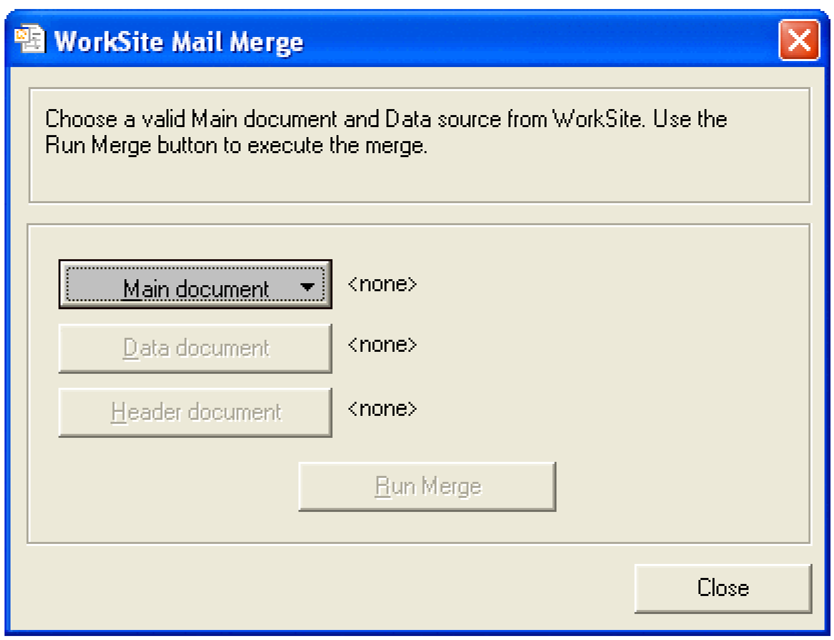
9. In the Microsoft Office Merge dialog box, change **Query Options** if necessary, and make other selections. When you have finished, click **Merge** to perform the mail merge operation.

Performing a Mail Merge Using Newly Created Documents

NOTE You may want to display the Microsoft Word Mail Merge toolbar and use the buttons when performing a WorkSite Mail Merge.

1. Launch the Microsoft Word integrated application.
2. Open the document you want to use as the Main Document from your local or network drive.
3. Select **WorkSite Mail Merge** from the **Tools** menu. The WorkSite Mail Merge dialog box opens.

Figure 166 WorkSite Mail Merge dialog box

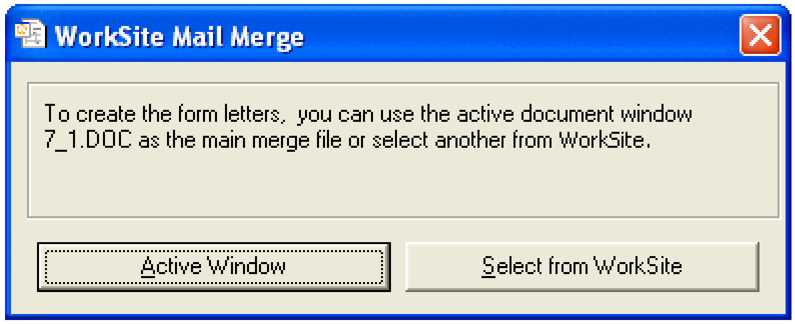


4. Click the **Main document** button drop-down arrow and choose the type that corresponds to your main document.
   - Form letters
   - Mailing labels
   - Envelopes
   - Catalog

- Click **Restore to normal Microsoft Word document** to restore the document selected as the main document to a non-mail merge document.

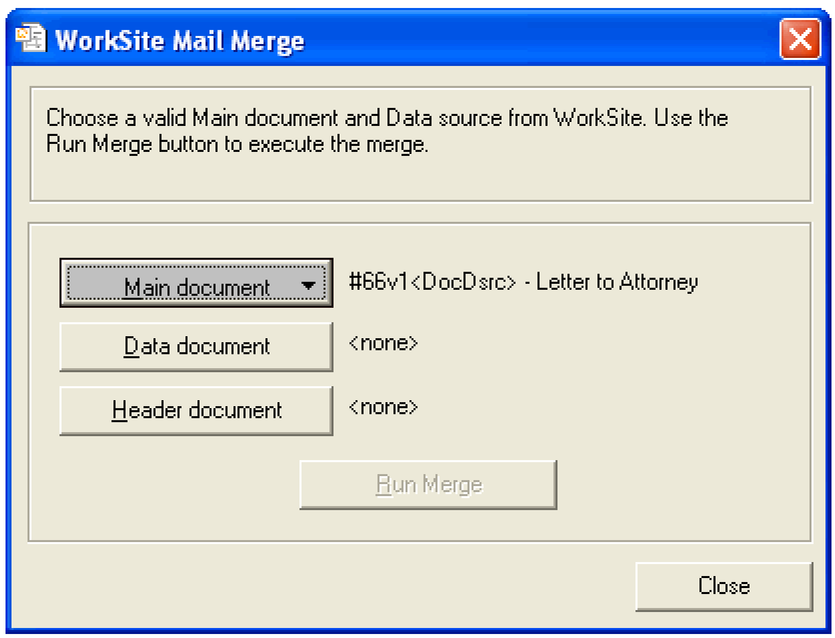
  The following dialog box opens.

Figure 167 WorkSite Mail Merge dialog box, Main document selection



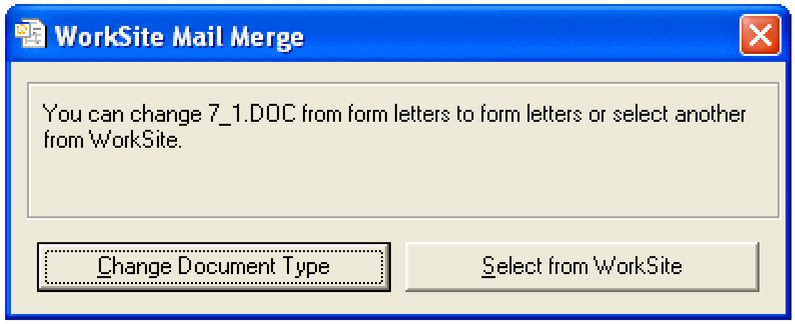
5. Click **Active Window** to return to the WorkSite Mail Merge dialog box. The active document name appears against the **Main document** button, as shown in Figure 168.

Figure 168 WorkSite Mail Merge dialog box, Active document selected



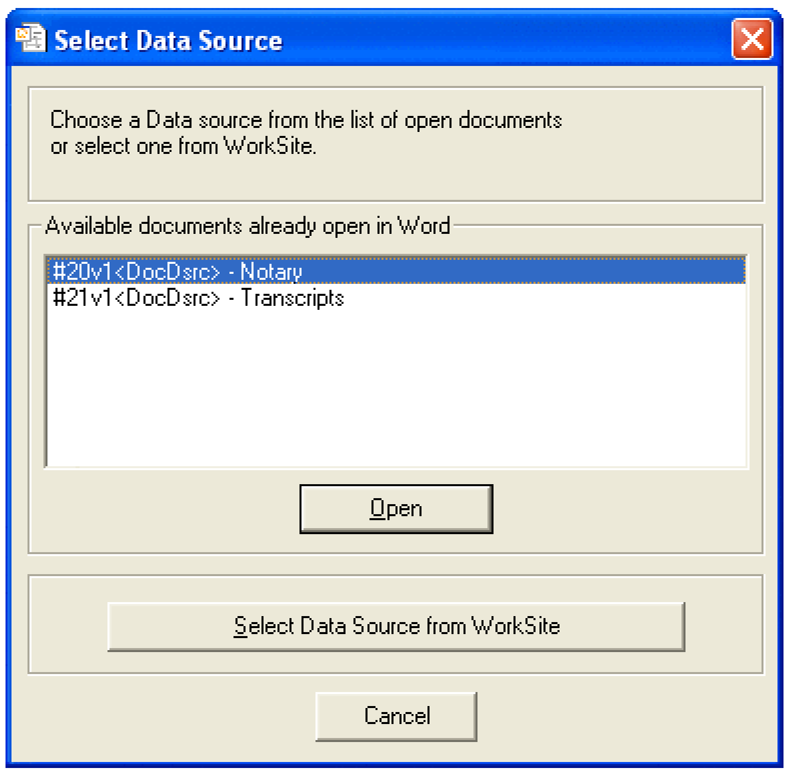
6. To change the main document to a different document type, for example from labels to envelopes, click the **Main document** button drop-down arrow and choose the kind of main document you want to use. The dialog box shown in Figure 169 appears.

Figure 169 WorkSite Mail Merge dialog box, Change Document Type



7. Click **Change Document Type** to confirm the change to a different document type and return to the WorkSite Mail Merge dialog box.
8. Click **Data document** on the WorkSite Mail Merge dialog box. The Select Data Source dialog box opens.

Figure 170 Select Data Source dialog box



The remaining procedure varies according to the type of Data Source document.

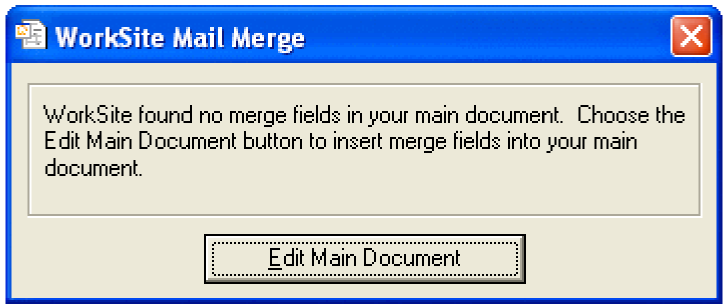
- If your data source is a Microsoft Word or Excel document, proceed to Step 9.
- If your data source is a Microsoft Outlook Contacts list, proceed to Step 10.

- If your data source is an Access library, proceed to Step 9.

9. Click **Select Data Source from WorkSite**, and open the Data Source document from the WorkSite Integrated Select Data Source dialog box.

    - If you need to create merge fields in your Main document, a message appears indicating that you need to edit the Main document. Click **Edit Main Document**. Add the merge fields to your Main document, then proceed with the mail merge.

    Figure 171 Edit Main Document message box

    - If you do not need to create merge fields in your Main document, proceed to Step 10.

10. Click **Close** to close the WorkSite Mail Merge dialog box.

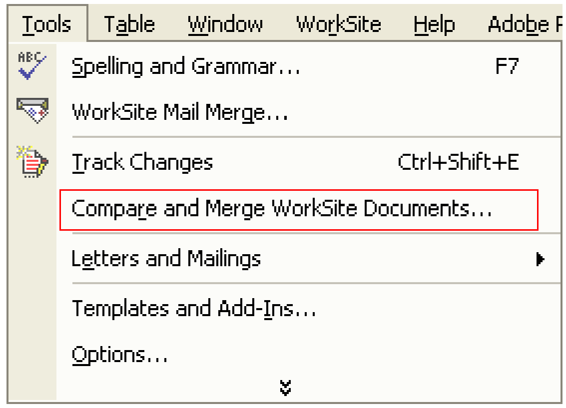
11. In Microsoft Word, from the **Tools** menu, point to **Letters and Mailing** and select **Mail Merge**. The Microsoft Word Mail Merge Wizard task pane appears. Follow Microsoft's instructions to complete the merge.

Comparing and Merging WorkSite Documents

Use the **Compare and Merge WorkSite Documents** option on the **Tools** menu of the integrated application to compare the currently open document against a document in a WorkSite library.

1. Launch Microsoft Word.
2. From the **Tools menu**, select **Compare and Merge WorkSite Documents**.

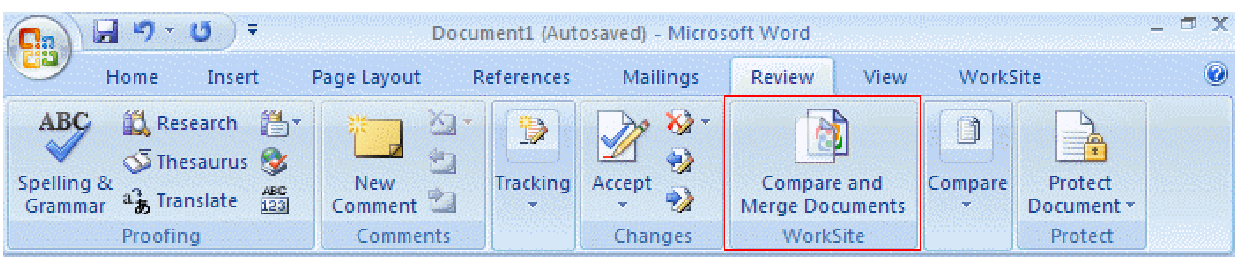
Figure 172 Tools menu



NOTE If this menu option does not appear, it has not been enabled by your WorkSite Administrator. Contact your WorkSite Administrator for more information.

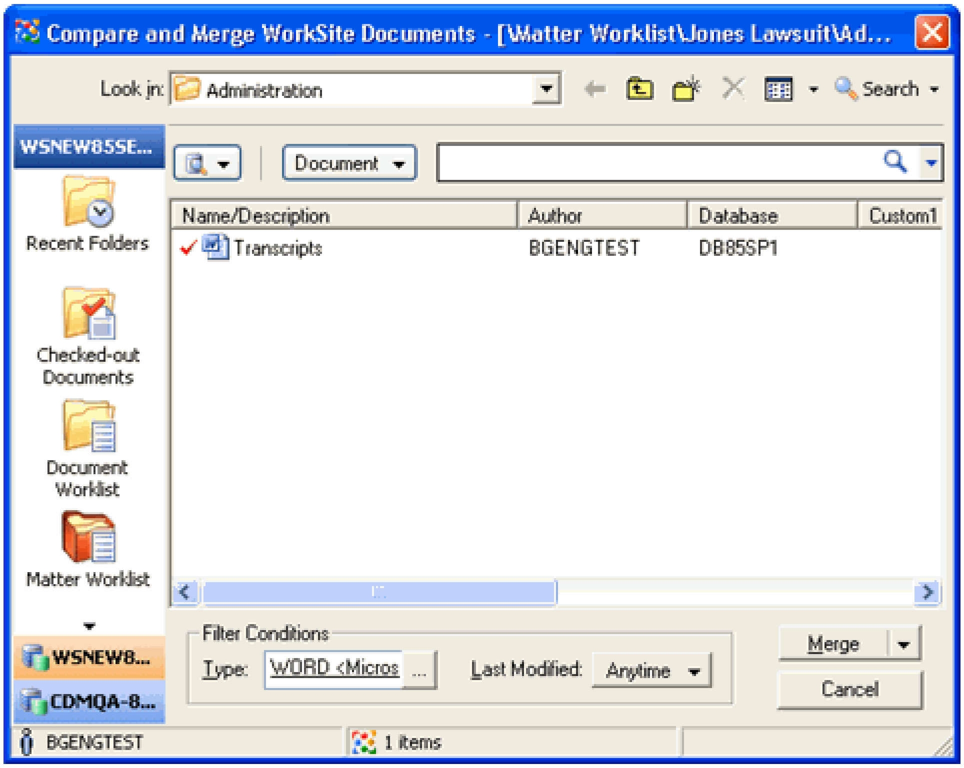
In Office 2007 Integration or Office 2010 Integration, the **Compare and Merge WorkSite Documents** option is available from the **Review** tab of the ribbon bar.

Figure 173 Example Review ribbon bar, Compare and Merge WorkSite Documents option



The WorkSite Integrated Compare and Merge WorkSite Documents dialog box opens.

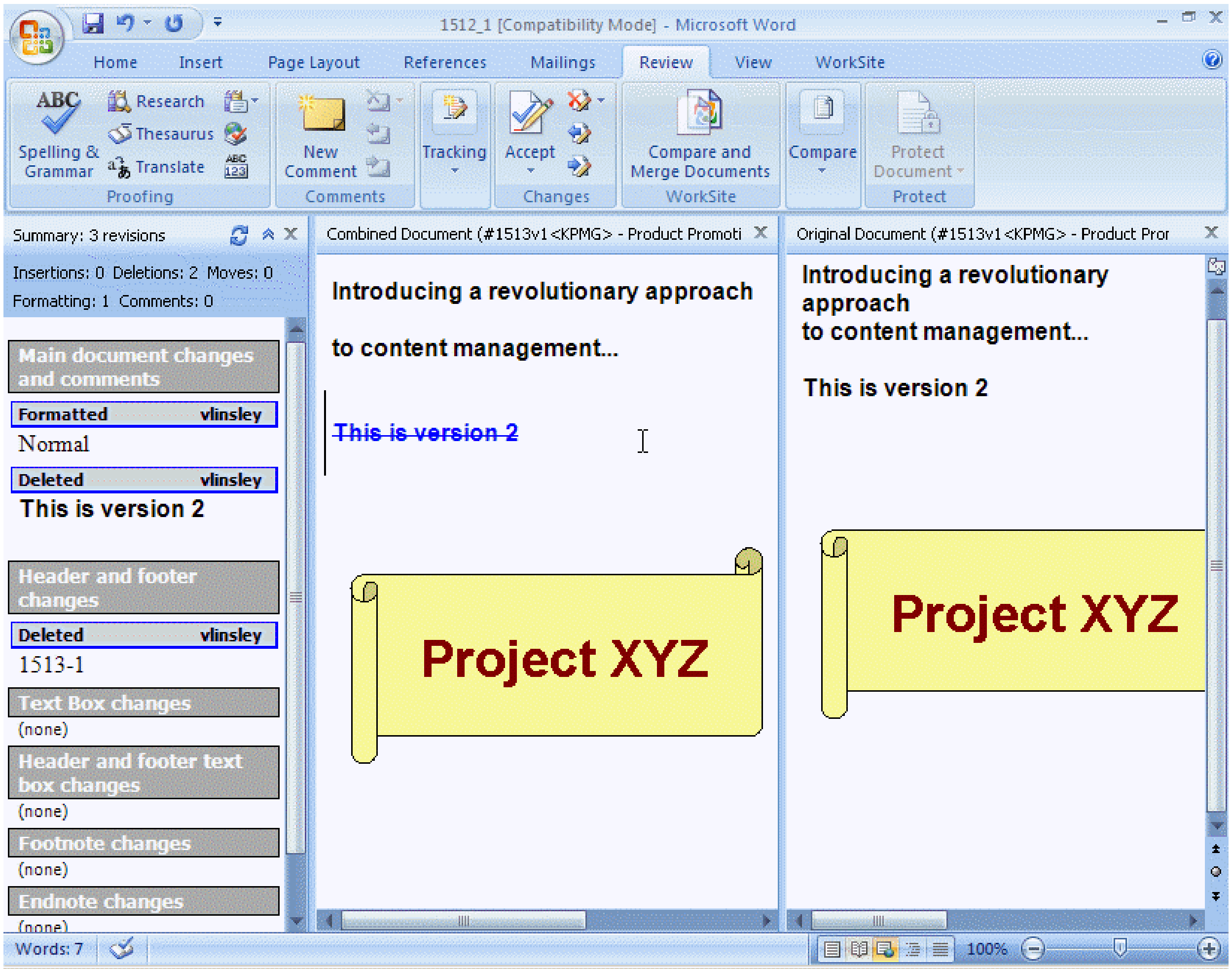
Figure 174 Compare and Merge WorkSite Documents dialog box



3. Navigate to the document you want to compare with the open document. You can also use the Express Search panel to find a location. See “Express Search Panel” on page 266 for more information on using this panel.
4. Click the **Merge** button drop-down arrow to display a list of options:
   - Merge
   - Merge into current document
   - Merge into new document
5. Make your selection to perform the compare and merge operation.

In Office 2007 Integration or Office 2010 Integration, the compare and merge operation returns multiple windows comparing the original document and the merged document.

Figure 175 Example Compare and Merge Documents result



Additional Microsoft Office Integration Functions

In an integrated application, the **WorkSite** menu option appears in the menu bar.

For Office 2007 Integration or Office 2010 Integration, the **WorkSite** tab appears in the ribbon bar.

You can perform the following tasks from the **WorkSite** menu or tab:

- Connecting to and registering WorkSite Servers. See "Register/Unregister WorkSite Servers" on page 300.
- Performing synchronization tasks. See "Synchronization Tasks" on page 300.
- Viewing information about the Integration module. See "About the Integration Module" on page 300.

- Changing the connection mode. See “Switch Connection Mode” on page 301.

Register/Unregister WorkSite Servers

Your first step in using the Microsoft Office Integration Module is to register the WorkSite Servers you will use. The WorkSite Server contains your documents and libraries. To register and log into a WorkSite Server, you need a valid Login, Password and Server name. The **Register/Unregister** menu option is only available when you use FileSite in the online mode. It is not available in offline mode, and it does not appear on the **WorkSite** menu (or **WorkSite** tab for Office 2007 or Office 2010) in local mode.

See “Connecting to WorkSite Servers” on page 53 for more information.

Synchronization Tasks

Use the **Offline Access** menu to configure your synchronization options. It opens a submenu with the following options:

- Express Synchronize
- Full Synchronize
- View Offline Details
- Offsite Synchronization Settings

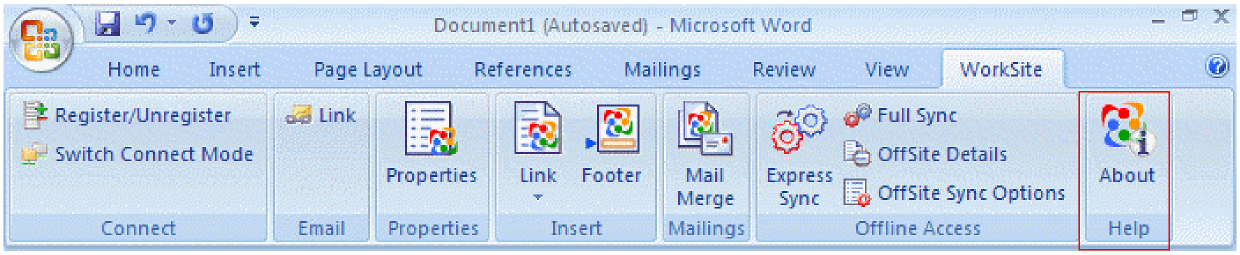
NOTE Options related to OffSite do not appear unless OffSite is installed with your WorkSite client application. Refer to the *OffSite Installation and User’s Guide* for more information.

About the Integration Module

The **About WorkSite Integration** menu option displays information about the Integration module. Select the **About WorkSite Integration** menu option to display the About WorkSite Integration dialog box.

In Office 2007 Integration or Office 2010 Integration, the **About WorkSite** option is on the **WorkSite** tab of the ribbon bar.

Figure 176 Example WorkSite ribbon bar, About WorkSite option



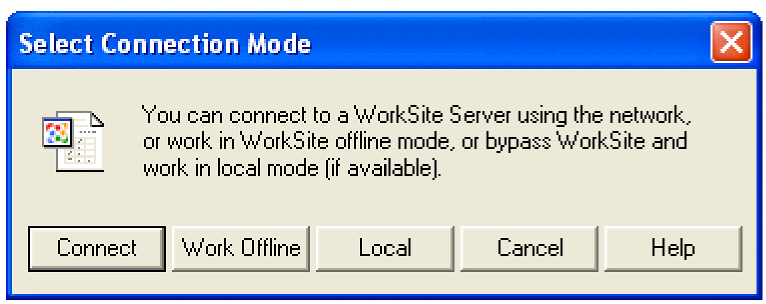
The About WorkSite Integration dialog box displays information about the application and the current session and user.

Switch Connection Mode

The **Switch Connection Mode** menu option enables you to change the connection mode you are presently in.

Select the **Switch Connection Mode** menu option to display the Select Connection Mode dialog box. This dialog box is similar to Figure 128, but includes a **Cancel** button, which is used to close the dialog box without changing the connection mode.

Figure 177 Select Connection Mode dialog box



Adobe Acrobat Integration

The Adobe Acrobat Integration Module provides users of Adobe Acrobat and Acrobat Reader with an integrated interface to the WorkSite document management system. When a user opens Acrobat or Acrobat Reader, an integrated user interface presents menu options that enable the user to perform operations on PDF documents within the WorkSite system.

Requirements

The following software components are required for a successful installation of the Adobe Acrobat Integration Module:

- Adobe Acrobat or Adobe Acrobat Reader 6.04 (Standard and Professional), 7.08, or 8.0.
- FileSite 8.2 SP1 or later

NOTE The Adobe Acrobat Integration Module is installed during the installation of FileSite. Contact your WorkSite Administrator for more information on installing the Integration Module.

Getting Started

The behavior of the Adobe Acrobat and Acrobat Reader integrated application at startup depends on how your system has been configured and whether other WorkSite components are running. The Adobe Integration module can start in one of the following ways:

- Prompts you to select a connection mode.

  For more information about selecting a connection mode when using an integrated application, see “Choice of Connection Mode” on page 248.

- Automatically starts in online mode.

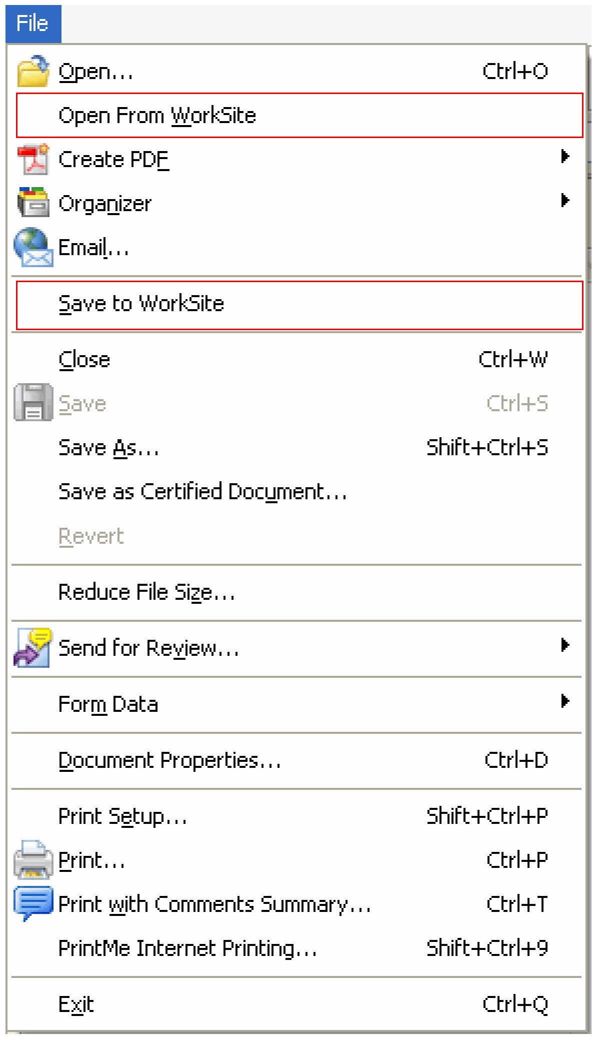
  For more information, see “Automatic Online Mode” on page 249.

NOTE When you are working in online mode, you can still access documents from your local or network drives using the **Open**, **Save**, and **Save As** options on the Acrobat or Acrobat Reader **File** menu.

Integration with WorkSite

When the Adobe Acrobat and Acrobat Reader application is integrated with WorkSite, its **File** menu changes to support WorkSite functionality. Certain new commands such as **Open from WorkSite and Save to WorkSite** are added to the menu. Figure 178 illustrates the Adobe Acrobat or Acrobat Reader **File** menu when integrated with FileSite.

Figure 178 Integrated Adobe Acrobat or Acrobat Reader File menu



Open from WorkSite

The **Open from WorkSite** command launches the WorkSite Integrated Open dialog box, instead of the default Adobe Acrobat or Acrobat Reader Open dialog box.

NOTE For a detailed description of the WorkSite Integrated Desktop, see "Enhanced Application Integration" on page 262 and "Classic Application Integration" on page 277.

Save to WorkSite

The **Save to WorkSite** command behaves differently in the Classic and Enhanced modes of integration. In the Enhanced mode of integration, the **Save to WorkSite** command opens the WorkSite Integrated Save As dialog box. In the Classic mode of integration, this command opens the Save As Options dialog box.

See “Enhanced Application Integration” on page 262 and “Classic Application Integration” on page 277 for more information on the functionality of the WorkSite Integrated Desktop.

Save and Save As

The **Save** and **Save As** commands open a standard Windows Save As dialog box. Use this dialog box to save the file to your local or network drive. This is a convenient way to save a WorkSite document locally. It is equivalent to using the **Export** function in FileSite.

Modes of Integration

Integration with the Adobe Acrobat and Acrobat Reader applications is available in two modes:

- Enhanced Application Integration
- Classic Application Integration

These modes affect the behavior of the **Open from WorkSite** and **Save to WorkSite** commands in the integrated application’s **File** menu.

Your WorkSite Administrator can set the integration mode to either Classic Application Integration or Enhanced Application Integration.

See “Enhanced Application Integration” on page 262 and “Classic Application Integration” on page 277 for more information.

Working with Documents in the Integrated Application

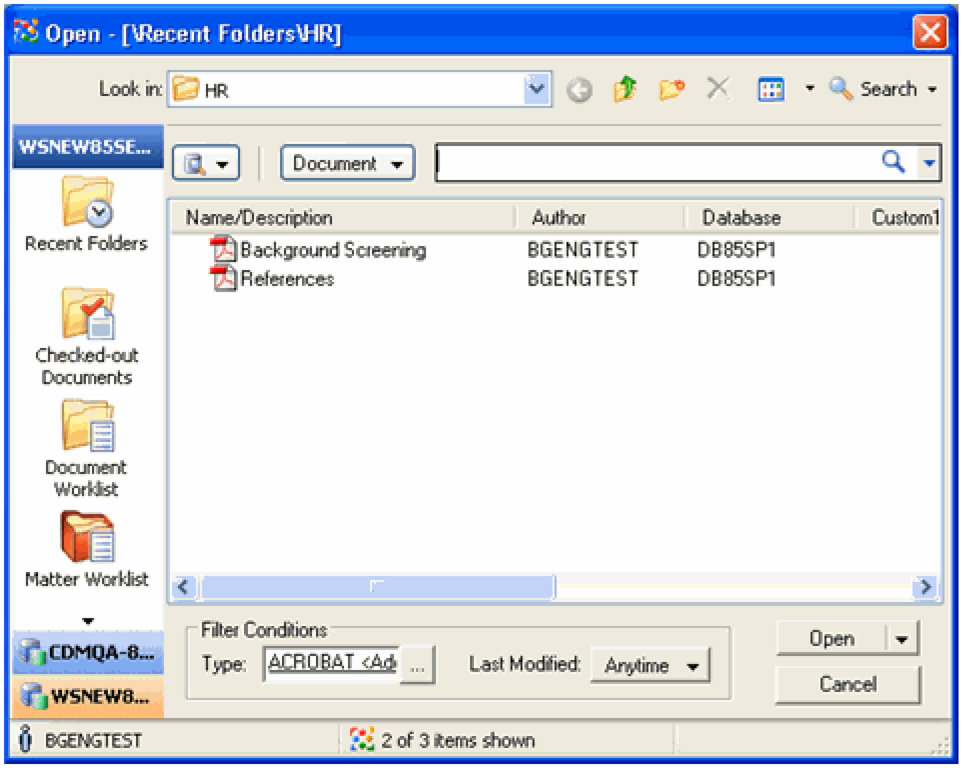
The document functions you can perform in the Adobe Integration module are similar to those you can perform in the Microsoft Office Integration module, though Adobe uses the **Open from WorkSite** and **Save to WorkSite** menu commands.

See “Working with Documents in the Enhanced Integrated Desktop” on page 271 and “Working with Documents in the Classic Integrated Desktop” on page 280 for information on the other document functions.

Opening Documents

1. From the **File** menu of the integrated Adobe Acrobat or Acrobat Reader application, select **Open from WorkSite**. The WorkSite Integrated Open dialog box opens.

Figure 179 WorkSite Integrated Open dialog box



2. Navigate to the document you want to open. You can also use the Express Search panel to find the document. See “Express Search Panel” on page 266 for more information on using this panel.

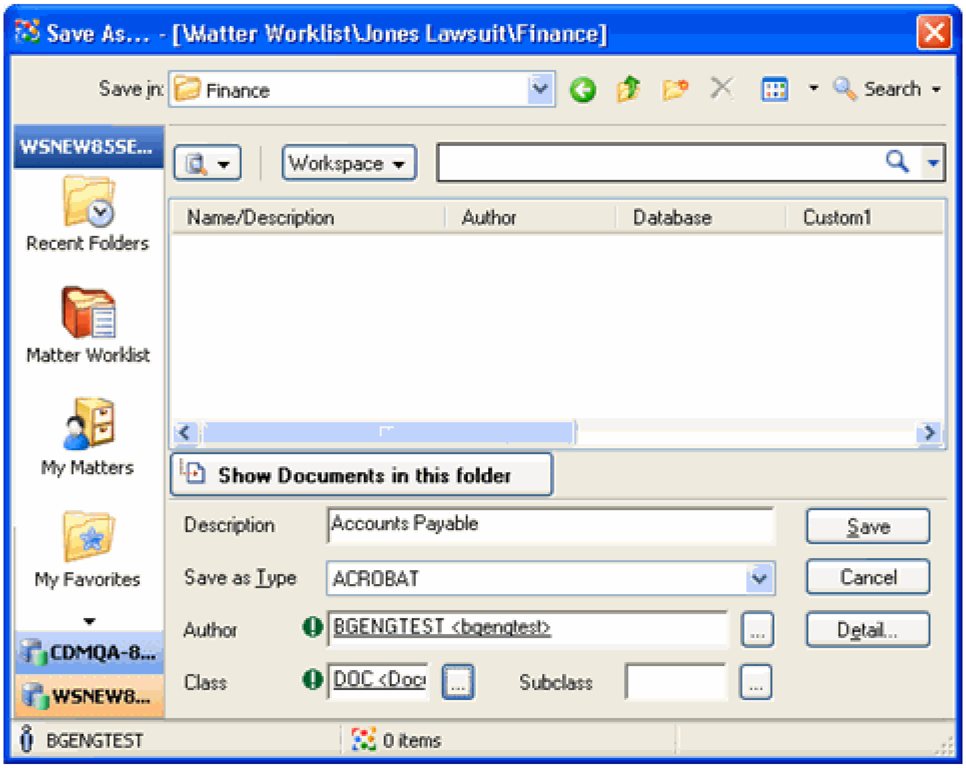
   Only Acrobat documents will display; however, you have the option of selecting a different document type using the **Type** lookup button in the **Filter Conditions** area.

3. Select a document in the Document Grid.
4. Click **Open** to open the document in the integrated Adobe Acrobat or Acrobat Reader viewer.

Saving Documents

1. From the **File** menu of the integrated Adobe Acrobat or Acrobat Reader application, select **Save to WorkSite**. The WorkSite Integrated Save As dialog box opens.

Figure 180 WorkSite Integrated Save As dialog box



2. Navigate to the Workspace or folder where you want to save the document. You can also use the Express Search panel to find a location. See "Express Search Panel" on page 266 for more information on using this panel.

   - To display the names of documents already in the current location, click **Show Documents in this folder**.
   - Enter the **Author**, **Class**, and **Subclass** (if any) fields.
   - Click **Save**.

NOTE When the document is added to the folder, the document automatically takes on the folder's profile properties or metadata. If the folder's metadata includes all required fields, FileSite automatically creates the profile without further input from you.

3. If the folder's metadata does **not** include all required fields, the New Profile dialog box opens for you to enter profile information. You can also open the New Profile dialog box by clicking **Detail**.
4. Click **Save** to save the document to the WorkSite library.

Additional Adobe Acrobat Integration Functions

In an integrated application, the **WorkSite** menu option appears in the menu bar. You can perform the following tasks from the **WorkSite** menu:

- Connect to and register WorkSite Servers. See "Register/Unregister WorkSite Servers" on page 300.
- View and edit document profile information. See "Properties" on page 307.
- Send WorkSite document links. See "Sending WorkSite Links" on page 307.
- Change the connection mode. See "Switch Connection Mode" on page 301.
- Perform synchronization tasks. See "Synchronization Tasks" on page 300.
- View information about the Integration module. See "About the Integration Module" on page 308.

Properties

When you select **Properties** from the **WorkSite** menu, the Properties dialog box for viewing or editing document profile information appears.

NOTE The Properties dialog box can be customized by your WorkSite Administrator. The dialog boxes that appear in your version of FileSite may differ from the default.

Users who have Read access to a document cannot change the information displayed in this dialog box. Users with Read/Write access can change certain fields, such as the **Comments** field. Only the Author and Operator of a document have the full authority to change the access privileges on the document. Edit the profile information according to the procedure described in "Editing Document Profile Information" on page 146.

Sending WorkSite Links

When you select **Send WorkSite Link** from the **WorkSite** menu, a new e-mail message appears with the WorkSite link (as an .nrl file) to the currently active document included as an attachment. The link can then be sent to any user who has access to the document.

About the Integration Module

The **About WorkSite Acrobat Integration** menu option displays information about the Integration module. Select the **About WorkSite Acrobat Integration** menu option to display the About WorkSite Acrobat Integration dialog box. This dialog box displays information about the application and the current session and user.

Integration with Other Applications

FileSite can be integrated with the following document utilities:

- DocuComp
- CompareRite
- FullAuthority
- CiteRite

These document utilities can be directly accessed from the FileSite desktop and not through an integrated application (such as Microsoft Word) or the WorkSite Integrated Desktop.

In FileSite, from the **Document** menu point to **Applications**, and select the appropriate application from the list.

NOTE You must have a path established to the directories for each of these utilities. Each WorkSite library automatically provides entries in the application table for each of these document utilities. Contact your WorkSite Administrator for more information.

Integration with DocuComp

DocuComp is an application that enables you to compare versions of documents and to produce comparison reports automatically. For the **DocuComp** menu option to work properly, this application must be integrated correctly with FileSite. Contact your WorkSite Administrator for assistance.

Comparing Documents using DocuComp

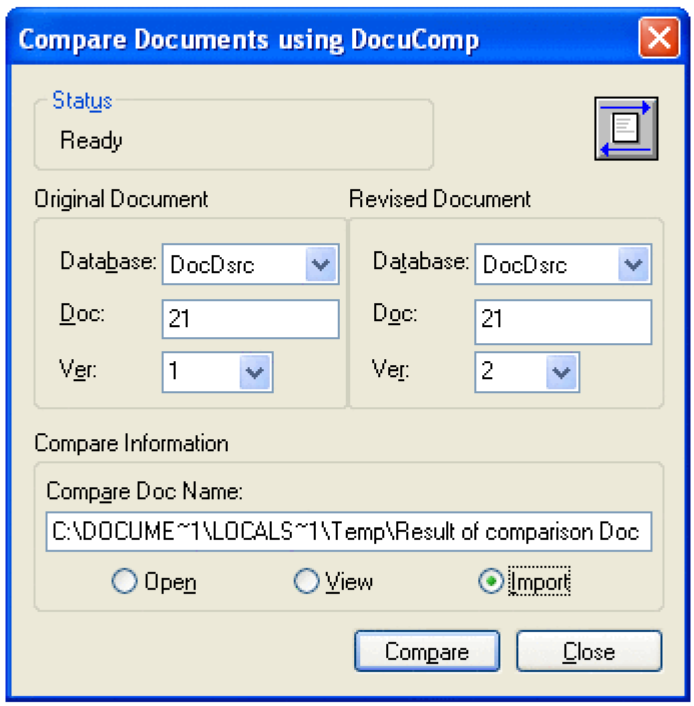
1. In FileSite, select the document whose versions you want to compare from the Document Grid.

2. From the **Document** menu, point to **Document Info** and select **Versions**. A list of the document's version is displayed in the Document Versions window.
3. From this list, select the two versions of the document you want to compare.

NOTE To compare versions of the same document you must show all versions of the document. See "Document View" on page 67 for information on setting this option.

4. From the **Document** menu, point to **Applications and select DocuComp** from the submenu. The Compare Documents using DocuComp dialog box opens.

Figure 181 Compare Documents using DocuComp dialog box



The version of the document shown first in the Document Results Frame is listed as the Original Document. You can sort the Document Results Frame by version number by clicking the **Version** column heading.

5. Select the way you want to handle the resulting comparison document.
   - **Open**. To open the comparison document.
   - **View**. To view the comparison document with the WorkSite Viewer program.
   - **Import**. To import the comparison document into a WorkSite library.

6. FileSite automatically enters a filename in the **Compare Doc Name** field. The comparison results are saved to the file specified in this field.
7. Click **Compare** to perform the comparison.

Integration with CompareRite

CompareRite is another application that lets you compare versions of documents and generate comparison reports. For the **CompareRite** menu option to work properly, this application must be integrated correctly with FileSite. Contact your WorkSite Administrator for assistance.

The procedure for comparing documents using CompareRite is similar to DocuComp. See "Comparing Documents using DocuComp" on page 308.

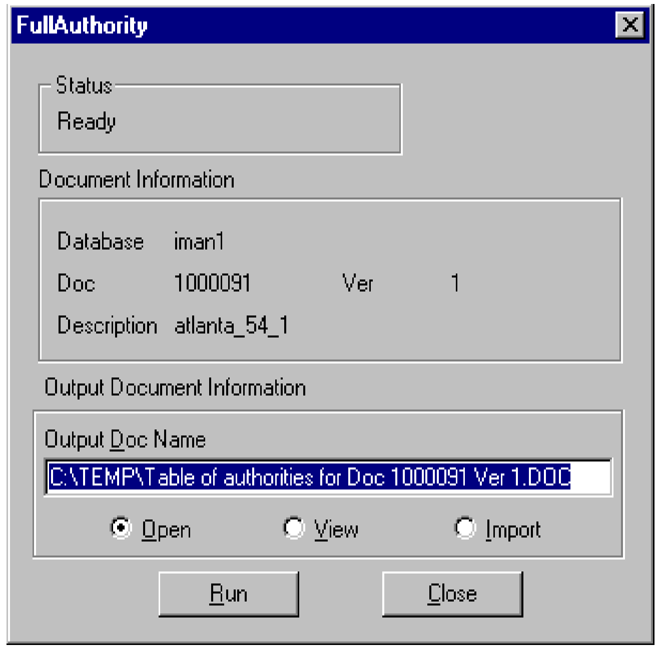
Integration with FullAuthority

FullAuthority is a software application provided by Lexis-Nexis that enables you to analyze the citations in a document. For the **FullAuthority** menu option to work properly, it must be integrated correctly with FileSite. Contact your WorkSite Administrator for assistance.

Analyzing Citations Using FullAuthority

1. In FileSite, select a document in the Document Grid.
2. From the **Document** menu, point to **Applications, and select FullAuthority** from the submenu. The FullAuthority dialog box opens, with the selected document listed in the dialog box.

Figure 182 FullAuthority dialog box



3. Select how you want to handle the report.
   - **Open**. To open the output document.
   - **View**. To view the output document with the WorkSite Viewer program.
   - **Import**. To import the output document into a WorkSite library.
4. FileSite automatically enters a filename in the **Output Doc Name** field. The table of authorities or citation report is saved to the file specified in this field.
5. Click **Run** to perform the analysis on the selected document.

Integration with CiteRite

CiteRite is another software application provided by Lexis-Nexis that enables you to analyze the citations in a document. For the **CiteRite** menu option to work properly, it must be integrated correctly with FileSite. Contact your WorkSite Administrator for assistance.

The procedure for analyzing citations in a document using CiteRite is similar to FullAuthority. See “Analyzing Citations Using FullAuthority” on page 310.

E-mail Integration

FileSite is integrated with electronic mail products through the MAPI interface. Standard e-mail systems supported include:

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

You can choose to send either a link to a WorkSite document or a copy of a WorkSite document as an attachment to an e-mail message. See "E-mailing Documents" on page 170 for more information.

When you have selected the document, FileSite automatically invokes the e-mail Send command and uses the MAPI standard to display the Mail To windows appropriate to the e-mail system. When sent via e-mail, document profiles have the extension `.txt,` while document filenames have the application's extension (for example, `.doc` for Word files, `.wri` for Write files, and so on).

Non-Integrated Applications

In some cases, an application cannot be integrated with FileSite, and FileSite's functions are not available from within the application. You can still organize, track, and store your documents using FileSite. To open a document:

1. Launch FileSite and log into a WorkSite Server.
2. Search for and find the document you want to open.
3. **Check out** the document from the WorkSite library to your local drive.
4. Launch the non-integrated application.
5. **Open** the document on your local drive from within the application.
6. When you are finished editing or revising the document, switch focus to FileSite.
7. Use the **Checkin** option to copy the revised document back to the WorkSite library.

CHAPTER 8

Linking WorkSite Documents

Overview

This chapter contains the following information about linking WorkSite documents:

Introduction

You can use the linking features of Microsoft Office to create documents containing linked objects and import them into a WorkSite library. Documents containing linked objects are supported in the following applications:

- Word 2003
- Excel 2003

- PowerPoint 2003

NOTE Microsoft Office 2007 and Office 2010 use an updated document format, which affects linking. The current version of FileSite does not support Office 2007 or Office 2010 documents containing linked objects. However, Office 2007 Integration and Office 2010 Integration support OLE linking in documents created in Office 2003.

Documents can be linked in the following ways:

- **Entire documents**. Use the **WorkSite Object** option on the **Insert** menu of the integrated Office application to link entire documents into other documents.
- **Object links**. Use the **Copy** and **Paste Special** technique to links parts of documents into other documents. See "Using the Paste Special Option" on page 319.
- **Cell links**. Links groups of Excel cells to other Excel worksheets.

The types of links that WorkSite does *not* support (at this time) are:

- **Recursive links**. An object from Document A is linked to Document B along with an object from Document B linked to Document A, or an object from Document A to another place in Document A.
- **Multi-level links**. An object from Document C is linked to Document B which, in turn, is linked to Document A.
- Word or Excel objects linked into PowerPoint slides.

Linking Definitions

The following terminology is used to define the object linking and embedding functionality in WorkSite:

- **Destination document**. It is the document in which you insert the linked object. If you change information in a linked object in the destination document, it does not change the source document.
- **Source document**. It is the document used to create the linked object. If you change information in the source document, the information in the destination document can change, depending on whether or not you choose to always use the current version.
- **Cached information**. It is the information in the destination document that is contained in the link.

Example of OLE Linking in WorkSite

If you are producing a report that consists of a Word document with information from several Excel spreadsheets and some slides from a PowerPoint presentation, you can link the information from all the source documents to a single destination document and store all the documents in a WorkSite library.

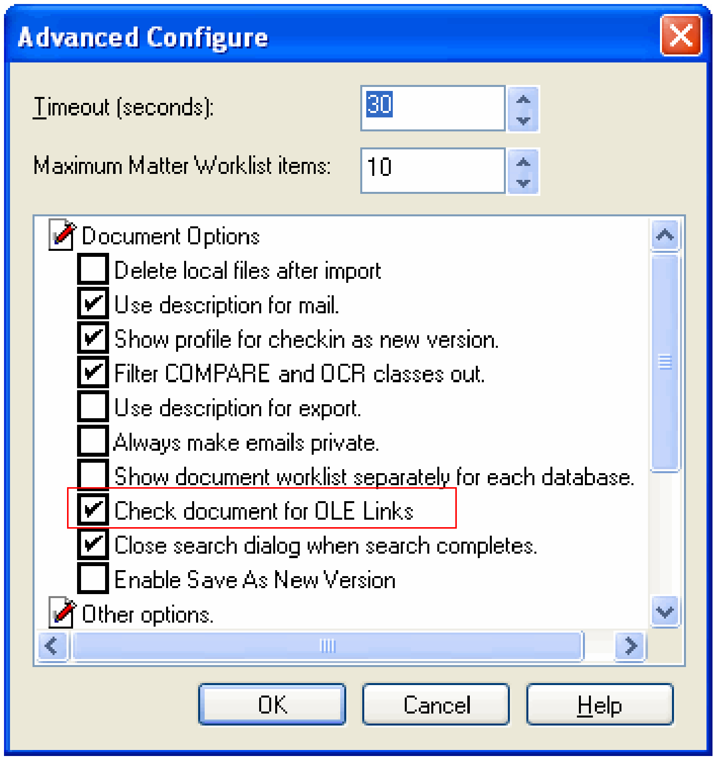
You can choose whether to update the information in the destination document whenever the source documents are updated. If you create a document on a local drive, add links to it, and import it to a library, WorkSite prompts you to import the linked documents as well. You can create a single document profile and apply it to all linked documents that are imported simultaneously.

Configuring WorkSite for Linking

For the WorkSite linking feature to work properly, you need to specify a configuration option in FileSite.

1. From the **WorkSite** menu, point to **Configure**, and select **General Options**. The Options dialog box opens.
2. Select the **Advanced** tab.
3. Click **Options** or type **ALT+O**. The Advanced Configure dialog box opens.

Figure 183 Advanced Configure dialog box



4. Within the **Document Options** listed, select the **Check document for OLE links** option.

   This option enables WorkSite to prompt you to import the linked documents as well, when you import a document with links from your local or network drive into a WorkSite library.

5. Click **OK** to save your changes and close the dialog box. Click **OK** again to close the Configure dialog box.

Working with Destination Documents

You can perform the following operations with documents:

- "Creating Documents Containing Linked Objects"
- "Importing Documents Containing Linked Objects"
- "Opening Documents Containing Linked Objects"
  - "Editing Links in Documents Containing Linked Objects"
  - "Replacing Links in Documents Containing Linked Objects"

- “Exporting Documents Containing Linked Objects”
- “Checking Out Documents Containing Linked Objects”
- “Checking In Documents Containing Linked Objects”

Creating Documents Containing Linked Objects

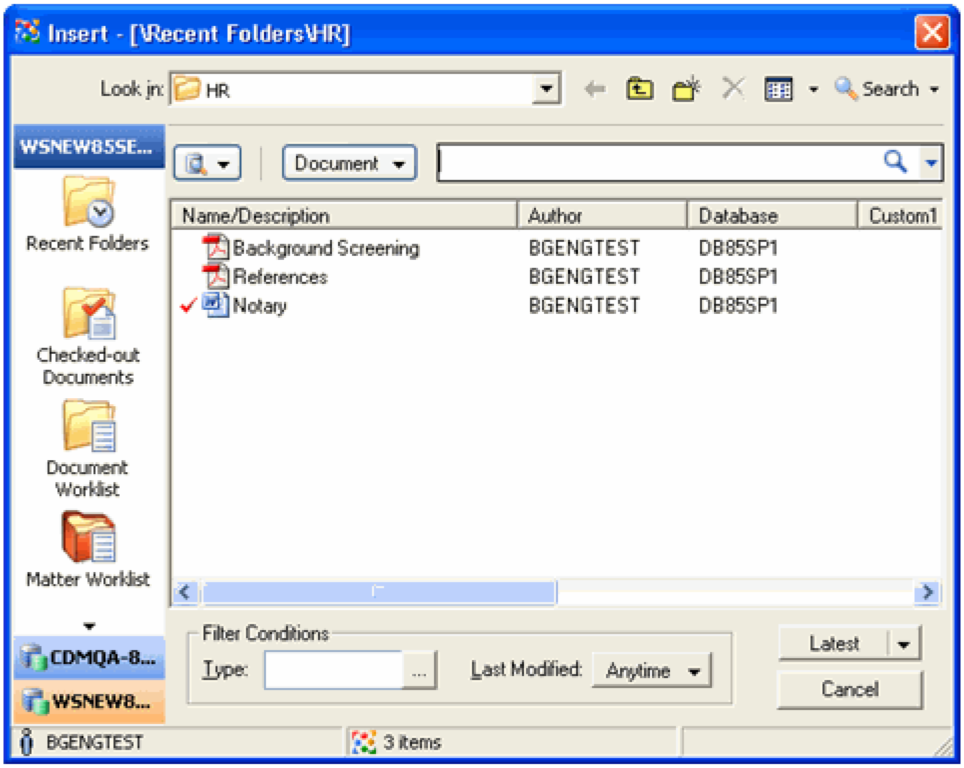
You can create OLE links using the following Microsoft Office functionalities, which you can access from the integrated application:

- “Using the Insert Option”
- “Using the Paste Special Option”

Using the Insert Option

1. Open the document in which you want to insert the link. This is the destination document.
2. Place the cursor where you want to insert the link.
3. From the **Insert menu,** point to **WorkSite Object** and select **WorkSite Link**. The WorkSite Integrated Insert dialog box opens.

Figure 184 WorkSite Integrated Insert dialog box



4. Navigate to the document you want to link to your document. This is the source document. You can also use the Express Search panel to find the document. See "Express Search Panel" on page 266 for more information on using this panel.

5. You can link any version of the source document to the destination document. Click the **Latest** button drop-down arrow to display the following options:

   - **Latest**. Inserts the link that will always point to the most current version of the source document to which you have access rights.
   - **This Version**. Inserts the link that will always point to the selected version of the source document.

   When you select **either version option**, WorkSite inserts a link to the source document into your destination document.

NOTE You can also insert an icon that represents the source document, if you do not want to insert the entire document. To do this, select **WorkSite Link as Icon** from the **Insert | WorkSite Object** menu in Step 3. The remaining procedure is the same.

Using the Paste Special Option

1. Open the document in which you want to insert the link. This is the destination document.
2. Open the source document you want to link to the destination document.
3. Select and copy to the clipboard the portion of the source document that you want to link to the destination document.

   NOTE If the source document is a PowerPoint presentation, you must switch to the Slide Sorter View to select a slide.

4. In the destination document, place the cursor where you want to paste the link.
5. From the **Edit** menu, select **Paste Special.** A Microsoft Paste Special dialog box opens.

   The Paste Special dialog box varies according to the application of the source and destination documents.

a. If the destination document is a Word document, see Table 36.

b. If the destination document is an Excel document, see Table 37.

Table 36 Destination Document: Microsoft Word Document

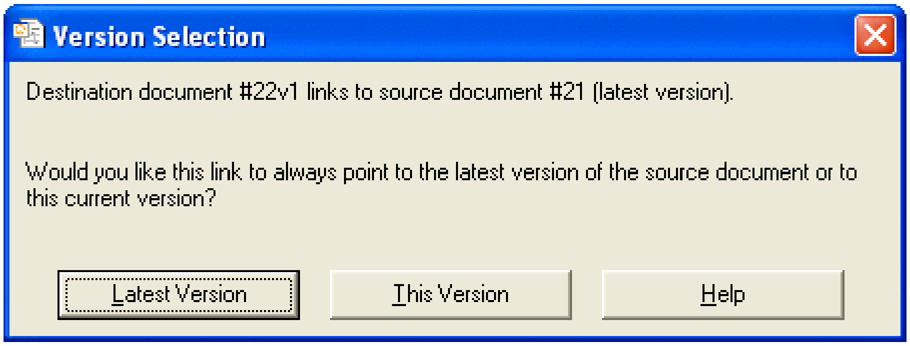
The Source Document is:	In the Paste Special dialog box, do the following:
Another Word document	6. Select **Microsoft Office Word Document Object**. 7. Choose the **Paste link** option. 8. Click **OK**.
An Excel workbook	9. Select **Microsoft Office Excel Worksheet Object**. 10.Choose the **Paste link** option. 11.Click **OK**.
A PowerPoint presentation	12.Select **Microsoft Office PowerPoint Slide Object**. 13.Choose the **Paste link** option. 14.Click **OK**.

Table 37 Destination Document: Microsoft Excel Document

The Source document is:	In the Paste Special dialog box, do the following:
Another Excel workbook	15.Select **Microsoft Office Excel Object**. 16.Click **OK**.
A Word document	17.Select **Microsoft Office Word Document Object**. 18.Choose the **Paste link** option. 19.Click **OK**.
A PowerPoint presentation	20.Select **Microsoft Office PowerPoint Slide Object**. 21.Choose the **Paste link** option. 22.Click **OK**.

23. Repeat Step 2 to Step 5 until you have linked all required objects from the source documents into your destination document.
24. When you save your document, the Version Selection dialog box opens.

Figure 185 Version Selection dialog box



- Select **Latest Version** to always point to the most current version of the document that you have access to.
- Select **This Version** to always point to the version you have just used to create the link.

25. When your edits are complete, close the source documents.
26. Close the destination document to check it in to FileSite.

Importing Documents Containing Linked Objects

When importing documents into WorkSite, there are two scenarios than can occur. Table 38 indicates what to do in each scenario.

Table 38 Importing Linked Documents

If	Then
Neither the destination nor source documents are in WorkSite.	Follow the procedure given in "Importing Destination and Source Documents into WorkSite"
The destination document is in WorkSite, but the source document is not.	Follow the procedure given in "Importing Source Documents into WorkSite"

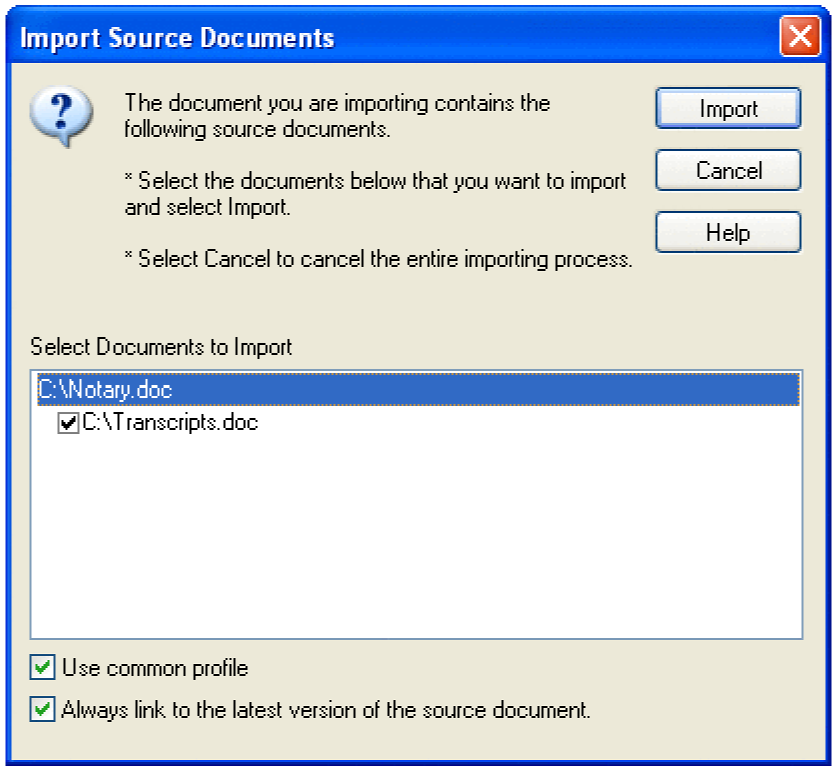
Importing Destination and Source Documents into WorkSite

If you already have existing destination and linked source documents saved on your local or network drive, you can import them into WorkSite.

1. In FileSite, navigate to the folder in the WorkSite library where you want to save the document.
2. Select **Add Document** from the **WorkSite** menu. The Find File to Import to Folder dialog box opens.

3. Navigate to the file you want to import, and click **Open**. The Import Source Documents dialog box opens if you have selected a document containing linked objects.

Figure 186 Import Source Documents dialog box



4. The local source documents that are linked to the local destination document appear in the list. Select the check box for each linked source document you want to import. If you do not wish to import the source document, clear the check box.
5. (Optional) Select the **Use common profile** option to record the same profile information for each document you are importing. If you do not select this option, FileSite opens a profile dialog for each imported source document.
6. (Optional) Select the **Always link to the latest version of the source document** option. Leave this option unselected if you only want to link to the current version of the source document.

NOTE This option applies to all source documents you import. You can change this setting later on, if you wish. See “Creating Documents Containing Linked Objects” on page 317.

7. Click **Import** to import the documents into WorkSite.

Importing Source Documents into WorkSite

If you have a destination document already saved in WorkSite, you can import linked source documents into WorkSite directly from the destination document.

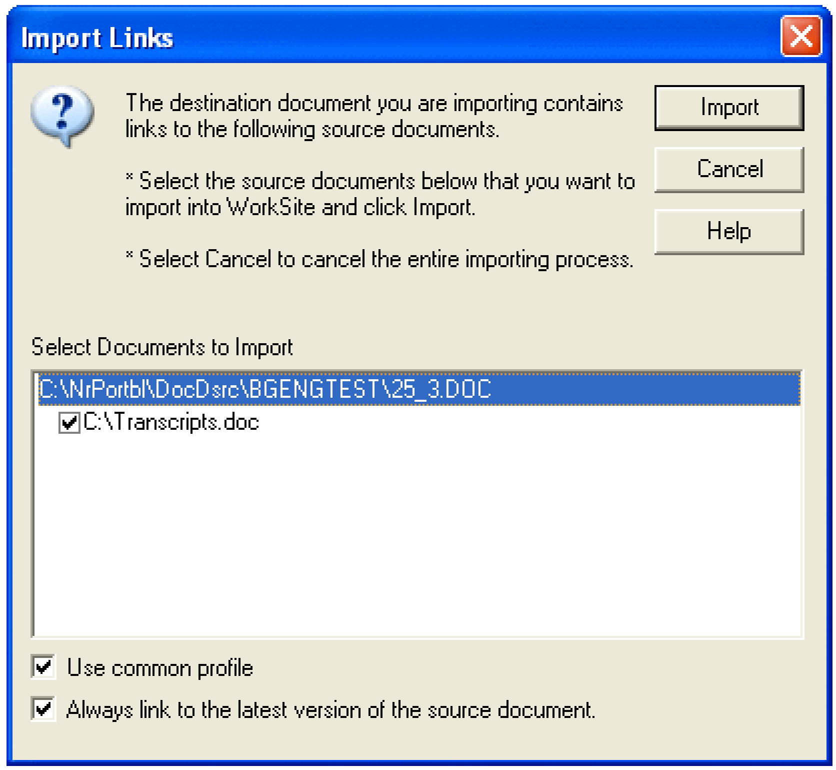
1. Open the destination document.
2. Open the source document stored on your local or network drive.
3. Select and copy to the clipboard the portion of the source document that you want to link to the destination document.
4. In the destination document, place the cursor where you want to paste the link.
5. From the **Edit** menu, select **Paste Special**.

NOTE See Step 5 of "Using the Paste Special Option" on page 319 for information on how to use the **Paste Special** option in various applications.

When you have completed pasting the links, you can import the linked source documents into WorkSite.

6. In the destination document, select **Import WorkSite Links** from the **Edit** menu. The Import Links dialog box opens.

Figure 187 Import Links dialog box



7. The local source documents that are linked to the destination document appear in the list. To import the linked source document, select the check box next to it.
8. (Optional) Select the **Use common profile** option to record the same profile information for each document you are importing. If you do not select this option, FileSite opens a profile dialog for each imported source document.
9. (Optional) Select the **Always link to the latest version of the source document** option. Leave this option unselected if you only want to link to the current version of the source document.

NOTE This option applies to all source documents you import. You can change this setting later on, if you wish.

10. Click **Import** to import the source documents into WorkSite.

Opening Documents Containing Linked Objects

When you open a document containing linked objects, you can choose to download and view the linked source documents for your reference. The destination document contains cached information from the source document. The source document could have been updated since the information was linked to the destination document.

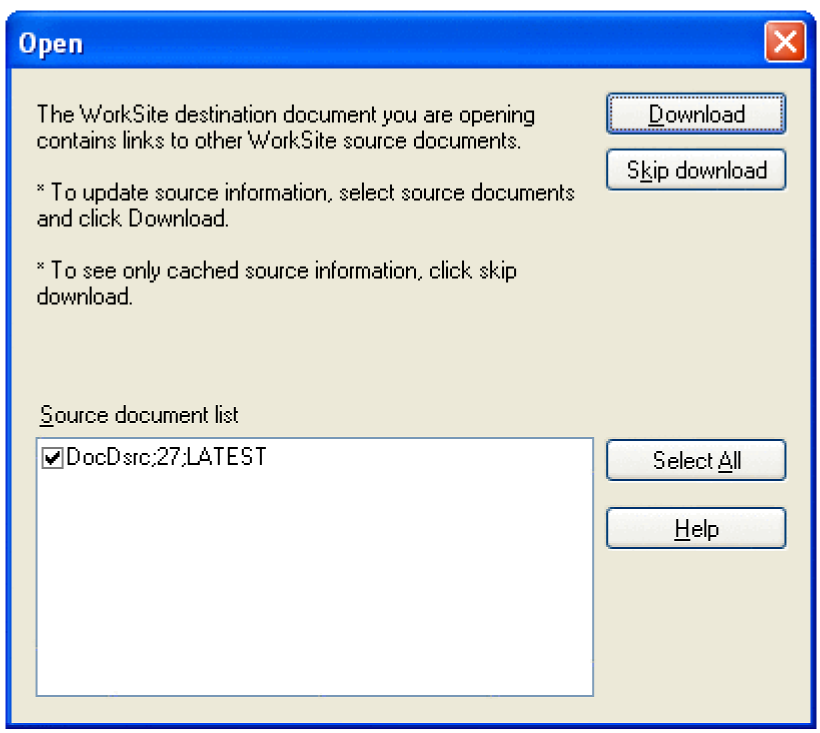
- If you want to see the latest information, you should download the source documents.
- If you can use the cached data in the destination document, you do not need to download the source documents.

NOTE Read-only copies of the source documents are downloaded. You must have at least Read access to the documents to download them.

To open a destination document and its linked source document:

1. Open the destination document in FileSite. If it contains links to source documents in WorkSite, the Open dialog box opens.

Figure 188 Open dialog box



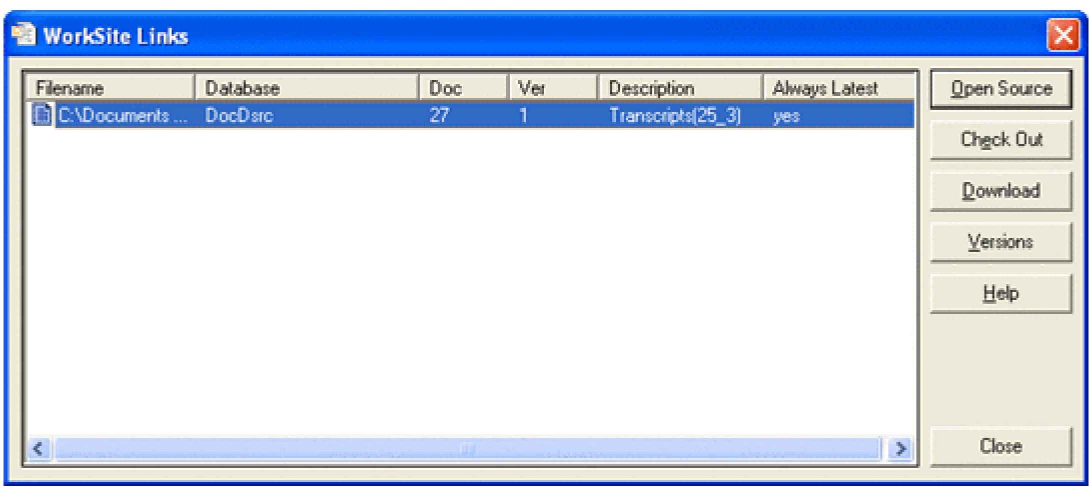
2. Select the linked source documents from the list. WorkSite downloads a read-only copy of the document. To download all linked source documents, click **Select All**.
3. Click **Download** when you have completed your selections. WorkSite opens the destination document.
4. You are prompted to update the linked data. If you want to update, click **Yes**. To keep the existing information, click **No**.

Editing Links in Documents Containing Linked Objects

You can edit source documents that are linked to a destination document. However, you should have at least Read/Write access to the source document.

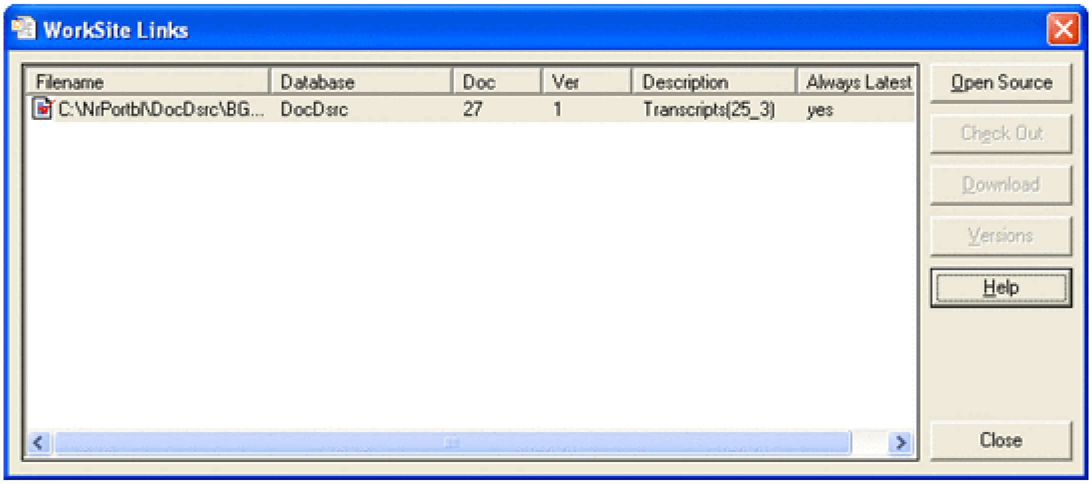
1. Open the destination document. To edit the links, it is not necessary to open the source documents.
2. In the destination document, from the **Edit** menu select **WorkSite Links**. The WorkSite Links dialog box opens.

Figure 189 WorkSite Links dialog box



3. Select the source document you want to edit from the list, and click **Check Out**. WorkSite places a copy of the source document into the `NrPortbl` directory on your local or network drive. The icon in front of the document changes (see Figure 190) to reflect its checked-out status.

Figure 190 WorkSite Links dialog box, checked-out document



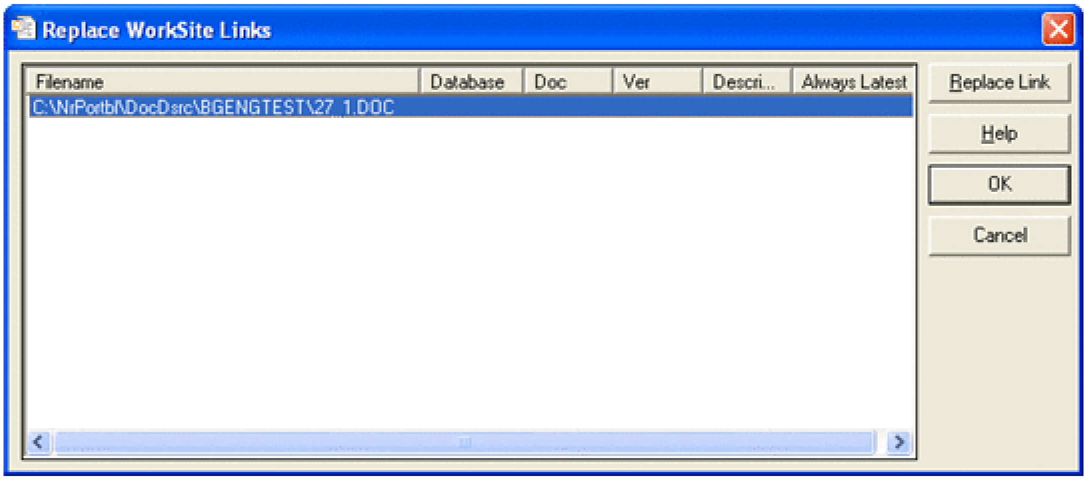
4. After the document is checked out, click **Open Source** to open and edit the source document.
5. When you have edited the documents, first close the source documents and then the destination document. When you close the destination document, it is checked in to WorkSite. You are also prompted to check in any source documents that you checked out. See "Checking In Documents Containing Linked Objects" on page 332.

Replacing Links in Documents Containing Linked Objects

In the destination document, you may want to replace a link to an existing source document with a different one.

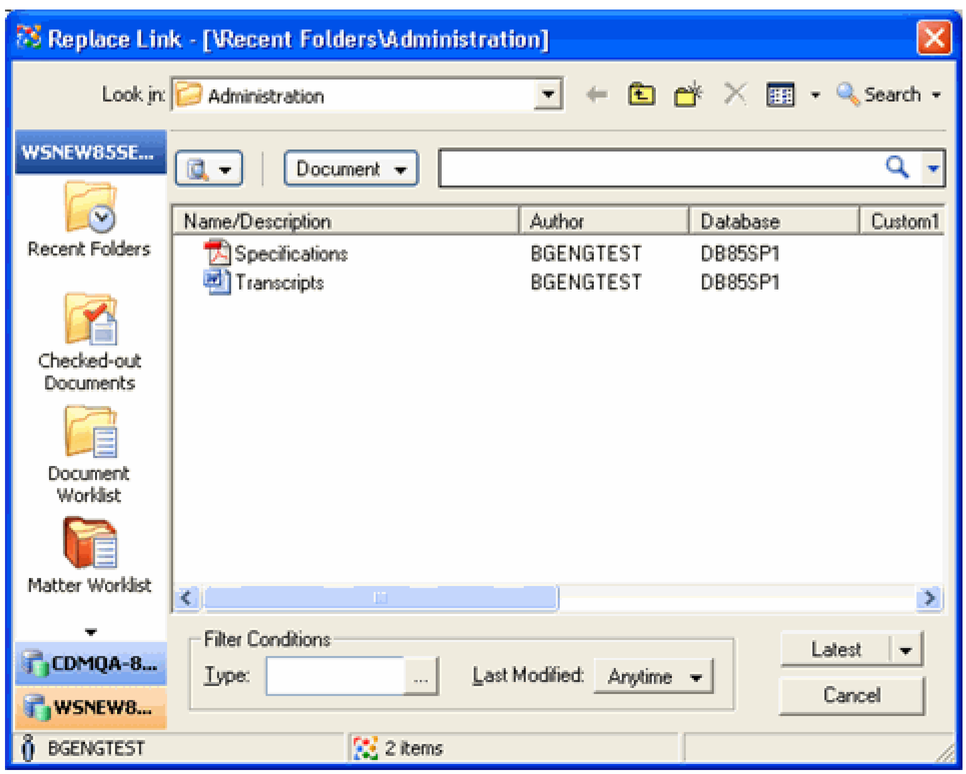
1. Open the destination document.
2. From the **Edit** menu, select **Replace WorkSite Links**. The Replace WorkSite Links dialog box opens.

Figure 191 Replace WorkSite Links dialog box



3. Select the source document you want to replace from the list.
4. Click **Replace Link** or type **ALT+R**. The WorkSite Integrated Replace Link dialog box opens.

Figure 192 WorkSite Integrated Replace Link dialog box



5. Navigate to the WorkSite document you want to link to the destination document. You can also use the Express Search panel to find the document.

See “Express Search Panel” on page 266 for more information on using this panel. You can link any version of the source document.

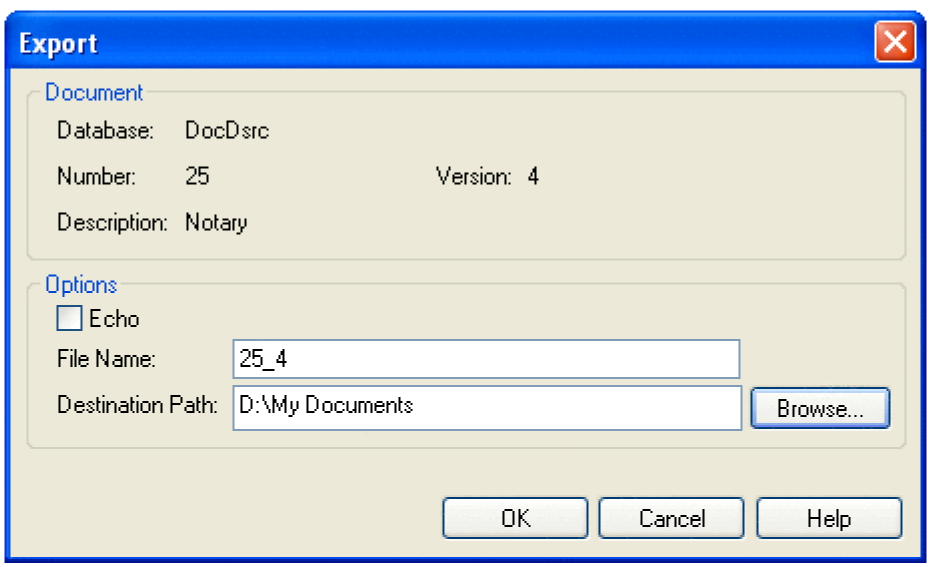
6. Click the **Latest** button drop-down arrow to display the following options:
   - **Latest**. Inserts the link that will always point to the most current version of the source document to which you have access.
   - **This Version**. Inserts the link that will always point to the selected version of the source document.
7. When you choose either of the version **options**, WorkSite selects this document and it appears in the Replace WorkSite Links dialog box.
8. Click **OK** to complete the process.

Exporting Documents Containing Linked Objects

You can export a destination document and its linked source documents to a folder on your local or network drive.

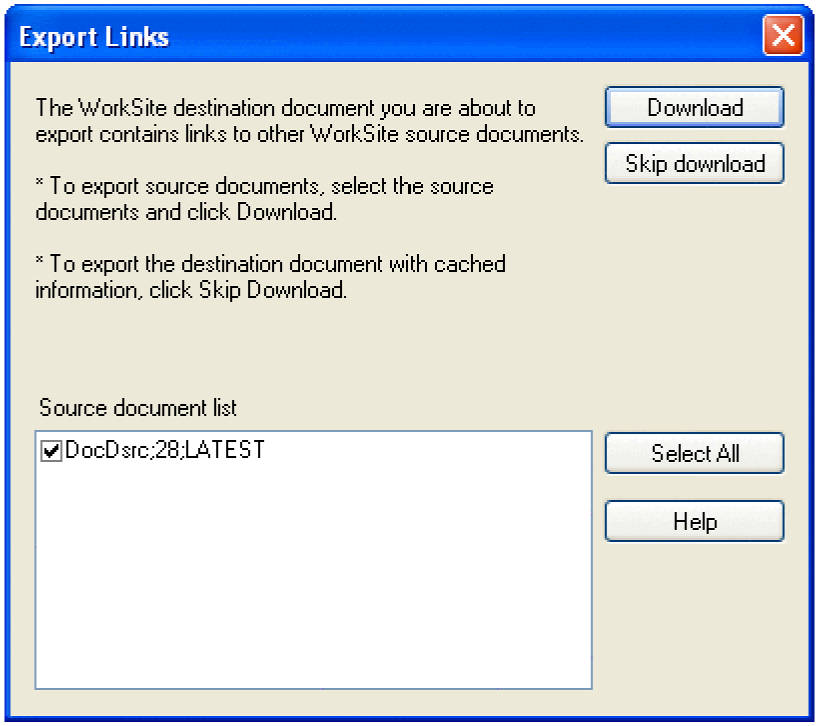
1. In FileSite, select the document containing linked objects that you want to export.
2. From the **Document** menu, choose **Save As**. The Export dialog box opens.

Figure 193 Export dialog box



3. Click **Browse** to select a destination path in the **Destination Path** field.
4. Select the **Echo** option if you wish to export the documents to the `NRTEcho` directory.
5. Click **OK**. The Export with Links dialog box opens.

Figure 194 Export with Links dialog box



6. Select the linked source documents you want to download along with the destination document. To download a specific source document, select the check box next to it. Click **Select All** to download all the source documents.
7. Click **Download** when you have completed your selections. WorkSite places copies of the selected documents into the directory chosen in Step 3. You can also click **Skip download** if you want to export only the destination document without copies of any of the linked source documents.

Checking Out Documents Containing Linked Objects

When you check out a document containing linked objects, you have the option of checking out and editing its source documents as well.

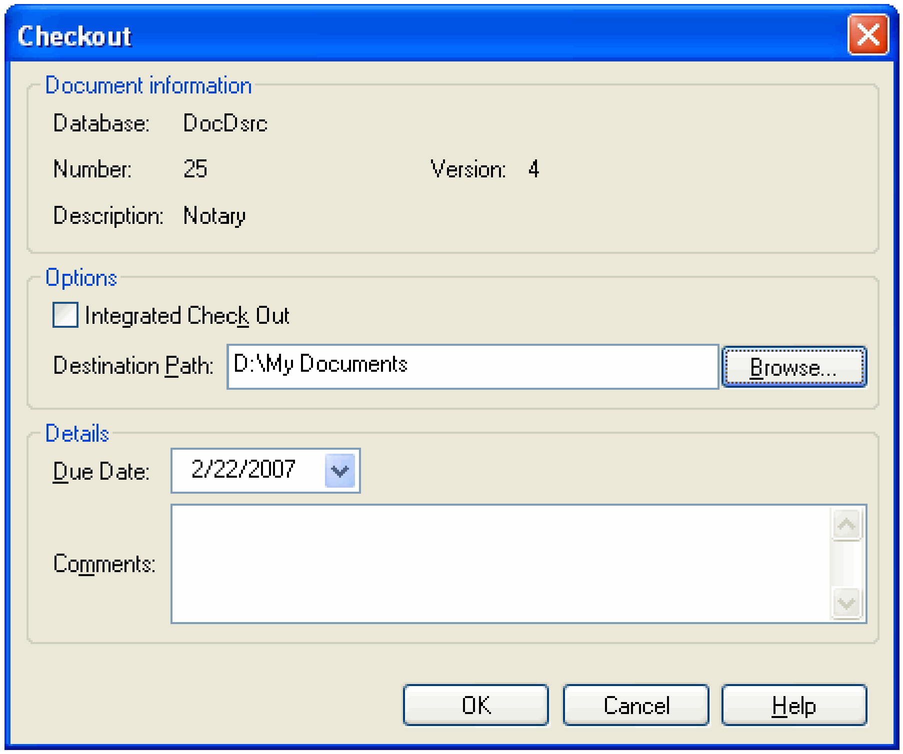
NOTE If the document is already checked out by another user, the ✓ **Checked out** icon appears against it in the Document Icon column of the Document Grid in FileSite.

To check out a document containing linked objects:

1. In FileSite, select the document that you want to check out.

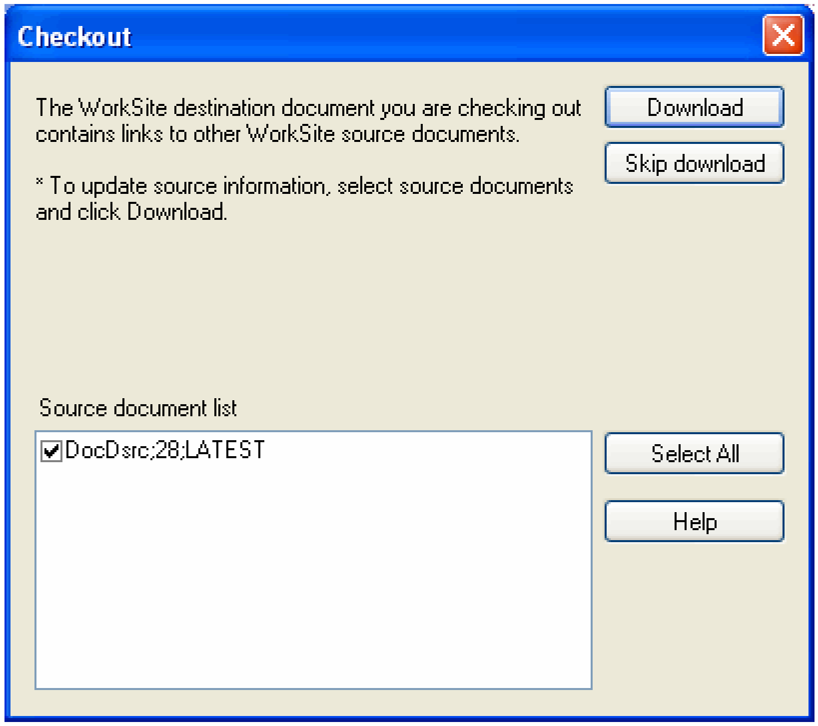
2. From the **Document** menu, choose **Check Out**. The Checkout dialog box opens.

Figure 195 Checkout dialog box



3. Click **Browse** to select a destination path in the **Destination Path** field.
4. (Optional) Select the **Integrated Check Out** option, if you are checking out the document for offline use.
5. Enter a **Due Date** for the check in of the document.
6. Enter the reason for checking out the document in the **Comments** field.
7. Click **OK** to check out the document. If WorkSite detects files that are linked to the selected document, the OLE (Object Linking and Embedding) Checkout dialog box opens.

Figure 196 OLE (Object Linking and Embedding) Checkout dialog box



8. Select the linked source documents you want to check out along with the destination document. To check out a specific source document, select the check box next to it. Click **Select All** to check out all the source documents.
9. Click **Download** when you have completed your selections. WorkSite places copies of the selected documents into the directory chosen in Step 3. You can also click **Skip download** if you want to check out only the destination document without copies of any of the linked source documents.

Checking In Documents Containing Linked Objects

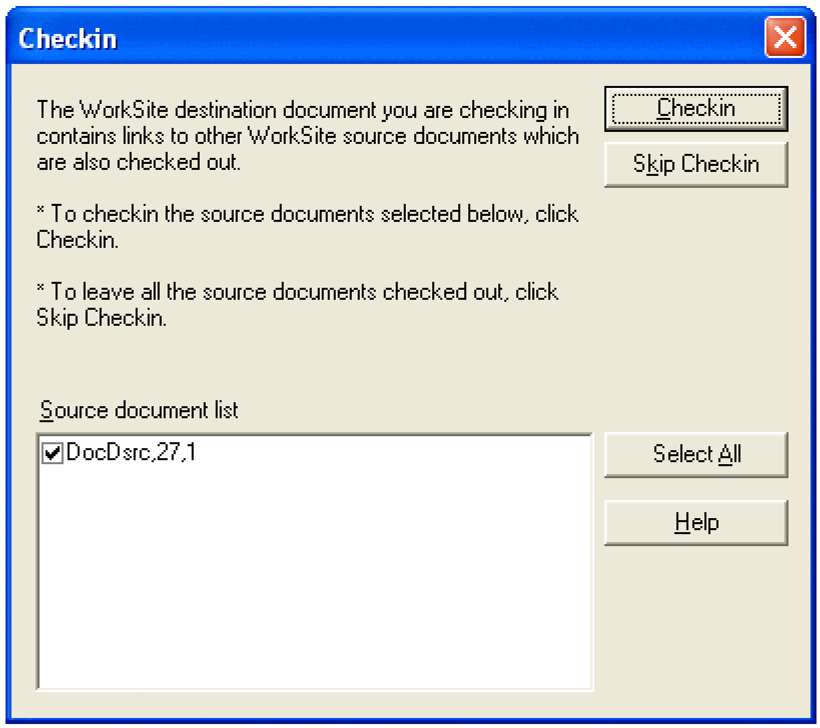
When you check in a document containing linked objects, you can simultaneously check in any or all of its source documents. You will also be prompted to import links added while the destination document was checked out, as well as source documents that were not imported with the destination document.

NOTE The instructions given in this section apply to documents checked out to your local or network drive. See "Checking Out Documents Containing Linked Objects" on page 330 for instructions on how to check out a document and its linked source documents.

To check in a destination document and its source documents:

1. When you have edited the destination document, close all its source documents.
2. In the destination document, select **Save** or **Save As** from the **File** menu. (In a passively integrated Office application, select **WorkSite Save As** from the **File** menu.)
3. Enter the profile information if necessary. The OLE (Object Linking and Embedding) Checkin dialog box opens.

Figure 197 OLE (Object Linking and Embedding) Checkin dialog box



4. Select the linked source documents you want to check in along with the destination document. To check in a specific source document, select the check box next to it. Click **Select All** to check in all the source documents.
5. Click **Checkin** when you have completed your selections. WorkSite copies the selected documents back into the WorkSite library. You can also click **Skip Checkin** if you want to check in only the destination document without copies of the linked source documents.

CHAPTER 9

WorkSite Viewer

Overview

This chapter contains the following information about the WorkSite Viewer application:

Introduction

The WorkSite Viewer application lets you view documents without launching the native application. It 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.

Supported Document Types

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

Your WorkSite Administrator can configure your system to support file types that are not automatically recognized by the WorkSite Server and associate them with the appropriate applications.

A few examples of file types supported by WorkSite Viewer are listed in the following sections.

Word Processing Formats

- Microsoft Office Suite 2003, 2007, and 2010
- Corel WordPerfect Suite 11.0, 12.0, X3

Spreadsheet Formats

- Excel 2003, 2007, and 2010
- QuattroPro for Windows

Graphic Formats

- Windows Bitmap
- Windows Metafile
- Tagged Image File Format TIFF
- Micrografx DRW

Miscellaneous Formats

- Adobe Reader PDF (text only)
- Adobe Acrobat

WorkSite Viewer Window

WorkSite Viewer displays read-only copies of documents. You can display documents in *cascade* or *tile* format by selecting **Cascade** or **Tile** from the **Window** menu.

Figure 198 is an example of the WorkSite Viewer window displaying two documents in *tile* format.

Figure 198 WorkSite Viewer window, Tile format

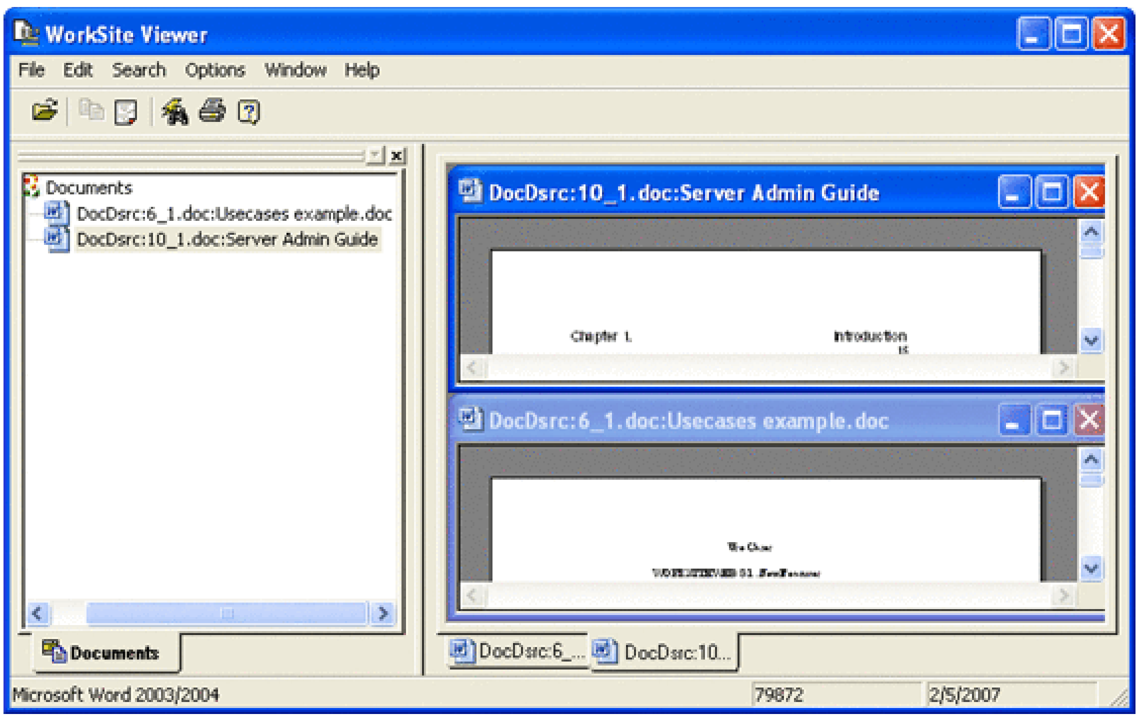
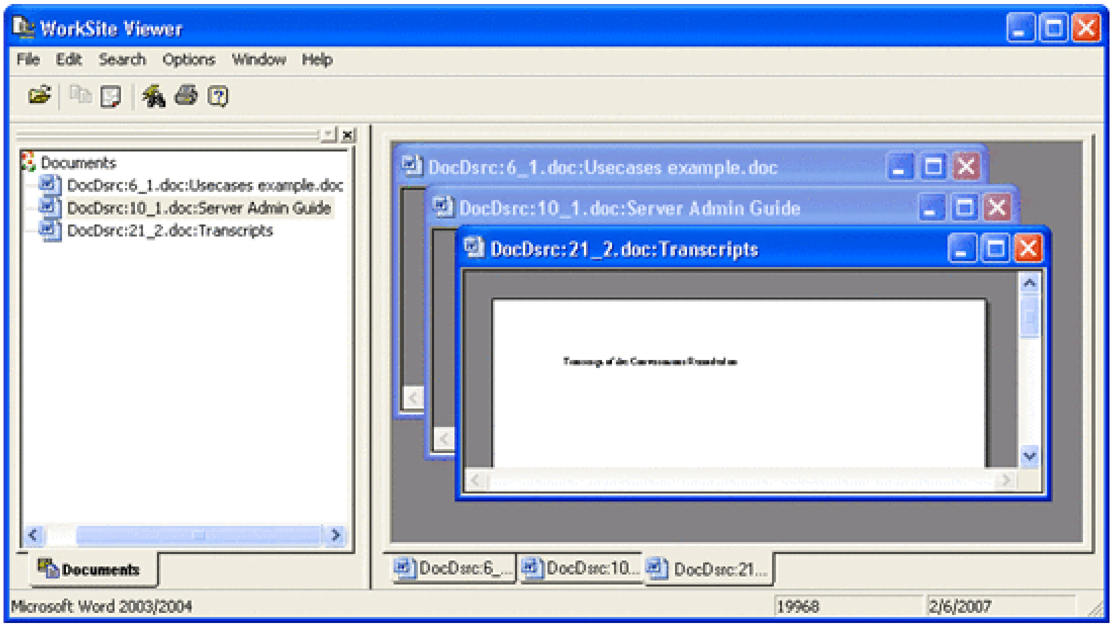


Figure 199 is an example of the same WorkSite Viewer window displaying three documents in *cascade* format.

Figure 199 WorkSite Viewer window, Cascade format



Viewing Documents

You can use WorkSite Viewer to view:

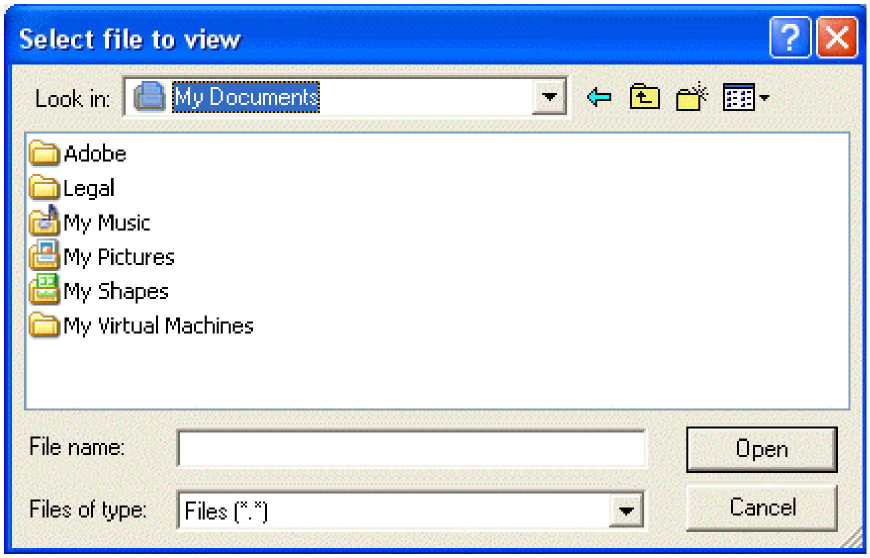
- Local documents
- WorkSite documents

Viewing Local Documents

You can view documents stored locally on your local or network drive.

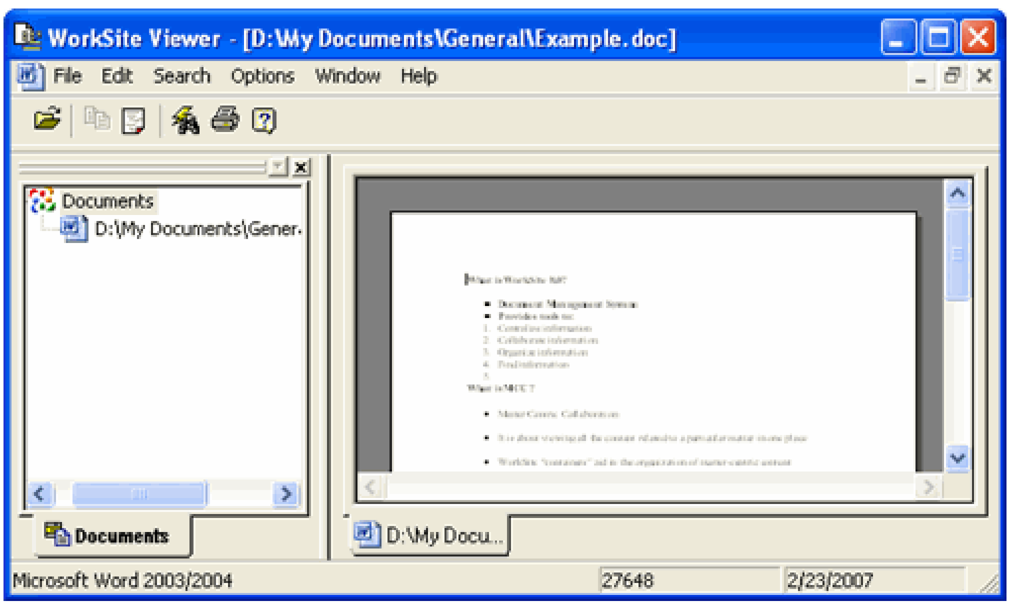
1. Click the **Start** menu, point to **Programs**, then to **Autonomy**, and select **iManage Viewer** to launch WorkSite Viewer. The WorkSite Viewer window opens containing no documents.
2. From the **File** menu, select **Local Open**. The Select File to View dialog box opens.

Figure 200 Select File to View dialog box



3. Use standard Windows techniques to browse and locate the local file, then click **Open** (**ALT+O**) to display the file in WorkSite Viewer.

Figure 201 WorkSite Viewer window



Viewing WorkSite Documents

You can use WorkSite Viewer to view WorkSite documents in:

- FileSite

- Integrated applications

To view documents from FileSite:

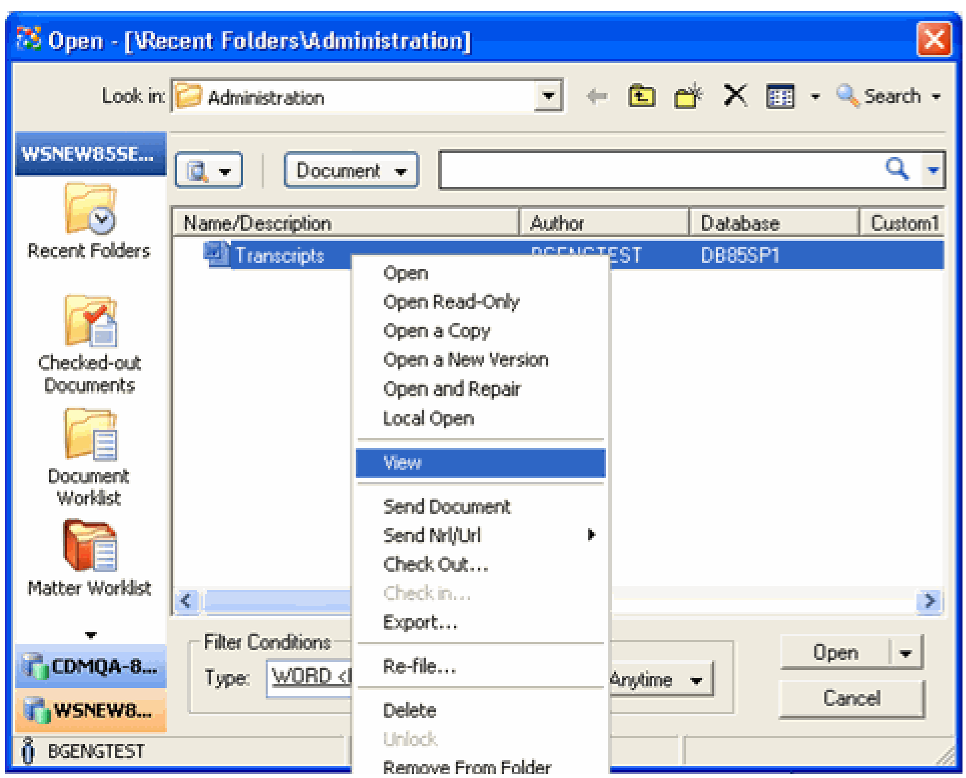
1. Select the documents you want to view in the Document Grid.
2. Choose **View** from the **Document** menu. If WorkSite Viewer is not already running, FileSite launches it and displays the documents in read-only format.

NOTE When you view documents using WorkSite Viewer, the documents are not locked or checked out of the WorkSite library. Instead, WorkSite Viewer makes a temporary copy of the document, which is displayed in read-only format.

To view documents from the WorkSite Integrated Desktop:

1. Select the documents from the Document Grid.
2. Right-click and choose **View** from the menu, as shown in Figure 202. WorkSite Viewer launches with the documents displayed in the WorkSite Viewer window.

Figure 202 WorkSite Integrated Open dialog box



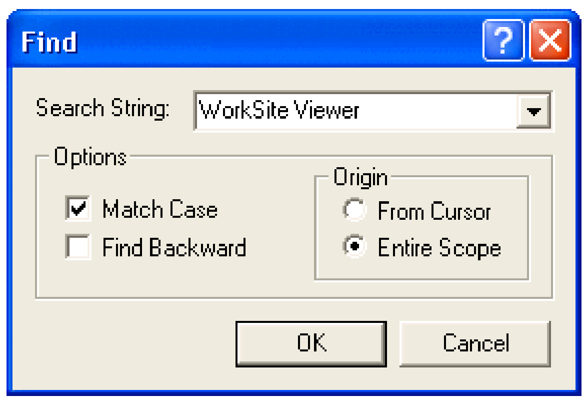
Searching Text of Documents

You can search the full text of a document displayed in the WorkSite Viewer window.

1. Select **Find** from the **Search** menu. The Find dialog box opens.

NOTE The Find dialog box operates only on the active document displayed in the WorkSite Viewer window. That document must be a word-processing document or a spreadsheet. Textual searches cannot be performed on other document types.

Figure 203 Find dialog box



2. Enter the text you want to search in the **Search String** field. Click the **Search String** drop-down arrow to select from a list of search strings you entered previously.
3. You can select from the following search options:
   - **Match Case**. Specifies that the search is case-sensitive. If you do not select this **option, the search returns** all instances of the search string, regardless of case.
   - **Find Backwards**. Specifies the direction of the search. By default, the search proceeds from the cursor forward in the document.
   - **Origin**. Specifies where the search begins.
     - **From Cursor**. The search begins at the current position of the cursor in the active document.
     - **Entire Scope**. The search begins at the start of the document and proceeds forward, or begins at the end of the document and proceeds backwards, depending on whether the **Find Backwards** option is also selected.

4. Click **OK** or press **ENTER** to start searching.
5. To repeat the search, select **Search Again** from the **Search** menu or press **F3**.

Copying Documents

You can copy the entire body of a document, or selected portions of it for pasting into another application from the WorkSite Viewer window.

- Select the document you want to entirely copy. From the **Edit** menu, choose **Select All** or click the **Select All** icon in the toolbar.
- Select portions of the document to copy. From the **Edit** menu, select **Copy**, or click the **Copy** icon in the toolbar. Alternatively, right-click the selected portion, and choose **Copy**.

  Paste the content into another document or application.

Printing Documents

You can print an entire document, or selected portions of a document from the WorkSite Viewer window.

1. Select the document or the portion of the document you want to print.
2. From the **File** menu, choose **Print** or click the **Print** icon in the toolbar. A standard Windows Print dialog box opens.
3. Specify your printing preferences and click **OK** to print the document.

NOTE The **Print** option operates only on the active document displayed in the WorkSite Viewer window.

Setting Printer Options

You can also set printer options from within WorkSite Viewer.

1. From the **File** menu, select **Print Setup**. Alternatively, right-click the document, point to **Options** and select **Print**. A standard Windows Print Setup dialog box appears.

> **NOTE** For spreadsheet documents, the Page Setup dialog box appears. For more information, see "Setting More Printer Options" on page 343.

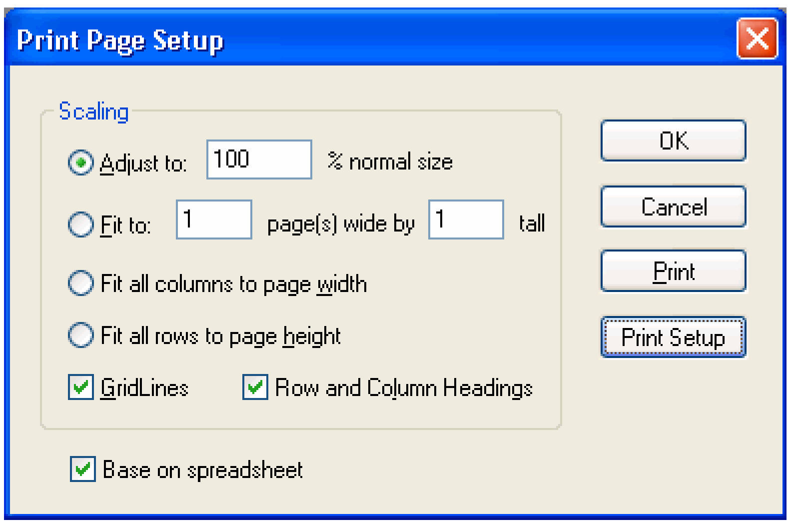
2. Enter your printer settings.

Setting More Printer Options

The Print Page Setup dialog box enables you to set additional printer options that are applicable *only* to spreadsheet documents.

1. When a spreadsheet document is displayed in the WorkSite Viewer window, select **Print Setup** from the **File** menu. The Print Page Setup dialog box appears.

Figure 204 Print Page Setup dialog box



The following options are available in the Print Page Setup dialog box:

- Scaling. Select the desired scaling options for the print-out.
- **GridLines**. Select this check box to print horizontal and vertical gridlines.
- **Row and Column Headings**. Select this check box to include row and column headings in the print-out.
- **Base on spreadsheet**. Select this check box to print based on the design of your spreadsheet.

2. Click **More** to display the standard Windows Print Setup dialog box to specify other printer settings.

Setting Document Display Options

In WorkSite Viewer, you can specify display settings for different document types.

Word Processing Documents

To display word processing documents in different view modes, select the window in which the document is displayed. From the **Options** menu, point to **Document**. Alternatively, right-click the window in which the document is displayed, and point to **View**. A submenu of available view modes appears. Select the desired mode from the following:

- **Normal**. Displays the document using the specified fonts and formatting in the document. Text wraps to display all text in the window.
- **Preview**. Displays the document using the specified fonts and formatting. Text does *not* wrap in the window. This mode shows how the document would look when printed.

Setting Display Font

To enlarge or reduce the font size when viewing documents, right-click the window in which the document is displayed, and point to **Font Size**. Select **Enlarge** or **Reduce** from the submenu.

NOTE These options are available only when the view mode is set to Normal.

Bitmap Files

You can adjust the size of the bitmap files that are displayed, rotate these images by increments of 90°, and/or zoom in and out of these images.

Select the window in which the image is displayed. From the **Options** menu, point to **Bitmap**. Alternatively, right-click the window in which the image is displayed. A submenu of available display sizes, degrees of rotation, and zoom settings appears. Select the size, rotation, and/or the zoom setting desired.

Vector Graphics

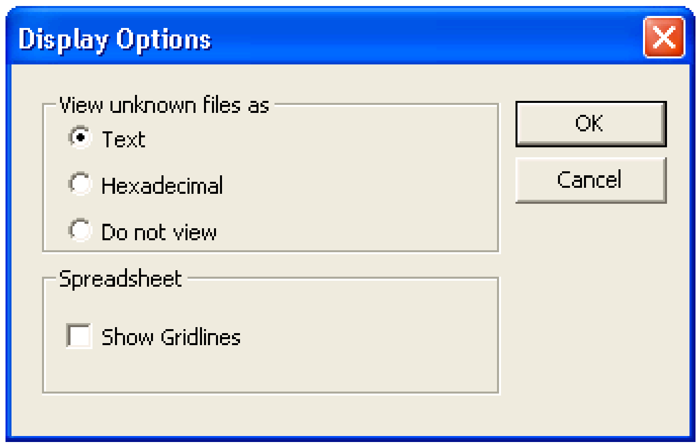
You can adjust the size of vector graphics files that are displayed. Select the window in which the vector graphic is displayed. From the **Options** menu, point to **Vector**. Select a size from the submenu of available sizes.

Setting Default Display Options

You can select a file format to use to view files of unknown type.

1. Right-click the WorkSite Viewer window.
2. Point to **Options** and select **Display**. The Display Options dialog box appears.

Figure 205 Display Options dialog box



3. In the **View unknown files as** area, select from the available options to set the default display mode for documents of unknown file types.
4. In the **Spreadsheet** area, select the **Show Gridlines** option to show gridlines in the display.
5. Click **OK**.

CHAPTER 10

Working Offline

FileSite allows you to access the document management system even when you are not connected to a WorkSite Server. If you are traveling or working from home, you can work on your documents offline and then synchronize your files with the online WorkSite repository when you reconnect to the WorkSite Server.

You can work offline using:

- **OffSite**. An add-on for FileSite, it is an advanced and fully portable version of WorkSite. It allows you to carry not only your documents but also your My Matters folder offline, so that you can work on them when disconnected from the network. Refer to the *OffSite Installation and User’s Guide* for more information about OffSite.
- **Portable**. If you do not have OffSite, you can still work offline using the more limited functionality of Portable. It allows you to check out documents from a library to a directory on your local machine, so that you can work on them when disconnected from the network. See “Working in Portable Mode” on page 348 for more information.

This chapter contains the following information about working offline with FileSite:

Portable Mode Versus OffSite

Table 39 provides a comparison of the functionality available in OffSite and Portable.

Table 39 Comparison of OffSite and Portable

Function	OffSite	Portable
Creating a new document	¸	
Editing document profile information	¸	¸
Editing document security		
Viewing and Quick-viewing a document	¸	¸
Importing a document	¸	¸
Importing a new version of a document		
Saving an edited document as a new version		
Saving an edited document and synchronizing it as a new version	¸	
Copying a document	¸	
Creating document links on the desktop or in another document	¸	
E-mailing a document as a link or an attachment	¸	¸
Printing a document	¸	¸
Accessing Document Worklist, Checked-out Documents list and My Matters list of Workspaces and folders	¸	

Working in Portable Mode

When working in Portable mode you can take the FileSite document management system on the road with you. The process works like this:

1. Check out the FileSite documents you want to work on to your local machine.
2. Once you are disconnected from the network, you can access these documents through FileSite or through the standard commands (**Open**, **Save**, and so on) of an integrated application.

3. When you reconnect to a WorkSite library, you can automatically check in these documents and synchronize them with those in the library.

Prerequisites

To access portable documents effectively, your PC should be set up as follows:

- Registered for portable mode operation.
- Able to run a local copy of the Windows operating system.
- Have local stand-alone versions of the application programs associated with the portable documents.

Switching to Portable Mode

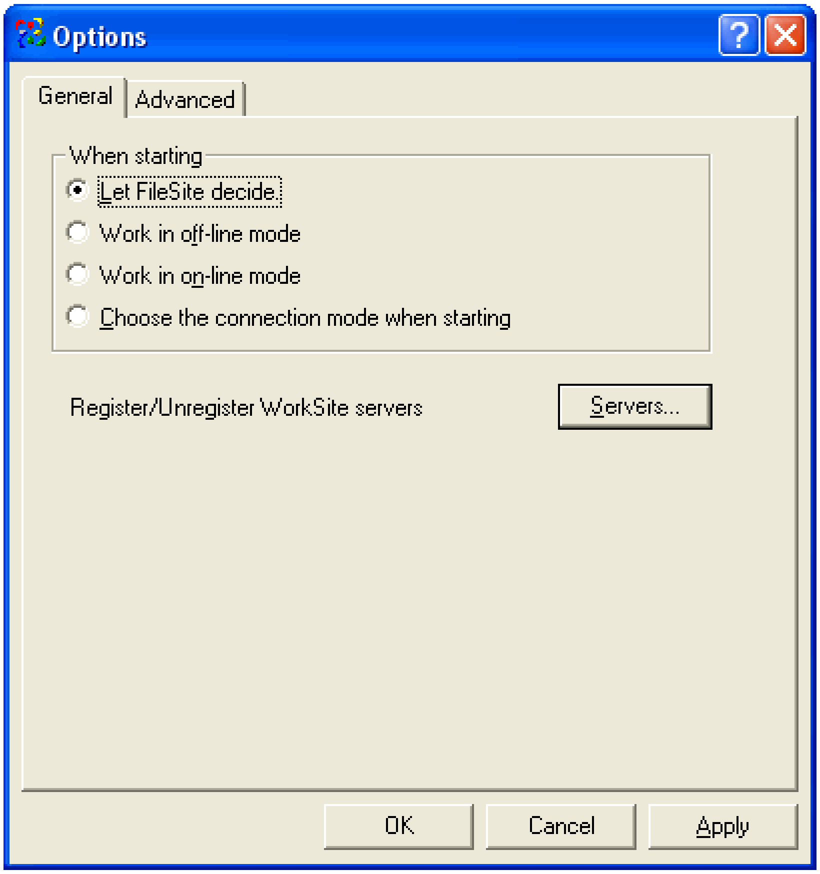
To switch from online mode to portable mode:

1. In FileSite, from the **WorkSite** menu, point to **Configure**, and select **General Options**.

   In Outlook 2010, on the **WorkSite** tab, click the  **General Options** icon from the Configure area.

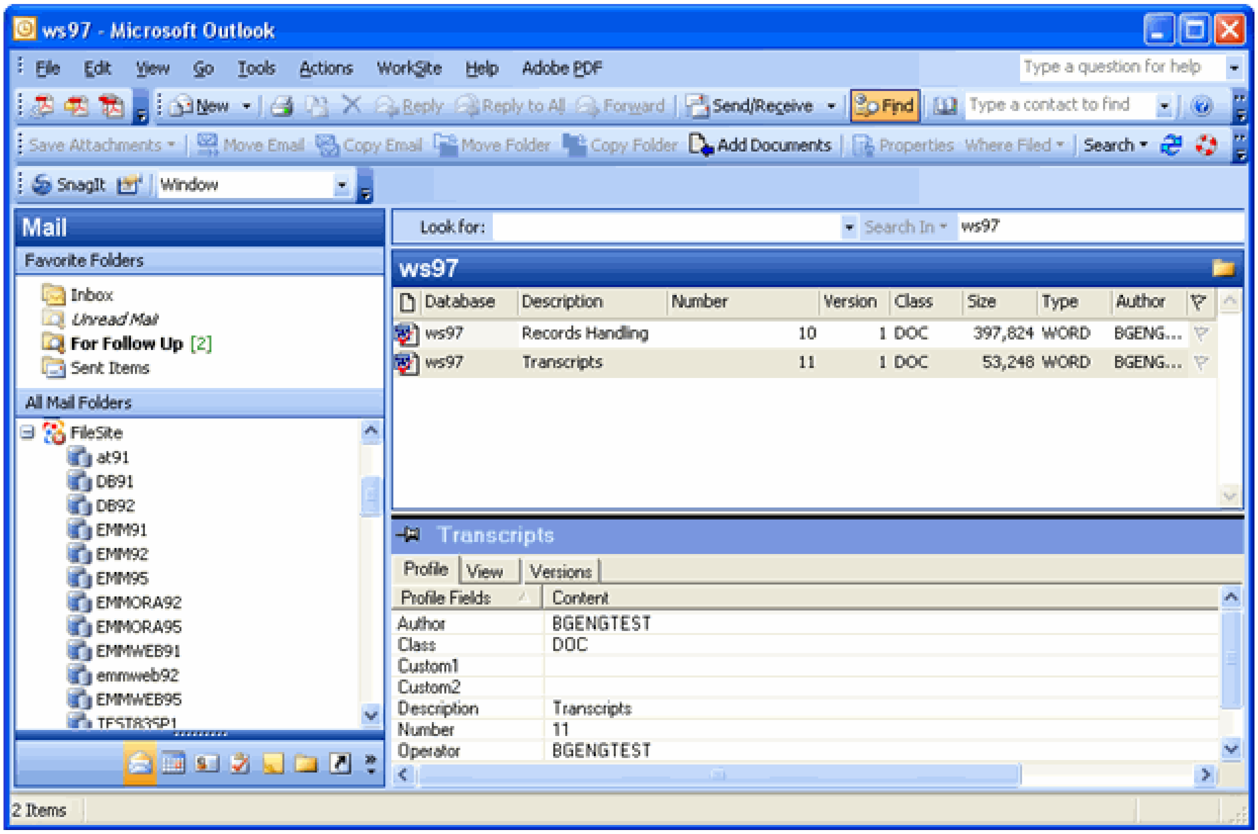
   The Options dialog box opens with the **General** tab selected.

Figure 206 Options dialog box, General tab



2. In the **When starting** area, select the **Work in off-line mode** option.
3. Click **Apply** to save your selection. Click **OK** to close the dialog box.
4. Restart the Microsoft Outlook application. You are now in portable mode. The FileSite interface is retained as shown in Figure 207.

Figure 207 Example FileSite Desktop, Portable mode



FileSite Node in Portable Mode

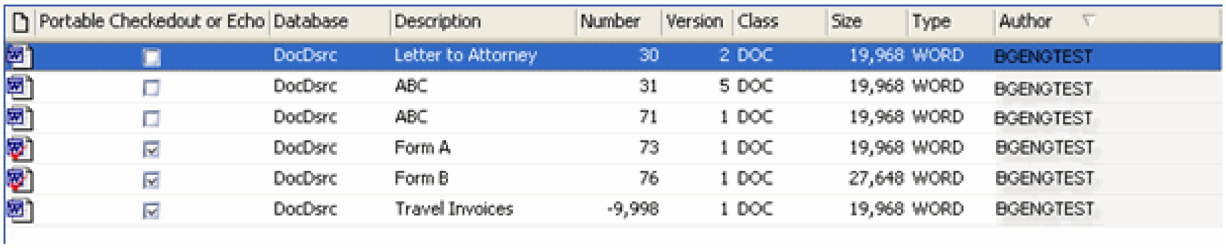
In portable mode, the libraries listed under the FileSite node are those that you previously accessed when in online mode. These libraries are stored as subdirectories under the `NrPortbl` and `NrtEcho` directories on your local hard drive. Your portable checked-out documents and echo documents are stored under each library.

See "Advanced Options" on page 66 for information on how to set the default drive for the Portable directory.

Document Grid in Portable Mode

In Portable Mode, the documents displayed in the Document Grid are initially filtered based on whether the document is a portable checked-out document or an echo document.

Figure 208 Example Document Grid, Portable mode



	Portable Checkedout or Echo	Database	Description	Number	Version	Class	Size	Type	Author
		DocDsrc	Letter to Attorney	30	2	DOC	19,968	WORD	BGENGTEST
		DocDsrc	ABC	31	5	DOC	19,968	WORD	BGENGTEST
		DocDsrc	ABC	71	1	DOC	19,968	WORD	BGENGTEST
		DocDsrc	Form A	73	1	DOC	19,968	WORD	BGENGTEST
		DocDsrc	Form B	76	1	DOC	27,648	WORD	BGENGTEST
		DocDsrc	Travel Invoices	-9,998	1	DOC	19,968	WORD	BGENGTEST

Document status icons appear in the far left column of the Document Grid to indicate portable checked-out documents and echo documents. The icons that may appear in this column are listed in Table 40.

Table 40 Document Status Icons

Icon	Portable Documents	Echo Documents
	The document is checked out.	
	The document is an orphan document in the `NrPortbl` directory.	The document is an unmodified document in the `NRTEcho` directory.
		The echo document has been modified and should be synchronized.

Application Setup in Portable

The local application table contains information that is used by Portable to launch applications associated with particular document types. Under certain circumstances, you may need to change the local copy of the application table:

- 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.

NOTE Contact your WorkSite Administrator before editing the application table. If you do not understand the way applications are integrated with WorkSite, editing the local copy of the application table is not recommended.

Working with Portable Documents

This section describes operations that can be performed with portable documents in FileSite:

- "Checking Out Documents from Online into Portable Mode"
- "Importing Documents into Portable Mode"
- "Opening Portable Documents"
- "Printing Portable Documents"
- "Viewing Portable Documents"
- "E-mailing Portable Documents"
- "Editing Portable Document Profile Information"
- "Checking In Documents from Portable to Online Mode"

Checking Out Documents from Online into Portable Mode

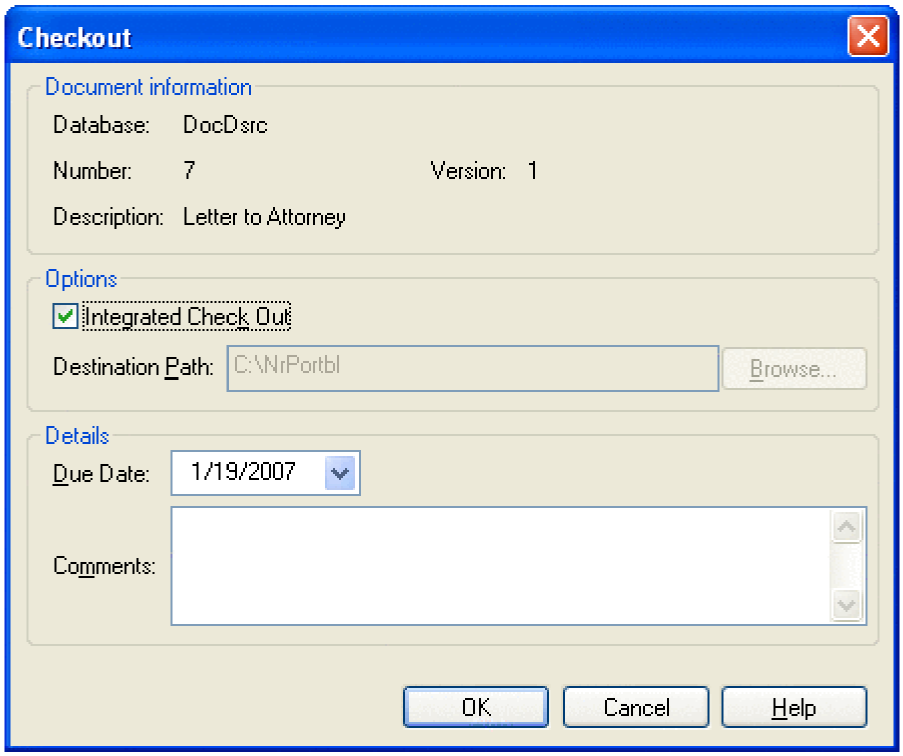
The first step in working in portable mode, is to check out documents from the WorkSite library to the portable document location on your local PC. This operation is referred to as an *integrated checkout*. FileSite provides you the ability to check out multiple documents in a single operation. The checked-out documents are marked as "In use" in FileSite.

The checkout process copies the documents to the NrPortbl directory, which is defined during portable mode registration. The profile information of the checked-out documents is also copied, so that you can find and access portable documents.

To checkout a document for portable use:

1. In FileSite, select the document you wish to check out from the Document Grid.
2. From the **Document** menu, select **Check Out**. The Checkout dialog box opens.

Figure 209 Checkout dialog box



3. Select the **Integrated Check Out** option. The **Destination Path** field defaults to the `NrPortbl` directory.
4. Specify a due date to return the document, from the **Due Date** list.
5. (Optional) Specify your reason for checking out the document or enter other information in the **Comments** field.
6. Click **OK** or press **ENTER** to check out the document for portable use.

Importing Documents into Portable Mode

If you created a new document on your local machine, while disconnected from the network; you can import this document into the portable mode using the **Add Document** option. When you reconnect to the network, you can checkin and synchronize the document with the WorkSite repository.

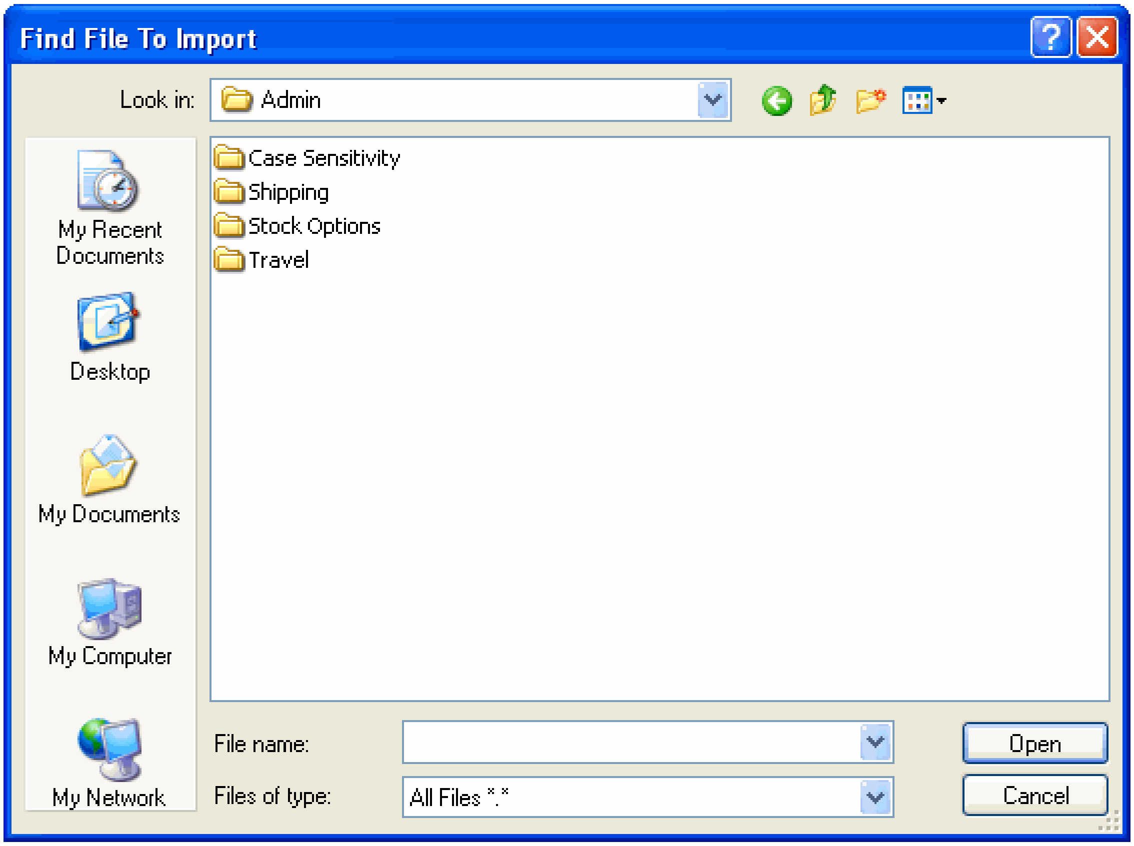
To import a document from your local machine into the portable mode:

1. Open FileSite in portable mode. See “Switching to Portable Mode” on page 349 for more information.
2. From the **WorkSite** menu select **Add Document** or click the **Add Document** icon in the toolbar.

In Outlook 2010, on the **WorkSite** tab, click the **Add Documents** button from the Actions area.

The Find File To Import dialog box opens.

Figure 210 Example Find File To Import dialog box



3. Navigate to the document on your local or network drive. Select it and click **Open** or press **ENTER**. The New Document Profile dialog box opens.
4. Enter information in the document's profile.

NOTE In portable mode, the **Lookup** buttons are not available on the dialog boxes. You must enter information manually. However, if the **Autocomplete** option is selected, FileSite "remembers" and automatically fills in the rest of the character string previously entered. See "Other Options" on page 65 for more information on setting this option.

5. Click **OK** or press **ENTER**.

The document appears in the Document Grid. You can check it in when you reconnect to the network.

Opening Portable Documents

1. Open FileSite in portable mode. See “Switching to Portable Mode” on page 349 for more information. The list of portable checked-out documents appears in the Document Grid as shown in Figure 207.

NOTE Portable looks for portable documents that have been checked out by the same user ID used to log into Windows. If you checked out documents using a user ID other than the one used to log into Windows, Portable cannot find the documents. You must log out of Windows and log back in using the same user ID that you used to log into the WorkSite Server when you checked out the portable documents.

2. Select the desired document.
3. Choose **Open** from the **Document** menu. The document opens in its associated local application.

Printing Portable Documents

You can print documents by using the **Print** option.

NOTE In portable mode, if you select **Print** from the **Document** menu, the document is automatically opened in its associated application and printed. To specify printing preferences in the Print dialog box, use the **Print** option in the integrated application.

1. Select the document you want to print from the Document Grid.

NOTE If you want to preview the document before printing, select **Print Preview** from the **File** menu.

2. From the **File** menu select **Print**. A standard Windows Print dialog box opens.
3. Specify your printing preferences and click **OK**.

Viewing Portable Documents

WorkSite Viewer allows you to view multiple documents of different formats at the same time.

1. Select the document you want to view from the Document Grid.
2. Choose **View** from the Document menu. A read-only copy of the document is displayed in the WorkSite Viewer window.

E-mailing Portable Documents

In portable mode you can use the **Forward** and **Send Link** options on the **Document** menu to send a copy, or a link to a portable document by e-mail.

Send Document

1. Select the document from the Document Grid.
2. Right-click to access the **Document** menu and select **Forward**.

   A new e-mail message appears with the document attached. You can remove this document from the e-mail by selecting it and pressing **Delete**.

Send Nrl/Url

1. Select the document from the Document Grid.
2. Right-click to access the **Document** menu and select **Send Link**. The **Send Link** submenu appears with the following options:
   - **To This Version**. The link is to the current version of the document.
   - **To Latest Version**. The link is to the most recent version of the document.

   A new e-mail message appears with the document Nrl or Url link attached.

NOTE To send a Document *URL link*, your system must include the WorkSite Web component server.

Editing Portable Document Profile Information

You can view and edit document profile information of the portable documents in portable mode.

1. Select the document from the Document Grid.
2. Choose **Properties** from the **Document** menu. The Properties dialog box opens.

3. Make changes or enter new values in the appropriate fields.

> **NOTE** In portable mode, the **Lookup** buttons are not available on the dialog boxes. You must enter information manually. However, if the **Autocomplete** option is selected, FileSite "remembers" and automatically fills in the rest of the character string previously entered. See "Other Options" on page 65 for more information on setting this option.

4. Click **OK** or press **ENTER**.

   The changed profile information is verified when the portable documents are checked back into FileSite.

Checking In Documents from Portable to Online Mode

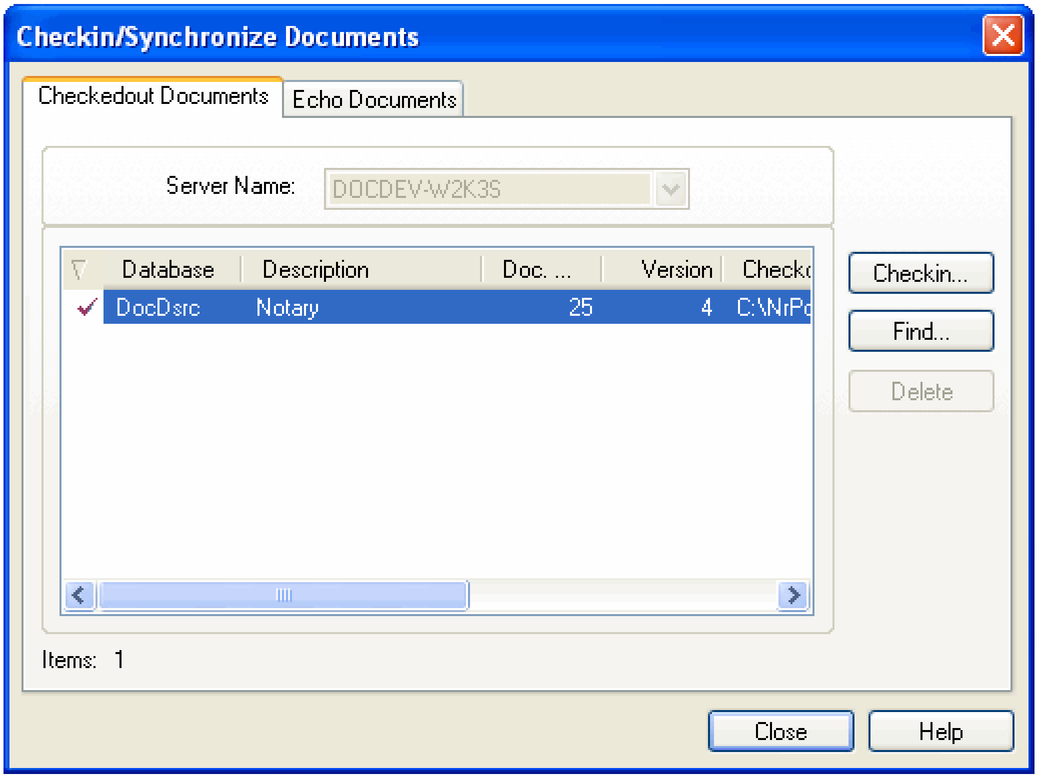
After working in portable mode, when you reconnect to the WorkSite Server, you can check in the checked-out documents and synchronize them with FileSite. The checkin process verifies the profiles of the portable documents against the profile-entry tables. If errors are detected, you are prompted to enter correct information.

1. Open FileSite in online mode. See "Switching to Online Mode" on page 362 for more information.
2. **Select Checkin/Synchronize** from the **WorkSite** menu.

   In Outlook 2010, on the **WorkSite** menu, click the **Checkin/Synchronize** icon from the Configure area.

   The Checkin/Synchronize Documents dialog box opens. See Figure 211.
3. Select the document from the **Checkedout Documents** tab.

Figure 211 Checkin/Synchronize Documents dialog box, Checkedout Documents



4. The checked-out documents appear in the display table with their profile fields as column headings.
   - 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 checked-out documents.
   - Click **Find** to open the Find in List dialog box and search on the profile fields of these documents. This is especially useful if the list of checked-out documents is large.

NOTE Document icons that appear against the documents indicate their status. See Table 40.

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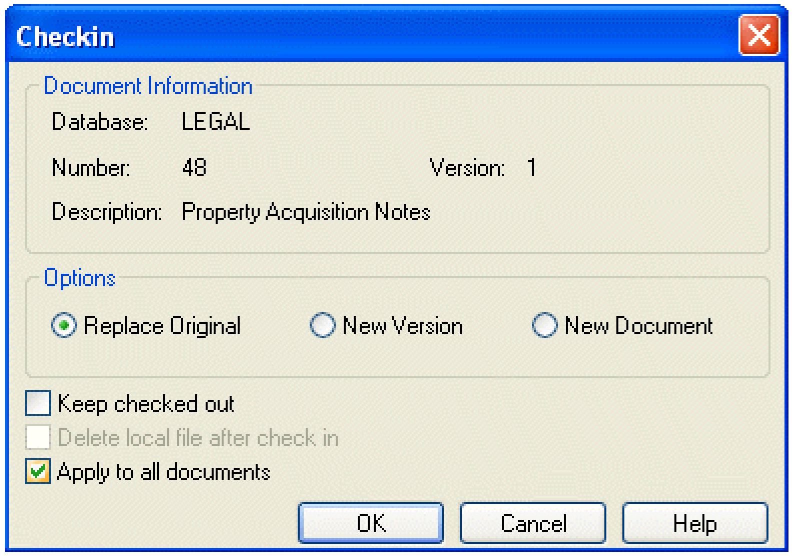
5. Select the documents you want to check in.
6. Click **Checkin** or type **ALT+C**. The Checkin dialog box opens.

Figure 212 Checkin dialog box



7. Select from the following options:
   - **Replace Original**
   - **New Version**
   - **New Document**

NOTE Depending on your system settings, you may not be able to select the **Replace Original** option. Contact your WorkSite Administrator for more information.

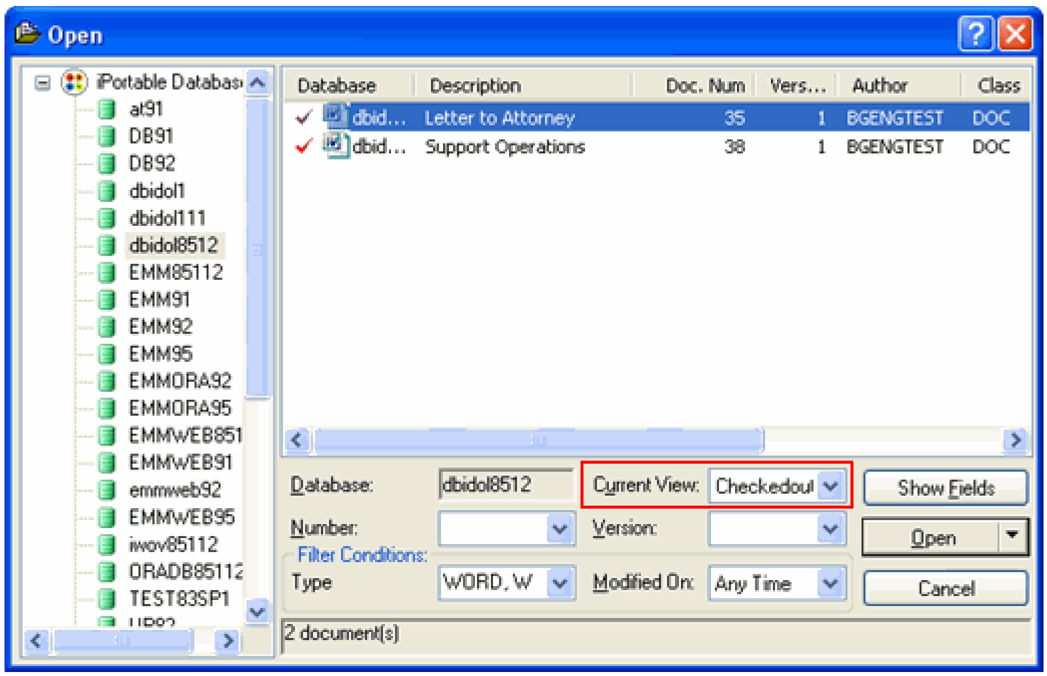
8. (Optional) Select from the following additional options:
   - **Keep checked out**. The document remains checked out, but the changes are synchronized with the document in the WorkSite library.
   - **Delete local file after check in**. The file in the Portable directory is deleted and the document is checked in.
   - **Apply to all documents**. The option you selected, that is, **Replace Original**, **New Version**, or **New Document**, is applied to all documents you selected. This option is available only when you select multiple documents.
9. (Optional) You can choose the following options:
10. Click **OK** or press **ENTER** to check in the documents.

Working with Portable Documents in Integrated Applications

You can open documents that are checked out for portable use, and save the changes from within integrated applications.

1. Launch the integrated application.
2. From the **File** menu in the integrated application select **Open**. The WorkSite Integrated Portable Open dialog box opens.

Figure 213 WorkSite Integrated Portable Open dialog box



3. From the **Current View** list, select **Checkedout documents**.
4. Browse within the portable libraries listed and navigate to the file you want to open.
5. Select the file and click **Open** button drop-down arrow to display the **Open** list, as shown in Figure 213. Choose one of the following options:
   - **Open**. Opens the original document in the portable library.
   - **Open Read-Only**. Opens a read-only copy of the document.
   - **Open and Repair**. Opens and repairs the corrupted document.
   - **Local Open.** Opens the local copy of the document stored on your local or network drive.

6. The document opens in its associated local application. You can make changes and save it. See "Saving Documents" on page 272 for more information on saving documents in integrated applications.

Switching to Online Mode

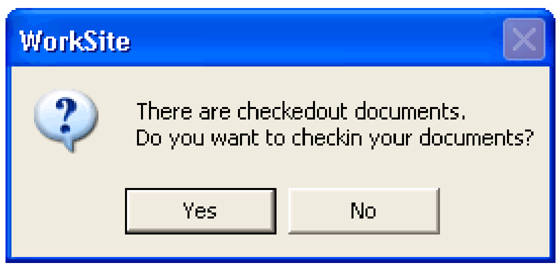
To switch from portable mode to online mode:

1. In FileSite, from the **WorkSite** menu, point to **Configure**, and select **Options**.

   In Outlook 2010, on the **WorkSite** tab, click the **General Options** icon from the Configure area.

   The Options dialog box opens with the **General** tab selected. See Figure 206.
2. In the **When starting** area, select the **Work in on-line mode** option.
3. Click **Apply** to save your selection. Click **OK** to close the dialog box.
4. Restart the Microsoft Outlook application. You are now in online mode. If you have checked-out documents in the offline repository, a message appears asking if you wish to check in the checked-out documents.

Figure 214 Checked-out Documents message



5. Click **Yes** to checkin the documents. See "Checking In Documents from Portable to Online Mode" on page 358 to continue.

Orphan Documents

You may have documents in your `NrPortbl` directory that were checked out by a user other than yourself. FileSite identifies such documents as *orphan documents*. You can import these orphan documents into FileSite as new documents.

CHAPTER 11

Document Echoing

Overview

This chapter contains the following information about the document echoing function:

- "Introduction"
- "Setting Up"
- "Working with Echo Documents"

Introduction

WorkSite provides a safeguard in the event of a network failure. *Document echoing* preserves backup copies of your documents, so that content is not lost.

Every time you close a WorkSite document, FileSite saves a duplicate copy of it to the hard disk on your local machine. After a network failure, you can access and perform functions on your important and recently accessed files. If you make revisions to these files, FileSite provides a *synchronize* function to help reintegrate them into the WorkSite library.

Setting Up

This section contains the following information:

- “Prerequisites”
- “Enabling Document Echoing”
- “Setting the Default Drive for the Echo Directory”

Prerequisites

To access echo documents during a network failure, your local machine should be set up as follows:

- Registered for Portable mode operation.
- Able to run a local copy of the Windows operating system.
- Have local stand-alone versions of the application programs associated with the echoed documents.

NOTE If no applications are associated with your echoed documents, you can still view echoed documents using WorkSite Viewer.

Enabling Document Echoing

Document echoing must be enabled for FileSite to save backup copies of your documents to your local machine.

Your *WorkSite Administrator* can enable and disable document echoing globally or for certain kinds of documents. If your machine is registered for portable mode but FileSite is not echoing documents, contact your *WorkSite Administrator* for assistance.

Setting the Default Drive for the Echo Directory

You can set the directory where FileSite saves the echo documents. Normally, they are stored on a directory on your local machine. While the location for the Echo directory can be changed, the name of the directory is always `NRTEcho`. Contact your *WorkSite Administrator* for setting the default drive for the Echo directory.

Working with Echo Documents

You can access echo documents through FileSite in portable mode or through integrated applications such as Microsoft Word. See “Switching to Portable Mode” on page 349 for information on how to enable Portable mode.

This section contains the following information:

- “Working with Echo Documents in Portable Mode”
- “Working with Echo Documents from Integrated Applications”

NOTE You cannot open documents in the Echo directory until they have been synchronized with the WorkSite library. This feature prevents you from overwriting changes that you made to the document. See “Synchronizing Echo Documents” on page 367 for more information.

Working with Echo Documents in Portable Mode

Both echo documents and portable documents are accessed through FileSite in portable mode. In portable mode, you use the same interface as in online mode. See “Working in Portable Mode” on page 348 for more information.

Several of the document functions performed with portable documents can be performed with echo documents. Table 41 provides a summary.

Table 41 Summary of Echo Document functions

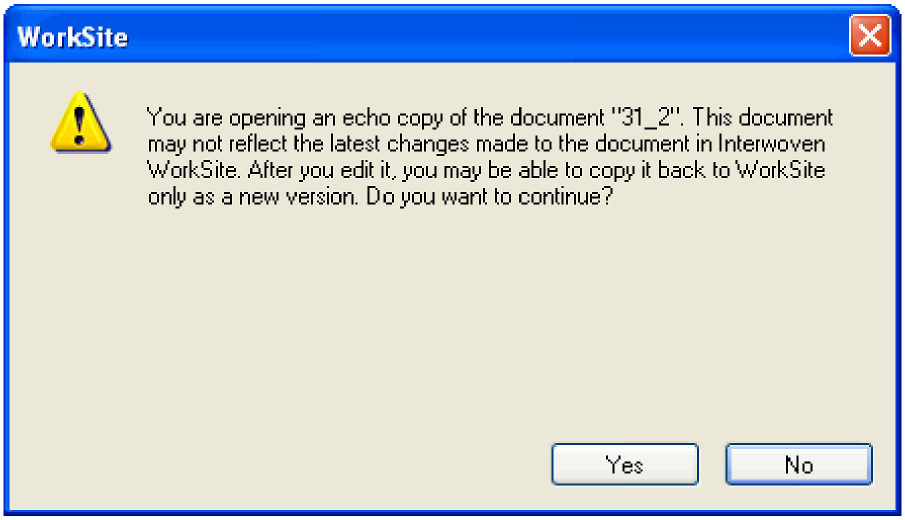
To	See
Open echo documents	“Opening Echo Documents” on page 365
Print echo documents	“Printing Portable Documents” on page 356
View echo documents	“Viewing Portable Documents” on page 357
E-mail echo documents	“E-mailing Portable Documents” on page 357
View an echo document’s profile information	“Viewing Echo Document Profile Information” on page 366

Opening Echo Documents

1. Launch FileSite. If you are not connected to a network, FileSite switches to portable mode. The list of portable checked-out documents and echo documents appears in the Document Grid. See Figure 208 on page 352.

2. Open the desired WorkSite document. A message appears (see Figure 215), stating that this copy of the document may not be as updated as the copy in the WorkSite library; on reconnecting to the network, you can copy it back into FileSite only as a new version.

Figure 215 Echo document warning message



3. Click **Yes** to continue. The document opens in its associated local application.

Viewing Echo Document Profile Information

You can view document profile information of the echo documents, but you *cannot* edit profile information.

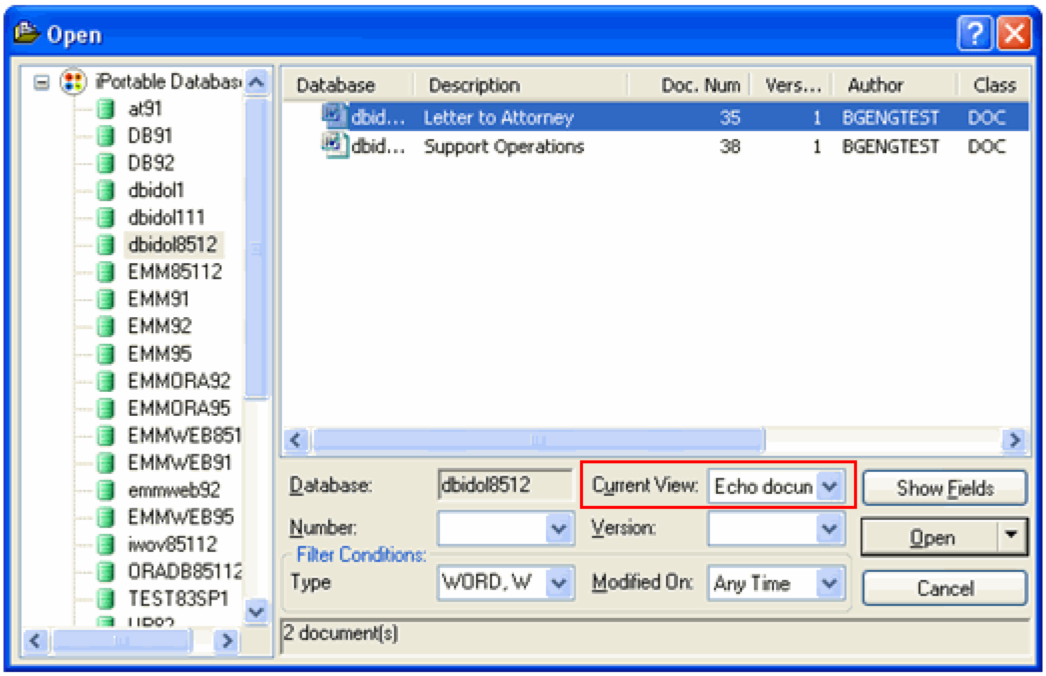
1. Launch FileSite. If you are not connected to a network, FileSite switches to portable mode. The list of portable checked-out documents and echo documents appears in the Document Grid. See Figure 208 on page 352.
2. Select the desired document.
3. Choose **Properties** from the **Document** menu. The Properties dialog box opens, with all the profile fields appearing as unavailable because you cannot edit these fields.

Working with Echo Documents from Integrated Applications

You can open echo documents, and save the changes you make from within integrated applications.

1. Launch the integrated application.
2. From the **File** menu in the integrated application select **Open**. The WorkSite Integrated Portable Open dialog box opens.

Figure 216 WorkSite Integrated Portable Open dialog box



3. From the **Current View** list, select **Echo documents**.
4. Browse within the portable libraries listed and navigate to the file you want to open.
5. Select the file and click the **Open** button drop-down arrow to display the **Open** list, as shown in Figure 216. Choose one of the following options:
   - **Open**. Opens the original document in the portable library.
   - **Open Read-Only**. Opens a read-only copy of the document.
   - **Open and Repair**. Opens and repairs the corrupted document.
   - **Local Open.** Opens the local copy of the document stored on your local or network drive.
6. The document opens in its associated local application. You can make changes and save. See "Saving Documents" on page 272 for more information on saving documents in integrated applications.

Synchronizing Echo Documents

After you edit and save an echo document while working offline, you can copy it back to the WorkSite library after network connections are restored. FileSite provides an easy way to copy modified echo documents back to the network through a process called *synchronization.*

When you start FileSite, if you have echo documents with changes that are not reflected in the copies in the WorkSite library, you are prompted to synchronize. This feature prevents you from overwriting changes made to the document.

The following are the prerequisites when synchronizing a document:

- Only the user who last edited the document in FileSite can synchronize it. If you try to synchronize an echo document edited by another user, a message asking you to contact the user who last edited the document appears.
- Your echo copy of a document must be newer than the copy in the WorkSite library. FileSite does not allow you to synchronize an echo document if the copy in the WorkSite library has been modified more recently than your echo copy.
- You must have *Read/Write* access to the source document in the WorkSite library.

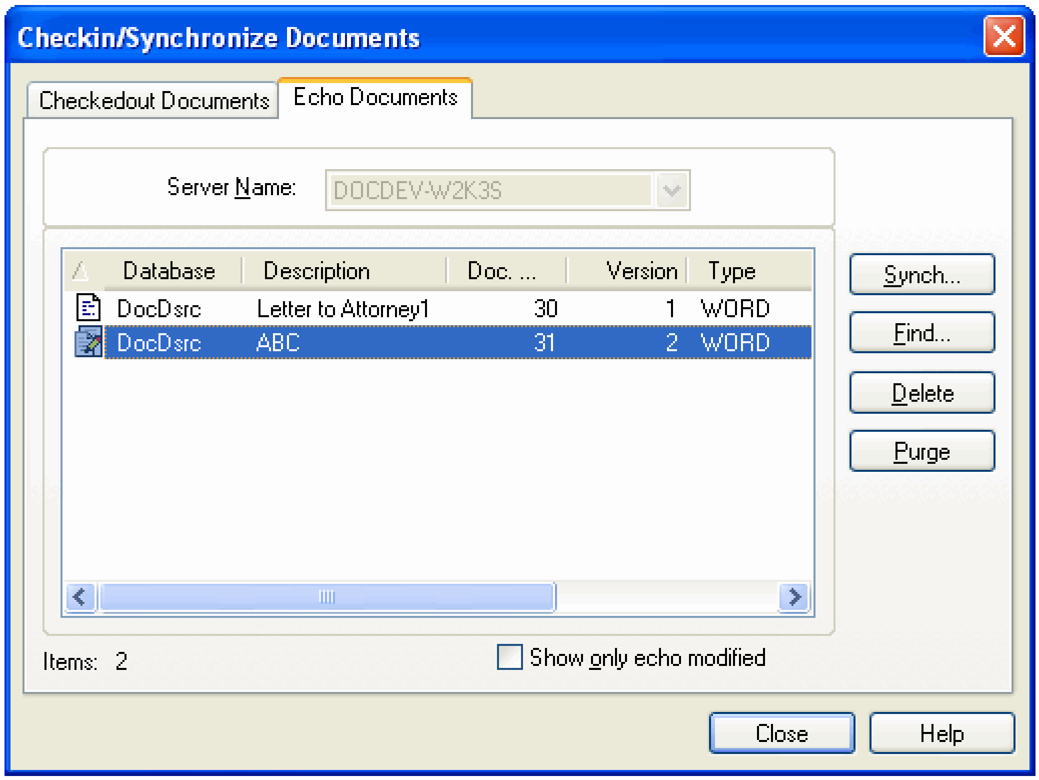
To synchronize an echo document:

1. Launch FileSite. You are in online mode as network connections have been restored.
2. From the **WorkSite** menu, select **Checkin/Synchronize**.

   In Outlook 2010, on the **WorkSite** tab, click the **Checkin/Synchronize** icon from the Configure area.

   The Checkin/Synchronize Documents dialog box opens. See Figure 217.
3. Select the **Echo Documents** tab to display the list of echo documents.

Figure 217 Checkin/Synchronize Documents dialog box, Echo Documents



4. The echo documents appear in the display table with their profile fields as column headings.

NOTE Document icons that appear against the documents indicate their status. See Table 40.

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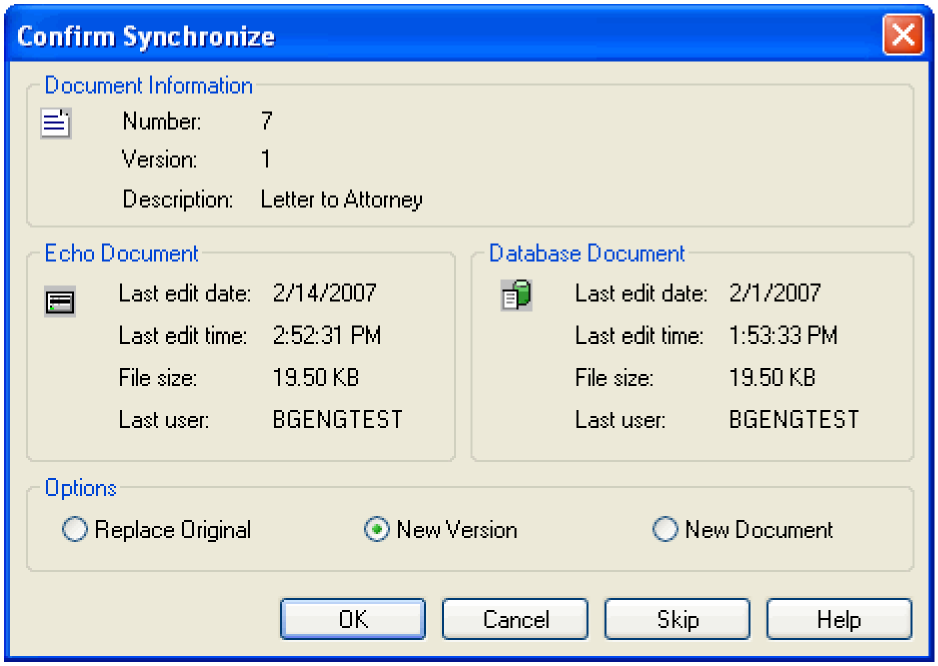
5. (Optional) Select the **Show only echo modified** option to display only the changed echo documents.
6. Select the echo documents you want to synchronize.
7. You can perform the following functions in this dialog box:
   - Click **Find** to open the Find in List dialog box for you to perform a search on the profile fields of the echo documents. This is especially useful if the list of echo documents is large.
   - Click **Delete** to discard the modified echo document.
   - Click **Purge** to set purge criteria. See "Purging Echo Documents" on page 371 for more information.

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

Figure 218 Confirm Synchronize dialog box



8. Verify the comparison between the Echo Document and the Database Document.

9. Choose from the following options:

   - **Replace Original**. The modified echo document replaces the original copy in the WorkSite library.
   - **New Version**. The modified echo document is synchronized as a new version of the document.
   - **New Document**. The modified echo document is synchronized as a new document.

NOTE Depending on your system settings, you may not be able to select the **Replace Original** option. Contact your *WorkSite Administrator* for more information.

All checkin options may not be available in the following circumstances:

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

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

10. Click **OK** to synchronize the document. Click **Cancel** if you want to cancel synchronizing all the selected documents. Click **Skip** to cancel synchronizing a specific document.

NOTE If you are unable to use the FileSite synchronization process to copy your modified echo document back to the WorkSite library, you can use the **Add Document** command in FileSite to **import** the modified echo document as a new document.

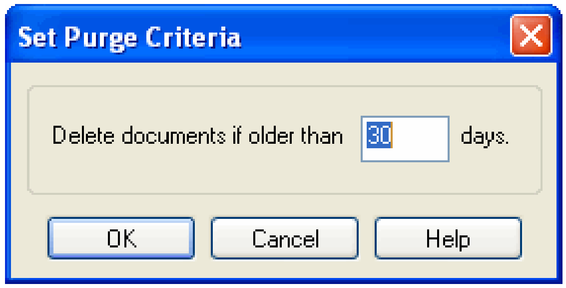
Purging Echo Documents

1. Launch FileSite.
2. From the **WorkSite** menu, select **Checkin/Synchronize**.

   In Outlook 2010, on the **WorkSite** tab, click the **Checkin/Synchronize** icon from the Configure area.

   The Checkin/Synchronize Documents dialog box opens. See Figure 217.
3. Select the **Echo Documents** tab to display the list of echo documents. The echo documents appear in the display table with their profile fields as column headings.
4. (Optional) Select the **Show only echo modified** option to display only the changed echo documents.
5. Select the echo documents you want to purge.
6. Click **Purge**. The Set Purge Criteria dialog box opens:

Figure 219 Set Purge Criteria dialog box



7. To delete all documents older than a certain number of days, enter the maximum age (in days) of the echo documents that you want to keep.
8. Click **OK**. 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 valid only for a manual purge of the directory. Echo documents continue to accumulate unless you manually purge the directory in this manner.

Purging Echo Documents Automatically

Documents stored in the echo folder can be purged from the command line or through a login script. Use the following command line options, or contact your *WorkSite Administrator* for assistance.

The Portable program (PORTBL32.EXE) allows the following command line options:

```
-D [number]{/DEL} -DS [number] {/DEL} -PS [number] {/DEL} -D
[number]
```

This option opens the Portable program and purges the user’s echo files older than the specified number of days. After all eligible files are purged, the Portable application continues running on the user's desktop.

-DS [number]

This option launches the Portable program in “silent” mode, and then purges the user’s echo files older than the specified number of days. Silent mode launches the Portable program only long enough to purge the necessary files, and then exits automatically. This is the option that is usually used in a login script to automatically purge the echo files upon login.

-PS [number]

This feature is similar to the -DS option, but applies to *all* users’ documents found on the machine rather than just your documents.

/DEL

If you add this string to one of the previous options, the echo files are permanently deleted from the system rather than moved to the Recycle Bin.

Examples

To purge all echo documents older than 20 days and leave the Portable application running, enter the following at the command line:

```
“C:\Program Files\Interwoven\WorkSite\Portbl32.exe” -D20
```

To purge all echo documents older than 20 days and exit the Portable application, enter the following at the command line:

```
“C:\Program Files\Interwoven\WorkSite\Portbl32.exe” -DS20
```

The following string permanently deletes *all* users’ echo documents that are more than 20 days old. The delete operation is performed silently, and `Portbl32.exe` exits after the delete operation without displaying any user interface or messages.

```
“C:\Program Files\Interwoven\WorkSite\Portbl32.exe” -DS20 /DEL
```

The following string permanently deletes *all* users’ echo documents that are more than 5 days old. After the delete operation is completed, the Portable user interface is displayed for the user.

```
“C:\Program Files\Interwoven\WorkSite\Portbl32.exe” -D5 /DEL
```

The following string silently and permanently deletes *all* users’ echo documents that are more than 15 days old. The delete operation is performed silently, and `Portbl32.exe` exits after the delete operation without displaying any user interface or messages.

```
“C:\Program Files\Interwoven\WorkSite\Portbl32.exe” -PS15 /DEL
```

Index

E

F

G

H

I

K

L

M

N

O

P

Q

R

S

T

U

V

W

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