

Navigating FileSite

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FileSite Overview

FileSite is a desktop application for using WorkSite that is fully integrated with Microsoft Office and Microsoft Outlook. Figure 1 shows FileSite integrated into Microsoft Outlook 2010. You use FileSite-specific menu options and toolbars to perform many tasks in FileSite.

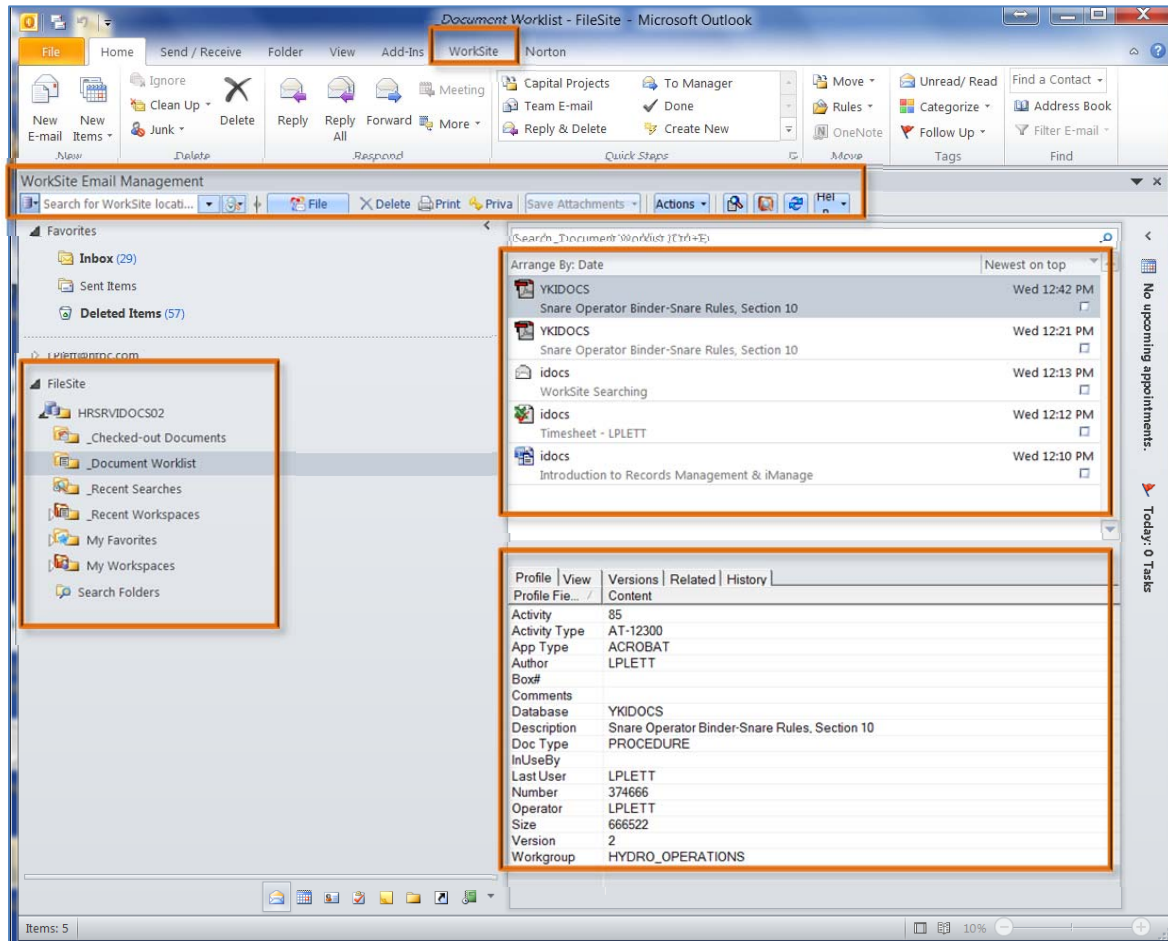


Figure 1. The menus and toolbars for accessing Filesite tasks in Outlook 2010.

WorkSite Menu

The WorkSite menu is integrated into the ribbon bar of Microsoft Outlook. Many of the tools required to perform tasks in iManage can be found here. Similar to most Microsoft products, you can find many different ways to access these same tools throughout the application.

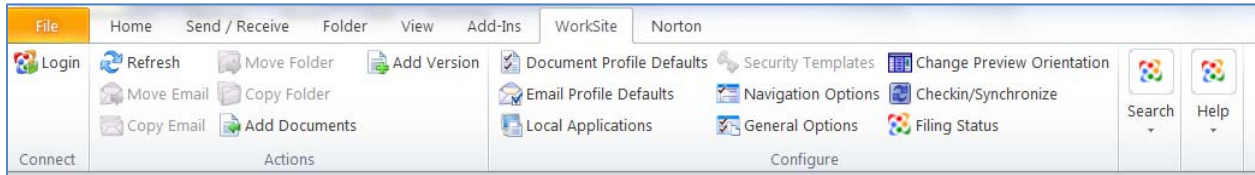
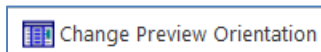


Figure 2. WorkSite menu options in the ribbon bar of Microsoft Outlook 2010.

One very useful tool in the WorkSite menu is the **Change Preview Orientation** button.



Clicking on this button will move the document results frame from the bottom of the document grid (Figure 3) to the right hand side of the document grid (Figure 4). It is recommended that you configure your screen with the document results frame below the document grid as shown in Figure 3.

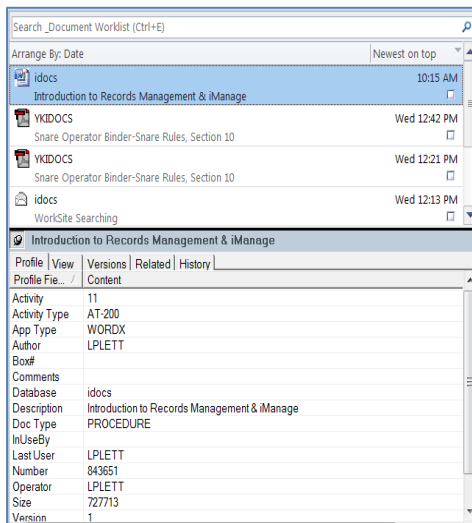


Figure 3. Document results frame below the document grid.

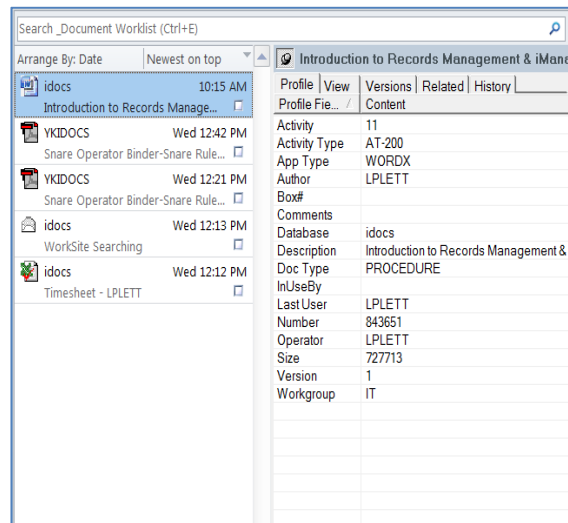
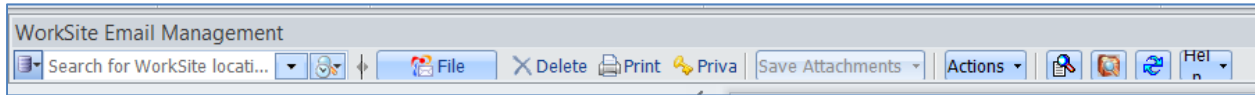


Figure 4. Document results frame beside the document grid.

Email Management Toolbar

The Email Management toolbar is where you find the tools used in iManaging your emails. Other tools found here are document searches, workspace searches, the Actions button with many tools similar to those found in the WorkSite Menu, as well as access to the online FileSite Help.



Folder List

The Folder List, located below your Outlook Mailbox, displays information about workspaces, folders and recent searches (Figure 5).

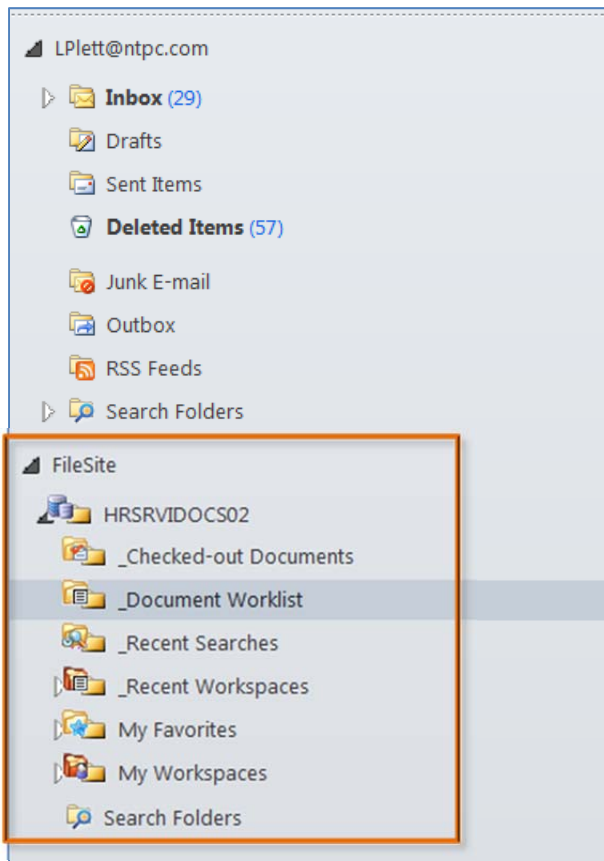
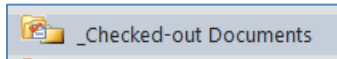


Figure 5. The FileSite folder list.

The items and their function available in the folder list include:

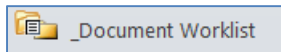


The server you are currently connected to will be listed directly under the FileSite heading. If you work in Hay River you will connect to the HRSRVIDOCS02 server. If you work outside of Hay River you will connect to the YKSRVIDOCS01 server.

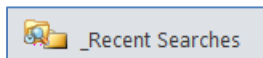


When you open a document from iManage it “checks it out” from the file server. This means it makes a copy of the file on the local c: drive of your computer. Others can still view the document in read-only mode because the original remains on the file server but they cannot save changes to it while you have it checked-out. Once you are done with the document and you save and close it, the file is copied back to the file server and “checked back in”. Clicking on Checked-out Documents in the folder list will display a list in the document grid of all of the documents you currently have checked out.

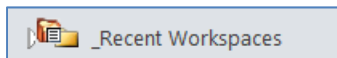
It’s important to monitor this folder for checked-out documents. If you close a file and a communication problem prevents the server from checking it back in correctly, the document will remain checked-out and others will not be able to make any changes to it. If you do see a file listed here that you don’t have open or did not check-out to work on offline, you can manually check it back in.



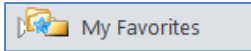
The Document Worklist displays the last 40 documents you most recently edited or used. By default, they will be sorted in the document grid by the date they were last accessed. This is a quick way to return to a document you recently worked on.



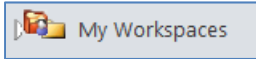
Recent Searches displays a list of searches you have performed during your current session - it refreshes each time you reopen Outlook.



Similar to the Document Worklist, the Recent WorkSpaces will display a list of the workspaces you have recently accessed. The default sort order is also by the date last accessed.



My Favorites displays a list of shortcuts to any items that you add. You can add or remove workspaces, folders and documents as you need them. This is quick way to access information you are currently working on without having to drill down through workspaces or multiple folder levels.



My Workspaces displays a list of workspaces you have added as shortcuts. You can customize this area by adding or removing workspaces as you need them. A workspace is a functional based organization of tabs, folders and documents.

Document Grid

The document grid lists the results of folders or searches from the folder list. It is presented as a table, in sortable columns (Figure 6).

Database	Description	Number	Version	Doc Type	Author	Access Time	Exter...
idocs	Introduction to Records Management & iManage	843,651	1	PROCEDURE	LPLETT	Fri 12/08/2011 10:15 AM	<input type="checkbox"/>
YKIDOCs	Snare Operator Binder-Snare Rules, Section 10	374,666	2	PROCEDURE	LPLETT	Wed 10/08/2011 12:42 PM	<input type="checkbox"/>
YKIDOCs	Snare Operator Binder-Snare Rules, Section 10	374,666	1	PROCEDURE	LPLETT	Wed 10/08/2011 12:21 PM	<input type="checkbox"/>
idocs	WorkSite Searching	843,557	1	CORR	LPLETT	Wed 10/08/2011 12:13 PM	<input type="checkbox"/>
idocs	Timesheet - LPLETT	843,556	1	DOC	LPLETT	Wed 10/08/2011 12:12 PM	<input type="checkbox"/>

Figure 6. The document grid.

The grid can be customized, so what is seen here may not be exactly what you see when you sign into FileSite. The main columns include:



The Document Icon column displays the application type for each document listed in the grid. Figure 6 shows examples of Adobe PDF files, an email document, a Microsoft Word document and a Microsoft Excel document.



Checked-out documents display the added red check mark over the icon so they are easily identified.

Database

This database corresponds to the 2 file servers discussed earlier. If the document exists on the HRSRVIDOCS02 server its database is idocs. If the document exists on the YKSRVIDOCS01 server its database is YKIDOCS. You can be connected to one server and still access workspaces, folders and documents on either database.

Description

The Description column is the name you give to the document when you save it to iManage. The better the description the easier it is to find it later and for others to know what the document contains.

Number

The number column shows the unique number assigned to every document automatically by iManage.

Version

The version column displays the version of the document.

Doc Type

Doc Type is a descriptor of the document to aid in searching. In most cases, when you save a document into a folder in a workspace, the Doc Type will inherit from the folder based on the folders subject matter.

Author

The author is the user who created the document.

Access Time

Access Time shows the last time the document was accessed.

All of these columns are sortable by clicking on the title of the column. For example, clicking on the description column will sort the documents alphabetically by their descriptions.

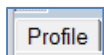
Document Results Frame

The document results frame displays information about the document selected in the document grid (Figure 7). It is divided into 5 tabs.

Search _Document Worklist (Ctrl+E)							
Database	Description	Number	Version	Doc Type	Author	Access Time	Exter...
idocs	Introduction to Records Management & iManage	843,651	1	PROCEDURE	LPLETT	Fri 12/08/2011 10:15 AM	<input type="checkbox"/>
YKIDOCs	Snare Operator Binder-Snare Rules, Section 10	374,666	2	PROCEDURE	LPLETT	Wed 10/08/2011 12:42 PM	<input type="checkbox"/>
YKIDOCs	Snare Operator Binder-Snare Rules, Section 10	374,666	1	PROCEDURE	LPLETT	Wed 10/08/2011 12:21 PM	<input type="checkbox"/>
idocs	WorkSite Searching	843,557	1	CORR	LPLETT	Wed 10/08/2011 12:13 PM	<input type="checkbox"/>
idocs	Timesheet - LPLETT	843,556	1	DOC	LPLETT	Wed 10/08/2011 12:12 PM	<input type="checkbox"/>

Introduction to Records Management & iManage	
Profile	View
Profile File...	Content
Activity	11
Activity Type	AT-200
App Type	WORDX
Author	LPLETT
Box#	
Comments	
Database	idocs
Description	Introduction to Records Management & iManage
Doc Type	PROCEDURE
InUseBy	
Last User	LPLETT
Number	843651
Operator	LPLETT
Size	727713
Version	1
Workgroup	IT

Figure 7. The document results frame.



The profile tab lists the information describing the document, also referred to as metadata. The Activity and Activity Type metadata are used by the records manager component of iManage to classify the record under the File Classification System. Most metadata is inherited from the folder you save your document into. Other metadata seen here includes the author, last used by, if it's checked out it will show who has it checked out in the InUseBy field, the size of the file and what workgroup the document belongs too (Figure 7).

View

The view tab lets you view the document without having to leave FileSite. This is very useful when you are looking for a specific document and need a quick glimpse of it without having to open it in its associated application. Figure 9 shows an example of an Excel document being viewed in the view tab of the document results frame.

	A	B	C	D	E	F	G	H	I	J	K	
1	NORTHWEST TERRITORIES	WEEKLY TIME SHEET										
2	POWER CORPORATION										<input type="checkbox"/> Part	
3											<input type="checkbox"/> Term	
4											<input type="checkbox"/> Shift	
5											<input type="checkbox"/> Part	
6	101	YELLOWKNIFE	Coyne				Erin					<input type="checkbox"/> Perm
7	Plant #	Plant Name	Surname				First					<input type="checkbox"/> Casu
8												
9												
10	Work Performed		Hours Worked Daily							Regular		
11			Sun	Mon	Tue	Wed	Thur	Fri	Sat	Earn Code	Hours	
12	Days of Rest		*							*		

Figure 9. Excel document viewed in FileSite.

Versions

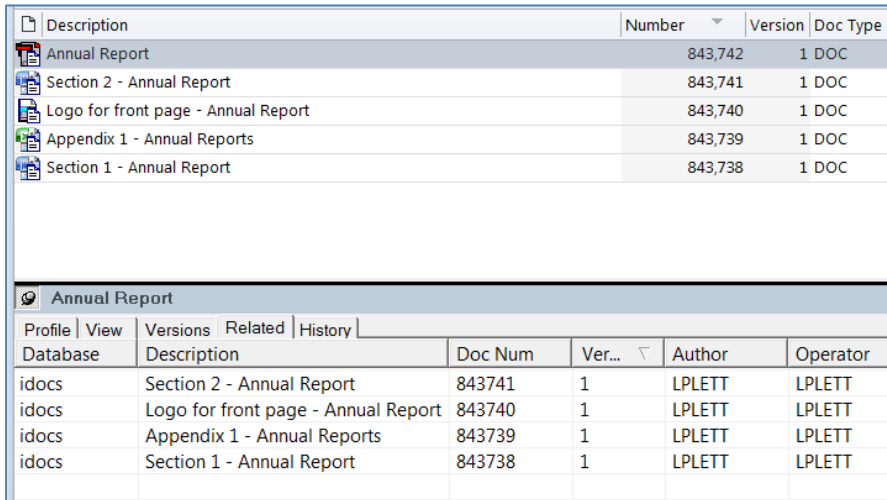
The versions tab will list all of the versions for the document selected in the document grid. iManage allows for creation and tracking of multiple versions of a document. Figure 10 shows 3 pdf files with the same descriptions and the same document numbers but with different versions. Selecting one of the pdf's in the document grid will display all 3 versions in the versions tab of the document results frame.

Database	Description	Doc Num	Ver...	Author	Operator	
YKIDOCs	Snare Operator Binder-Snare Rules, Section 10	374666	3	LPLETT	LPLETT	Fri 12/08/2011 1:25 PM
YKIDOCs	Snare Operator Binder-Snare Rules, Section 10	374666	2	LPLETT	LPLETT	Wed 10/08/2011 12:42 PM
YKIDOCs	Snare Operator Binder-Snare Rules, Section 10	374666	1	LPLETT	LPLETT	Wed 10/08/2011 12:21 PM

Figure 10. Versions tab of the document results frame.

Related


The related tab lists all document related to the one selected in the document grid. Document relations are used to group multiple documents to a master document. For example, a contract and its amendments, or a final pdf report with all its inserts that may include image files, Word or Excel files (Figure 11).



Description	Number	Version	Doc Type
Annual Report	843,742	1	DOC
Section 2 - Annual Report	843,741	1	DOC
Logo for front page - Annual Report	843,740	1	DOC
Appendix 1 - Annual Reports	843,739	1	DOC
Section 1 - Annual Report	843,738	1	DOC

Annual Report						
Profile	View	Versions	Related	History		
Database	Description	Doc Num	Ver...	Author	Operator	
idocs	Section 2 - Annual Report	843741	1	LPLETT	LPLETT	
idocs	Logo for front page - Annual Report	843740	1	LPLETT	LPLETT	
idocs	Appendix 1 - Annual Reports	843739	1	LPLETT	LPLETT	
idocs	Section 1 - Annual Report	843738	1	LPLETT	LPLETT	

Figure 11. Document results frame displaying all the related documents to the pdf selected in the document grid.

The related document icon  displays over the application icon in the document grid to easily identify files with relations.

History



The history tab displays all the activity recorded about a document as well as the date and duration of each, who performed it and from what computer. Things displayed typically include when the document was created, when profile metadata or security on the document was modified, printing of a document and how many pages were printed as well as when a document was opened or viewed and for how long (Figure 12).

Database	Description	Number	Version	Doc Type	Author
idocs	Section 1 - Annual Report	843,738	1	DOC	LPLETT
idocs	Annual Report	843,742	1	DOC	LPLETT
idocs	Section 2 - Annual Report	843,741	1	DOC	LPLETT
idocs	Logo for front page - Annual Report	843,740	1	DOC	LPLETT
idocs	Appendix 1 - Annual Reports	843,739	1	DOC	LPLETT
YKIDOCs	Snare Operator Binder-Snare Rules, Section 10	374,666	3	PROCEDURE	LPLETT

Section 1 - Annual Report							
Profile	View	Versions	Related	History			
User	Application	Activity	Date-Time	Duration	Pages Printed	Location	Co
LPLETT	WINWORD	Checkin	13/08/2011 2:16:22 PM	0:0:18	0	LEAHP	
LPLETT	WINWORD	Print	13/08/2011 2:16:20 PM	0:0:0	0	LEAHP	
LPLETT	OUTLOOK	Checkout	13/08/2011 2:16:04 PM	0:0:0	0	LEAHP	
LPLETT	OUTLOOK	Print	13/08/2011 2:15:29 PM	0:0:0	0	LEAHP	
LPLETT	OUTLOOK	Checkin	13/08/2011 2:10:55 PM	0:0:33	0	LEAHP	
LPLETT	OUTLOOK	Checkout	13/08/2011 2:10:22 PM	0:0:0	0	LEAHP	
LPLETT	OUTLOOK	Change Security	13/08/2011 2:10:19 PM	0:0:0	0	LEAHP	
LPLETT	OUTLOOK	Changed Profile	13/08/2011 2:10:19 PM	0:0:0	0	LEAHP	
LPLETT	OUTLOOK	View	13/08/2011 2:09:59 PM	0:0:0	0	LEAHP	
LPLETT	WINWORD	Checkin	13/08/2011 11:59:51 AM	0:0:6	0	LEAHP	
LPLETT	OUTLOOK	Checkout	13/08/2011 11:59:45 AM	0:0:0	0	LEAHP	
LPLETT	OUTLOOK	Checkin	13/08/2011 11:59:45 AM	0:0:2	0	LEAHP	
LPLETT	OUTLOOK	Checkout	13/08/2011 11:59:43 AM	0:0:0	0	LEAHP	
LPLETT	OUTLOOK	Create	13/08/2011 11:59:43 AM	0:0:0	0	LEAHP	

Figure 12. History details of the document selected in the document grid.

The other feature in the display frame is the **push pin**. This controls the relationship between the document grid and the document results frame. Depending on the push pin state, the document results frame behaves differently when you click on an item in the document grid.

-  When the push pin state is up, the grid goes blank when you switch from one document to another.
-  When the push pin state is down, the grid automatically refreshes when you switch from one document to another.

The push pin can be set differently for each tab in the document results frame.