

# Working with Documents

# Table of Contents

- Document Profile Information ..... 2
  - Viewing Profile Information* ..... 2
- Security ..... 5
  - Viewing Security* ..... 7
  - Modifying Security* ..... 8
  - General FileSite Security Rules* ..... 8
- Understanding Application Integration ..... 9
  - WorkSite Integrated Desktop* ..... 10
    - Components of the WorkSite Integrated Desktop* ..... 11
- Working with iManage Documents in Outlook ..... 13
  - Opening Documents* ..... 13
  - Importing Documents* ..... 13
  - Check Out and Export* ..... 16
    - Check Out ..... 16
    - Export ..... 18
  - Check In* ..... 19
  - Unlock* ..... 21
  - Move* ..... 22
  - Delete & Remove from Folder* ..... 24
  - Emailing Documents* ..... 24
    - Email a copy ..... 24
    - Email a link ..... 25
  - Convert to PDF & Send as PDF* ..... 25
    - Convert to PDF ..... 26
    - Send as PDF ..... 27
  - Document Info* ..... 28
- Working with Documents in Integrated Applications ..... 30
  - Open* ..... 30
  - Save & Save As* ..... 31
  - Emailing Documents* ..... 31
  - Viewing Profile Information* ..... 33



## Document Profile Information

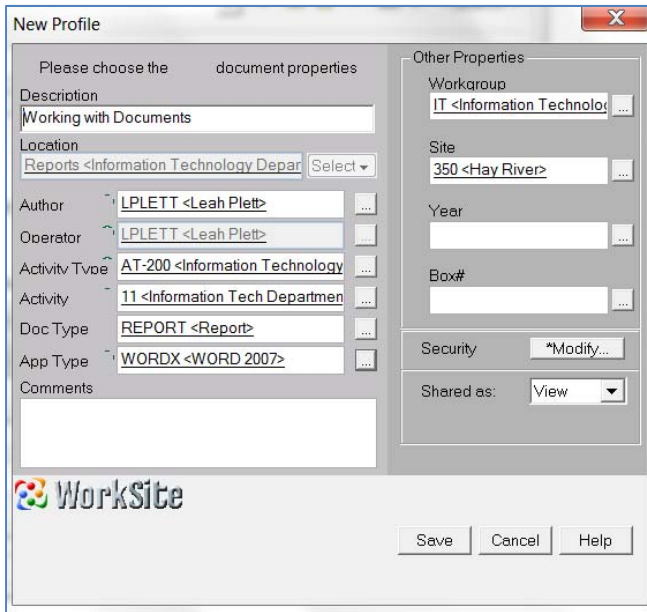
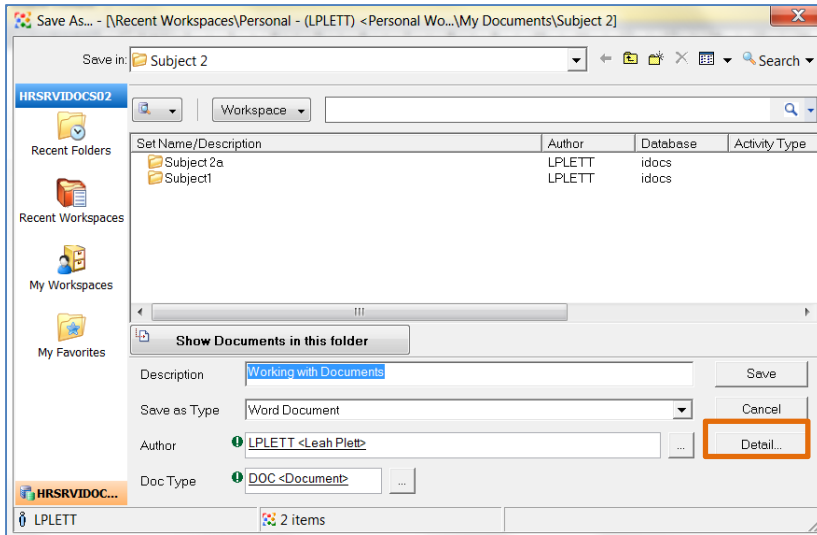
Every document saved in iManage has profile information stored along with it that identifies the record. This information is referred to as meta-data. When you save a document to a folder in a workspace, most of the meta-data is inherited from the folder so the only thing the user is required to enter is the Description, though all fields can be modified as required. All of this information is searchable for helping find documents as well as in aiding the Records Manager component of iManage in assigning primary and secondary file classification and file retention.

FIELD	DESCRIPTION
Description	Name of the document entered by the author when the document is created.
Doc Num	Unique number automatically assigned by iManage.
Version	Each version of a document is assigned an incremental version number.
Author	The user who created the document.
Operator	User currently working on the document.
Activity Type	Custom field used by the Records Manager component of iManage for assigning primary and secondary class and file retention.
Activity	Custom field used by the Records Manager component of iManage for assigning primary and secondary class and file retention.
Doc Type	User-defined classification of the document. This field inherits from the folder the document is saved to based on the folder matter.
App Type	Application used to create the document and open it again. In most cases this will fill automatically.
Workgroup	Workgroup that owns the document.
Box Number	Used by the IT Department for finding the paper records that have been boxed up and a record entered into iManage.
Site	NTPC plant number associated with the file.
Year	Year associated with yearly workspaces.

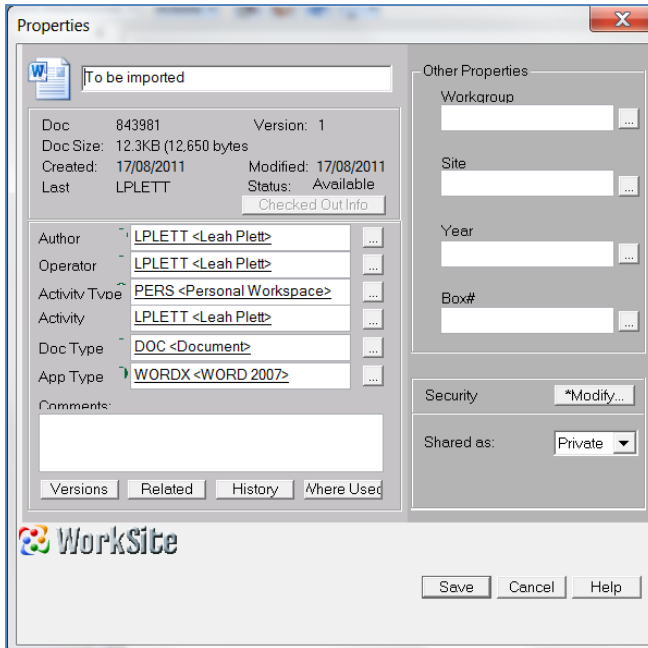
### Viewing Profile Information

There are several ways to view profile information.

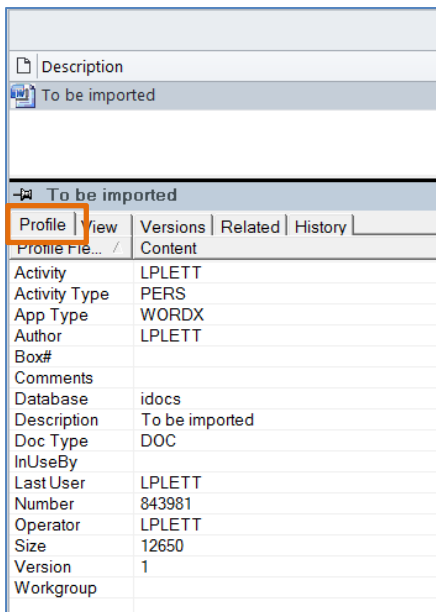
1. During Save or Save As - Click the **Detail** button on the Save As dialog box to view the profile information that defaults from the folder. You can modify meta-data in this window before saving the document.



- Right click on a document in the document grid and select **Properties**. You can make changes to meta-data from this window.



3. Select a document in the document grid and then click the **Profile** tab in the document results frame.



## Security

FileSite security is designed to enable sharing of information and collaboration while simultaneously keeping content secure. In most cases, when you are unable to access an item in FileSite, the reason involves the item's security settings or your system privileges.

Workspaces, tabs, folders and document have individual security settings. There are three ways to set security on a FileSite object:

1. **Inherited Security** – By default most folders and documents are set to inherit the security of the parent workspace. 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 in the folder list easily identify those folders that are inheriting security or have individual security assigned.

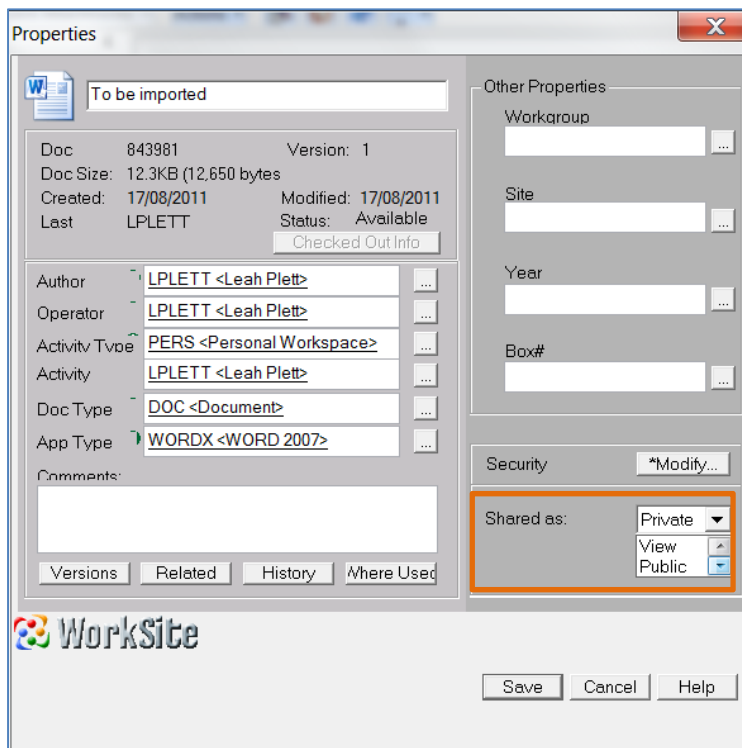


- folder icon showing inherited security



- folder icon with a key added showing folders with individual security

2. **Default Security** – sets the default security level for all users. **It is recommended you DO NOT modify this security level.**



**Private** – Access to a document is restricted to the user who created the document and to users and groups that are explicitly granted access rights.

**View** - All users can access the document, but cannot make changes to it, unless explicitly assigned different access rights.

**Public** - All users have the right to modify the document, unless explicitly assigned different access rights.

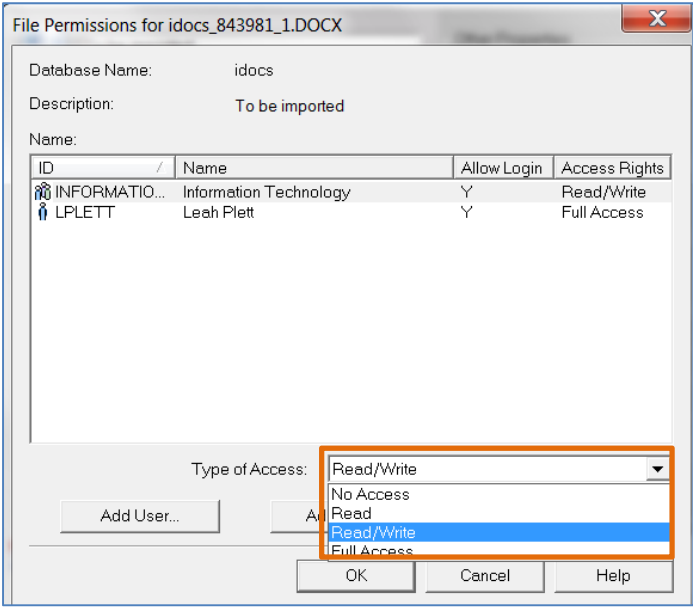
3. **Access Control List (ACL)** - The Owner of a container, the Author of the document, or user with Full Access, can assign specific access rights to individual users and groups by creating an Access Control List (ACL).

**No Access** - The user or group cannot view the document.

**Read** - The user or group has read-only access to the document.

**Read/Write** -The user or group has read/write access to the document but cannot make changes to profile or security information.

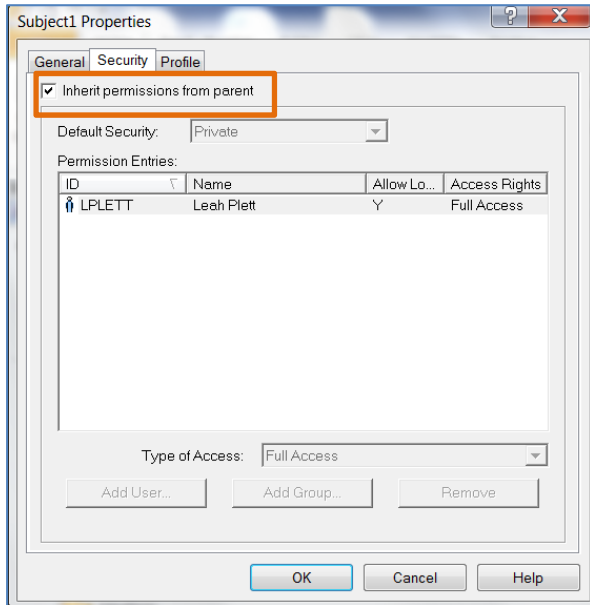
**Full Access** - The user or group have the same rights as the author of the document. In addition to being able to add, edit and delete items from the document, users can also change the security and profile information



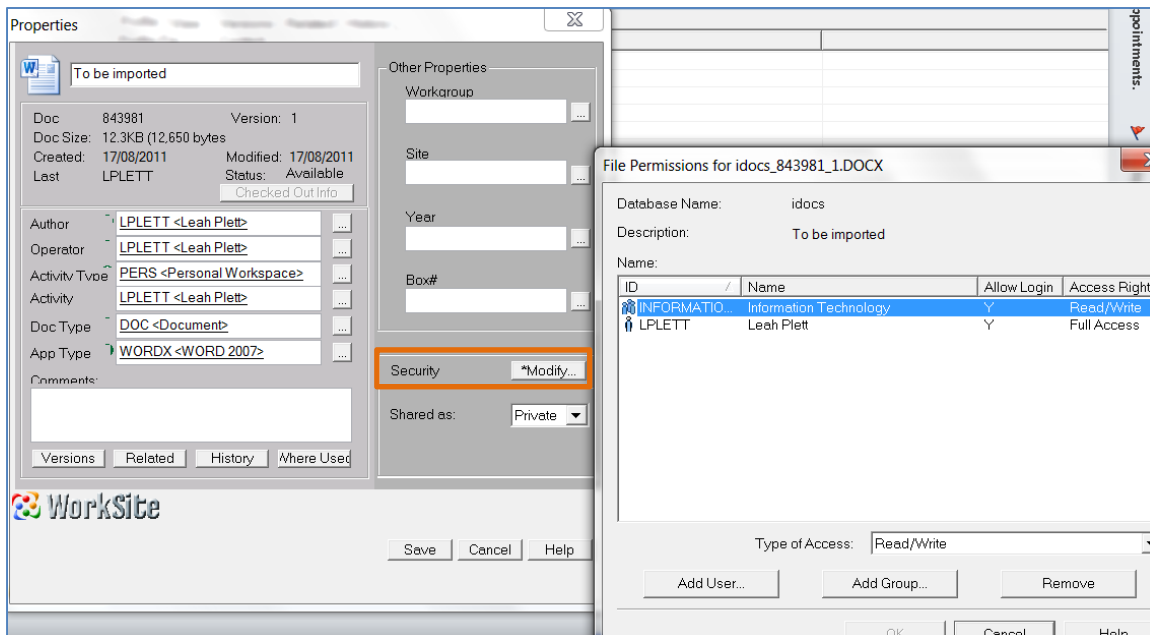
## Viewing Security

On a folder or a document, you can view the security settings by right clicking on the object and selecting **Properties**.

On a folder you select the Security tab on the Properties window. Folders that inherit security from the parent will have the “inherit permissions from parent” checkbox marked.



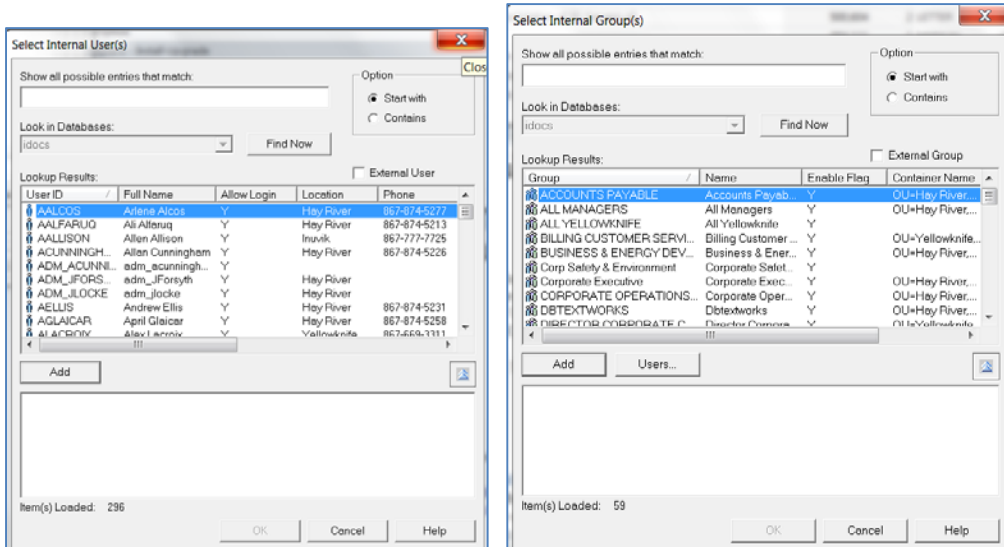
On a document, click the Security **Modify** button to open the File Permissions dialog box.



## Modifying Security

The process to modify security on a folder or a document is very similar. With folders, you first have to uncheck the “inherit permissions from parent” checkbox to enable the fields in the window allowing you to make changes.

1. Select the **Type of Access** from the drop down and then click the **Add User** or the **Add Group** button.



2. Double click on a userID or Group to add them to the bottom panel. Or single click on a UserID or a Group and then click **Add** to add them to the bottom panel. Add as many users or groups as you wish. Click OK.
3. You can modify the type of access assigned to each user or group listed by selecting the user or group from the list and then picking a security type from the drop down list.

## General FileSite Security Rules

- The Author of a document or the Owner of a folder always has **Full Access**.
- When you create an ACL for a document, users and groups that have Read access or higher to the workspace can be added to that ACL. In other words, users and groups that do not have access to a workspace cannot receive access rights to the items within that workspace.
- When you create an ACL, the access privileges granted to specific users and groups are **exceptions** to the Default Security levels you choose. For example, if a documents' Default Security is View, then all users will implicitly have Read access to it. However, a user who has been explicitly granted No Access will not be able to see the document.

- When a group is granted access privileges to a document, the same access rights are applied to all users who are members of the group.
- FileSite 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.

## Understanding Application Integration

Application integration is the seamless integration of FileSite with applications like Microsoft Office. It allows you to perform FileSite functions directly from the application you are using. FileSite integrates with many windows applications, but the main ones used at the Corporation and the ones we will discuss in this document are the Microsoft Office suite (Word, Excel, PowerPoint) and Adobe Acrobat.

In the Microsoft Office integration, FileSite replaces some of the applications' file menu to provide access to FileSite commands (Figure 1). The **Save**, **Save As** and **Open** buttons now evoke the **WorkSite Integrated Desktop** window allowing you to save to iManage or open from iManage. The **Local Save** and **Local Open** evoke the standard Office Save As or Open dialog boxes, allowing you to save to or open from your local computer. FileSite also adds a new menu option called **WorkSite** to the ribbon bar.

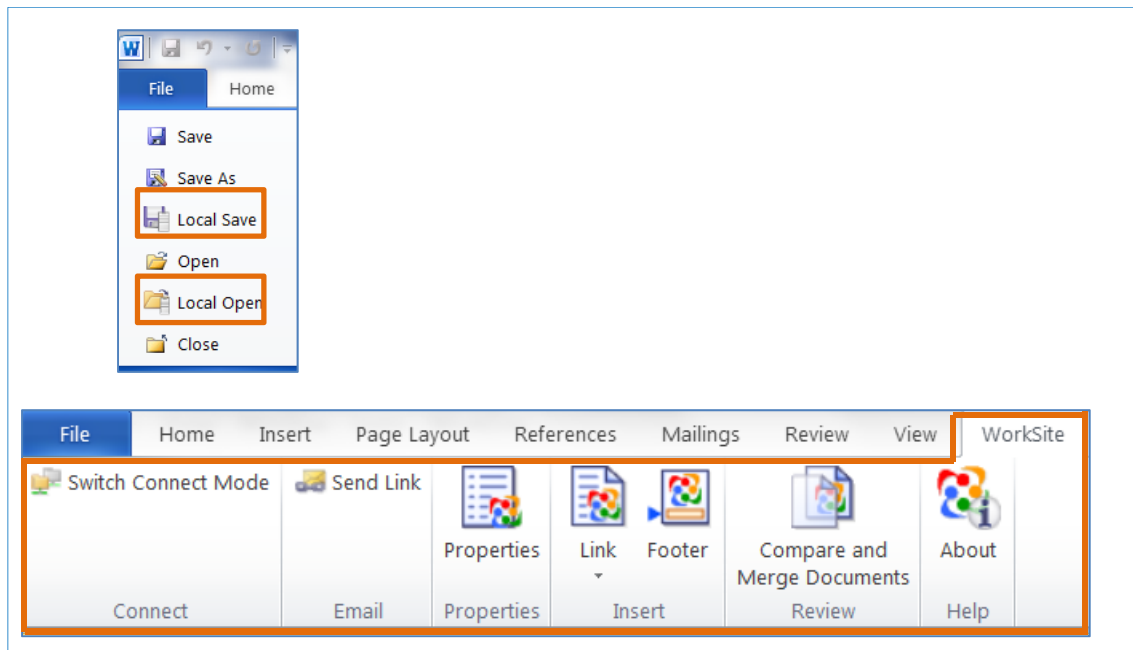


Figure 1. FileSite commands integrated into the Microsoft Word File menu and the WorkSite menu added to the ribbon bar.

When the Adobe Acrobat and Acrobat Reader applications are integrated with FileSite, their **File** menus change to support FileSite functionality. Certain new commands such as **Open from WorkSite** and **Save to WorkSite** are added to the menu (Figure 2).

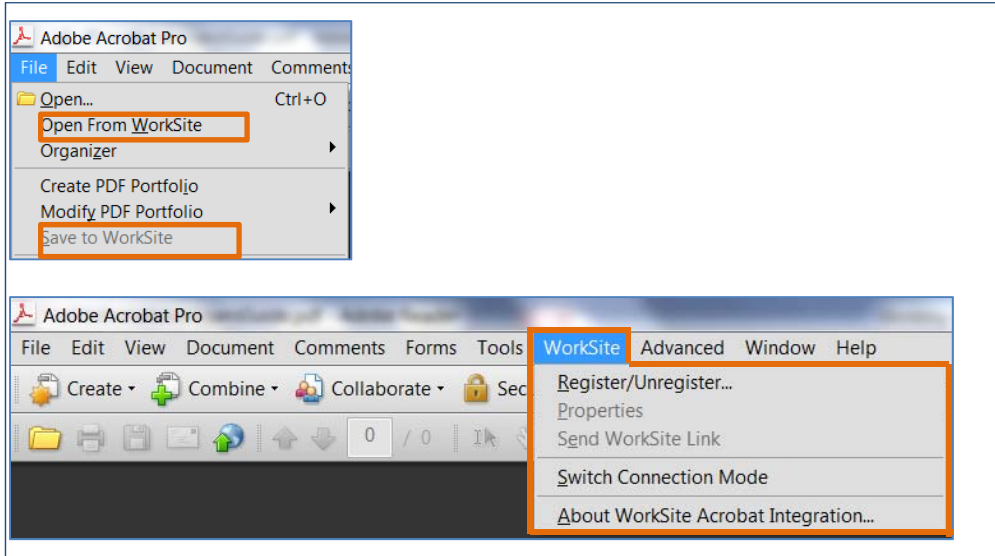


Figure 2. FileSite commands integrated into the File menu of Adobe Acrobat and the WorkSite menu added to the menu bar.

### WorkSite Integrated Desktop

When you click on the **Save**, **Save As** or **Open** buttons in the Office integrated File window or the **Open from WorkSite** or **Save to WorkSite** options in Adobe, the **WorkSite Integrated Desktop** window will open. There are slight differences between the window if it is used to Open a file or used to Save a file as seen in Figure 3.

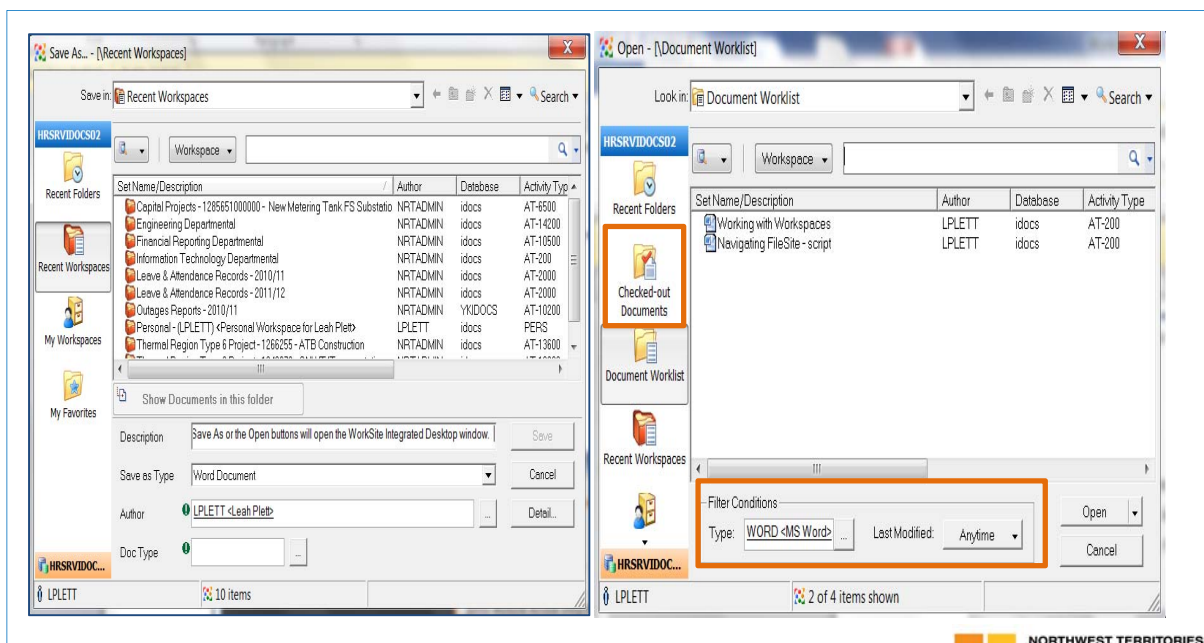
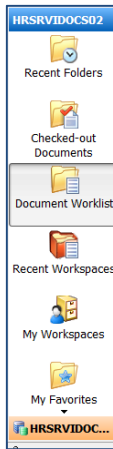


Figure 3. The WorkSite Integrated Desktop. The left image is the window that will open if you click Save or Save As from the File menu. The right image is the window that will open if you click Open from the File menu.

## Components of the WorkSite Integrated Desktop



### Shortcut Bar

On the left side of the Integrated Desktop is the **Shortcut Bar**. If you have opened the dialog box by clicking Save or Save As, it contains shortcuts to Recent Folders, Recent Workspaces, My Workspaces and My Favourites. If you've opened the dialog box by clicking the Open option from the File menu it will have the added shortcut Checked-Out Documents.

### 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. When used to Open documents, you can narrow the focus of documents displayed the Document Grid by making selections from the Filter Conditions area: Type and Last Modified.

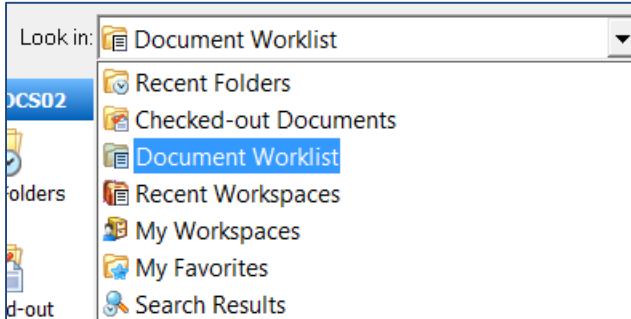
Set Name/Description	Author	Database	Activity
Personal - (LPLETT) <Personal Workspace for L...	LPLETT	idocs	PERS
Thermal Region Type 6 Project - 1266255 - ATB ...	NRTADMIN	idocs	AT-136
Capital Projects - 1285651000000 - New Metering...	NRTADMIN	idocs	AT-650
Thermal Region Type 6 Project - 1346278 - GNW...	NRTADMIN	idocs	AT-136
Leave & Attendance Records - 2011/12	NRTADMIN	idocs	AT-200
Outages Reports - 2010/11	NRTADMIN	YKIDOCs	AT-102
Engineering Departmental	NRTADMIN	idocs	AT-142
Financial Reporting Departmental	NRTADMIN	idocs	AT-105
Leave & Attendance Records - 2010/11	NRTADMIN	idocs	AT-200
Information Technology Departmental	NRTADMIN	idocs	AT-200


Filter Conditions	
Type: WORD <MS Wc ...	Last Modified: Anytime


## Look In


Choose a container from the **Look In** list to start looking for documents to open or folders to save your document to.




## Toolbar Options

The **Back** button  navigates to the last list you looked at.

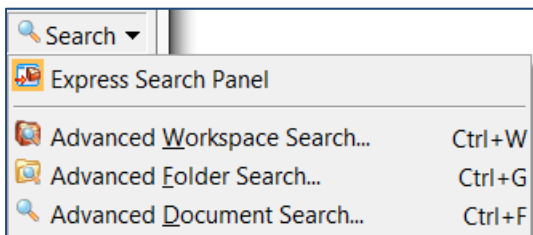
Click the **Up One Level** button  to access a container higher in the tree structure.

Click the **Create New Folder** icon  to create a new folder. This icon will only be available when you have the required security access to create a folder in the selected container.

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 iManage.

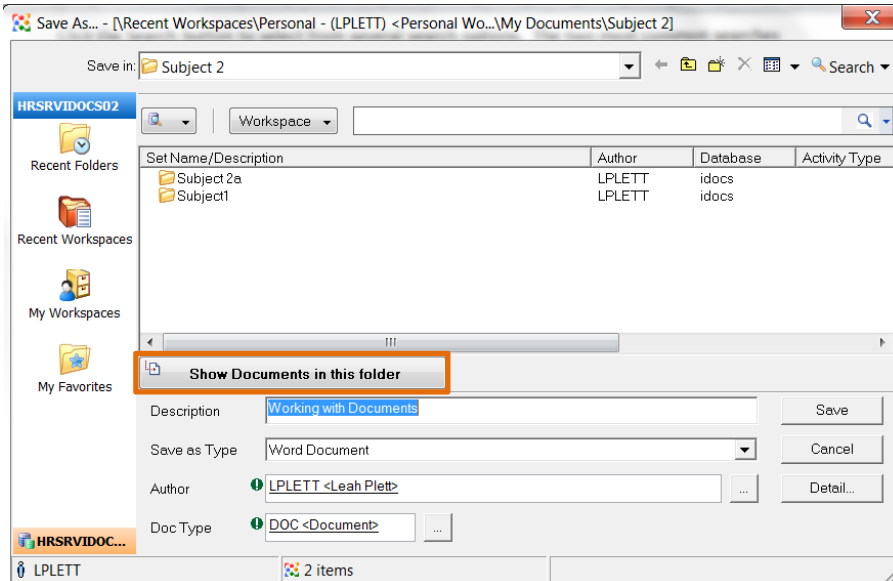
## Search

Click the **Search** button to select from several search options. The two most common searches to use are the Advanced Workspace Search and the Advanced Document Search.



## Show Documents in this folder

On the Save As dialog box, documents contained in the folders will not be displayed in the document grid by default. To see the documents, click the **Show Documents in this folder** button.



## Working with iManage Documents in Outlook

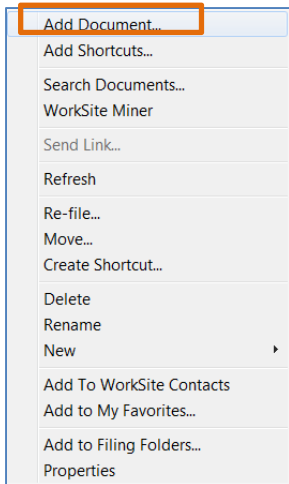
### Opening Documents

To open a document from iManage in Outlook, double click on any document in the document grid. FileSite automatically opens the document in the primary application defined for the document type.

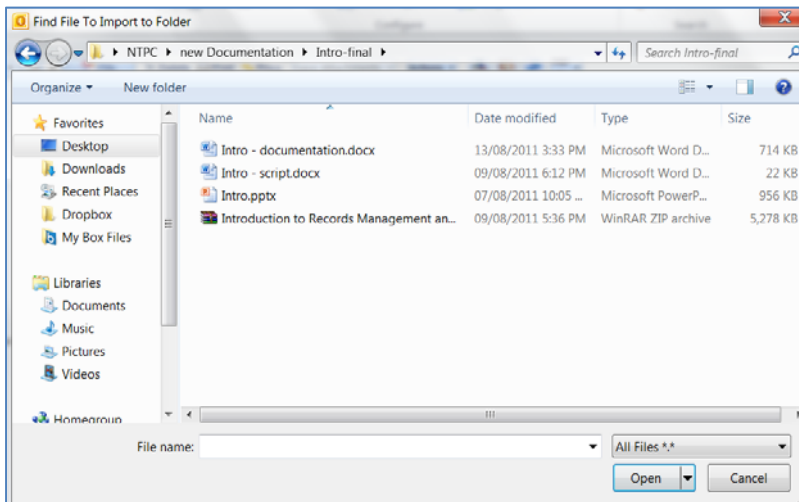
### Importing Documents

You can use the **Add Document** command in FileSite to add existing documents on your computer to iManage. Document import is not used for documents that already exist in iManage. This option is for a small number of documents only. If you require a large number of documents to be imported into iManage, contact the IT Department as they have an import tool to perform this function for you.

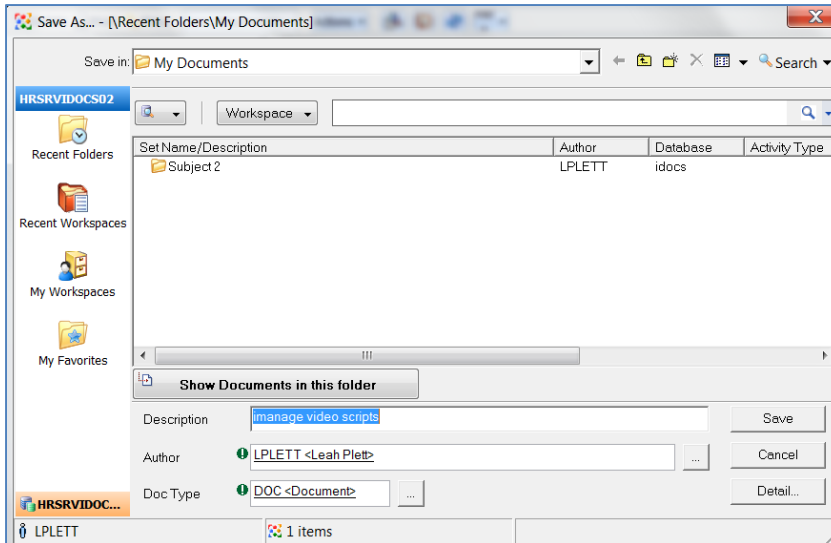
1. Right click on the folder in your folder list you wish to add the document to. Select **Add Document**.



2. The **Find File to Import to Folder** window will open. Find the file you wish to import. Select it and click Open.



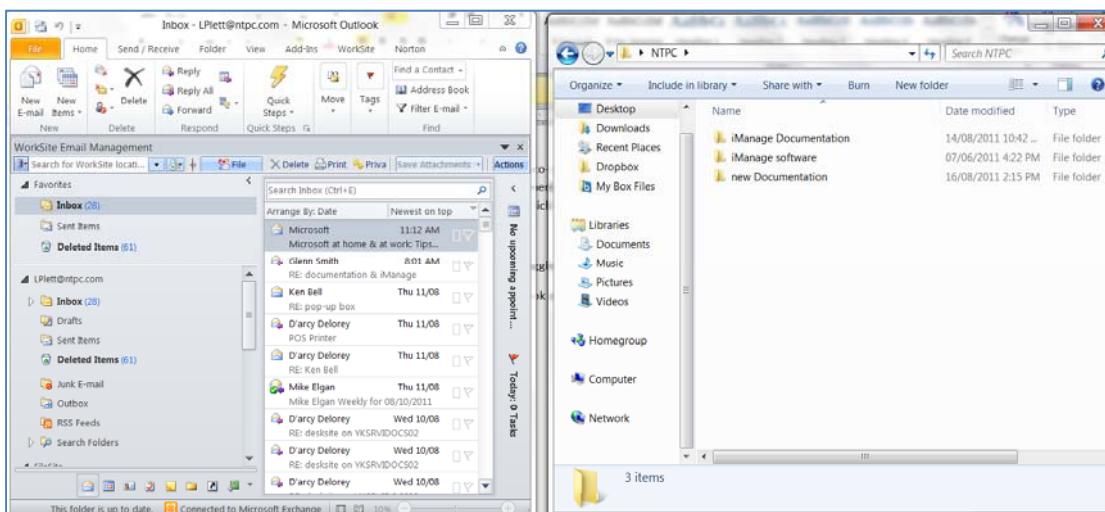
3. The **WorkSite Integrated Desktop** appears. The folder you selected in step 1 will be selected as default. If you wish to change the folder you wish to save your document to, browse for it using the Shortcut Bar on the left or the Save in across the top.



4. The description field will be auto-populated with the name of the document and all of the profile information will inherit from the folder you are saving to. Click Save.

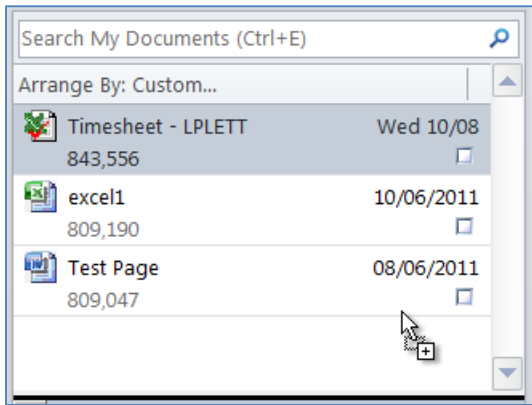
You can also import documents by dragging and dropping into an iManage folder.

1. Open My Computer and Outlook and resize the windows so you can view them both at the same time on your desktop.



2. In Outlook, use the folder list to find the folder you wish to import your documents too. Select it so the contents are listed in the document grid.
3. In My computer, browse to find the document you wish to import.

4. Drag and drop the document (or multiple documents) into the document grid. The mouse pointer will turn to a plus icon.



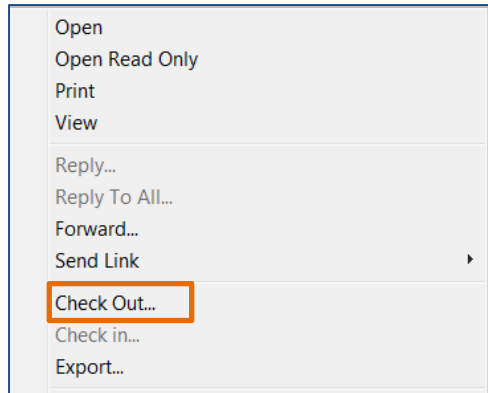
### **Check Out and Export**

There are 2 ways to save a copy of a document from iManage to your local computer: **Check Out** and **Export**. You can only return an exported document to iManage as a new document. If you are planning to edit a document and then return it to iManage later, it is advisable to use the **Check Out** function. Using the Check Out function also flags a document as being checked-out. If you **Export** a document, it is not marked as checked-out so others may access the document and possibly update it while you are editing it.

#### **Check Out**

You can check out individual documents from iManage for use outside of the FileSite system. 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 in. **Do not change a checked-out document's filename.** The same filename is used during the document check-in process.

1. Select the document from the document grid.
2. Right click on it and choose **Check Out**.

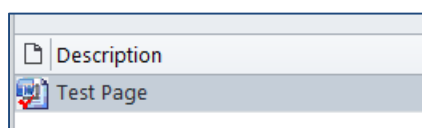


3. The **Checkout** dialog box will appear.

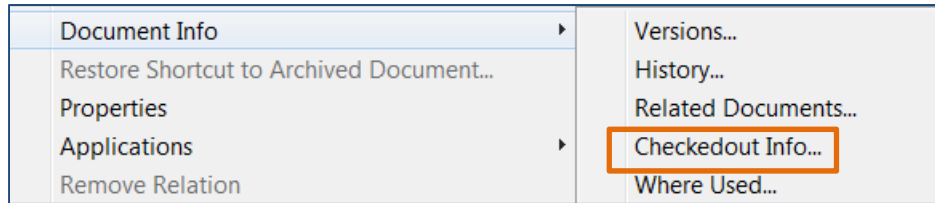


Enter a destination path by clicking the Browse button and selecting the location on your computer where you would like the document to be saved. You can enter an optional due date and comment. This is useful for other users that may also access the same document to know when you plan on checking the document back in.

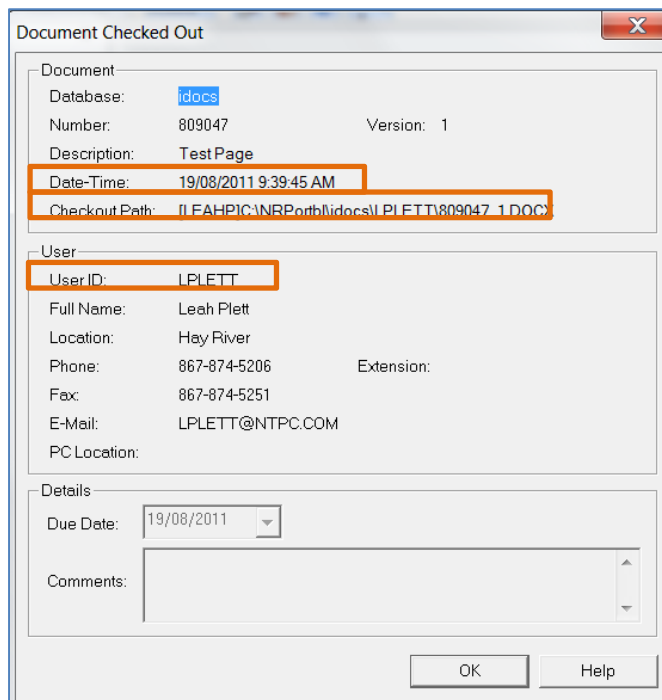
4. Click OK.
5. The document now displays in the document grid as a checked out document with the red checkmark over the document icon.



You can view information about checked out documents by right clicking on a document and selecting **Document Info -> Checkouted Info...**

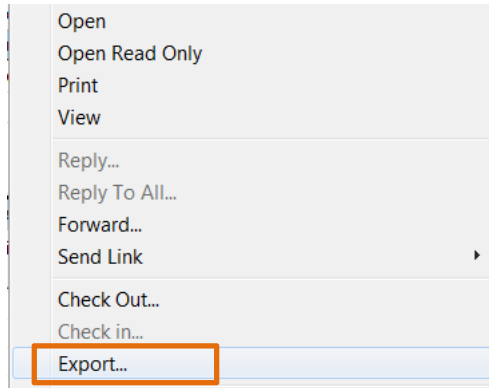


The Document Checked Out dialog box will open. Here you can find some useful information such as who has the document checked out, the date and time they checked it out, and where they save it to on their computer.

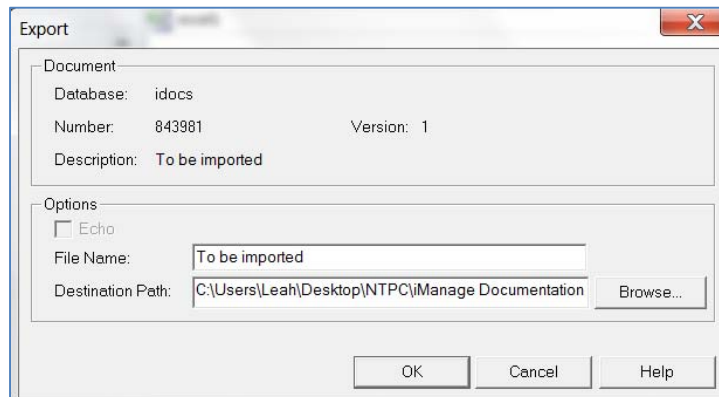


## Export

1. Select the document from the document grid.
2. Right click and chose Export.



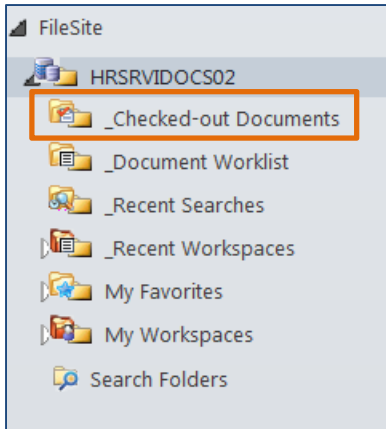
3. The Export dialog box opens. Enter a File Name or leave the default which is the description of the document from iManage. Click the Browse button to select a destination path on your local computer. Click OK.



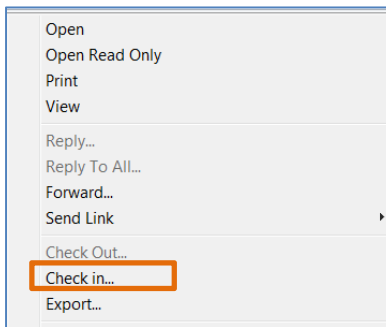
### *Check In*

You can return modified documents that you have manually checked out to iManage by using the **Check In** feature.

1. Click on **Checked-Out Documents** in the folder list. This will display all of the documents you currently have checked out.



2. Select the document in the document grid. Right click on it and select **Check In**.

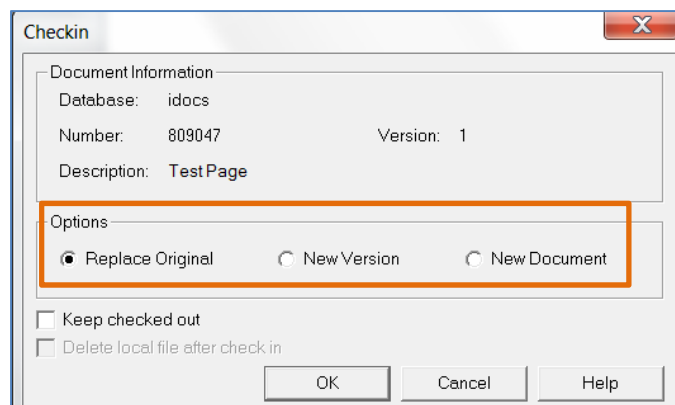


3. The Checkin dialog box will open. You have 3 options.

**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.

**New Document** – FileSite checks in the document as a brand new document.



4. You can also chose one of the following:

**Keep checked out** – the document remains checked-out, but your modifications are synchronized with the document in iManage.

**Delete local file after checkin** – the file on your local computer is deleted and the document is checked in.

**Apply to all documents** – the check in option you select (Replace Original, New Version or New Document) is applied to all documents you selected. This option is available only when you have selected multiple documents.

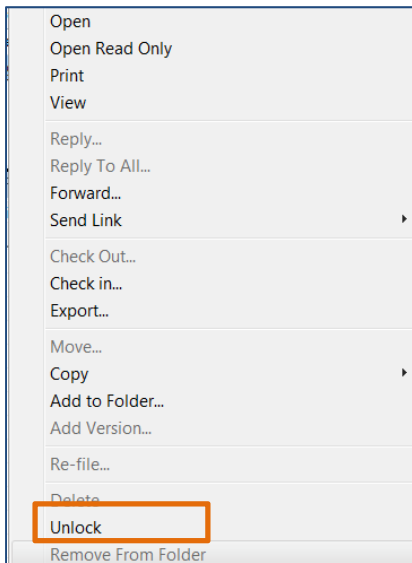
5. Click OK.

### *Unlock*

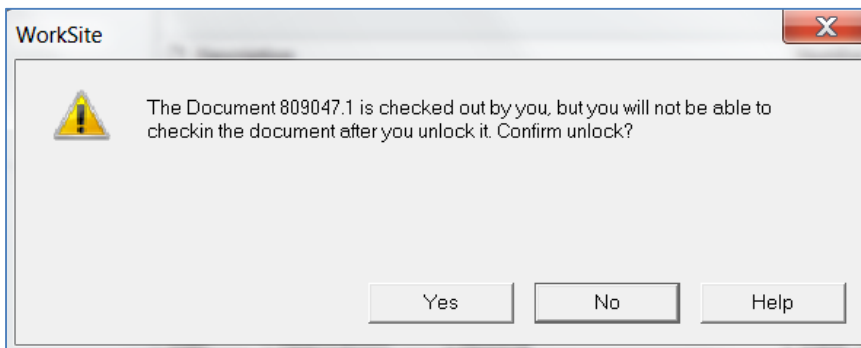
When you open a document from iManage, it checks it out from the filer server. This means it makes a copy of the file on your computer. As you work on it your changes are saved locally. The document shows as checked-out in iManage and users can still view the document in read-only mode but cannot make changes to it. When you save it and close the document, the modified file is copied back to the server, checking it back in and making it and all of your changes available to others.

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 “checked-out” when you no longer have it open or did not check it out manually. If trying to check the document back in does not work, you can manually unlock the document in iManage. Any copy of the document that exists locally will be orphaned from the iManage version after the unlock is complete. You should only use the Unlock option to free up documents that are erroneously marked “checked-out” due to a network or system failure.

1. Right click on a document in the document grid that shows checked out and select Unlock.



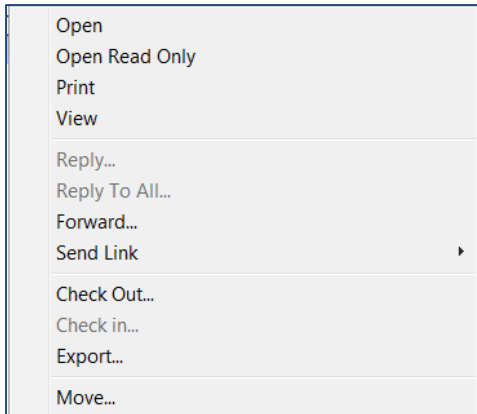
2. A WorkSite dialog box will open warning you that you will not be able to check the document in once you've unlocked it. Click Yes to continue with the Unlock.



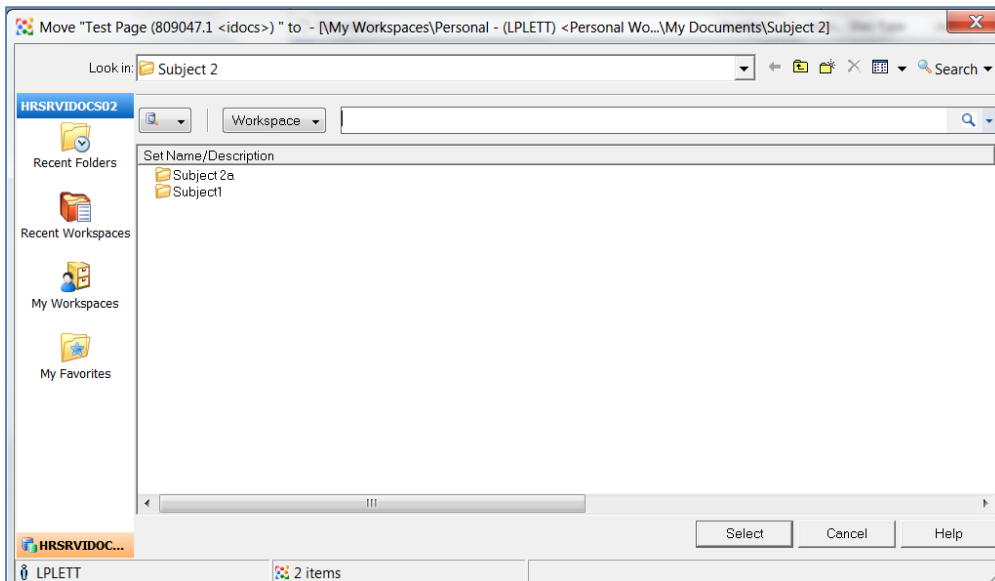
## **Move**

You can move a document in iManage from one folder to another.

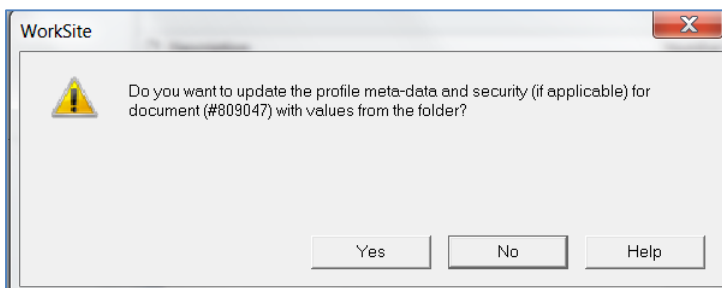
1. Select the document(s) from the document grid.
2. Right click and choose Move.



3. The WorkSite Integrated Desktop window opens. Use the shortcut bar or the Look in drop down to browse to the new location. Click Select to move the file.

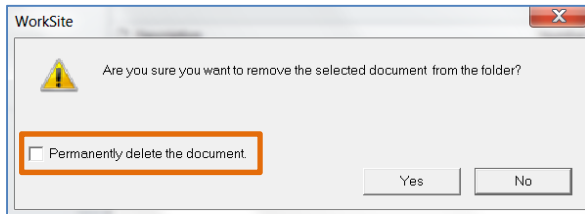


4. A WorkSite window will appear to ask if you would like to update the profile and security for the document you are moving. Clicking **Yes** will move the file, inheriting the profile and security information from the new folder. Clicking **No** will move the file without updating profile and security information. In most instances, you will click Yes on this window.



### Delete & Remove from Folder

iManage documents can reside in more than 1 folder at the same time as links to the original document. Because of this, you can choose to remove a document from a folder which just deletes the link in the folder but does not permanently delete the document from iManage. When you right click on a document and select Delete, the default option is to remove the file from the folder. But, if you have the correct permissions (author, operator or full access), there will be a checkbox to permanently delete the document from iManage.

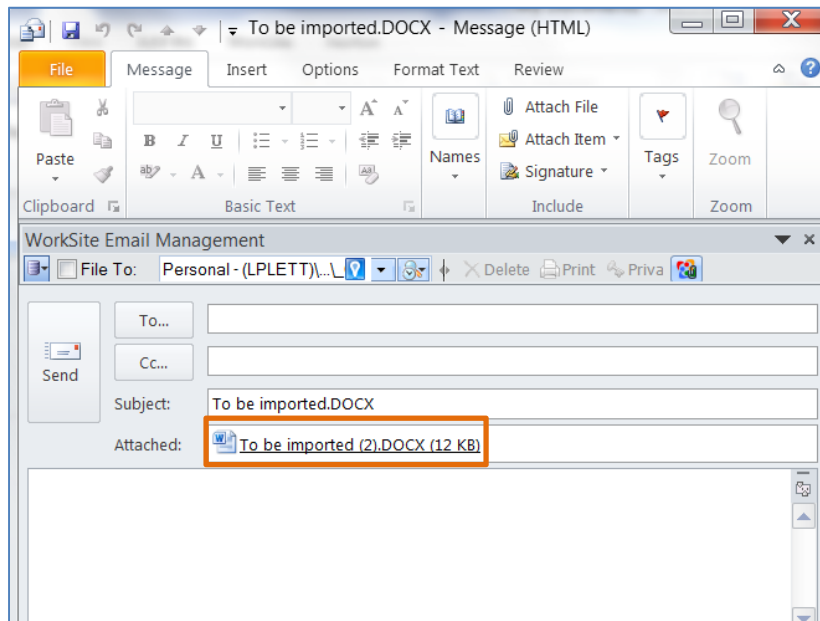


### Emailing Documents

You can email iManage document as copies or as links. When emailing documents internally, it's recommended to email an iManage link. This allows the recipient to open the document directly from iManage. When emailing external to recipients without iManage access, a copy will be required.

#### Email a copy

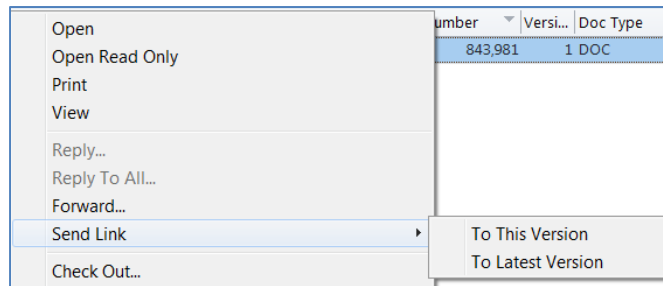
1. Right click on a document(s) in the document grid and click Forward.  
A new email message will open with the selected document attached.



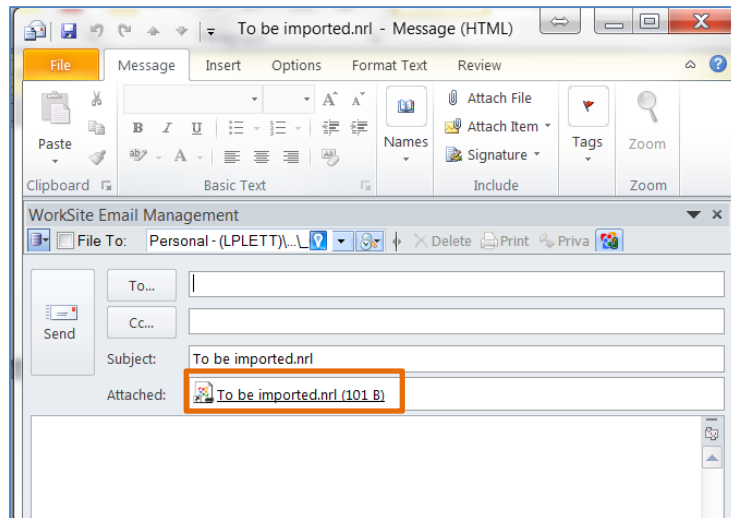
2. Enter an email address and click Send.

### Email a link

1. Right click on a document(s) in the document grid and click **Send Link**. You are given 2 options: **To This Version** and **To Latest Version**. If there are multiple versions of a document you can choose which to send: the one you have selected in the document grid or the newest version of the document. If there is only 1 version, selecting either option will do the same thing.



2. A new email message will open with an iManage link to the document attached with a .nrl extension.



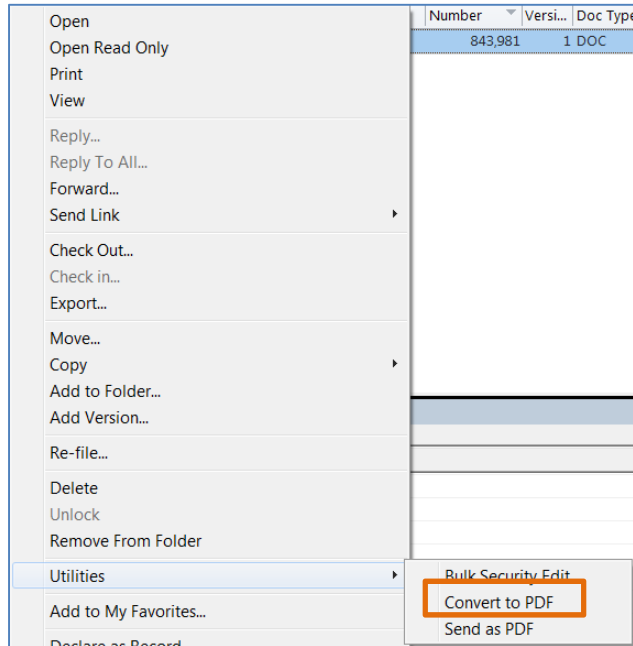
3. Enter an email address and click Send.

### Convert to PDF & Send as PDF

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.

## Convert to PDF

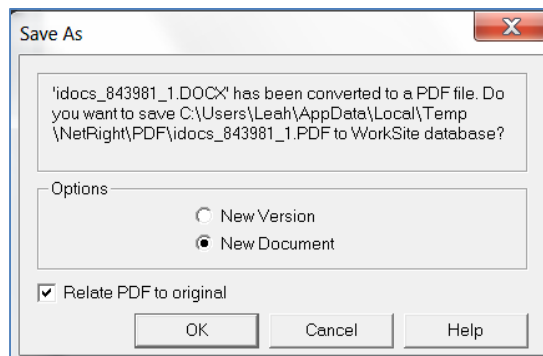
1. Select the document you want to convert.
2. Right click on it and select **Utilities -> Convert to PDF**.



3. Once the conversion process is completed the PDF Save As dialog box opens. You are given 2 options:

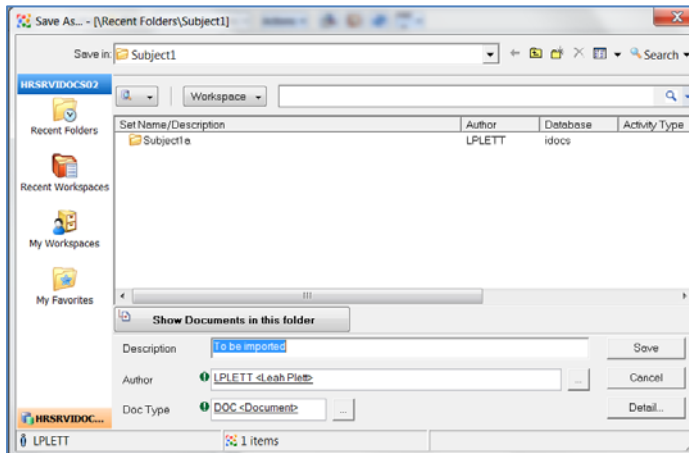
**New Document** (selected by default) – saves the PDF file to iManage as a new document.

**New Version** – saves the PDF to iManage as a new version of the original document.



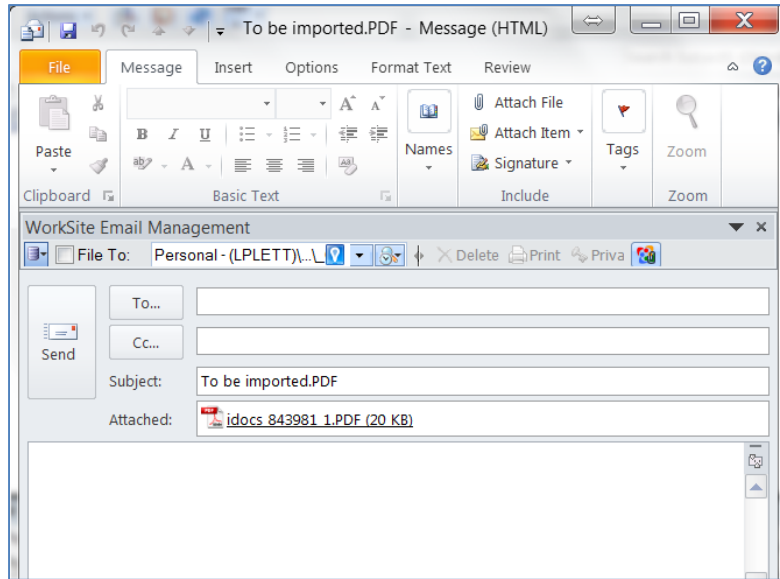
If you select as a New Document, you can also choose to Relate the new PDF with the original document.

4. Click OK.
5. The WorkSite Integrated Desktop window opens defaulting to the same location as the original document. Select the location you wish to save to, enter the description and click Save.



### Send as PDF

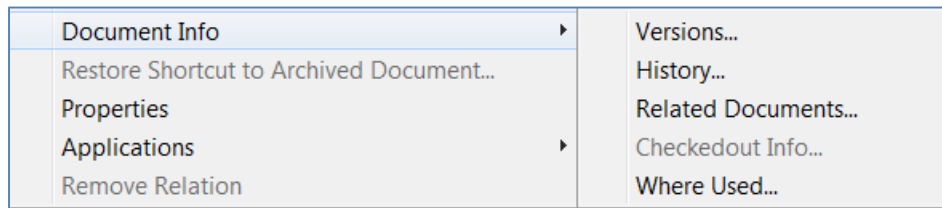
1. Select the document you wish to convert and send as a copy in an email.
2. Right click on it and select **Utilities -> Send as PDF**.
3. Once the PDF conversion process is complete, a new email message will open with the PDF document attached.



The PDF document is not saved in iManage. The conversion just creates a PDF from the original iManage document for emailing.

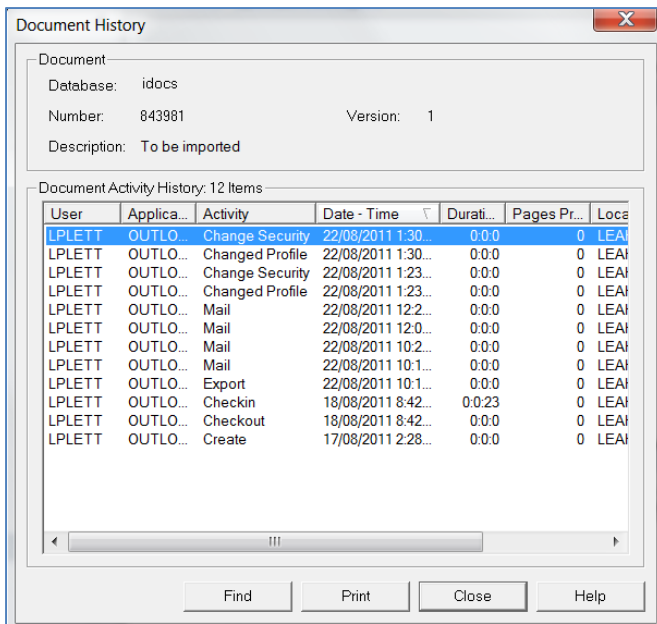
### *Document Info*

Right click on any document in the document grid and select Document Info.



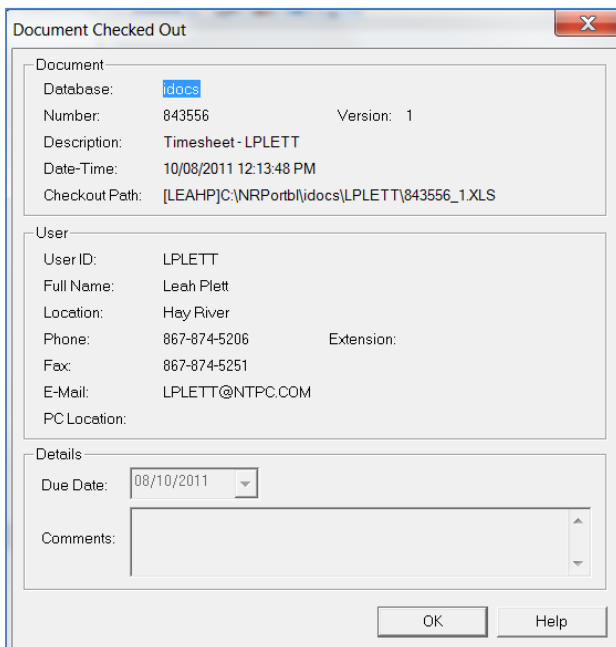
**Versions** – displays all the versions of the document selected.

**History** – opens the Document History window displaying all the history recorded on the document selected.

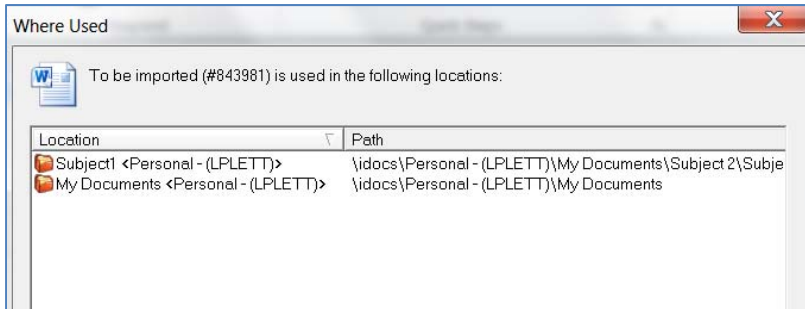


**Related Documents** – displays all the documents related to the document selected.

**Checkedout Info** – opens the Document Checked Out window displaying information about the checked out document.



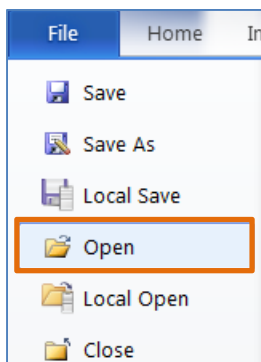
**Where Used** – opens the Where Used window that will show the Workspaces and folders where the document is located.



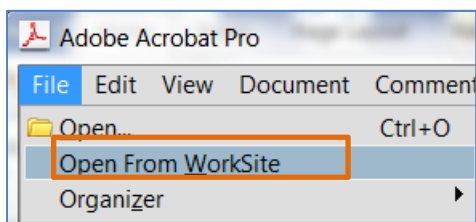
## Working with Documents in Integrated Applications

### Open

To open a document from an Office integrated application select **Open** from the File menu.



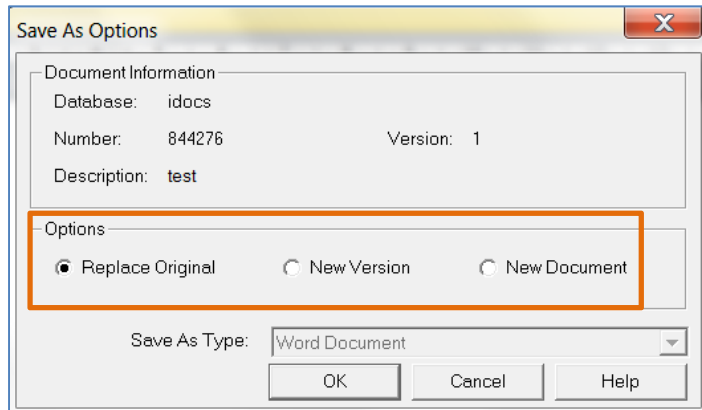
Similarly, to open a document from Adobe select **Open from WorkSite** from the File menu.



The WorkSite Integrated Desktop window opens. Navigate to the file you wish to open and double click on it or highlight it and click the Open button.

## Save & Save As

When clicking the **Save** and **Save As** commands, the WorkSite Integrated Desktop window opens if the document is being saved for the first time. If the document already exists in iManage, the **Save** command simply saves the document, and the **Save As** command opens the Save As Options dialog box.



You have 3 options:

**Replace Original** – replaces the original document. This option functions the same as clicking Save in the file menu.

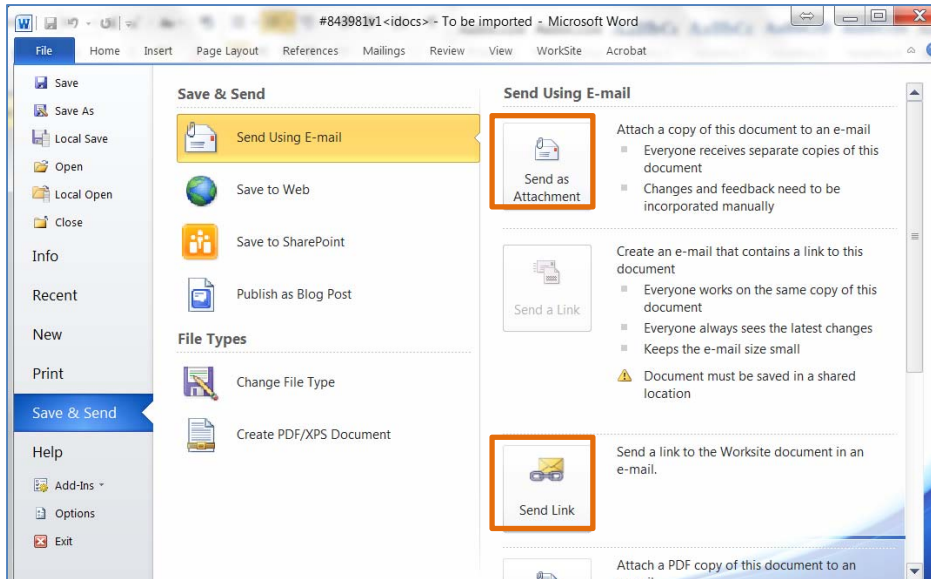
**New Version** – FileSite automatically assigns a new document number to the document.

**New Document** – launches the WorkSite Integrated Desktop window to enter a description and save the file as a new iManage document.

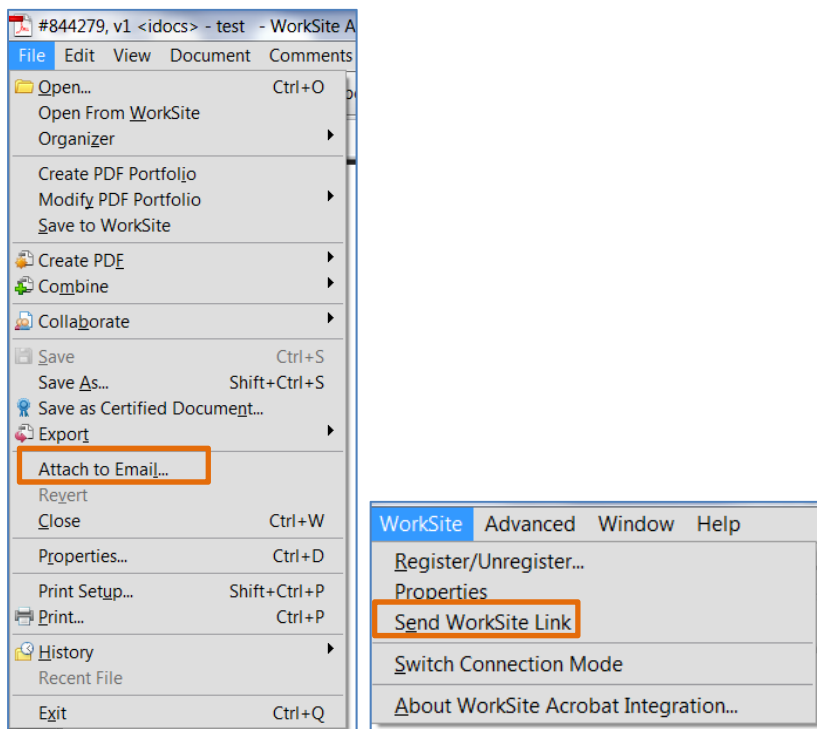
## Emailing Documents

From within an Office application or Adobe Acrobat, you can email a copy of an iManage document or a link to an iManage document.

From within an Office application click **File -> Save & Send**. Click **Send as Attachment** to email a copy of the document or **Send Link** to email a link to the document.

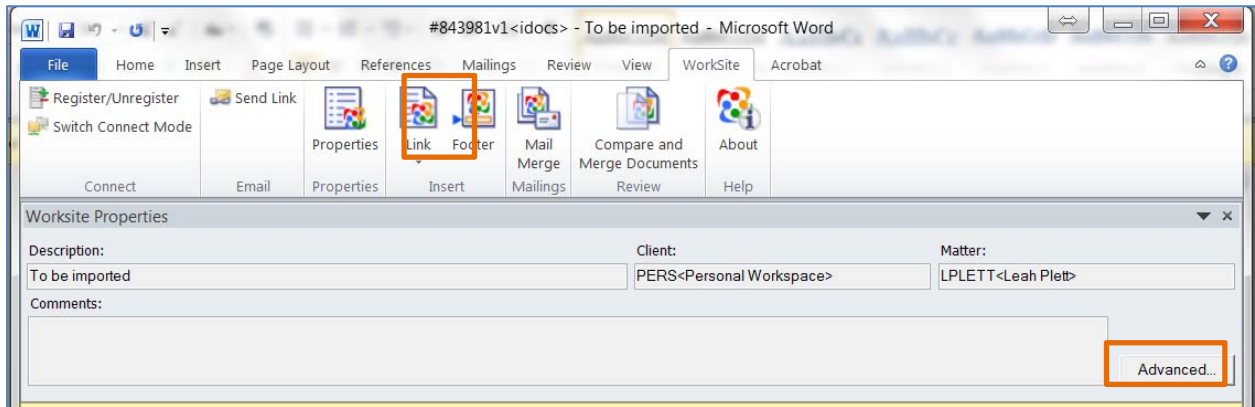


From within Adobe Acrobat click File -> **Attach to Email** to send a copy of the file and click WorkSite -> **Send WorkSite Link** to email a link to the document.



## Viewing Profile Information

To view the profile information for an iManage document from within an Office integrated application click **WorkSite -> Properties -> Advanced**.



To view the profile information from within Adobe Acrobat click **WorkSite -> Properties**.

