

iManage

FileSite Installation and User's Guide

Version 9.0
Document Revision 0
December 2011

Protect



Notice

This documentation is a proprietary product of Autonomy and is protected by copyright laws and international treaty. Information in this documentation is subject to change without notice and does not represent a commitment on the part of Autonomy. While reasonable efforts have been made to ensure the accuracy of the information contained herein, Autonomy assumes no liability for errors or omissions. No liability is assumed for direct, incidental, or consequential damages resulting from the use of the information contained in this documentation.

The copyrighted software that accompanies this documentation is licensed to the End User for use only in strict accordance with the End User License Agreement, which the Licensee should read carefully before commencing use of the software. No part of this publication may be reproduced, transmitted, stored in a retrieval system, nor translated into any human or computer language, in any form or by any means, electronic, mechanical, magnetic, optical, chemical, manual or otherwise, without the prior written permission of the copyright owner.

This documentation may use fictitious names for purposes of demonstration; references to actual persons, companies, or organizations are strictly coincidental.

Trademarks and Copyrights

Copyright 2011 Autonomy Corporation plc and all its affiliates. All rights reserved. Audit Center, Autonomy Consolidated Archive, Autonomy Express Search, Autonomy iManage ConflictsManager, Autonomy iManage RecordsManager, Autonomy Interaction Control Element (ICE), Autonomy Message Manager, Autonomy Notification Server, Autonomy Records Manager, Autonomy Windows Extension, DeskSite, Digital Safe, Digital Supervisor, EAS On-Demand, EAS, Enterprise Archive Solution, FileShare, FileSite, iManage WorkSite MP, iManage WorkSite, iManage, Introspect, Meridio, OffSite, Scrittura, WorkDocs, WorkPortal, WorkRoute, WorkSite MP, WorkSite, WorkTeam, Zantaz, and all related titles and logos are trademarks of Autonomy Corporation plc and its affiliates.

Microsoft is a registered trademark, and MS-DOS, Windows, Windows 95, Windows NT, SharePoint, and other Microsoft products referenced herein are trademarks of Microsoft Corporation.

UNIX is a registered trademark of The Open Group.

AvantGo is a trademark of AvantGo, Inc.

Epicentric Foundation Server is a trademark of Epicentric, Inc.

Documentum and eRoom are trademarks of Documentum, a division of EMC Corp.

FileNet is a trademark of FileNet Corporation.

Lotus Notes is a trademark of Lotus Development Corporation.

mySAP Enterprise Portal is a trademark of SAP AG.

Oracle is a trademark of Oracle Corporation.

Adobe is a trademark of Adobe Systems Incorporated.

Novell is a trademark of Novell, Inc.

Stellent is a trademark of Stellent, Inc.

All other trademarks are the property of their respective owners.

Notice to Government End Users

If this product is acquired under the terms of a **DoD contract**: Use, duplication, or disclosure by the Government is subject to restrictions as set forth in subparagraph (c)(1)(ii) of 252.227-7013. **Civilian agency contract**: Use, reproduction or disclosure is subject to 52.227-19 (a) through (d) and restrictions set forth in the accompanying end user agreement. Unpublished-rights reserved under the copyright laws of the United States. Autonomy, Inc., One Market Plaza, Spear Tower, Suite 1900, San Francisco, CA. 94105, US.

Acknowledgements

RSA Data Security, Inc. MD5 Message-Digest Algorithm; zlib general purpose compression library, Jean-loup Gailly and Mark Adler; Info-ZIP, more information at <ftp://ftp.info-zip.org/pub/infozip/license.html>; HTML-to-RTF Pro DLL 1.8 © 2002-2007 SautinSoft.

Contents

Tables	13
Figures	15
Preface	21
Documentation Updates	21
Conventions	22
Related Documentation	24
Autonomy Product References	24
Autonomy Customer Support	25
Contact Autonomy	25
Chapter 1	
Introduction	27
What is WorkSite?	27
Client-Server Architecture	28
What is FileSite?	29
FileSite Utilities	30
Key Features of FileSite	30
E-mail Management	31
Matter-Centric Collaboration	31
Building an Electronic Case File	31
Matter-Centric Navigation	31
Worklists	32
Document Profile Information	32
Search	35
Relating Documents	35
Security	35
Accessibility Features	36

New Features in This Release.....	36
Support for Save as PDF in Office Integration	36
Support for Unicode	37
Search Language Selection	37
Preview NRL Link	37
Chapter 2	
Installing and Configuring FileSite.....	39
Overview	39
Prerequisites	40
Supported Platforms	40
Installing FileSite	40
Silent Installation	42
Adding the FileSite Service in Microsoft Outlook	43
Loading Localized KeyView Resource Files	47
Language Settings	47
Starting FileSite	50
Connecting to WorkSite Servers	50
Logging In	50
Registering a Server	51
Unregistering a Server	52
Registering and Unregistering a Server Using Addlman.exe	53
Configuration Options	54
General Tab	54
Advanced Tab	56
Import Settings	57
Server Settings	58
WorkSite Settings	59
Advanced Configuration	59
Advanced Options	63
Uninstalling FileSite	64
Chapter 3	
The FileSite Desktop.....	65
Overview	65
Menu Options and Toolbar Buttons	67
Filing Toolbar.....	69
Outlook Shortcut Pane/Bar	69
Folder List.....	70
Folder List Components	70

Servers	71
Checked Out Documents	71
Document Worklist	71
Matter Worklist	72
Recent Searches	72
My Favorites	73
My Matters	73
WorkSite Explorer	73
WorkSite Containers	74
Document Grid	75
Columns in the Document Grid	75
Document Icon Column	75
Rank Column	75
Document Results Frame.....	76
Document Profile Tab	76
Quick View Tab	76
Related Documents Tab	76
Document Versions Tab	76
History Tab	77
Chapter 4	
Using the FileSite Desktop	79
WorkSite Security Concepts.....	80
Role-Based Security	80
Container-Based Access Rights	80
Inherited Security	80
Default Security	81
Access Control List (ACL)	81
Understanding External Users and Groups	82
General Security Rules	82
Using Elements of the Desktop	83
Managing the Folder List	83
Displaying the Folder List	83
Navigating in the Folder List	83
Managing Folder List Components	84
Managing WorkSite Containers	90
Category	90
Workspace	94
Tab	101

Document Folder	105
Search Folder	117
Managing the Document Grid	123
Sorting Documents in the Document Grid	123
Selecting Documents in the Document Grid	123
Refreshing the Document Grid	123
Customizing the Document Grid	124
Navigating in the Document Grid Without a Mouse	127
Managing the Document Results Frame	127
Document Profile Tab	128
Quick View Tab	128
Related Documents Tab	128
Document Versions Tab	128
History Tab	128
Document Results Frame Push Pin	129
 Chapter 5	
Working with Documents and E-mails	131
Document and E-Mail Functions	132
Using Lookup dialogs	136
Entering Document Profile Information	138
Editing Document Profile Information	140
Searching for Documents	142
Opening Documents	142
Opening Documents Sent as NRL Links	143
Opening Echo Documents	143
Opening Documents from an Integrated Application	143
Opening Documents from a Non-integrated Application	144
Viewing Documents	144
Viewing Single Documents	145
Viewing Multiple Documents	145
Importing Documents	145
Importing Documents into a WorkSite library	145
Importing New Versions of Documents	150
Importing E-mails	151
Importing E-mail Attachments as Separate Documents	153
Importing a Single Attachment	153
Importing Multiple Attachments	153
Exporting Documents	154
Exporting Documents from a WorkSite library	155

Checking Out Documents	157
Checking In Documents	158
Copying Documents	160
Moving Documents	161
Document Links	163
Creating Document Links	163
Copying WorkSite Documents to the Desktop	164
Deleting Documents	165
E-mailing Documents	165
Forward Document	166
Send NRL/URL to WorkSite Item	166
Inserting WorkSite Links into Outlook Objects	167
Drag and Drop	167
Printing Documents	168
Relating Documents	169
Creating Relations	169
Removing Relations	170
Uses for Related Documents	170
Unlocking Documents	170
Declaring a Document as a Record	172
Undeclaring a Record	173
Restoring Archived Documents	175
Restoring Archived Document Shortcuts	175
Displaying Document Information	176
Versions	176
History	176
Related Documents	177
Checkedout Info	178
Where Used	179
Move or Copy from Outlook to FileSite	179
Move E-mails to WorkSite	179
Copy E-mails to WorkSite	181
Move Folders to WorkSite	182
Copy Folders to WorkSite	184
WorkSite Add-on Functions	185
Convert to PDF Add-on	185
Send as PDF Add-on	186
Creating New Documents	187
Creating New Document Defaults	189
Keyword Variables in Default Profiles	192
Default Profile Properties for Documents	194

Creating E-mail Profile Defaults	194
Keyword Variables in Default E-mail Profiles	196
Default Profile Properties for E-mails	196
Working with Security Templates	197
Creating a Local Security Template	197
Applying a Security Template	200
Applying a Local Security Template	201
Applying an Author-based Security Template	202
Editing Security on Documents	204
Application Setup in FileSite	206
FileSite Features for Microsoft Outlook 2007 or 2010	206
Inserting a WorkSite Attachment	207
Creating Outlook Folders in FileSite	208
Dragging and Dropping Outlook Items to FileSite	209
Tasks	210
Contacts	211
Calendars and Appointments	213
Notes	214
Journal Entries	215
 Chapter 6	
Searching in FileSite	219
Overview	219
WorkSite Search Capability	220
Searching on Profile Information	220
Search Variables	220
These variables are case sensitive.	220
Search Dialog Box	220
Full-text Searching	221
Simplified Full-text Search	223
Search Syntax	224
Performing Searches	229
Microsoft Outlook Search	229
Saved Search	230
WorkSite Container Searches	231
Database Search	231
Workspace Search	234
Folder Search	236

Chapter 7	
Integrated Applications	239
Overview	239
Introduction	239
Microsoft Office Integration	240
Getting Started in the Integrated Application	240
Choice of Connection Mode	240
Automatic Online Mode	242
Seamless Online/Offline Transition	242
Delayed Login Option	244
Pre-Profiling Template	244
Menus with WorkSite Options	245
File Menu	245
Active Integration	245
Passive Integration	251
Enhanced and Classic Application Integration	252
Enhanced Application Integration	253
Elements of the Enhanced Integrated Desktop	254
Working with Documents in the Enhanced Integrated Desktop	262
Classic Application Integration	268
Elements of the Classic Integrated Desktop	268
Tree Frame	269
Working with Documents in the Classic Integrated Desktop	271
Working with WorkSite Links in Office Integration	273
Inserting a WorkSite Hyperlink	276
Inserting a WorkSite Footer	277
Performing a WorkSite Mail Merge	277
Performing a Mail Merge Using WorkSite Documents	278
Performing a Mail Merge Using Newly Created Documents	283
Comparing and Merging WorkSite Documents	286
Additional Microsoft Office Integration Functions	289
Register/Unregister WorkSite Servers	290
Synchronization Tasks	290
About the Integration Module	290
Switch Connection Mode	291
Adobe Acrobat Integration	291
Requirements	292
Getting Started	292
Integration with WorkSite	292
Open from WorkSite	293

Save to WorkSite	294
Save and Save As	294
Modes of Integration	294
Working with Documents in the Integrated Application	294
Opening Documents	295
Saving Documents	295
Additional Adobe Acrobat Integration Functions	297
Properties	297
Sending WorkSite Links	297
About the Integration Module	297
Integration with Other Applications	298
Integration with DocuComp	298
Comparing Documents using DocuComp	298
Integration with CompareRite	300
Integration with FullAuthority	300
Analyzing Citations Using FullAuthority	300
Integration with CiteRite	301
E-mail Integration	301
Non-Integrated Applications	302
 Chapter 8	
Linking WorkSite Documents	303
Introduction.....	303
Linking Definitions	304
Example of OLE Linking	304
Creating Linked Items Outside of WorkSite	305
Using the Insert Option	305
Using the Paste Special Option	306
Configuring WorkSite for Linking	307
Working with Linked Items in WorkSite	308
Creating Documents Containing Linked Objects	308
Using the Insert Option	308
Using the Paste Special Option	310
Importing Documents Containing Linked Objects	312
Importing Destination and Source Documents into WorkSite	313
Importing Source Documents into WorkSite	314
Opening Documents Containing Linked Objects	316
Editing Links in Documents Containing Linked Objects	317
Replacing Links in Documents Containing Linked Objects	318
Exporting Documents Containing Linked Objects	320

Checking Out Documents Containing Linked Objects	321
Checking In Documents Containing Linked Objects	323
Chapter 9	
WorkSite Viewer.....	325
Overview	325
Introduction	325
Supported Document Types	326
Word Processing Formats	326
Spreadsheet Formats	326
Graphic Formats	326
Miscellaneous Formats	326
WorkSite Viewer Window	327
Viewing Documents	328
Viewing Local Documents	328
Viewing WorkSite Documents	329
Searching Text of Documents	331
Copying Documents	332
Printing Documents	332
Setting Printer Options	332
Setting More Printer Options	333
Setting Document Display Options	334
Word Processing Documents	334
Setting Display Font	334
Bitmap Files	334
Vector Graphics	335
Setting Default Display Options	335
Chapter 10	
Working Offline	337
Portable Mode Versus OffSite	338
Working in Portable Mode	338
Prerequisites	339
Switching to Portable Mode	339
FileSite Node in Portable Mode	341
Document Grid in Portable Mode	341
Application Setup in Portable	342
Working with Portable Documents	342
Checking Out Documents from Online into Portable Mode	343
Importing Documents into Portable Mode	344

Opening Portable Documents	346
Printing Portable Documents	346
Viewing Portable Documents	346
E-mailing Portable Documents	347
Editing Portable Document Profile Information	347
Checking In Documents from Portable to Online Mode	348
Working with Portable Documents in Integrated Applications	351
Switching to Online Mode	352
Orphan Documents	352
Chapter 11	
Document Echoing.....	353
Overview	353
Introduction.....	353
Setting Up	354
Prerequisites	354
Enabling Document Echoing	354
Setting the Default Drive for the Echo Directory	354
Working with Echo Documents	355
Working with Echo Documents in Portable Mode	355
Opening Echo Documents	355
Viewing Echo Document Profile Information	356
Working with Echo Documents from Integrated Applications	356
Synchronizing Echo Documents	357
Purging Echo Documents	361
Purging Echo Documents Automatically	362
Index	365

Tables

Table 1	Document Profile Information Fields	32
Table 2	WorkSite Menu Options	68
Table 3	Types of containers in WorkSite	74
Table 4	Example Inherited and Individual Security Container Icons	81
Table 5	Checked-out Documents menu options	84
Table 6	Document Worklist menu options	85
Table 7	Matter Worklist menu options	85
Table 8	Recent Searches menu options	86
Table 9	Searches menu options	86
Table 10	My Matters menu options	87
Table 11	My Favorites menu options	88
Table 12	WorkSite Explorer menu options	90
Table 13	Category menu options	94
Table 14	Workspace menu options	97
Table 15	Workspace Refiling Rules	99
Table 16	Tab menu options	104
Table 17	Tab Refiling Rules	105
Table 18	Document Folder menu options	112
Table 19	Document Folder Refiling Rules	113
Table 20	Adding documents to a folder	115
Table 21	Search Folder menu options	122
Table 22	PushPin States	129
Table 23	Summary of Document menu commands	133
Table 24	When to perform a Document Importation	145
Table 25	Document Relations	169
Table 26	List of Supported Variables	192
Table 27	Default Profile Properties, Documents	194
Table 28	Default Profile Properties, E-mails	196
Table 29	Outlook Folder Types	209
Table 30	Profile Field Operators	225

Table 31	Full-text Search Operators	226
Table 32	Mail Merge Scenarios.....	278
Table 33	Source Document File Type Selection	306
Table 34	Source Document Paste As Selection.....	311
Table 35	Importing Linked Documents.....	312
Table 36	Comparison of OffSite and Portable.....	338
Table 37	Document Status Icons	342
Table 38	Summary of Echo Document functions	355

Figures

Figure 1	WorkSite Client-Server diagram	29
Figure 2	Language selection on search dialog	37
Figure 3	Outlook Data Files dialog box	43
Figure 4	Outlook 2007 Data Files dialog box	44
Figure 5	Outlook 2010 Account Settings Navigation	45
Figure 6	New Outlook Data File dialog box	46
Figure 7	Options dialog box, General tab	46
Figure 8	Locating Microsoft Outlook UI Elements	48
Figure 9	Locating More Microsoft Outlook UI Elements	49
Figure 10	Server Connection dialog box	51
Figure 11	Register and Login dialog box	52
Figure 12	Unregister dialog box	53
Figure 13	Options dialog box, General tab	55
Figure 14	Connection Mode dialog box	56
Figure 15	Options dialog box, Advanced tab	57
Figure 16	E-mail Duplicate Notification dialog box	58
Figure 17	Advanced Configure dialog box	60
Figure 18	Advanced Configure dialog box, Other options	62
Figure 19	Advanced Options dialog box	63
Figure 20	FileSite Desktop, Outlook 2007	66
Figure 21	FileSite Desktop, Outlook 2010	67
Figure 22	Example Shortcut Pane	70
Figure 23	Example Folder List	71
Figure 24	Document Results Frame	76
Figure 25	The Document Results Frame tabs	76
Figure 26	Add to My Favorites dialog box	89
Figure 27	Create New Category dialog box, General	91
Figure 28	Create New Category dialog box, Security	92
Figure 29	Create New Category dialog box, My Favorites	93
Figure 30	New Workspace Profile dialog box	95

Figure 31	File Permissions dialog box	96
Figure 32	Apply profile from container message	100
Figure 33	Refiling dialog box	101
Figure 34	Create New Tab dialog box, General	102
Figure 35	Create New Tab dialog box, Security	103
Figure 36	Create New Folder dialog box, General	106
Figure 37	Create New Folder dialog box, Security	107
Figure 38	Create New Folder dialog box, Profile	108
Figure 39	Folder Profile dialog box	109
Figure 40	Select Internal Author dialog box	110
Figure 41	Create New Folder dialog box, Profile, selected profile information	111
Figure 42	Browse for folder dialog box	114
Figure 43	Confirm Remove message	116
Figure 44	Create New Search Folder dialog box, General	118
Figure 45	Create New Search Folder dialog box, Security	119
Figure 46	Create New Search Folder dialog box, Search Criteria	120
Figure 47	Search dialog box	121
Figure 48	Field Chooser window	124
Figure 49	Document Grid, AutoPreview	125
Figure 50	Outlook View Menu Expansion	126
Figure 51	Outlook 2010 Change View Option	127
Figure 52	Select Internal Author dialog box	137
Figure 53	New Profile dialog box	139
Figure 54	File Permissions dialog box	140
Figure 55	Properties dialog box	141
Figure 56	Find File To Import to Folder dialog box	146
Figure 57	Choose Database dialog box	148
Figure 58	Choose a Folder dialog box	149
Figure 59	Save As dialog box	152
Figure 60	Select Attachments dialog box	154
Figure 61	Export dialog box	156
Figure 62	Checkout dialog box	158
Figure 63	Checkin dialog box	159
Figure 64	Move dialog box	162
Figure 65	Apply profile from folder message	162
Figure 66	WorkSite document link icon on desktop	164
Figure 67	WorkSite document link in a Word document	164
Figure 68	WorkSite document copied to the local desktop	164
Figure 69	Document removal message	165

Figure 70 Document attached to e-mail message 166
Figure 71 Document link in e-mail message 167
Figure 72 Example WorkSite links in an Outlook Task folder 168
Figure 73 Confirm Unlock message 171
Figure 74 Confirm Synchronization of Locked Document dialog box 172
Figure 75 Declare as Record confirmation message 173
Figure 76 Undeclare Record confirmation message 174
Figure 77 Document Archived Message 175
Figure 78 Restore Shortcut to Archived Document Message 175
Figure 79 Document History dialog box 177
Figure 80 Document Checked Out dialog box 178
Figure 81 FileSite Save As dialog box 180
Figure 82 Select Destination dialog box 181
Figure 83 FileSite Add to Folders dialog box 182
Figure 84 Create New Folder dialog box 183
Figure 85 File to WorkSite progress window 183
Figure 86 PDF Conversion Progress dialog box 185
Figure 87 PDF Save As dialog box 186
Figure 88 New folder containing example Word and Excel templates 187
Figure 89 New submenu 188
Figure 90 New Profile dialog box 189
Figure 91 Example New Profile Default dialog box 191
Figure 92 New Profile Default dialog box, variables entered 193
Figure 93 Example Default Email Profile dialog box 195
Figure 94 Security Template Management dialog box 198
Figure 95 Security Template dialog box 198
Figure 96 Select Internal Group(s) dialog box 199
Figure 97 Users of Group dialog box 200
Figure 98 Edit Security dialog box 202
Figure 99 Select Internal Author dialog box 203
Figure 100 Edit Security dialog box 204
Figure 101 File Permissions dialog box 205
Figure 102 Example New Message dialog box 207
Figure 103 Insert a WorkSite document dialog box 208
Figure 104 View options on navigation pane 209
Figure 105 Example Tasks folders displayed in Outlook navigation pane 210
Figure 106 Example Task dialog box 211
Figure 107 Example Contacts displayed in the Outlook navigation pane 212
Figure 108 Example Contact dialog box 212

Figure 109 Calendars and Appointments in the Outlook navigation pane213
Figure 110 Example Meeting dialog box214
Figure 111 Example Notes displayed in the Outlook navigation pane215
Figure 112 Example Note215
Figure 113 Example Journal folders displayed in the Outlook navigation pane216
Figure 114 Example Journal entry dialog box217
Figure 115 Search dialog box221
Figure 116 Search dialog box, full-text information222
Figure 117 Simplified full-text search dialog box223
Figure 118 Microsoft Outlook Quick Search toolbar229
Figure 119 Microsoft Outlook 2007 Instant Search toolbar 230
Figure 120 Microsoft Outlook 2010 Search tab 230
Figure 121 Search dialog box, database selected 232
Figure 122 Choose WorkSpace/Folder dialog box 233
Figure 123 Example Search Workspaces dialog box 234
Figure 124 WorkSpace Search Results 235
Figure 125 Search dialog box, folder selected 237
Figure 126 Choose WorkSpace/Folder dialog box 238
Figure 127 Select Connection Mode dialog box241
Figure 128 Example WorkSite tab on Office application ribbon bar241
Figure 129 Prompt to Switch Offline 243
Figure 130 Prompt to Switch Online 243
Figure 131 Example File menu, Active Integration246
Figure 132 Example Close message248
Figure 133 WorkSite Properties quick view249
Figure 134 Properties dialog box, Default appearance250
Figure 135 File menu, Passive Integration251
Figure 136 WorkSite Integrated Desktop, Enhanced mode254
Figure 137 Look in list255
Figure 138 View Options dialog box256
Figure 139 Search Folders dialog box 257
Figure 140 Default Scope 258
Figure 141 Type Selection259
Figure 142 Autocomplete feature 260
Figure 143 Autocomplete feature (suggestion selected) 260
Figure 144 Recent Search261
Figure 145 Save As Options dialog box 264
Figure 146 Integrated Save As dialog box, Enhanced mode 265
Figure 147 Open dialog box on the Classic Integrated Desktop269

Figure 148 Save As Options dialog box, Classic mode272
Figure 149 Microsoft Word integrated File menu273
Figure 150 Edit menu274
Figure 151 Insert menu274
Figure 152 Example WorkSite Link and Footer on Insert ribbon bar275
Figure 153 Example Insert Link menu on WorkSite ribbon bar275
Figure 154 Insert WorkSite Link dialog box 276
Figure 155 Insert WorkSite Hyperlink dialog box 277
Figure 156 Example WorkSite ribbon bar, Mail Merge option 279
Figure 157 WorkSite Mail Merge dialog box 279
Figure 158 WorkSite Mail Merge dialog box, Main document selection 280
Figure 159 WorkSite Mail Merge dialog box, Main document selected 280
Figure 160 Select Data Source dialog box 281
Figure 161 WorkSite Mail Merge dialog box, Data document selected 282
Figure 162 Merge dialog box 282
Figure 163 WorkSite Mail Merge dialog box 283
Figure 164 WorkSite Mail Merge dialog box, Main document selection 284
Figure 165 WorkSite Mail Merge dialog box, Active document selected 284
Figure 166 WorkSite Mail Merge dialog box, Change Document Type 285
Figure 167 Select Data Source dialog box 285
Figure 168 Edit Main Document message box 286
Figure 169 Tools menu 287
Figure 170 Review ribbon bar, Compare and Merge WorkSite Documents 287
Figure 171 Compare and Merge WorkSite Documents dialog box 288
Figure 172 Example Compare and Merge Documents result289
Figure 173 Example WorkSite ribbon bar, About WorkSite option291
Figure 174 Select Connection Mode dialog box291
Figure 175 Integrated Adobe Acrobat File menu293
Figure 176 WorkSite Integrated Open dialog box 295
Figure 177 WorkSite Integrated Save As dialog box 296
Figure 178 Compare Documents using DocuComp dialog box 299
Figure 179 FullAuthority dialog box 300
Figure 180 Advanced Configure dialog box 307
Figure 181 WorkSite Integrated Insert dialog box 309
Figure 182 Paste Special Option, Office 2007 Integration 310
Figure 183 Paste Special dialog311
Figure 184 Version Selection dialog box 312
Figure 185 Import Source Documents dialog box 313
Figure 186 Import Links dialog box 315

Figure 187 Open dialog box 316
Figure 188 WorkSite Links dialog box 317
Figure 189 WorkSite Links dialog box, checked-out document 318
Figure 190 Replace WorkSite Links dialog box 319
Figure 191 WorkSite Integrated Replace Link dialog box 319
Figure 192 Export dialog box 320
Figure 193 Export with Links dialog box 321
Figure 194 Checkout dialog box 322
Figure 195 OLE (Object Linking and Embedding) Checkout dialog box 323
Figure 196 OLE (Object Linking and Embedding) Checkin dialog box 324
Figure 197 WorkSite Viewer window, Tile format327
Figure 198 WorkSite Viewer window, Cascade format328
Figure 199 Select File to View dialog box 329
Figure 200 WorkSite Viewer window 329
Figure 201 WorkSite Integrated Open dialog box 330
Figure 202 Find dialog box 331
Figure 203 Print Page Setup dialog box 333
Figure 204 Display Options dialog box335
Figure 205 Options dialog box, General tab 340
Figure 206 Example FileSite Desktop, Portable mode341
Figure 207 Example Document Grid, Portable mode342
Figure 208 Checkout dialog box 344
Figure 209 Example Find File To Import dialog box 345
Figure 210 Checkin/Synchronize Documents dialog box, Checkedout Documents 349
Figure 211 Checkin dialog box 350
Figure 212 WorkSite Integrated Portable Open dialog box 351
Figure 213 Checked-out Documents message 352
Figure 214 Echo document warning message 356
Figure 215 WorkSite Integrated Portable Open dialog box 357
Figure 216 Checkin/Synchronize Documents dialog box, Echo Documents 359
Figure 217 Confirm Synchronize dialog box 360
Figure 218 Set Purge Criteria dialog box 362

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:

- [Documentation Updates](#)
- [Conventions](#)
- [Related Documentation](#)
- [Autonomy Product References](#)
- [Autonomy Customer Support](#)
- [Contact Autonomy](#)

Documentation Updates

The information in this guide is current as of FileSite version 9.0. The content was last modified December 2011. You can retrieve the latest available product documentation from Autonomy's Knowledge Base on the Customer Support Site:

<https://customers.autonomy.com>

A document in the Knowledge Base has a *version number* (for example, version 7.5) and may also have a *revision number* (for example, revision 3). The version number applies to the product that the document describes. The revision number applies to the document. The Knowledge Base contains the latest available revision of any document.

Conventions

The following conventions are used in this document.

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.
<i>Italics</i>	Document titles and new terms. For example: <ul style="list-style-type: none">■ For more information, see the <i>IDOL Server Administration Guide</i>.■ An <i>action command</i> is a request, such as a query or indexing instruction, sent to IDOL Server.
<code>monospace font</code>	File names, paths, and code. For example: The <code>FileSystemConnector.cfg</code> file is installed in <code>C:\Autonomy\FileSystemConnector\</code>
<code>monospace bold</code>	Data typed by the user. For example: <ul style="list-style-type: none">■ Type <code>run</code> at the command prompt.■ In the User Name field, type <code>Admin</code>.
<code>monospace italics</code>	Replaceable strings in file paths and code. For example: <code>user <i>UserName</i></code>

Command-line Syntax Conventions

This guide uses the following command-line syntax conventions.

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

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.

Related Documentation

The following documents provide more details on FileSite:

- *WorkSite Desktop Client Customization Guide*
- *WorkSite Server Administrator's Guide*

Autonomy Product References

This document references the following Autonomy products:

- iManage DeskSite
- iManage E-mail Management for Outlook
- iManage OffSite

- iManage WorkSite

Autonomy Customer Support

Autonomy Customer Support provides prompt and accurate support to help you quickly and effectively resolve any issue you may encounter while using Autonomy products. Support services include access to the Customer Support Site (CSS) for online answers, expertise-based service by Autonomy support engineers, and software maintenance to ensure you have the most up-to-date technology.

To access the Customer Support Site, go to

<https://customers.autonomy.com>

The Customer Support Site includes:

- **Knowledge Base:** The CSS contains an extensive library of end user documentation, FAQs, and technical articles that is easy to navigate and search.
- **Case Center:** The Case Center is a central location to create, monitor, and manage all your cases that are open with technical support.
- **Download Center:** Products and product updates can be downloaded and requested from the Download Center.
- **Resource Center:** Other helpful resources appropriate for your product.

To contact Autonomy Customer Support by e-mail or phone, go to

<http://www.autonomy.com/content/Services/Support/index.en.html>

Contact Autonomy

For general information about Autonomy, contact one of the following locations:

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

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.

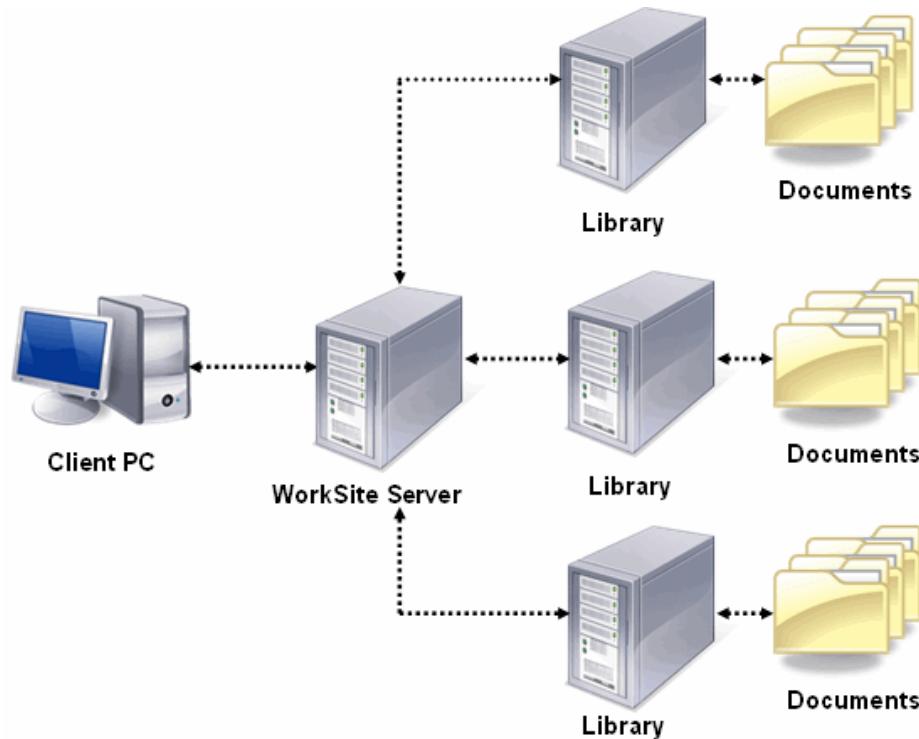
Client-Server Architecture

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*TM, *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 75](#)" 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 73](#) 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 73](#) 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 accessed Workspaces. This provides another efficient way to retrieve information that you worked with in the recent past.



NOTE If you open a document to which you have read-only access, that document does not appear in the Document Worklist.

See ["Folder List Components" on page 70](#) 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 1](#) lists the information typically contained in a document profile.

Table 1 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.

Table 1 Document Profile Information Fields

Profile Field	Description
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.
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	<p>Date the document was created.</p> <p>Note: Server settings enable you to view the create date/time profile property of the documents in FileSite in two ways:</p> <p>File Date. The date/time that a document was created locally, before it was imported into FileSite.</p> <p>System Date. The date/time that a document was created in the server or imported into the server.</p> <p>For more information on server settings, refer to the <i>WorkSite Server Administrator's Guide</i>.</p>
Last Edit Date	<p>Most recent date the document was edited.</p> <p>Note: Server settings enable you to view the edit date profile property of the documents in FileSite in two ways:</p> <p>File Date. The date that a document was last edited locally, before it was imported into FileSite.</p> <p>System Date. The date that a document was last edited in the server.</p> <p>For more information on server settings, refer to the <i>WorkSite Server Administrator's Guide</i>.</p>

Table 1 Document Profile Information Fields

Profile Field	Description
Last Edit Time	<p>Most recent time the document was edited.</p> <p>Note: Server settings enable you to view the edit time profile property of the documents in FileSite in two ways:</p> <p>File Date. The time that a document was edited locally, before it was imported into FileSite.</p> <p>System Date. The time that a document was edited in the server.</p> <p>For more information on server settings, refer to the <i>WorkSite Server Administrator's Guide</i>.</p>
File Entry	Date the source file was originally created <i>by the originating application</i> .
File Edit	Date the source file was last edited <i>by the originating application</i> .
Last User	Name of the user who most recently edited the document <i>in WorkSite</i> .
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 82](#) for information about external users and groups.

Because profile fields can be customized, the items listed in **Table 1** 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 application.

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 169](#) 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 80](#) 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.

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 available in FileSite 9.0.

Support for Save as PDF in Office Integration

WorkSite office integration now lets the user add a Word document to WorkSite in PDF format. The newly-saved PDF document can be either a new version of an existing WorkSite Office document or a new document.

This is only supported in Word 2007 / 2010 at this time, not in PPT or Excel

In Word 2007 you can find Save as PDF options under File -> Save as -> PDF into WorkSite.

In Word 2010 you can find Save As PDF options under File->Save & Send->Create PDF/XPS Document->save as PDF.

Support for Unicode

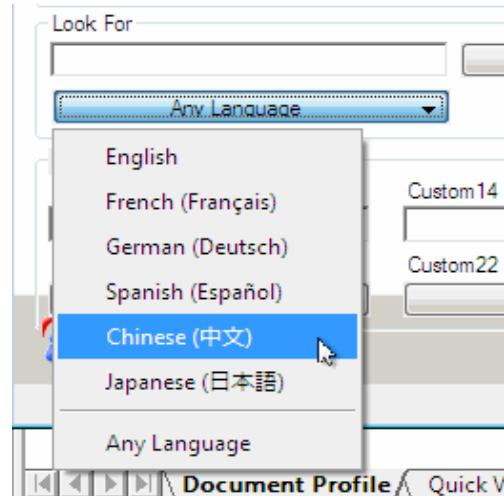
FileSite 9.0 supports a unicode environment. Profile data (including client, matter, author, etc.) can be stored in multiple languages. Workspaces, folders, and dialogs can be in any language.

Search Language Selection

A new option on the Search dialogs enables you to specify a language when performing a search operation. FileSite returns results for the specified language only.

This option is available on the Document Search dialog (see [Figure 2](#)) and on the Workspace Search dialog.

Figure 2 Language selection on search dialog



Preview NRL Link

When you receive an e-mail with an NRL link attached, you can now preview the content of the link in the Outlook message pane.



NOTE The preview functionality is limited to those formats supported by Outlook's preview handler.

CHAPTER 2

Installing and Configuring FileSite

Overview

This chapter contains the following information:

- “[Prerequisites](#)”
- “[Installing FileSite](#)”
- “[Adding the FileSite Service in Microsoft Outlook](#)”
- “[Loading Localized KeyView Resource Files](#)”
- “[Language Settings](#)”
- “[Starting FileSite](#)”
- “[Configuration Options](#)”
- “[Uninstalling FileSite](#)”



NOTE The installation and configuration of your FileSite application may be performed by your WorkSite Administrator. If that is the case, you can skip the Installation section of this chapter. Many of the configuration options described in this chapter are configurable by the user.

Prerequisites

The following components are required to install FileSite 9.0:

- Microsoft Office 2010 (32-bit), Office 2007 SP1
- Microsoft .NET Framework 3.5 SP1 (installer will automatically detect and install)
- Microsoft Visual C++ 2008 Redistributable (installer will automatically detect and install)
- Microsoft Internet Explorer 7.0 and above
- 2 GB RAM

Supported Platforms

Refer to the WorkSite *Supported Platforms and Applications* datasheet for a complete list of operating systems and software that is supported or compatible with FileSite and E-mail Management for Outlook.

Installing FileSite

The optional E-mail Management (EM) component is now included in the FileSite installation package instead of in a separate installation package. This streamlined installation provides a simplified upgrade process. The installer manages the entire upgrade instead of uninstalling and reinstalling components separately.

In addition to the optional EM component, the FileSite installer installs FileSite, Express Search, and the WorkSite Viewer application.

NOTE If any Microsoft Office applications are running, close them before installing FileSite.

NOTE Verify that the “[Prerequisites](#)” on page 40 have been met for the computer. Refer to the *Release Notes* for the latest information.



NOTE If you are installing FileSite on a machine with no Internet connection, you must confirm that the root certificate on the machine is up to date. You can update the machine through Microsoft Windows updates, or use the steps in the following Microsoft Knowledge Base article to update the root certificate as required.

<http://support.microsoft.com/kb/931125>

1. Start the FileSite installer using one of the following methods:
 - Insert the CD in your computer’s CD-ROM drive and wait for the installation wizard to appear. If it does not appear automatically, double-click `Setup.exe` located on the CD-ROM.
 - Download and unzip the installation files to a temporary folder on your computer. Locate and double-click `Setup.exe`.
2. Click **Next** at the Welcome window. The Customer Information window appears.
3. In the Customer Information window, enter your name and company name in the **User Name** and **Organization** fields. Choose the language from the list.
4. Select the radio button for the features you want to install: **FileSite Only** or **FileSite with E-mail Management**.
5. Enter the product serial number provided to you in the **Product Serial Number** key. Click **Next**. The License Agreement window appears.
6. Read the License Agreement and if you agree to the terms, select the **I accept the terms in license agreement** option, and click **Next**. The Setup Type window appears.
7. In the Setup Type window, select the setup type. This setting determines the components that are installed with FileSite.
 - Typical**. Installs Microsoft Office Integration and Adobe Acrobat and Acrobat Reader Integration.

- **Custom.** Allows advanced users to choose the components to be installed.

Click **Next** to continue. The Destination Folder window opens.

8. In the Destination Folder window, the Installation Wizard automatically creates and installs the files to the following path:

C:\Program Files\Interwoven\WorkSite\

On 64-bit clients, the path will be:

C:\Program Files (x86)\Interwoven\WorkSite\

Click **Next** to continue. The Ready to Install the Program window opens.

9. Click **Install** to complete the installation. The Installation Completed window opens.

10. Click **Finish** to exit, and then reboot your computer.



IMPORTANT If you install E-mail Management for Outlook and uninstall it at any time, you must uninstall and re-install FileSite.

Silent Installation

To install FileSite in silent mode, use one of the following command line syntaxes:

- `Setup.exe /s /v"/qn SERIALNUMBER=<serial number>"`
- `MsiExec.exe /i "<path to Full_Installer/*.msi file>" /qn SERIALNUMBER=<serial number>`



NOTE The `setup.exe` installer automatically checks for the Microsoft .NET 3.5 SP1 Framework and Microsoft Visual C++ 2008 Redistributable components and installs them, if necessary. However, when performing an installation from the `.MSI` file, you must check for and install these components manually.



IMPORTANT If you install E-mail Management for Outlook and uninstall it at any time, you must uninstall and re-install FileSite.

Adding the FileSite Service in Microsoft Outlook

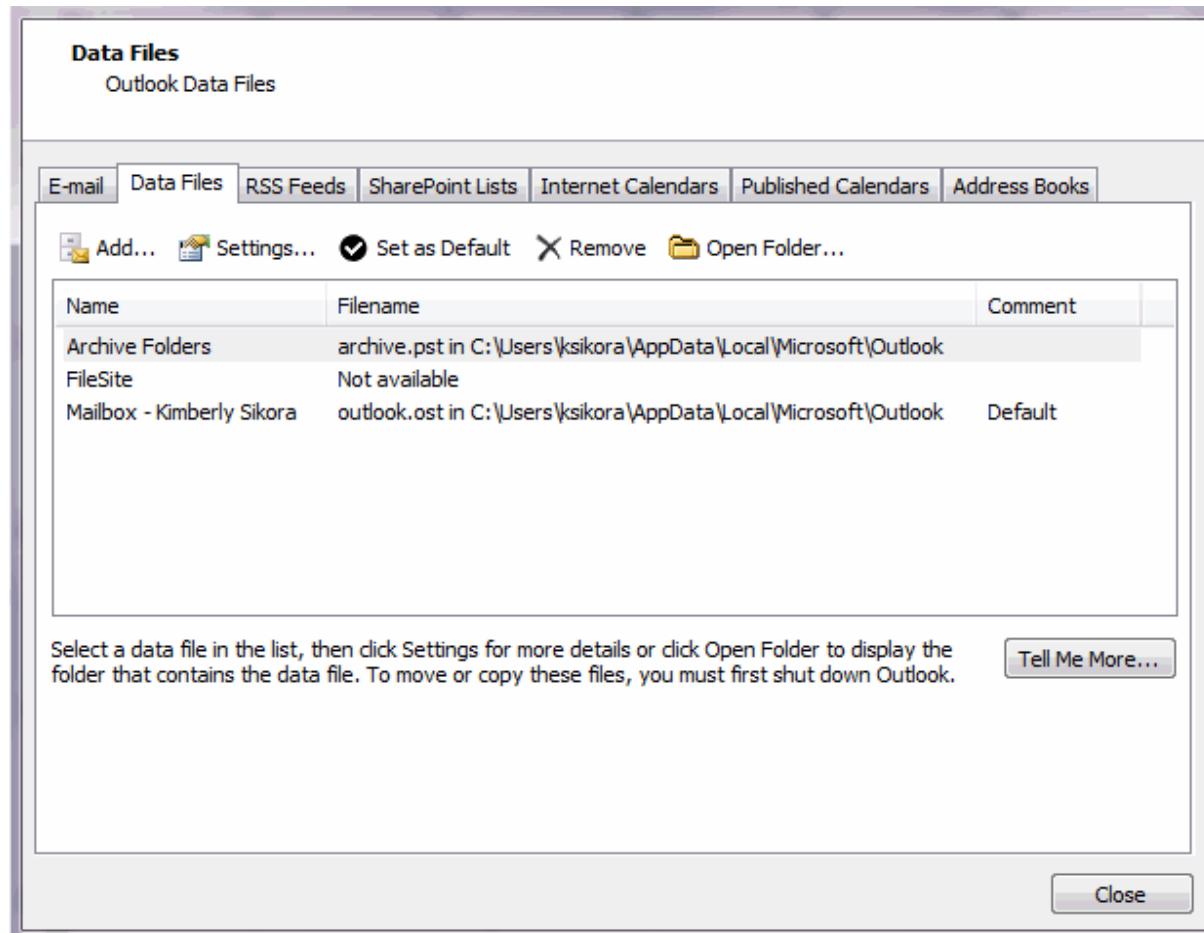
After installation, you must add FileSite as a service to your local instance of Outlook.

1. Start Outlook.
2. From the **File** menu, select **Data File Management**. The Outlook Data Files dialog displays.

Figure 3 Outlook Data Files dialog box



Figure 4 Outlook 2007 Data Files dialog box

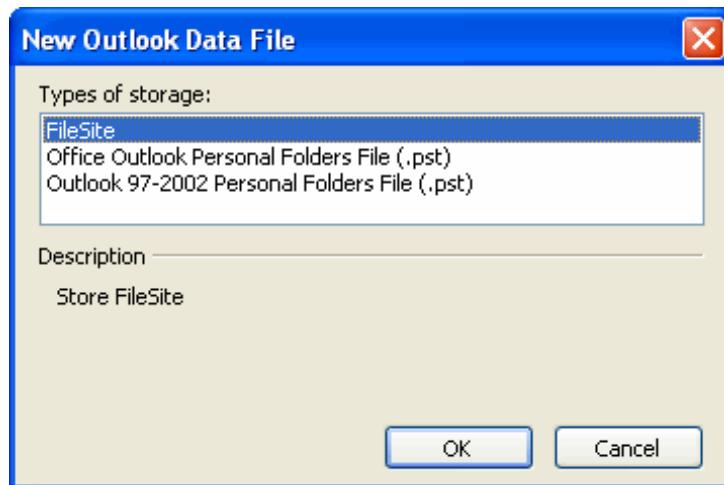


In Outlook 2010, to access the Data Files dialog box shown in Figure 4, click **File** and select **Info**. Click the **Account Settings** drop-down menu and select **Account Settings**. When the Account Settings dialog appears, click the **Data Files** tab.

Figure 5 Outlook 2010 Account Settings Navigation

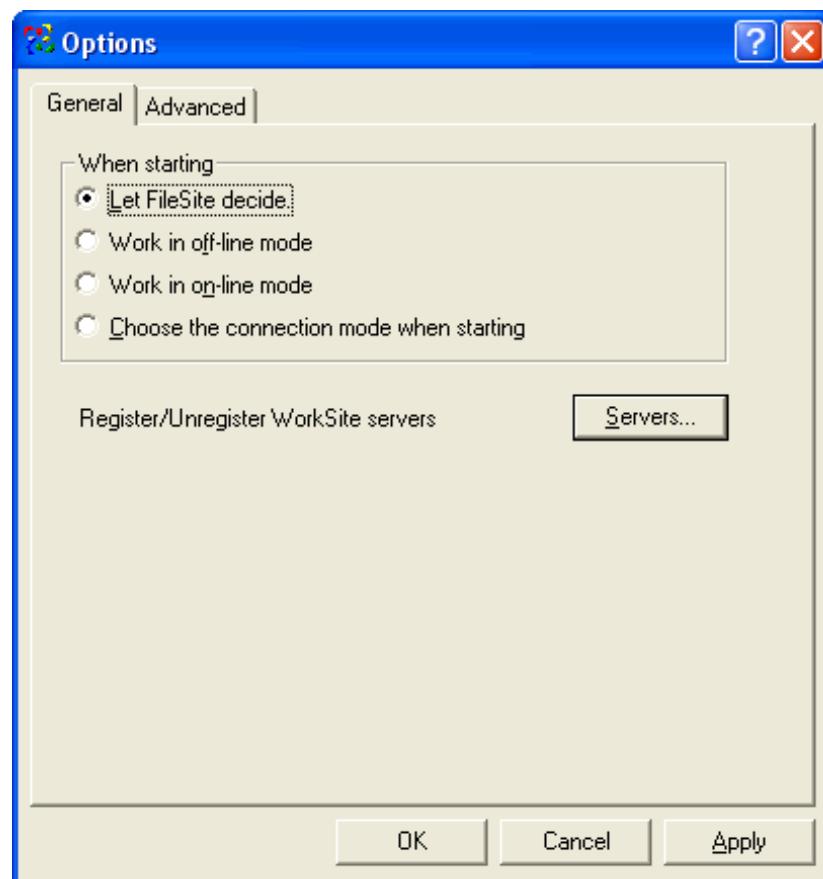
3. Click **Add** in the Outlook Data Files dialog box. The New Outlook Data File dialog box opens.

Figure 6 New Outlook Data File dialog box



4. Select **FileSite** from the **Types of storage** list.
5. Click **OK**. The Options dialog box opens with the **General** tab selected.

Figure 7 Options dialog box, General tab



The **General** tab of the Options dialog box allows you to configure the startup properties for FileSite. See “[General Tab](#)” on page 54 for more information on using the **General** tab.

6. If your environment requires running KeyView in a different language, continue with “[Loading Localized KeyView Resource Files](#)” on page 47. Otherwise, proceed to “[Starting FileSite](#)” on page 50.

Loading Localized KeyView Resource Files

FileSite includes Autonomy KeyView, which provides viewing capabilities so that you can view different file formats without launching native applications. KeyView loads the required resources from the `kwres.dll` file located in the default `C:\Program Files\Interwoven\WorkSite\KeyView` folder.

To run KeyView in another language, you must load localized resources. To load localized resources, copy the language-specific version of the `kwres.dll` file from the `C:\Program Files\Interwoven\WorkSite\KeyView\<language ID>` subdirectory and paste it into the `C:\Program Files\Interwoven\WorkSite\KeyView\` folder.

For example, to load German resources, copy the German version of the `kwres.dll` file from the `C:\Program Files\Interwoven\WorkSite\KeyView\1031` subdirectory and paste it into the `C:\Program Files\Interwoven\WorkSite\KeyView\` folder.

You can use the following similar procedure to switch locales and run KeyView in another language.

Language Settings

When FileSite is integrated with Microsoft Outlook, some elements of the Outlook user interface (UI) are modified. WorkSite identifies these UI elements by the strings used to display them. However, in a multilingual environment, it becomes difficult to identify these strings as their values vary depending on the locale in which Outlook is running.

The `FileSiteLocale.xml` file, which is located in the `C:\Program Files\Interwoven\WorkSite\iOutlook` directory contains information about the Outlook UI elements and their localized string values for a default set of locales. With this information, it is now possible to run FileSite in these locales.

To run FileSite in locales other than those supported by default, you must edit the `FileSiteLocale.xml` file using the following steps:

1. Run Outlook in the locale you wish to support.
2. Navigate to the `FileSiteLocale.xml` file and open it in an XML editor.
3. Add the relevant language element and specify its hexadecimal locale ID. For a list of locale IDs, refer to the Locale ID chart in the Microsoft Developer Network online resource.
4. In Outlook, locate the Outlook UI elements whose strings need to be specified in the `FileSiteLocale.xml` file. See [Figure 8](#) and [Figure 9](#).

Figure 8 Locating Microsoft Outlook UI Elements

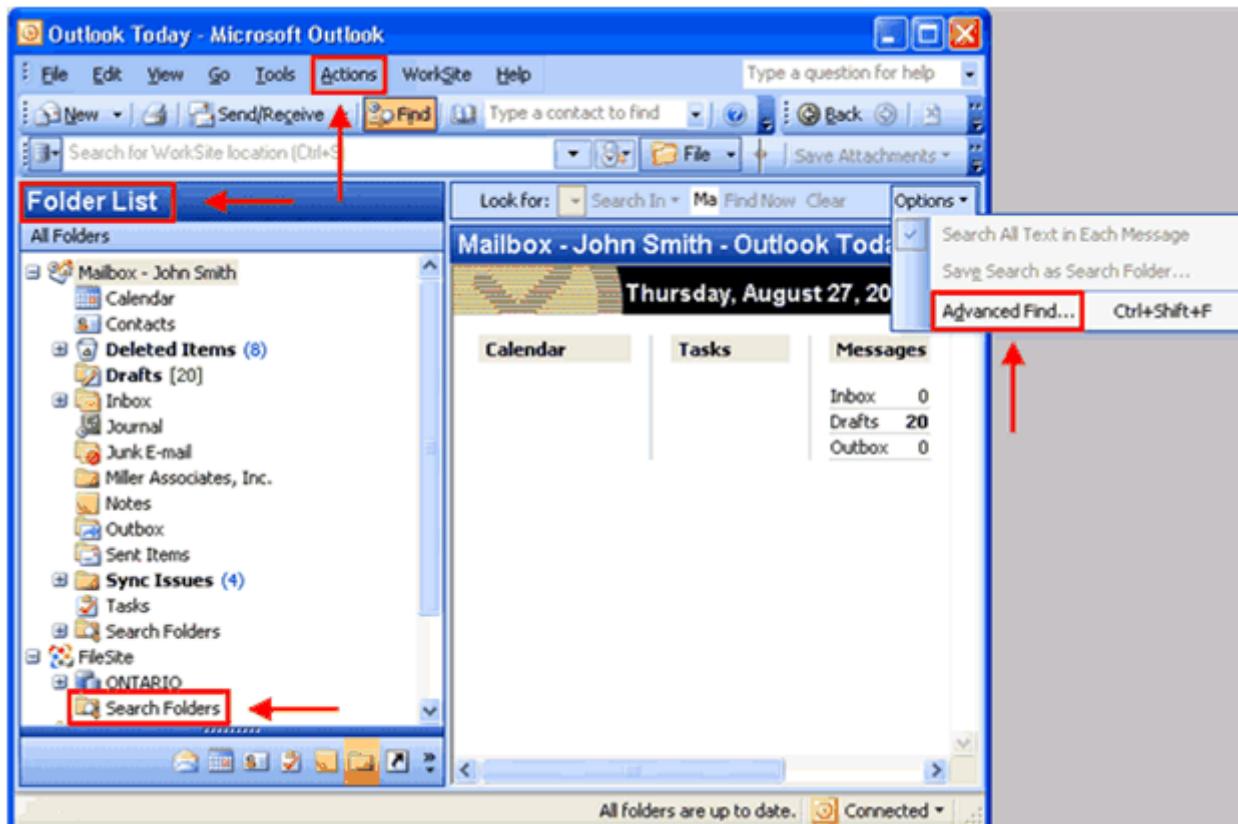
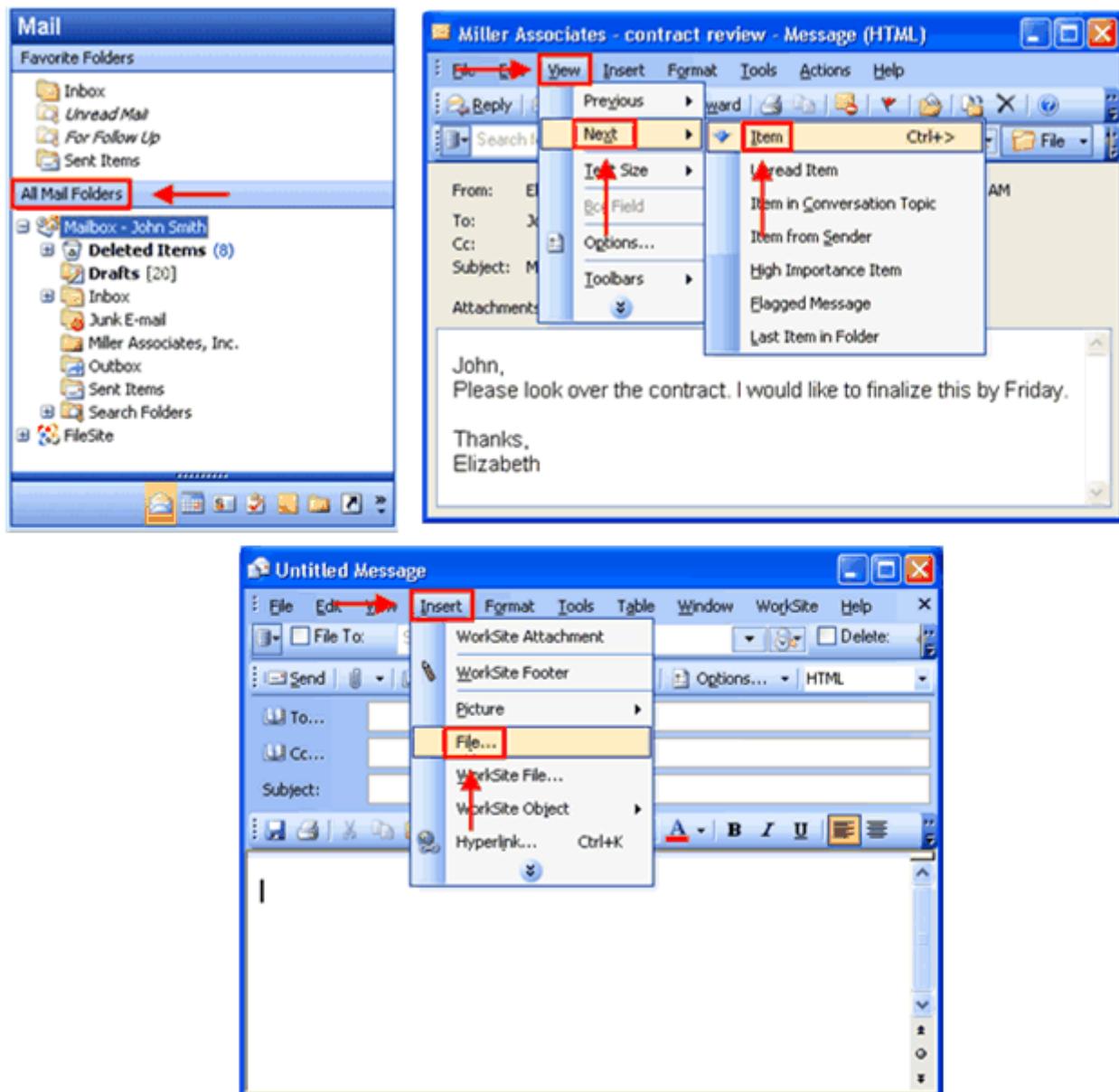


Figure 9 Locating More Microsoft Outlook UI Elements



5. Copy each of the required strings into the `FileSiteLocale.xml` file.

Now, with a valid code page, FileSite runs in the relevant locale.

NOTE If FileSite is running in a particular locale, but the localized string values are not provided or configured correctly, the WorkSite icons do not appear in the Folder List.

The following outlines a sample scenario to run FileSite in the Slovenian locale.

Add the following language element in the `FileSiteLocale.xml` file:

```
<Language Name="0424">
<string Name="All Mail Folders" value="Poštne mape"/>
<string Name="All Mail Folders 2007" value=" Poštne mape 2007"/>
<string Name="Folder List" value="Seznam map"/>
<string Name="Search Folders" value="Iskalne mape"/>
<string Name="Insert" value="Vstavljanje"/>
<string Name="File" value="& Datoteka"/>
<string Name="View" value="Pogled"/>
<string Name="Next" value="Naprej"/>
<string Name="Item" value="Element"/>
<string Name="Actions" value="Dejanja"/>
<string Name="Advanced Find" value="Napredno iskanje"/>
</Language>
```

Starting FileSite

The following steps assume that you have installed FileSite according to the instructions given in “[Installing FileSite](#) on page 40”, and set FileSite as a service in Microsoft Outlook according to the instructions given in “[Adding the FileSite Service in Microsoft Outlook](#)” on page 43.

FileSite launches every time you start Microsoft Outlook.

Connecting to WorkSite Servers

Your first step in using FileSite is to register your WorkSite servers. When you connect a server, FileSite looks for that server automatically at start-up and can be configured to log in for you automatically.

Logging In

To register and log into a WorkSite Server, you must have a valid login ID, password and server name.

When you log into a WorkSite Server, you have the option of using a WorkSite password or trusted login. You can use trusted login if you are one of the following users:

- Windows Active Directory Services (ADS)
- Windows NT Domain
- Novell NDS

■ Novell Bindery Users

If you are logging in with a special WorkSite password, your system may require you to change your password when it reaches an expiration date. Consult your WorkSite Administrator for information about the availability of trusted login and password expiration features on your system.

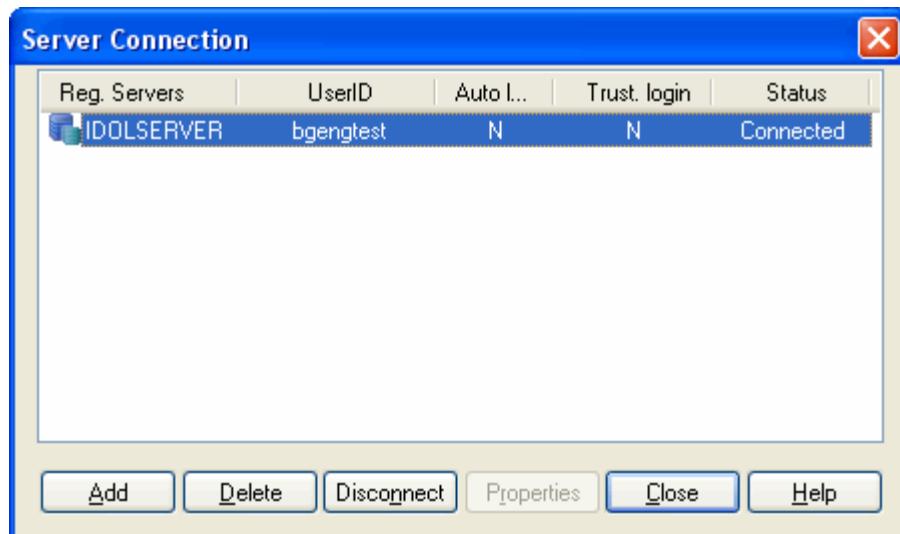
1. From the **WorkSite** menu, select **Login**.

In Outlook 2010, on the **WorkSite** tab, click the  **Login** icon.

The Server Connection 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 10 Server Connection dialog box



The dialog box displays a list of all the registered servers. If the value in the **Auto Login** column is "Y", when you launch Outlook, the login to the WorkSite server occurs automatically.

2. To disconnect from a server, select it and click **Disconnect** or type **ALT+N**. You will not lose the login information you have entered for that server.
3. To reconnect to a server, select it and click **Connect** or type **ALT+N**.

Registering a Server

1. Click **Add** in the Server Connection dialog box. The Register and Login dialog box opens.

Figure 11 Register and Login dialog box

2. Enter or select a server from the **Server Name** list.
3. In the **Login Information** area, select a login option:
 - ❑ Select the **Auto Login** option to automatically connect to the server at the start of a FileSite session. If you select this option, enter a **UserID** and **Password** and click **Save**.
 - ❑ Select the **Use Trusted Login** option to log in using your network authentication. When you select this option, the **UserID** and **Password** fields are unavailable and you are prompted to **Save**.



NOTE Your WorkSite Administrator must specifically enable the trusted login option. If you try to use this option and receive an error message, try logging in without using the trusted login option.

4. If you have entered authentic login information, the server appears in the list of the Server Connection dialog box. You may repeat these steps to add any number of servers and server clusters.

Unregistering a Server

1. 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. See [Figure 7 on page 46](#).



NOTE The dialog box may indicate that a connected server is disconnected.

2. On the **General** tab of the Options dialog box, click **Servers**. The Server Connection dialog box opens. See [Figure 10 on page 51](#).

3. Select the server you wish to unregister from the list, and click **Delete**.

The Unregister dialog box asks for confirmation to unregister the server.

Figure 12 Unregister dialog box



4. Click **Yes** to unregister the server.

Registering and Unregistering a Server Using Addlman.exe

The FileSite installer places a file called `addiman.exe` in the FileSite installation directory. This file can be used to register and/or unregister the WorkSite Service within Outlook automatically and to enable trusted login in FileSite.

To execute `addiman.exe`:

1. Go to the DOS command prompt.
2. Run the following command from the location where `addiman.exe` was copied, with the name of the DMS server:

`addiman [servername]`

To remove the WorkSite service from Outlook, execute the command:

`addiman /u`

NOTE This utility can also be run via a batch file or login script.



NOTE It is only possible to register one WorkSite server using `addiman.exe`.

NOTE The user's Outlook profile must already exist on the workstation.

NOTE The unregister parameter will remove all registered WorkSite servers.

Configuration Options

FileSite allows you to configure startup properties and set options that affect its behavior. These settings can be specified in the Options dialog box.

To access the Options dialog box, from the **WorkSite** menu, point to **Configure**, and select **General Options**.

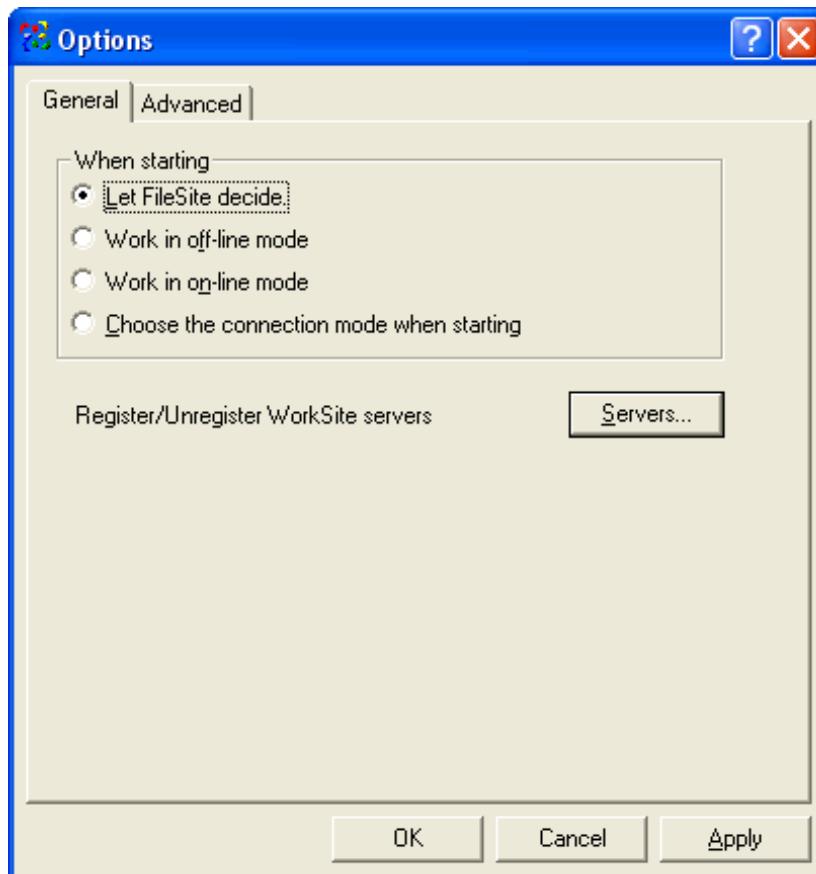
In Outlook 2010, on the **WorkSite** tab, click the  **General Options** icon from the Configure area.

The Options dialog box displays with two tabs — **General** and **Advanced**.

Keyboard shortcuts make it possible to navigate the dialog boxes without using a mouse. Use the **TAB** key or arrow keys to advance from one field to another. To move to a specific field, use the **ALT** key plus the mnemonic (underscored letter) for that field; for example, type **ALT+T** to move to the Timeout field. To move between tabs, type **CTRL+TAB**.

General Tab

The **General** tab is used to configure the startup properties for FileSite.

Figure 13 Options dialog box, General tab

The General tab is divided into the following areas:

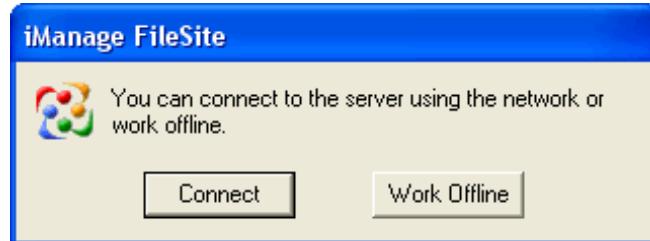
- The **When starting** area allows you to determine how FileSite should be started. You can select from the following options:
 - **Let FileSite decide.** This option follows the startup mode of Outlook.
 - **Work in off-line mode.** This option puts FileSite into offline mode and allows you to access offline documents. See [Chapter 10](#) for more information.
 - **Work in on-line mode.** This option causes FileSite to automatically connect to any servers registered for Auto Login. See [“Registering a Server” on page 51](#) for more information on registering servers.



NOTE If you have not set any servers for Auto Login, then the Server Connection dialog box opens for you to manually select the WorkSite Servers to connect to. See [Figure 10](#).

- **Choose the connection mode when starting.** This option opens the Connection Mode dialog box, giving you the choice to work online or offline.

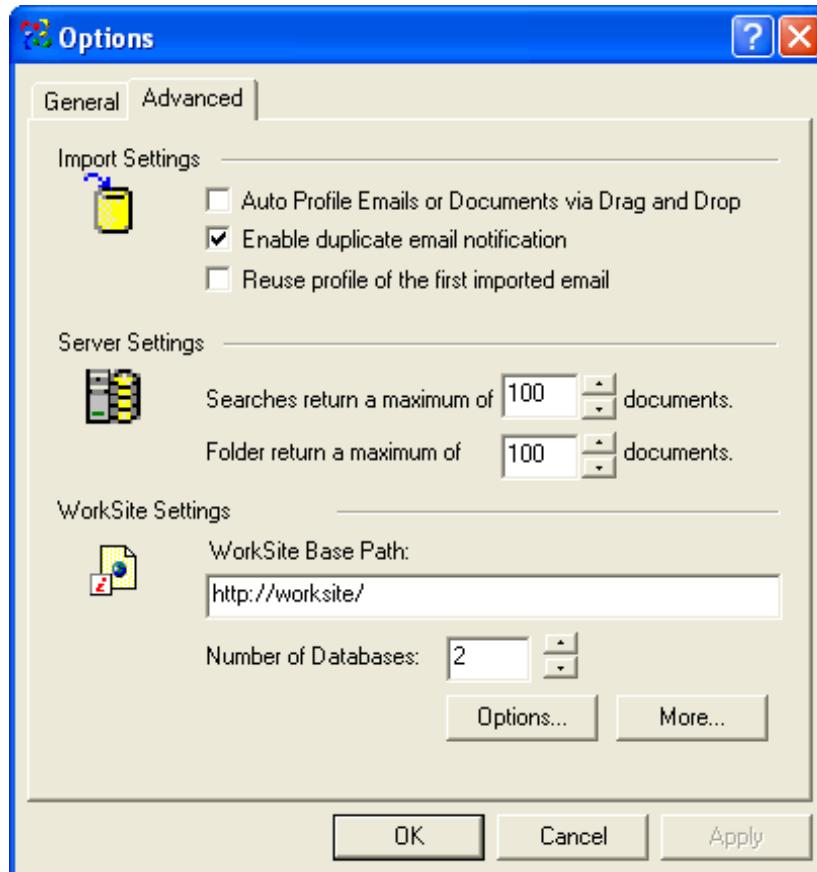
Figure 14 Connection Mode dialog box



- The **Register/Unregister WorkSite servers** area has the Servers button to register or unregister WorkSite servers. See ["Registering a Server" on page 51](#) and ["Unregistering a Server" on page 52](#) for more information.

Advanced Tab

The **Advanced** tab allows you to configure advanced settings that affect the behavior of FileSite.

Figure 15 Options dialog box, Advanced tab

The Advanced tab is divided into the following areas:

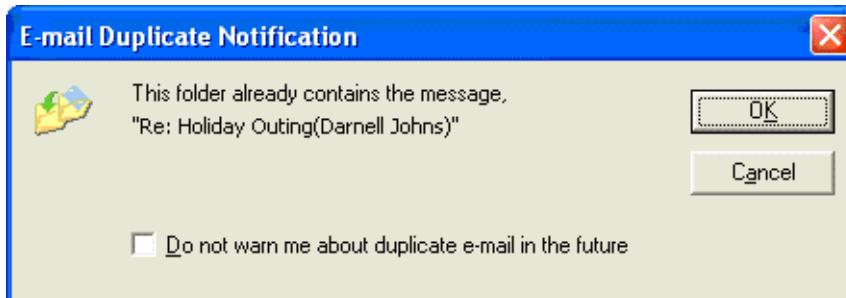
Import Settings

The **Import settings** area allows you to configure the import settings.

- The **Auto Profile E-mail or Documents via Drag and Drop** option determines whether a New Document Profile dialog box opens when you import or drag-and-drop e-mails to folders.
 - If this option is selected, the New Document Profile dialog box does *not* appear and e-mail documents are auto-profiled using information supplied by the folder profile or the Default Document or Default E-mail profile.
 - If this option is not selected, the New Document Profile dialog box opens, and e-mail and other documents are not auto-profiled.
 - If this option is disabled, Email Management (EM) for Outlook cannot file messages using the Server-Side Filing functionality. See the *9.0 E-mail Management Installation and User's Guide* for more information.

- The **Enable duplicate e-mail notification** option determines whether FileSite will notify you when you attempt to drag an e-mail message into a folder that already contains the same e-mail message.

Figure 16 E-mail Duplicate Notification dialog box



If you select the **Do not warn me about duplicate e-mail in the future** check box, the duplicate notice is no longer displayed. To display the **E-mail Duplicate Notification** again, **Auto Profile E-mail** select the **Enable duplicate e-mail notification** option.

- The **Reuse profile of the first imported email** option allows you to import multiple e-mails to a folder using the same profile information.



NOTE The **Reuse profile of the first imported email** option is available only if the registry key `UseBulkEmailFileCmdAlways` is disabled. For information about enabling/disabling `UseBulkEmailFileCmdAlways`, refer to the *WorkSite Desktop Client Customization Guide*.

- If this option is selected, you are prompted to enter profile information only once when you drag-and-drop multiple e-mails into a folder. You can drag-and-drop entire folder hierarchies into a FileSite folder in a single operation. You are prompted for profile information once for each folder in the hierarchy.
- If this option is not selected, you must enter profile information for each e-mail message separately.



NOTE The **Reuse Profile** option cannot be used simultaneously with the **Autoprofile** option. You can select only one profiling option.

Server Settings

The **Server Settings** area allows you to configure the following server settings:

- The **Searches return a maximum of __ documents** option allows you to select the maximum number of documents returned by a search. You can enter a number up to 10,000.
- The **Folder return a maximum of __ documents** option allows you to select the maximum number of documents listed in each folder. You can enter a number up to 10,000.

WorkSite Settings

The **WorkSite Settings** area allows you to define a base path to an installed WorkSite Web Components server so that WorkSite document URLs attached to e-mails can be resolved.

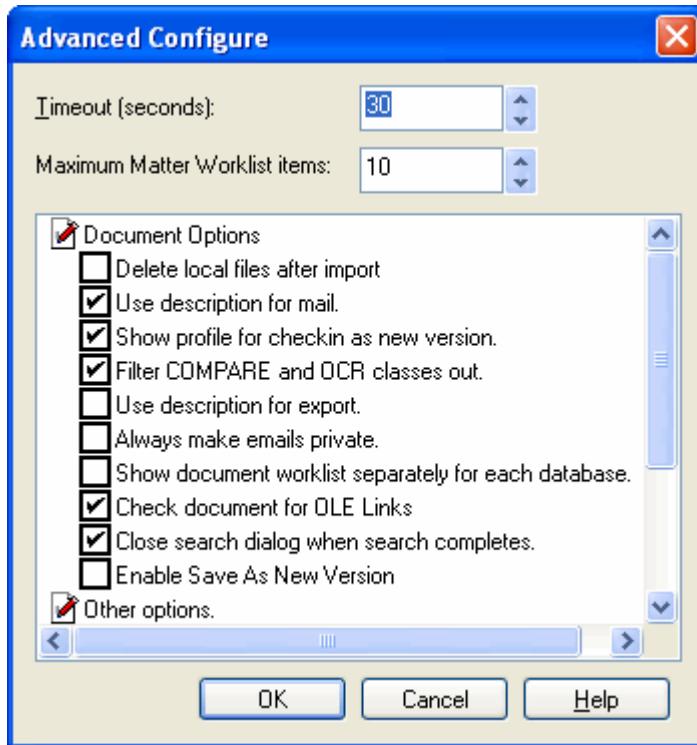
WorkSite NRL extensions are now registered with Microsoft. If you send an NRL link to a user who does not have WorkSite installed, the user is prompted to download a utility (`nrl2url.exe`). This utility converts the NRL link to a WorkSite Web Components URL link.

However, this utility requires you to set the **WorkSite Base Path** to the location of WorkSite Web Components (for example, `https://worksuite.companyname.com/worksuite`).

In the **Number of Databases** field, you can enter the maximum number of libraries contained in your server. By selecting a high number, you ensure that all possible libraries are included when you perform a database search in FileSite. See [Chapter 6](#) for more information.

Advanced Configuration

When you click **Options** or type **ALT+O**, in the Options dialog box, the Advanced Configure dialog box opens.

Figure 17 Advanced Configure dialog box

Timeout Option

The **Timeout** option controls the length of time the FileSite client will wait before timing out. The **Timeout** setting applies to both login and searching.

When you are logging into multiple WorkSite libraries, the login for each library is performed sequentially. The login for all libraries must be complete before the **Timeout** expires.

If you are searching multiple libraries, the searches for all libraries must be complete before the **Timeout** expires.

The default **Timeout** value is 30 seconds. The minimum is 15 seconds. You may need to increase this value when connection times are slow, for example, over a WAN connection, or if you are connecting to or searching multiple libraries.

Matter Worklist Options

Use the **Maximum matter worklist items** option to set the maximum number of items that appear in the Matter Worklist.

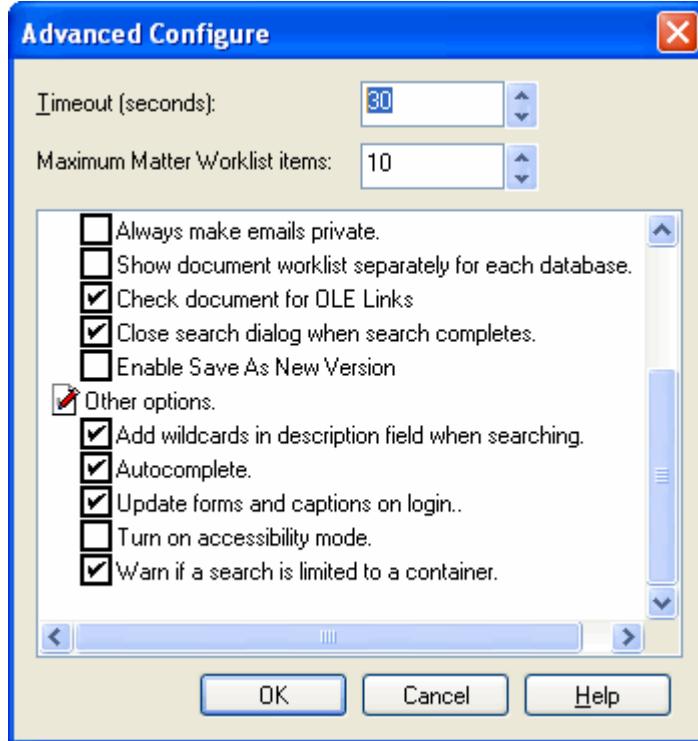
Document Options

- When the **Delete local files after import** option is selected, FileSite removes documents from your local drive after you import them to FileSite.

- When the **Use description for mail** option is selected, FileSite uses the Description field from the e-mail profile as the subject when you send the document or a link from the **Document** menu.
- When the **Show profile for checkin option** is selected, a Profile dialog box opens when you check in a document as a new version. By default, no dialog box opens.
- When the **Filter COMPARE and OCR classes out** option is selected, FileSite excludes all documents with the COMPARE and OCR (optical character recognition) document classes. To include documents created with document comparison or OCR software, make sure this option is *not* selected.
- When the **Use description for export** option is selected, FileSite uses the profile description as the file name when you export the document.
- When the **Always make e-mails private** option is selected, the default security for e-mails is *private*.
- When the **Show document worklist separately for each database** option is selected, separate Document Worklists are displayed for each WorkSite library under the **WorkSite Explorer** node.
- When the **Check document for OLE Links** option is selected, FileSite detects OLE links in documents you are importing or checking in.
- When the **Close search dialog when search completes** option is selected, the Search dialog box closes when the search finishes.
- When the **Enable Save As New Version** option is selected, FileSite enables you to save a local document as a version of an existing WorkSite document.

Other Options

Figure 18 Advanced Configure dialog box, Other options



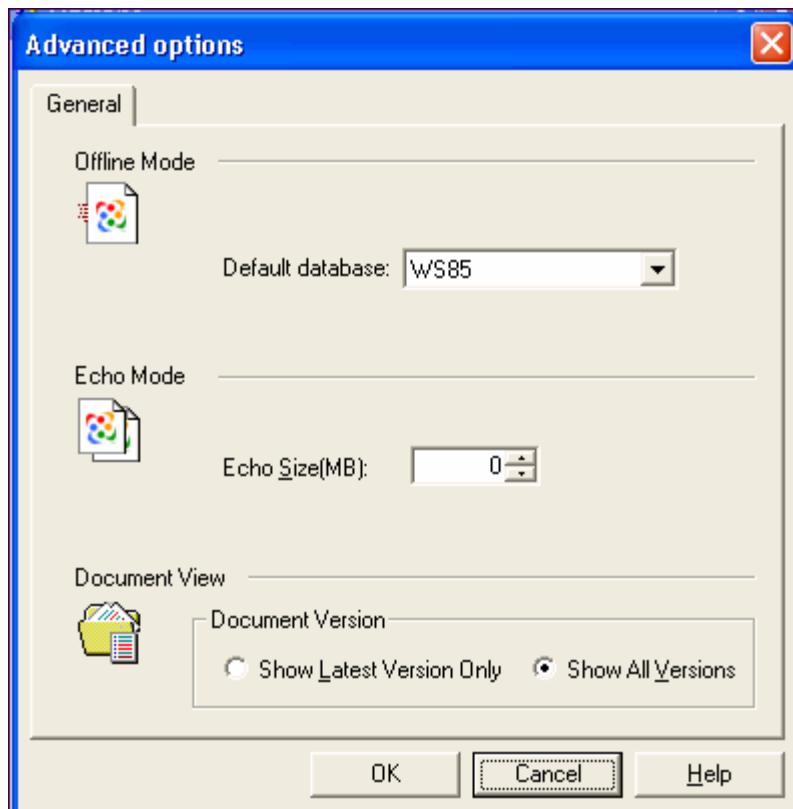
- When the **Add wildcards in description field when searching** option is selected, FileSite automatically inserts an asterisk at the beginning and end of the search string in the description field when performing a profile search.
- When the **Autocomplete** option is selected, FileSite automatically fills in the rest of the character string you previously entered in a field on a form.
- When the **Update forms and captions on login** option is selected, forms and captions are updated automatically when you log in. If this option is not selected, forms and captions are updated when you access them.
- When the **Turn on accessibility mode** option is selected, the accessibility features become operational. See "[Accessibility Features](#)" on page 36.
- When the **Warn if a search is limited to a container** option is selected, FileSite warns you if you begin a search from a folder or Workspace. A container search does not look for results outside of the folder or Workspace that you have selected.

Click **OK** to save your settings and return to the Options dialog box.

Advanced Options

When you click **More** or type **ALT+M** in the Options dialog box, the Advanced Options dialog box opens.

Figure 19 Advanced Options dialog box



The Advanced Options dialog box is divided into the following areas:

Offline Mode

The **Offline Mode** area allows you to set the default database for the Portable directory. Select the desired database from the **Default database** list.

Echo Mode

The **Echo Mode** area allows you to set the size of the Echo directory. Specify the maximum size of the directory by clicking the up or down arrows in the **Echo Size (MB)** field. If the total size exceeds the specified limit, FileSite prompts you to purge the echo directory. See “[Purging Echo Documents](#)” on page 361 for more information.

Document View

The **Document View** area allows you to set display options for **Document Version** information. You can choose to display only the latest versions of documents or all versions in the Document Grid.



NOTE If you select **Show Latest Version Only**, you can still locate all the versions of a document in the WorkSite library by selecting the document in the Document Grid and clicking the **Document Versions** tab.

Click **OK** to save your settings and return to the Options dialog box. Click **OK** to close the Options dialog box, then restart Microsoft Outlook to apply the settings.

Uninstalling FileSite

1. Click the **Start** menu, and navigate to the **Control Panel**. The Control Panel window opens.
2. Double-click **Add or Remove Programs** to open the Add or Remove Programs window.
3. Select **iManage FileSite** from the list. Click **Remove**.
4. When prompted in the Add or Remove Programs Confirmation dialog box, click **Yes**. The FileSite application is removed from your computer.

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 2007, and 2010.

The FileSite desktop used with Outlook 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 20](#) 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 20 FileSite Desktop, Outlook 2007

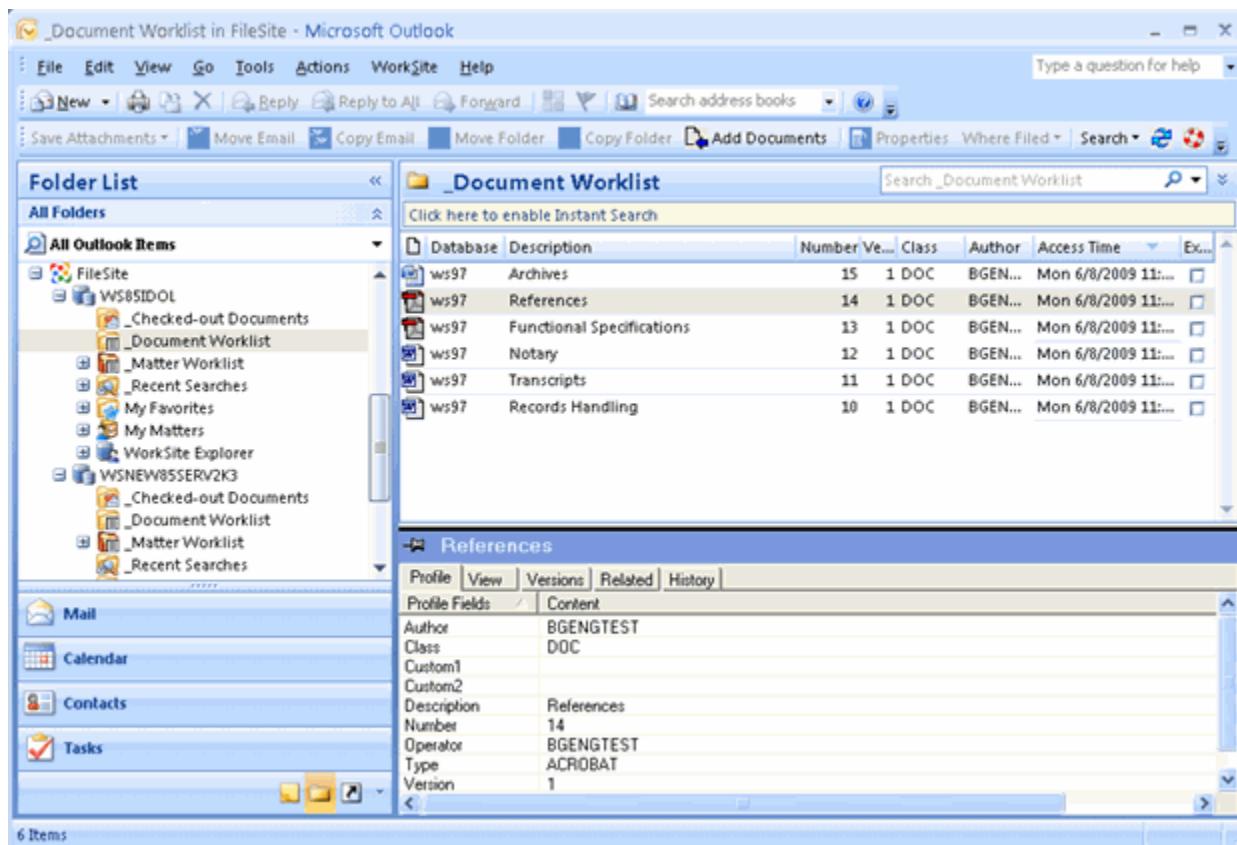
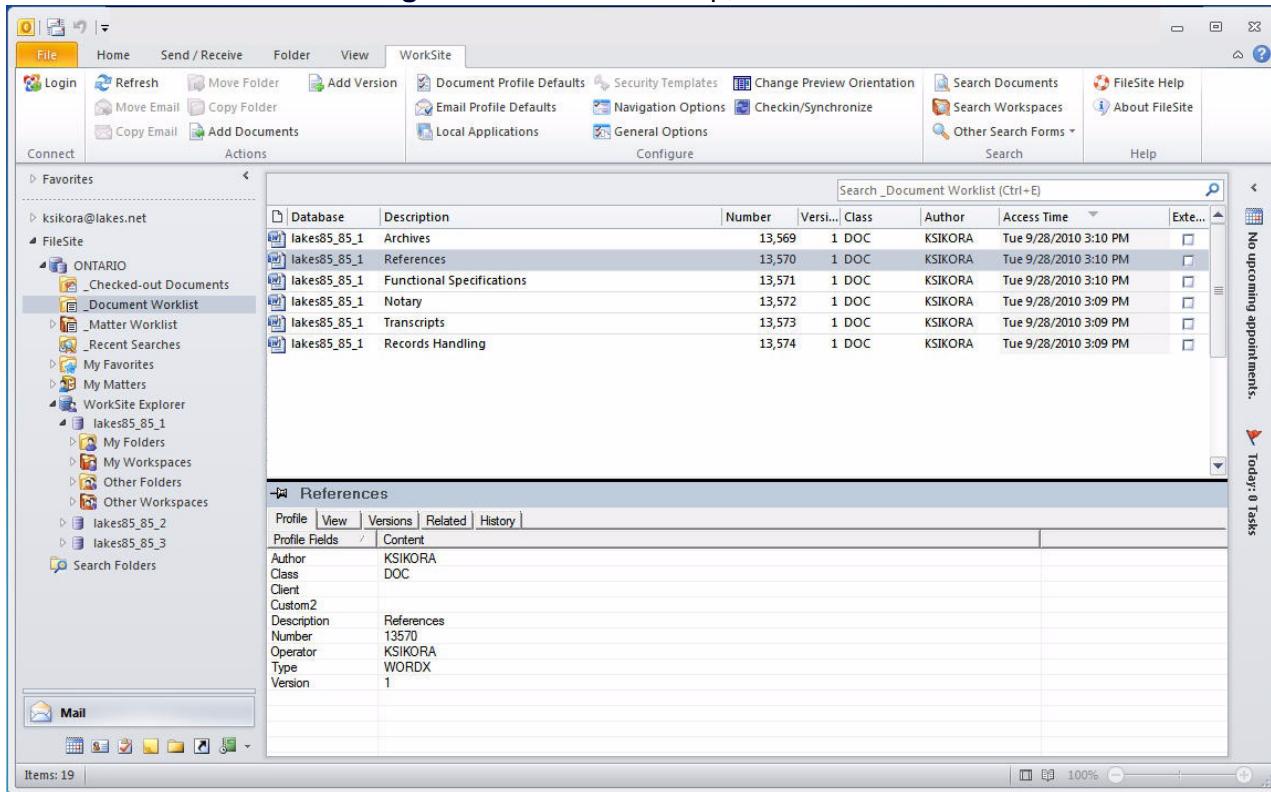


Figure 21 FileSite Desktop, Outlook 2010

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 2](#) shows 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 2 WorkSite Menu Options

Menu Option	Toolbar Icon
<u>Log</u> in	—
Add <u>D</u> ocument	
Add <u>V</u> ersion	—
<u>S</u> earch Documents	
Search Workspaces	
Other Search Forms	—
<u>R</u> efresh	
Configure Submenu	
► <u>D<td>—</td></u>	—
► <u>E</u> mail Profile Defaults	—
► Local <u>A</u> pplications	—
► Security Templates	—
► <u>N</u> avigation Options	—
► <u>G</u> eneral Options	—
► Change Preview Orientation	—
► Filing Status	—
<u>C</u> heckin/Synchronize	—



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 242.

Filing Toolbar

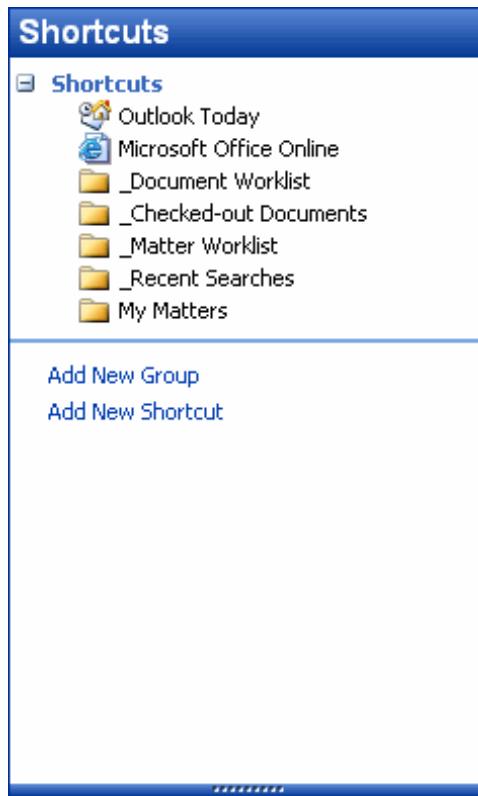
Using the **Filing Toolbar**, WorkSite makes it easy to file e-mails and attachments. See [Chapter 5](#) for more information.

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

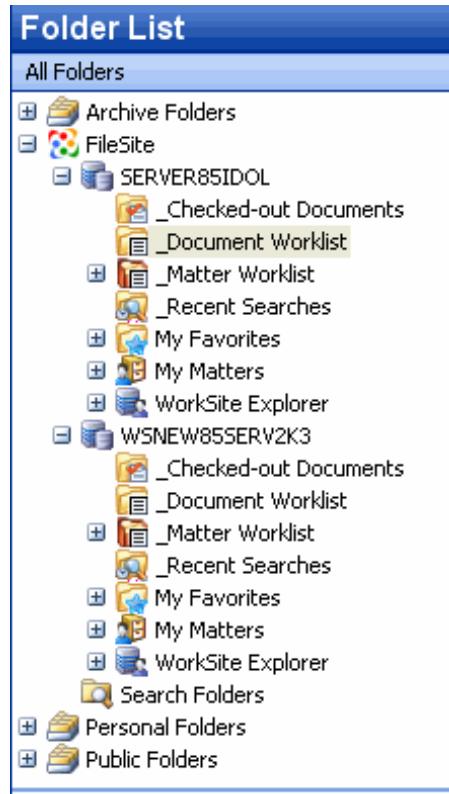
The Folder List organizes and displays information about matters, folders, recent searches, and servers. It shows the hierarchical structure of all connected servers and libraries, as well as folders that facilitate matter-centric navigation, for example, **My Matters**, **My Favorites**, and the **Matter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

See “[Managing the Folder List](#)” on page 83 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 84](#) 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 accessed 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.



NOTE If you open a document to which you have read-only access, that document does not appear in the Document Worklist.

See “[Document Worklist](#)” on page 84 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 75 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 60 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 85 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 87 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 86 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 89 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 3 describes the types of container objects available in WorkSite.

Table 3 Types of containers in WorkSite

Container Type	Description
Category	<p>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.</p> <p>A category can contain only subcategories and Workspaces; it cannot contain folders and documents. You can set security at the individual category level.</p> <p>See "Category" on page 90 for more information on commands associated with Categories.</p>
Workspace	<p>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.</p> <p>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.</p> <p>See "Workspace" on page 94 for more information on commands associated with Workspaces.</p>
Tab	<p>The  tab is a subdivision of a Workspace that helps you organize your work. A Workspace can have multiple tabs.</p> <p>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.</p> <p>See "Tab" on page 101 for more information on commands associated with tabs.</p>
Folder	<p>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.</p>

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 105 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 117 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 123 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 124 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 124.

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 128](#) 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 128](#) 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 128](#) 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 128](#) 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 128](#) 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 4](#), 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 4 Example Inherited and Individual Security Container Icons

Icon	Description
	Category folder icon showing <i>inherited</i> security
	Category folder icon showing <i>individual</i> 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 70 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 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 67 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 70 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 5](#).

Table 5 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.



NOTE If you recently opened a document to which you have read-only access, that document does not appear in the Document Worklist.

Right-click the **Document Worklist** icon to access the menu options described in [Table 6](#).

Table 6 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 <i>WorkSite Administrator</i> .
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 7](#).

Table 7 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 recommended that you use WorkSite menus.

See [“Matter Worklist Options” on page 60](#) for more information on how to set the maximum number of items to appear in the Matter Worklist.

Recent Searches

Click 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 8](#).

Table 8 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 9](#).

Table 9 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 10](#).

Table 10 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 <i>OffSite Installation and User's Guide</i> .
Add Shortcuts	Adds shortcuts from other matters/Workspaces to My Matters. Note: The shortcut icon is added only if the original document resides in a different Workspace.
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 11](#).

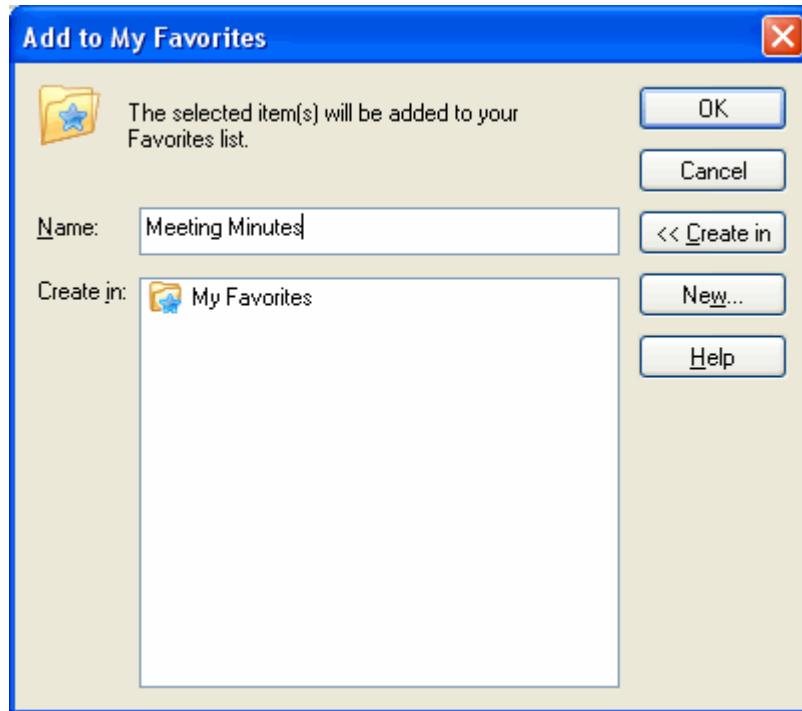
Table 11 My Favorites menu options

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 <i>OffSite Installation and User's Guide</i> .
Add Shortcuts	Adds shortcuts to other objects to the My Favorites folder. Note: The shortcut icon is added only if the original document resides in a different Workspace.
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 12](#).

Table 12 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

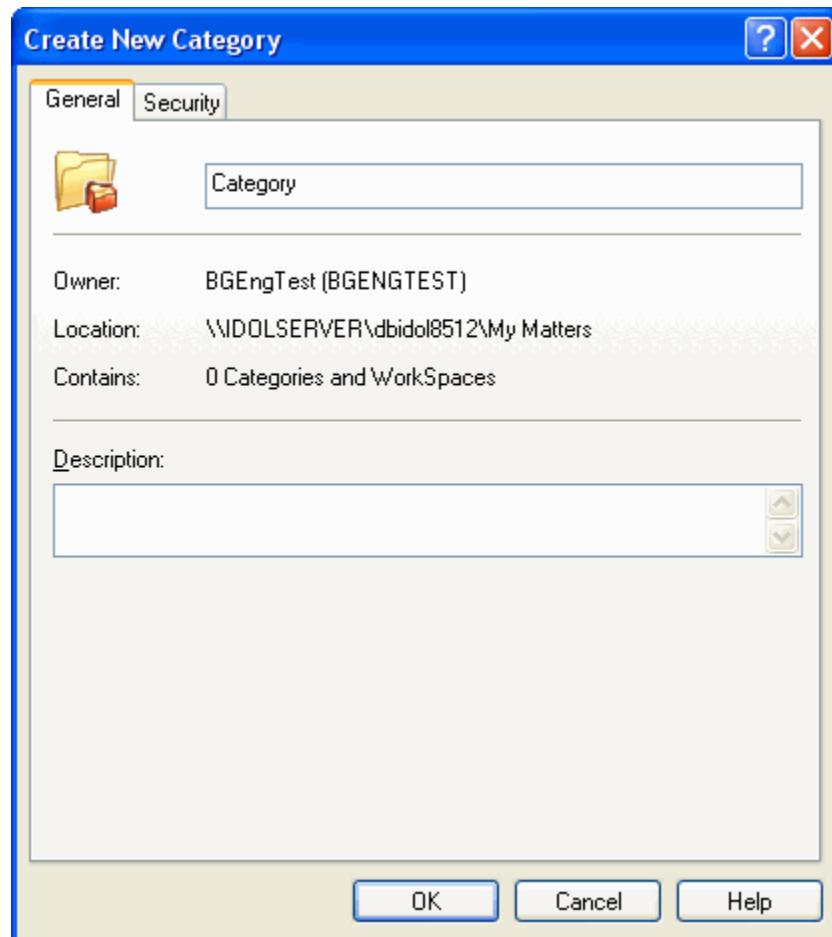
Commands associated with WorkSite containers are discussed in this section. See ["Document Grid" on page 75](#) for an overview of the various WorkSite containers.

Category

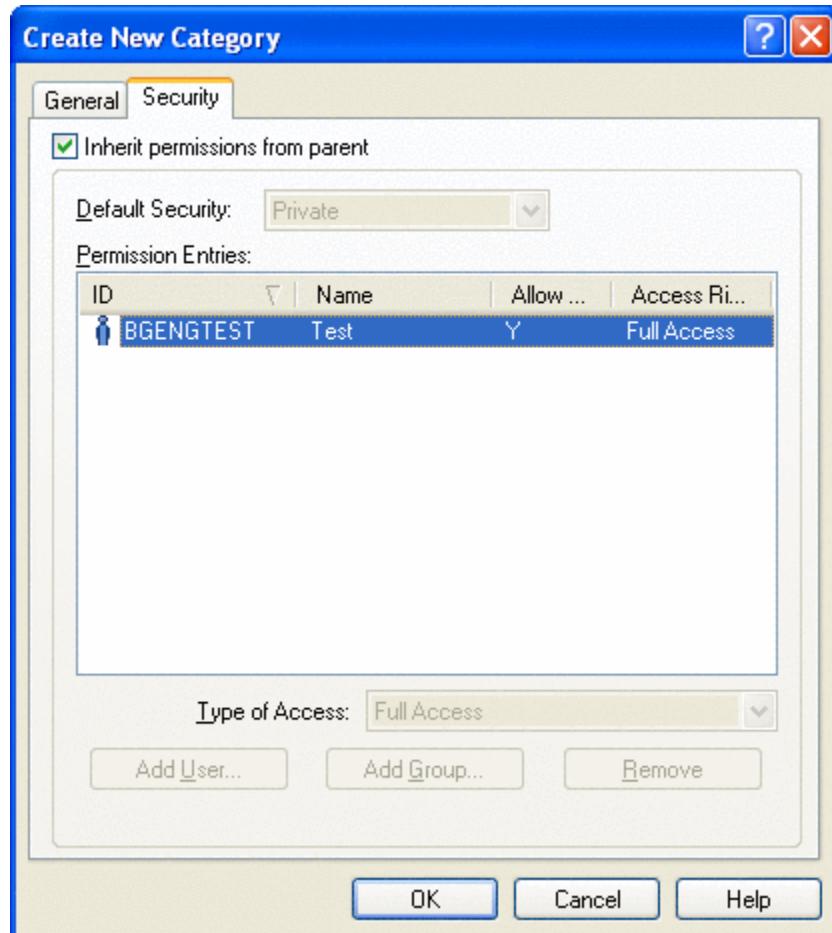
You can create a category in **My Matters**, in **My Favorites**, or within another category. You can set security on a category to make it available to a select list of users and/or groups.

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 81 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 81 for more information.

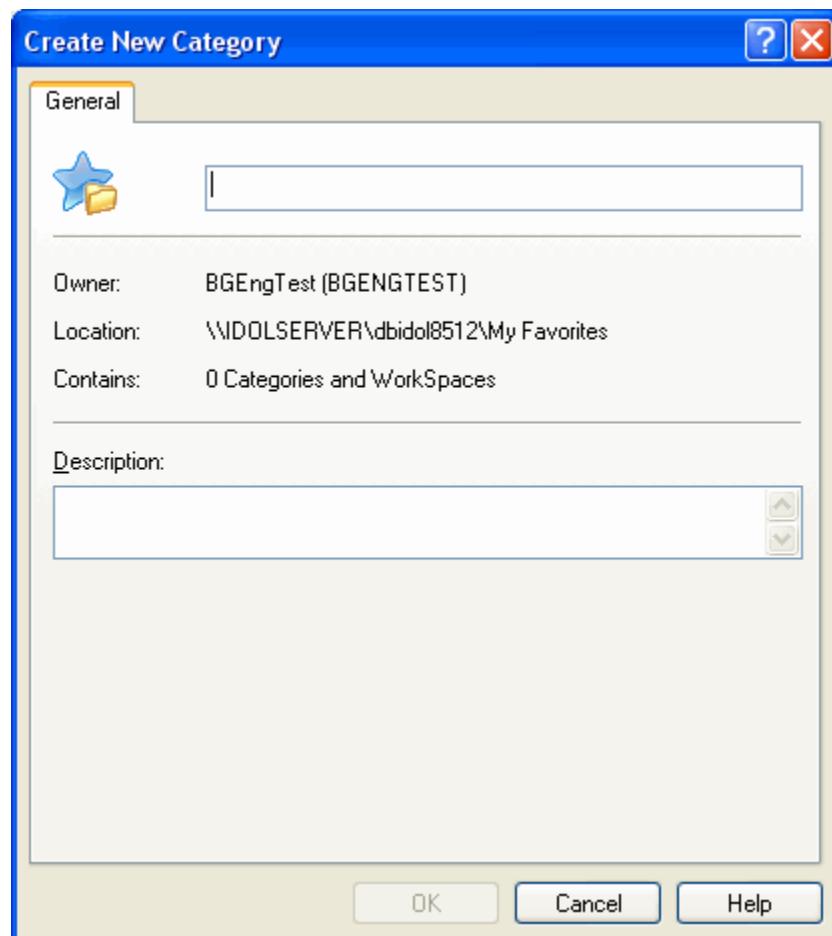


NOTE The security settings on a category determine whether a user can see the category, and whether the user can add or remove objects from the category.

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 13](#).

Table 13 Category menu options

Menu Option	Function
Add Shortcuts	Adds shortcuts to other objects to the category. Note: The shortcut icon is added only if the original object resides in a different Workspace.
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

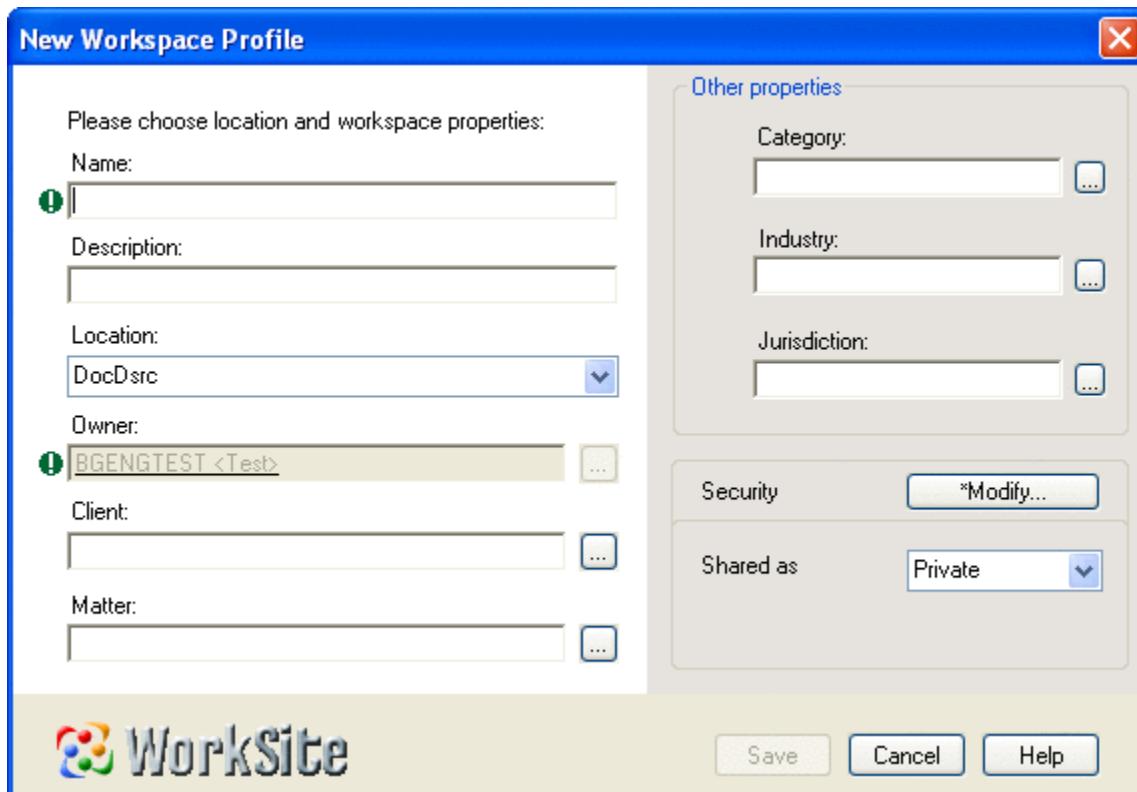
You can create a Workspace in My Matters or in a category. You can also set security on Workspaces created under them. You can subscribe to any user's My Matters folder to which you have access.

Creating a Workspace

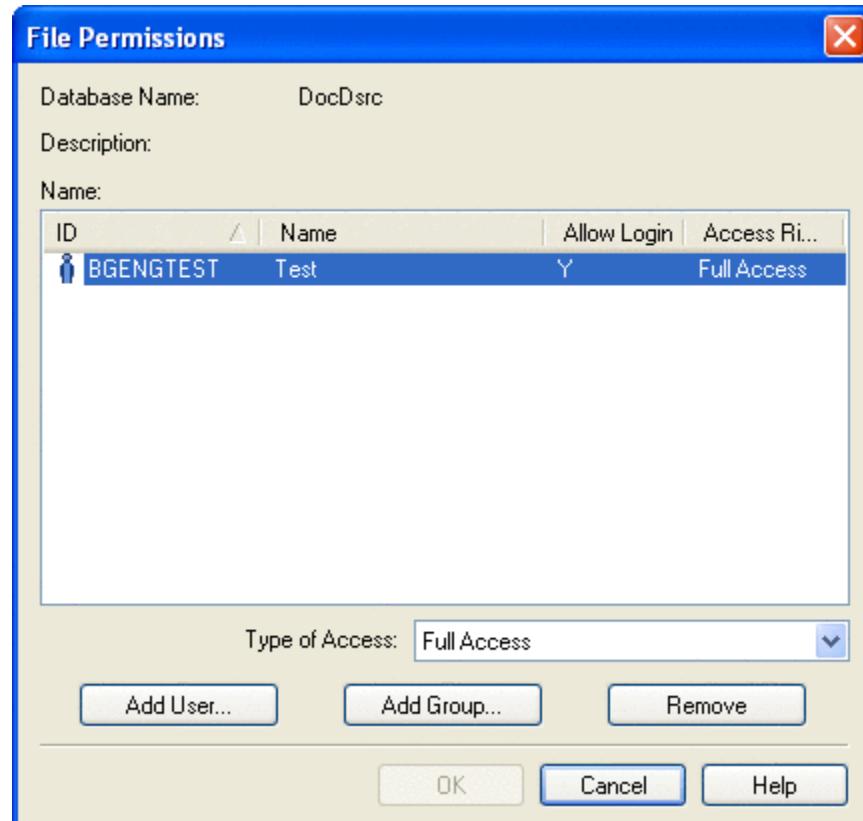
1. Right-click the **My Matters** icon in the Folder List, point to **New** and select **Workspace**. The New Workspace Profile dialog box opens.



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 81](#)" 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 81 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 14](#).

Table 14 Workspace menu options

Menu Option	Function
Add Shortcuts	Adds shortcuts to other objects to the Workspace. Note: The shortcut icon is added only if the original object resides in a different Workspace.
Search Documents	Opens the Search dialog box.
Send NRL/URL	Opens a new e-mail message with the selected Workspace 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.
Re-file	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	Adds a shortcut to the specified Workspace to another object.
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 14 Workspace menu options

Menu Option	Function
Add to My Favorites	Adds a shortcut to the selected Workspace to your My Favorites list. Note: The shortcut icon is added only if the original object resides in a different Workspace.
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 <i>Express Search User's Guide</i> . Note: An error message appears in the following situations: <ul style="list-style-type: none">■ 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 94.
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 15](#).

Table 15 Workspace Refiling Rules

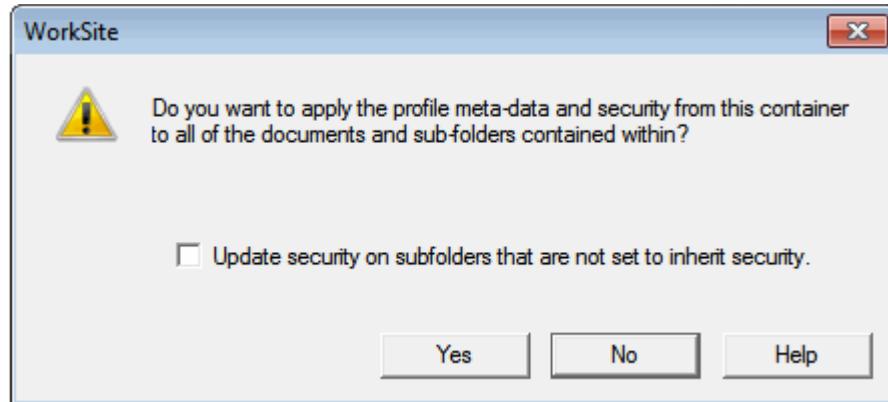
Workspace to Tab	<ul style="list-style-type: none"> ■ Parent Object: Workspace ■ Refiled Object (inherits from parent): Tab ■ Metadata: None ■ Security: Set folder security to Inherited (from parent).
Workspace to Folder	<ul style="list-style-type: none"> ■ Parent Object: Workspace ■ Refiled Object (inherits 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 **Re-file**. 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

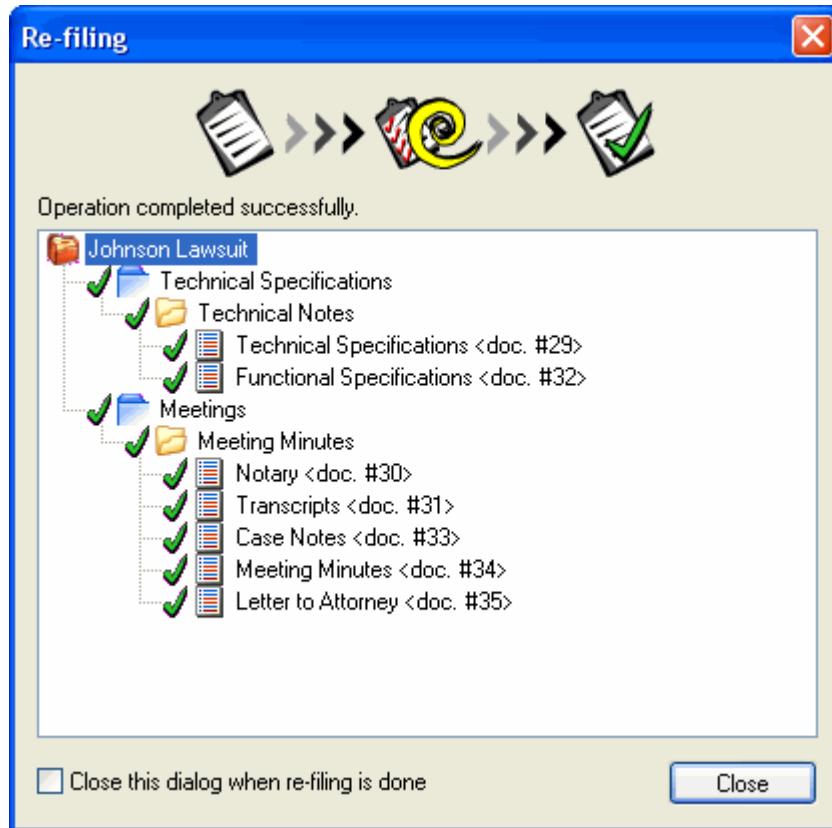


NOTE If you select the Update security on subfolders that are not set to inherit security option, only the security settings for those folders that are not set to inherit security from the parent are modified during the refiling of their parent container.

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](#).



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

4. 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.

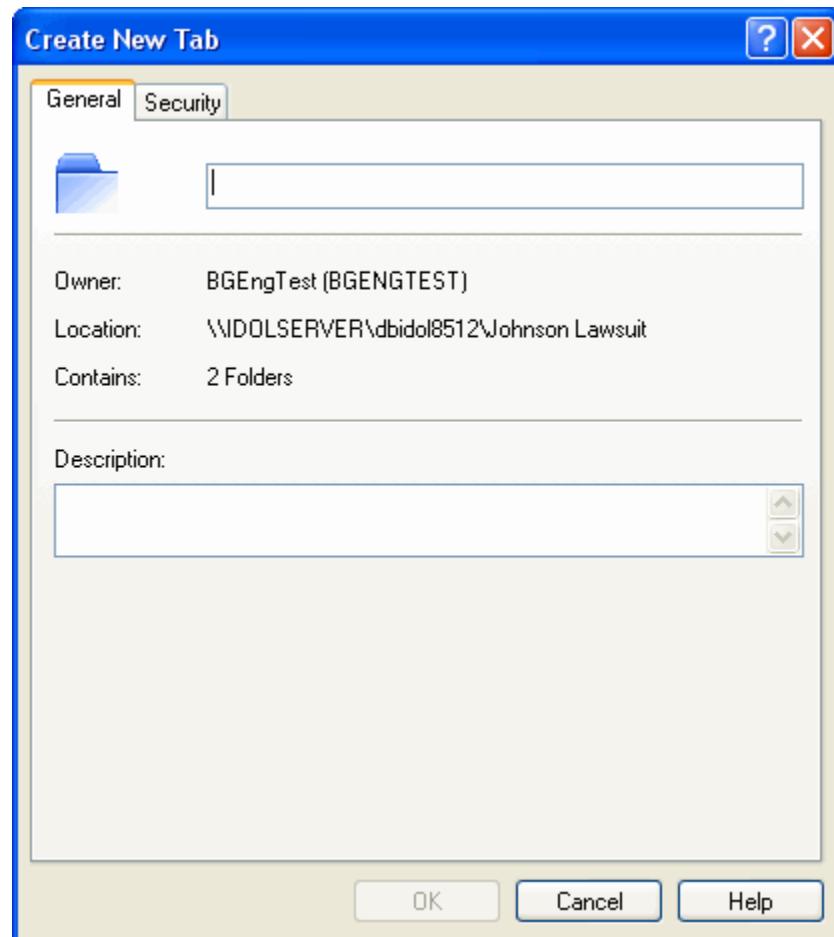
Tab

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

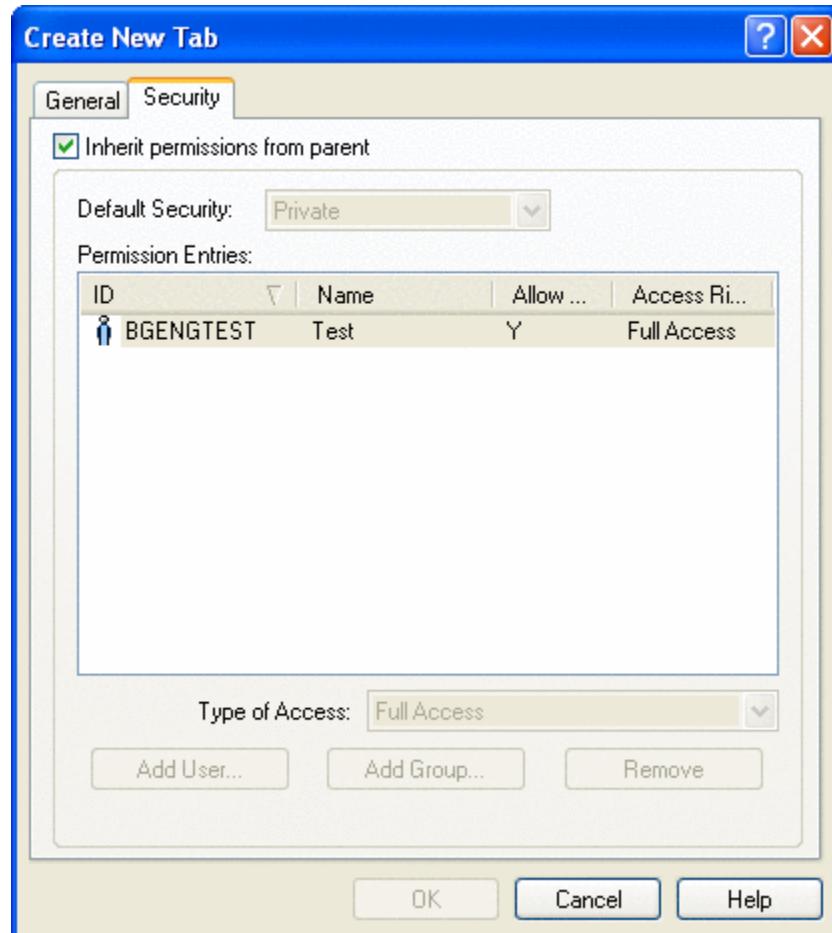
1. Right-click the  **Workspace** icon in the Folder List, point to **New** and select **Tab**. The Create New Tab dialog box opens.

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 81 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 81 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 16](#).

Table 16 Tab menu options

Menu Option	Function
Search Documents	Opens the Search dialog box.
Add Shortcuts	Adds shortcuts from other objects to the tab. Note: The shortcut icon is added only if the original object resides in a different Workspace.
Send NRL/URL	Opens a new e-mail message with the tab link as an attachment.
Refresh	Refreshes the contents of the tab.
Re-file	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.

Refiling a Tab

Tabs 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 17](#)

Table 17 Tab Refiling Rules

Tab to Folder	<ul style="list-style-type: none"> ■ 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 99](#) for more information.

Document Folder

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

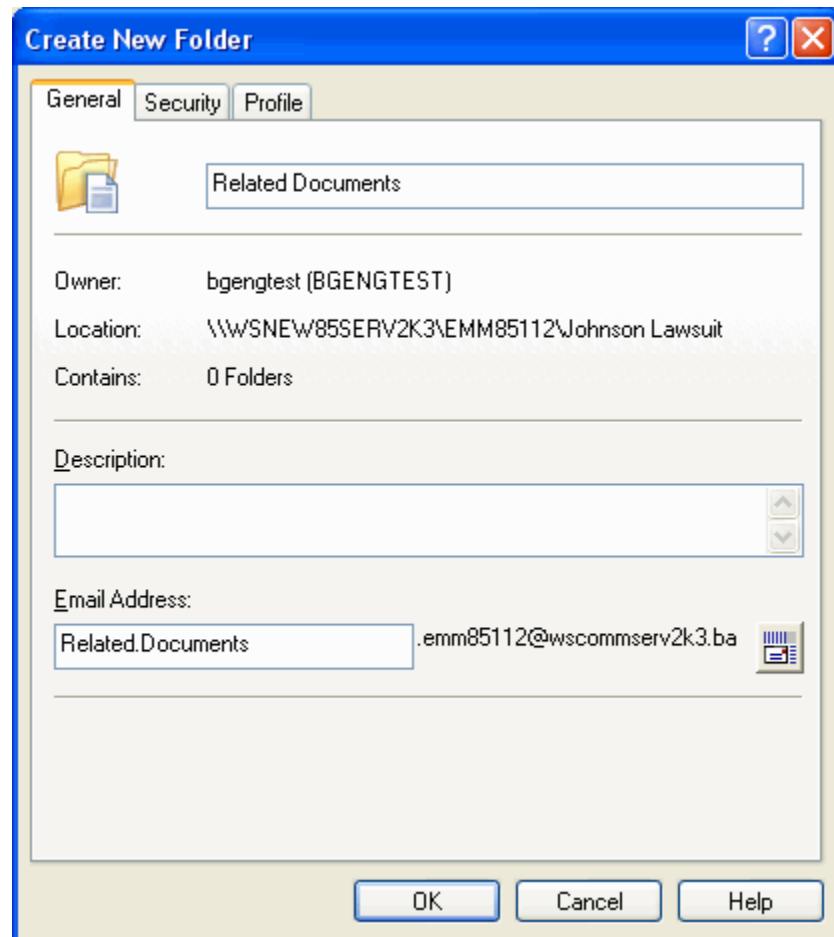
Creating a Document Folder

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

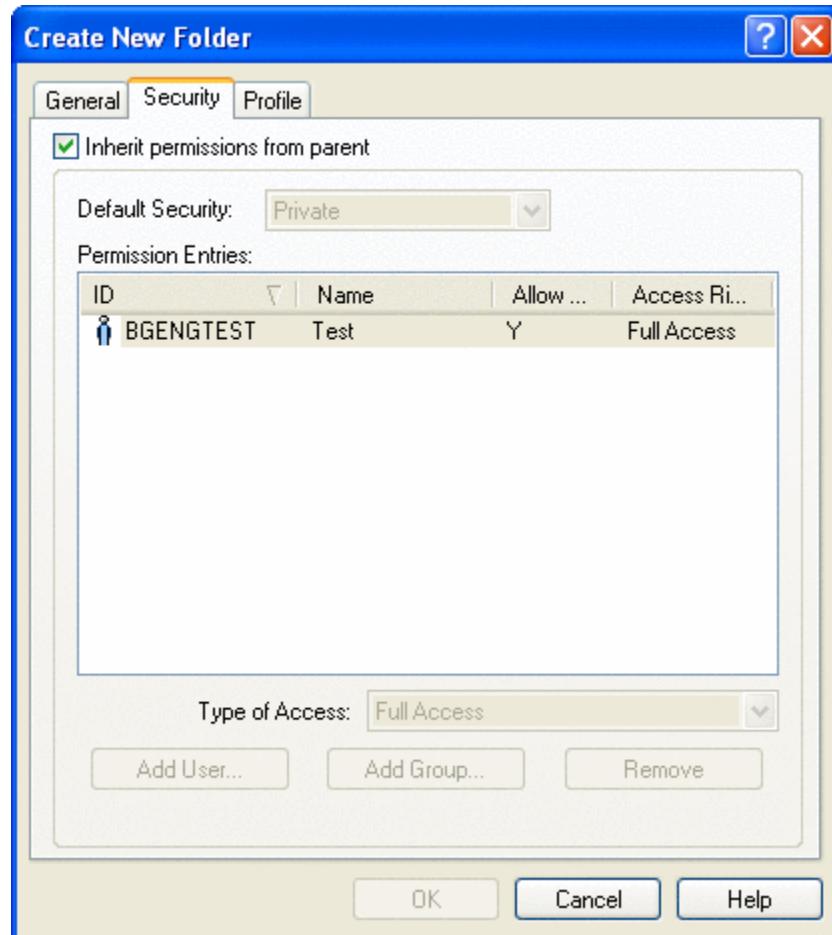


3. Enter a **Name** for the document folder.
4. Enter a **Description** for the document folder.

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.

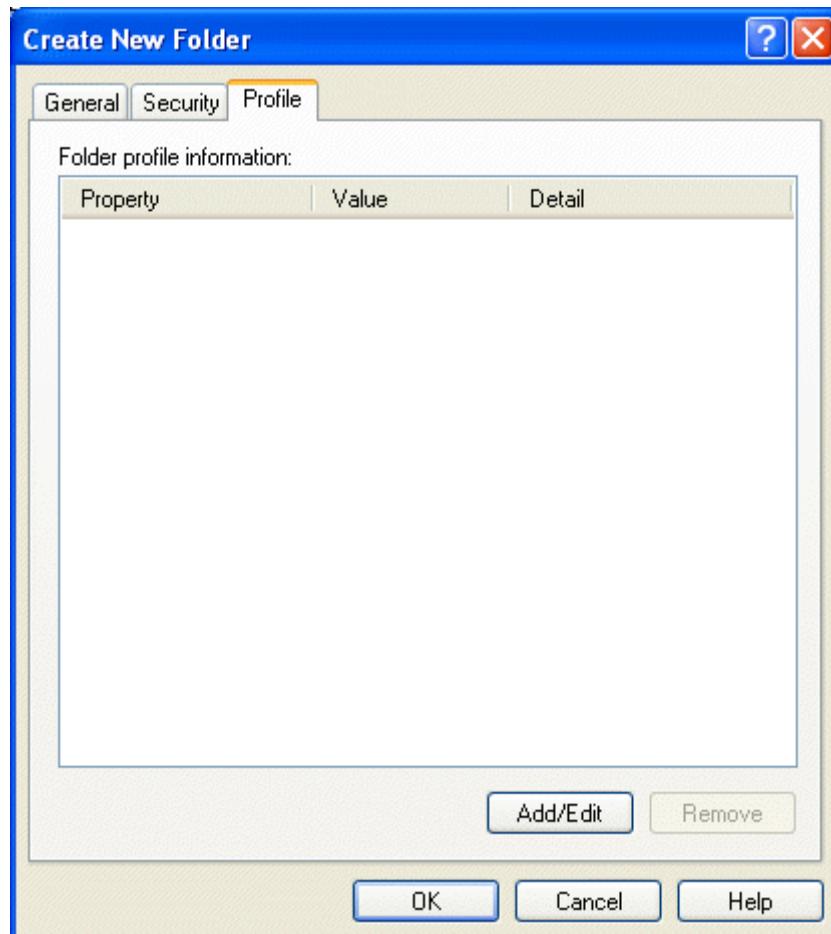
3. If you wish to change these settings, clear the **Inherit permissions from parent** check box. The **Default Security** list is now enabled.
4. To set the Default Security for the folder, make a selection from the **Default Security** list. See "["Default Security" on page 81](#) for more information.
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 81](#) 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.

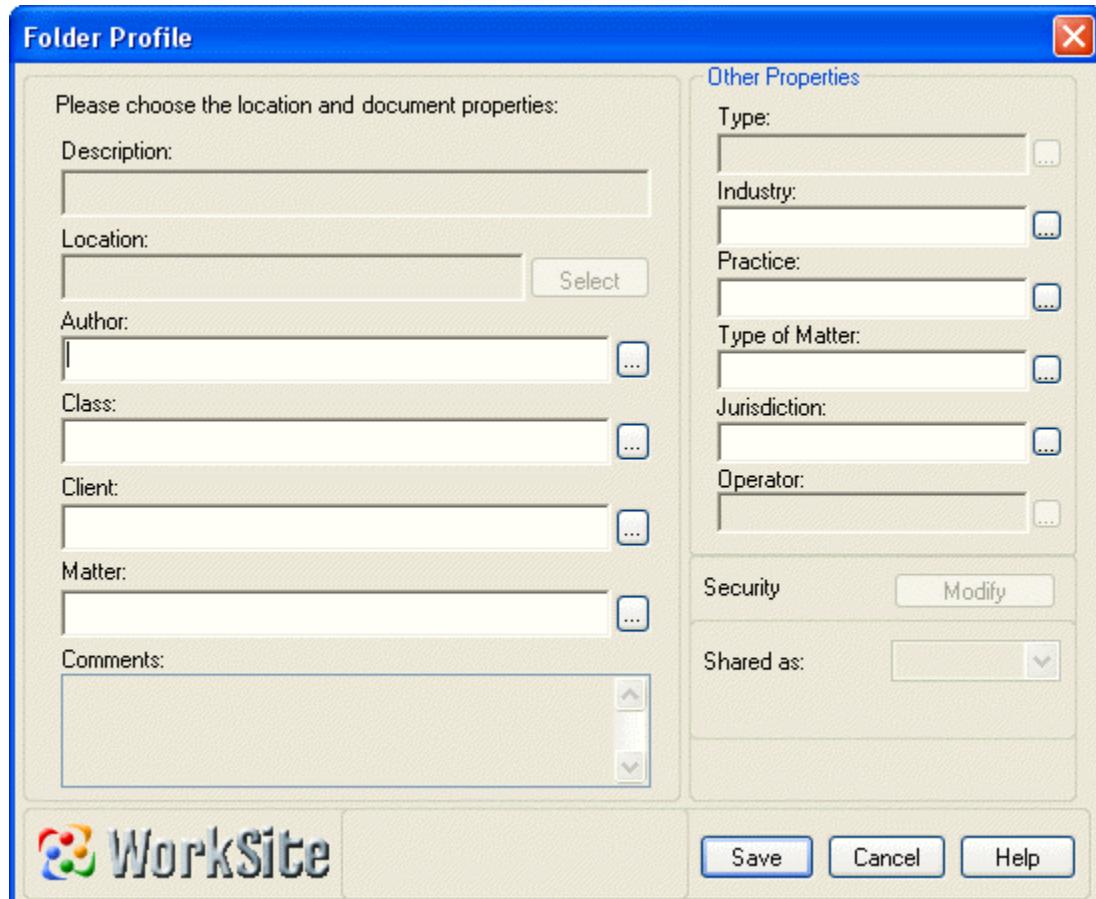
Figure 38 Create New Folder dialog box, Profile



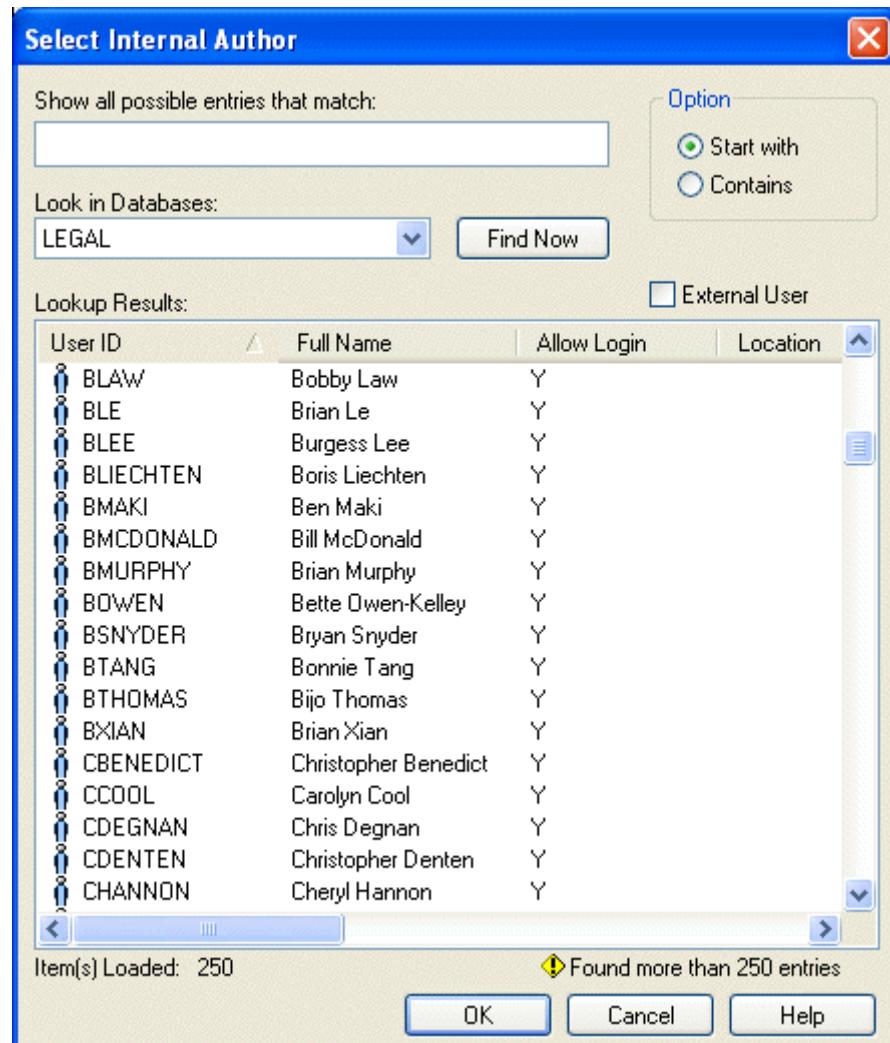
7. Click **Add/Edit** to define the **Document Folder** profile. The Folder Profile dialog box opens.



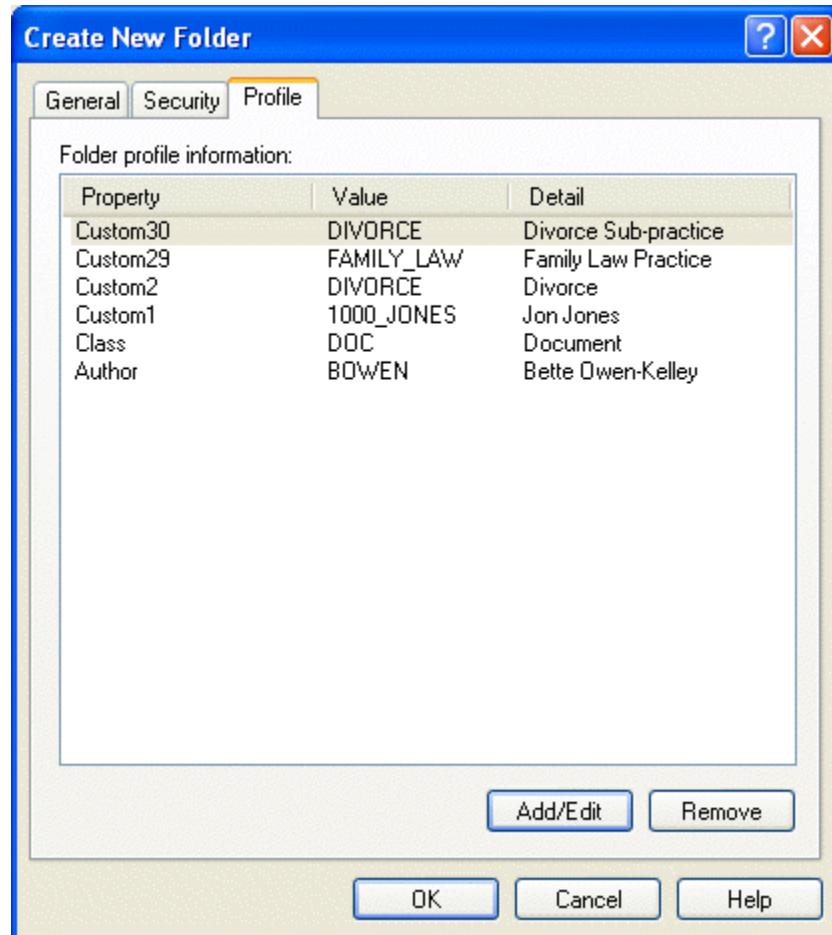
NOTE Your WorkSite Administrator may customize the Folder Profile dialog box on your system to display different fields, based on your company's business needs.

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 18](#).

Table 18 Document Folder menu options

Menu Option	Function
Add Document	Imports a document to the folder.
Add Shortcuts	Adds shortcuts to other objects to the folder. Note: The shortcut icon is added only if the original object resides in a different Workspace.
Search Documents	Opens the Search dialog box.
Send NRL/URL	Opens a new e-mail message with the selected folder 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: <ul style="list-style-type: none">■ 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 specified folder to 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 105.
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 114 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 19](#).

Table 19 Document Folder Refiling Rules

Folder to Subfolder	<ul style="list-style-type: none"> ■ 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	<ul style="list-style-type: none"> ■ 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 99 for more information.



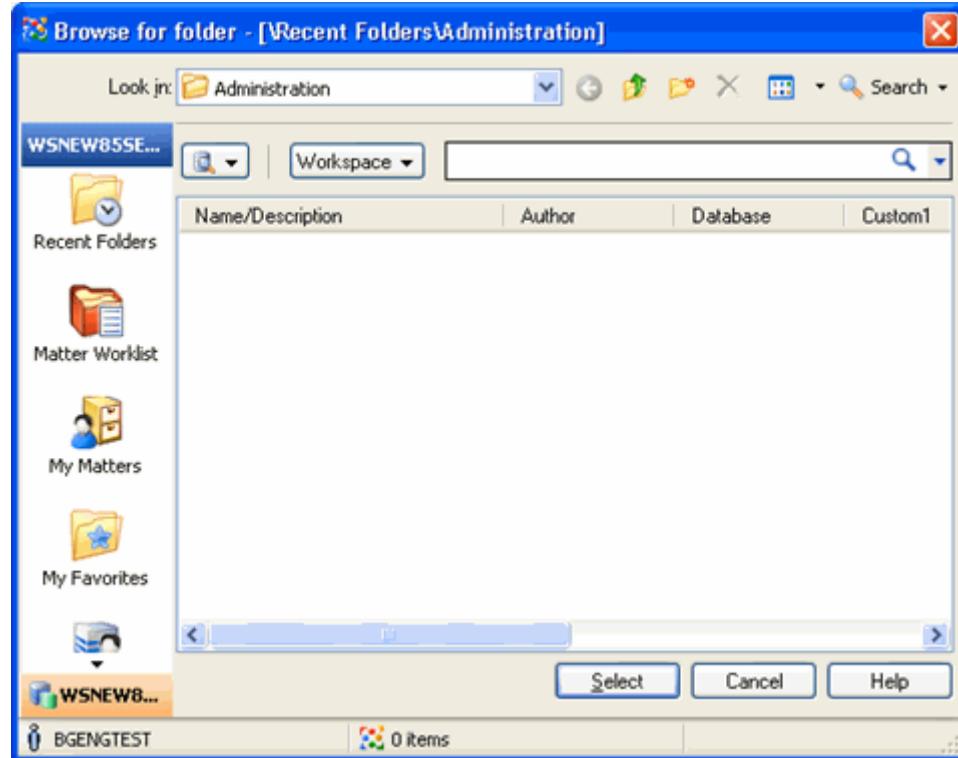
NOTE For a folder that contains at least one document declared as a record, the Refile operation does not modify the document's profile metadata. But, if you have Full Access to the declared document, its security is modified during refiling.

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 257](#) 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 or copy the document(s) to the selected folder..

Table 20 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

1. 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.
2. Release the mouse button. Continue from step 4 of the procedure for ["Adding Documents to a Folder" on page 114](#).

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 delete a document from the WorkSite library, see ["Deleting Documents" on page 165](#).

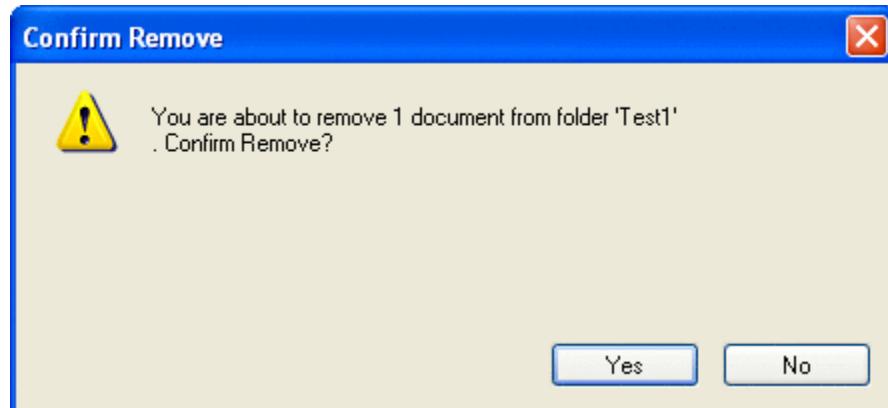
1. Select the document(s) in the Document Grid.
2. Right-click the selected document(s) to open the **Document** menu.
3. Choose **Remove From Folder**. You get a message asking you to confirm the removal of the document. See [Figure 43](#).

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 57"), 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.

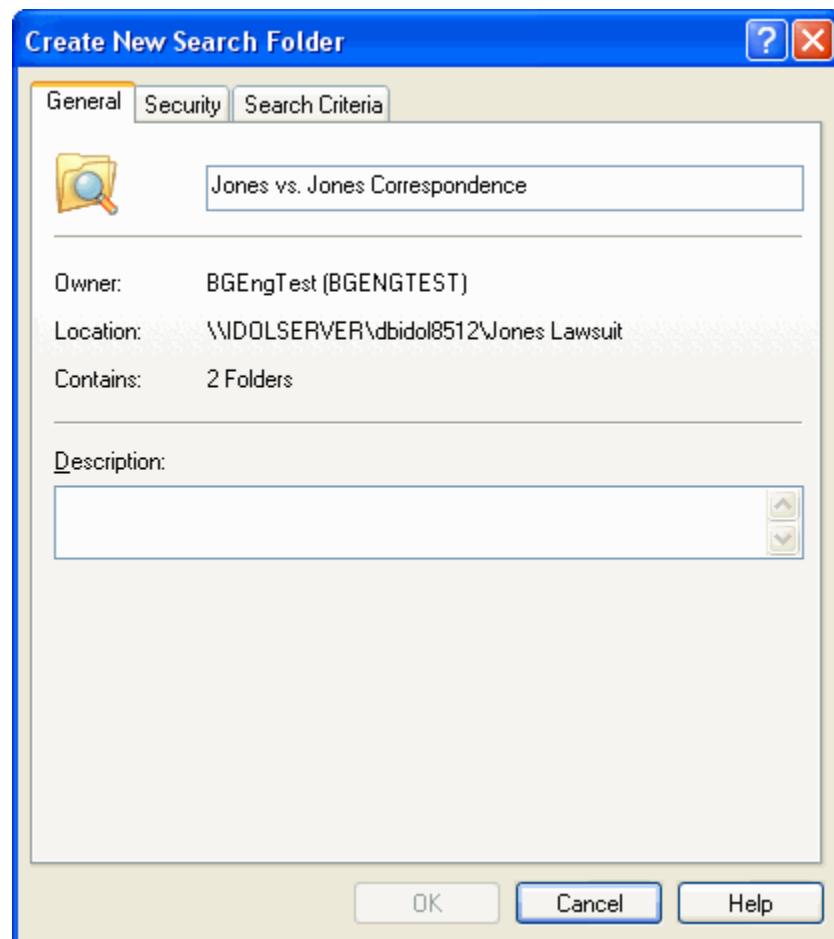
Search Folder

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

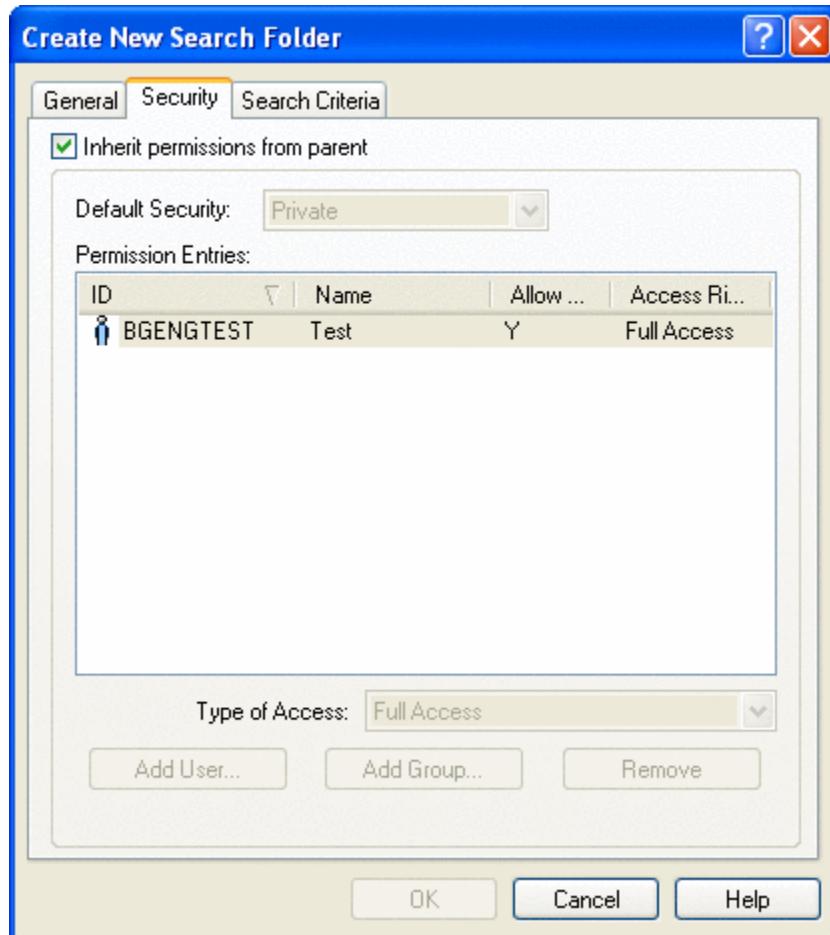
Creating a Search Folder

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

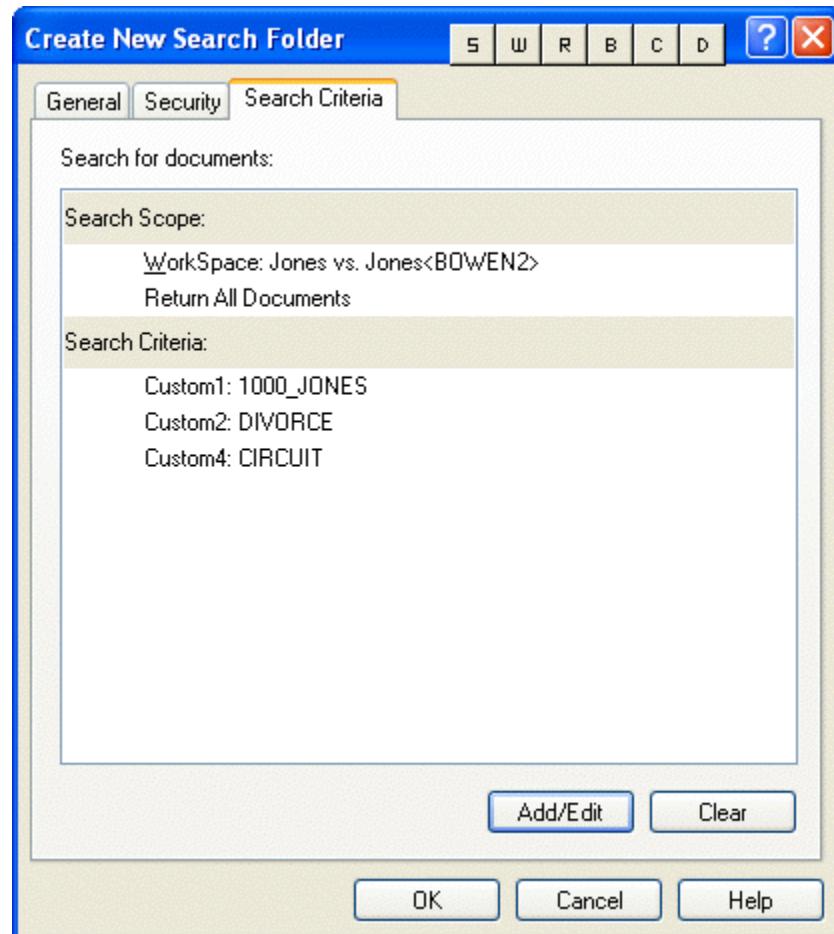
5. When you create a search folder, it has the same security settings as the parent container, by default. If you wish to change these settings, clear the **Inherit permissions from parent** check box. The **Default Security** list is now enabled.
6. To set the Default Security for the search folder, make a selection from the **Default Security** list. See ["Default Security" on page 81](#) 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 81](#) for more information.



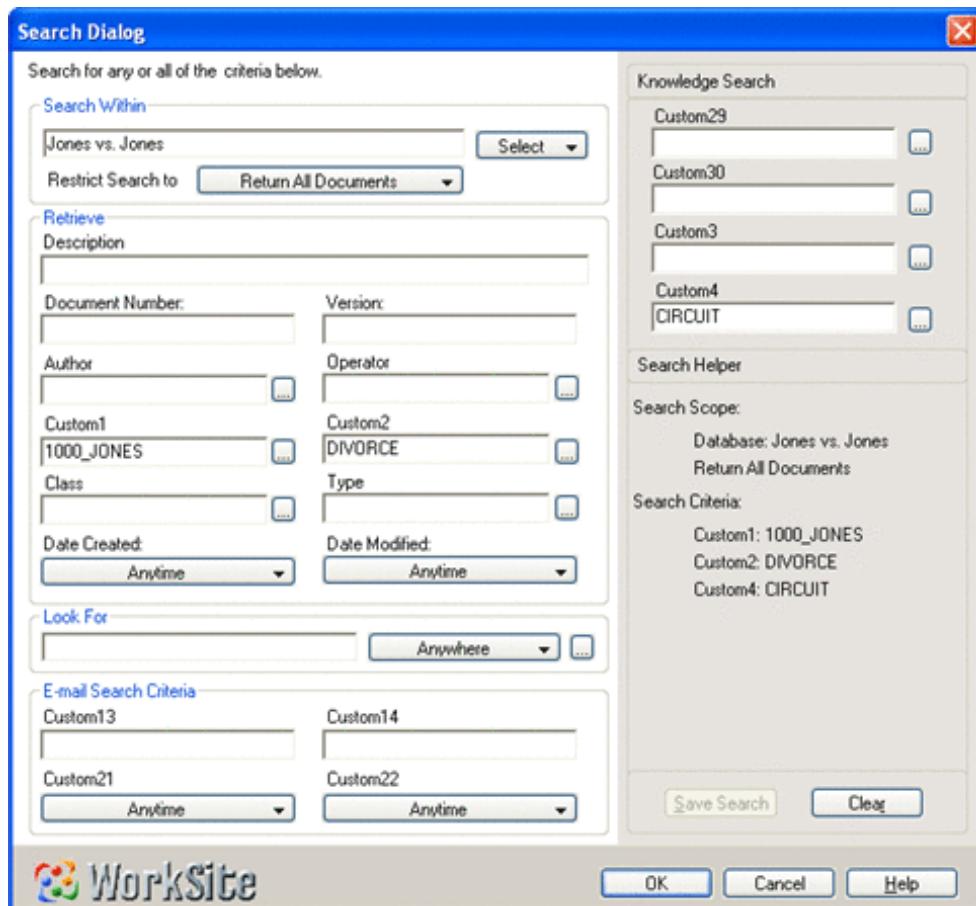
NOTE The security settings on a search folder determine whether a user can see the search folder and whether the user can edit the existing search criteria specified on the folder.

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 21](#).

Table 21 Search Folder menu options

Menu Option	Function
Import	Imports a document to the folder.
Send NRL/URL	Opens a new e-mail message with the search folder link as an attachment.
Refresh	Refreshes the contents of the folder.
Move	Moves the selected folder to a Workspace.
Create Shortcut	Adds a shortcut to the specified folder to 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 117](#) 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 [75](#) 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 alphabetical 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.

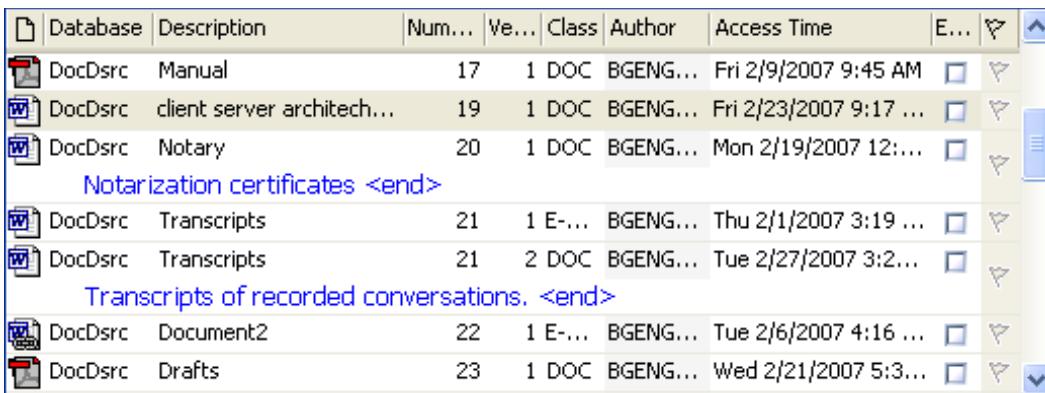
Resizing Columns in the Document Grid

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



The screenshot shows a Microsoft Outlook window with the 'Document Grid' view. The grid displays a list of documents with columns for 'Database', 'Description', 'Num...', 'Ve...', 'Class', 'Author', 'Access Time', and 'E...'. Several documents have blue hyperlinks in the 'Description' column, such as 'Notarization certificates <end>' and 'Transcripts of recorded conversations. <end>'. The 'View' menu is open, and 'AutoPreview' is selected, which is highlighted in blue.

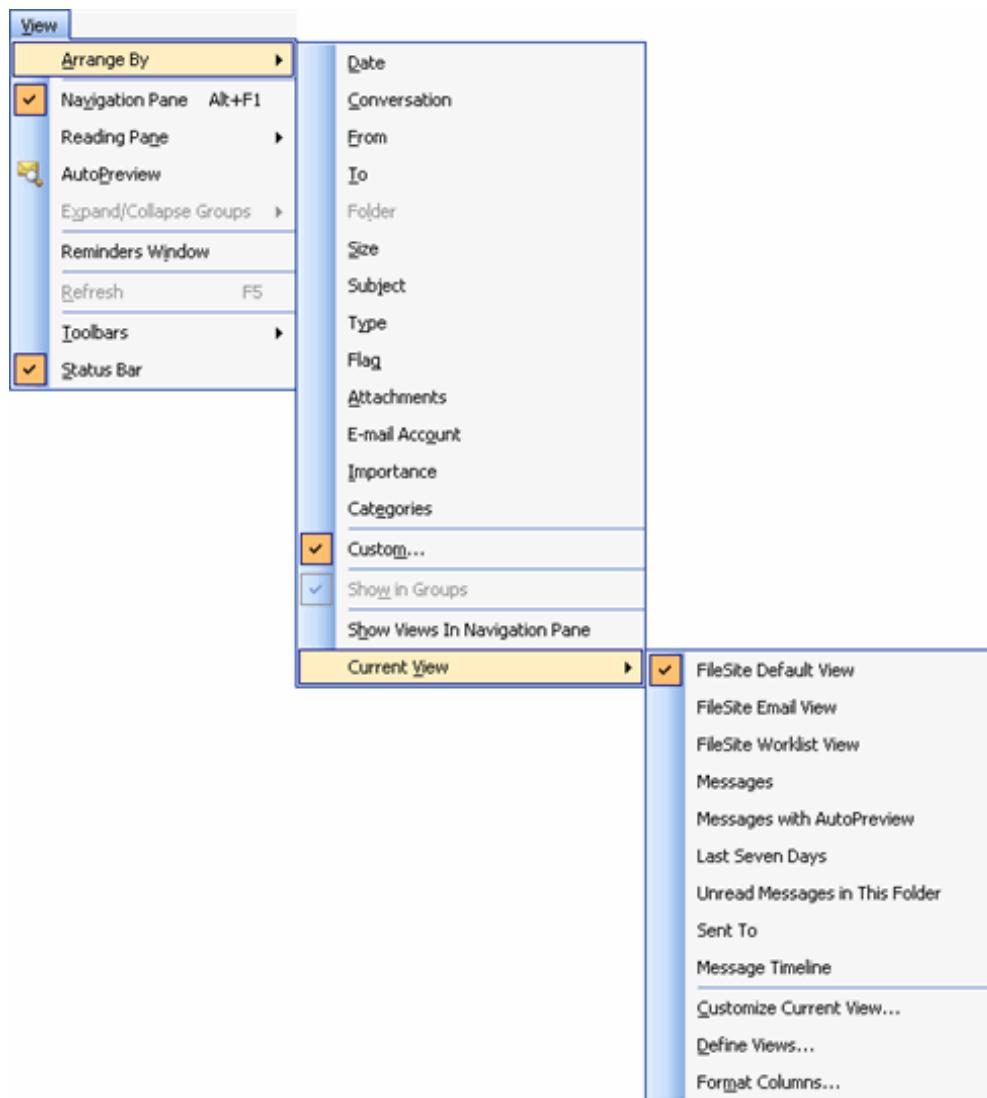
Database	Description	Num...	Ve...	Class	Author	Access Time	E...
DocDsrc	Manual	17	1	DOC	BGENG...	Fri 2/9/2007 9:45 AM	<input type="checkbox"/> <input type="checkbox"/>
DocDsrc	client server architech...	19	1	DOC	BGENG...	Fri 2/23/2007 9:17 ...	<input type="checkbox"/> <input type="checkbox"/>
DocDsrc	Notary	20	1	DOC	BGENG...	Mon 2/19/2007 12:...	<input type="checkbox"/> <input type="checkbox"/>
	Notarization certificates <end>						<input type="checkbox"/>
DocDsrc	Transcripts	21	1	E...	BGENG...	Thu 2/1/2007 3:19 ...	<input type="checkbox"/> <input type="checkbox"/>
DocDsrc	Transcripts	21	2	DOC	BGENG...	Tue 2/27/2007 3:2...	<input type="checkbox"/> <input type="checkbox"/>
	Transcripts of recorded conversations. <end>						<input type="checkbox"/>
DocDsrc	Document2	22	1	E...	BGENG...	Tue 2/6/2007 4:16 ...	<input type="checkbox"/> <input type="checkbox"/>
DocDsrc	Drafts	23	1	DOC	BGENG...	Wed 2/21/2007 5:3...	<input type="checkbox"/> <input type="checkbox"/>

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:

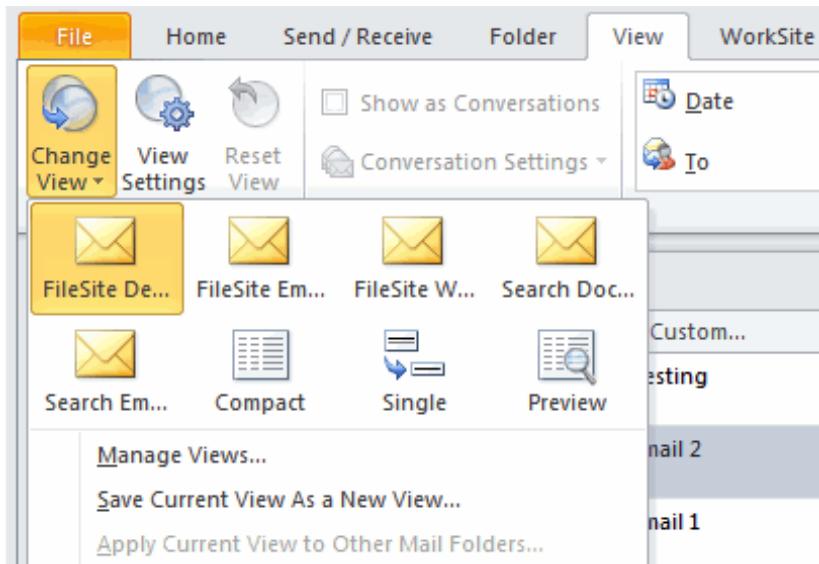
1. From the **View** menu, point to **Arrange By**.
2. In the **Arrange By** submenu, point to **Current View**. A list of available views appears. The currently used view is checked, as shown in [Figure 50](#).

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 76 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 169 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 63 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 22 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”

- “E-mailing Documents”
- “Inserting WorkSite Links into Outlook Objects”
- “Printing Documents”
- “Relating Documents”
- “Unlocking Documents”
- “Declaring a Document as a Record”
- “Undeclaring a Record”
- “Restoring Archived Documents”
- “Restoring Archived Document Shortcuts”
- “Displaying Document Information”
- “WorkSite Add-on Functions”
- “Creating New Documents”
- “Creating New Document Defaults”
- “Creating E-mail Profile Defaults”
- “Working with Security Templates”
- “Editing Security on Documents”
- “Application Setup in FileSite”
- “FileSite Features for Microsoft Outlook 2007 or 2010”

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 [67](#) for more information on toolbar buttons.

Table 23 provides an overview of the commands available on the **Document** menu.

Table 23 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 142
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 142
Print	Prints the document.	"Printing Documents" on page 168
View	Opens the document in the WorkSite Viewer.	Chapter 9
Forward/Send Document	Forwards an e-mail to a recipient or sends a document as an e-mail attachment.	"E-mailing Documents" on page 165
Send NRL/URL submenu		
► To Latest Version	Opens a new e-mail message with a link to the latest version of the document as an attachment.	
► To This Version	Opens a new e-mail message with a link to the current version of the document as an attachment.	
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 157
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 158
Save As	Copies the document to your local or network drive. This option is not available in offline mode.	"Exporting Documents" on page 154

Table 23 Summary of Document menu commands

Commands	Description	See
Move	Relocates the document to the desired Workspace and folder. This option is not available in offline mode or from the Document Worklist.	
Copy Submenu		"Copying Documents" on page 160
▶ 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 114
Add Version	Imports a document and saves it as a new version of an existing document.	"Importing New Versions of Documents" on page 150
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 113
Delete	<p>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.</p> <p>Note: To permanently remove the document from the WorkSite library, you must select the Permanently remove the document check box. If you do not select this check box, the document is removed from the folder but remains in the WorkSite repository.</p>	"Deleting Documents" on page 165
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 170

Table 23 Summary of Document menu commands

Commands	Description	See
Remove from Folder	Removes the document from the folder, but does not delete the document from the WorkSite library. This option is not available in offline mode.	"Removing Documents from a Folder" on page 115
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 204
▶ Convert to PDF	Converts an MS Office document to a PDF document. -----+ -----+	"WorkSite Add-on Functions" on page 185
▶ Send as PDF	Converts the document to a PDF document and sends it in an e-mail message.	"WorkSite Add-on Functions" on page 185
Add to My Favorites	Adds a shortcut of the document to your My Favorites list.	"Adding Documents to My Favorites" on page 88
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 172
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 173
Document Info submenu		"Displaying Document Information" on page 176
▶ 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.	

Table 23 Summary of Document menu commands

Commands	Description	See
► Where Used	Lists the location and path of all folders where the document is placed and offers navigation to the document location(s) if inside a Workspace.	
Properties	Opens the Properties dialog box displaying profile information for the document.	"Entering Document Profile Information" on page 138 and "Editing Document Profile Information" on page 140
Applications submenu		"Integration with Other Applications" on page 298
► 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 170

Using *Lookup* dialogs

In FileSite, every document has a *profile* that contains information about it. (See ["Document Profile Information" on page 32](#) 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.

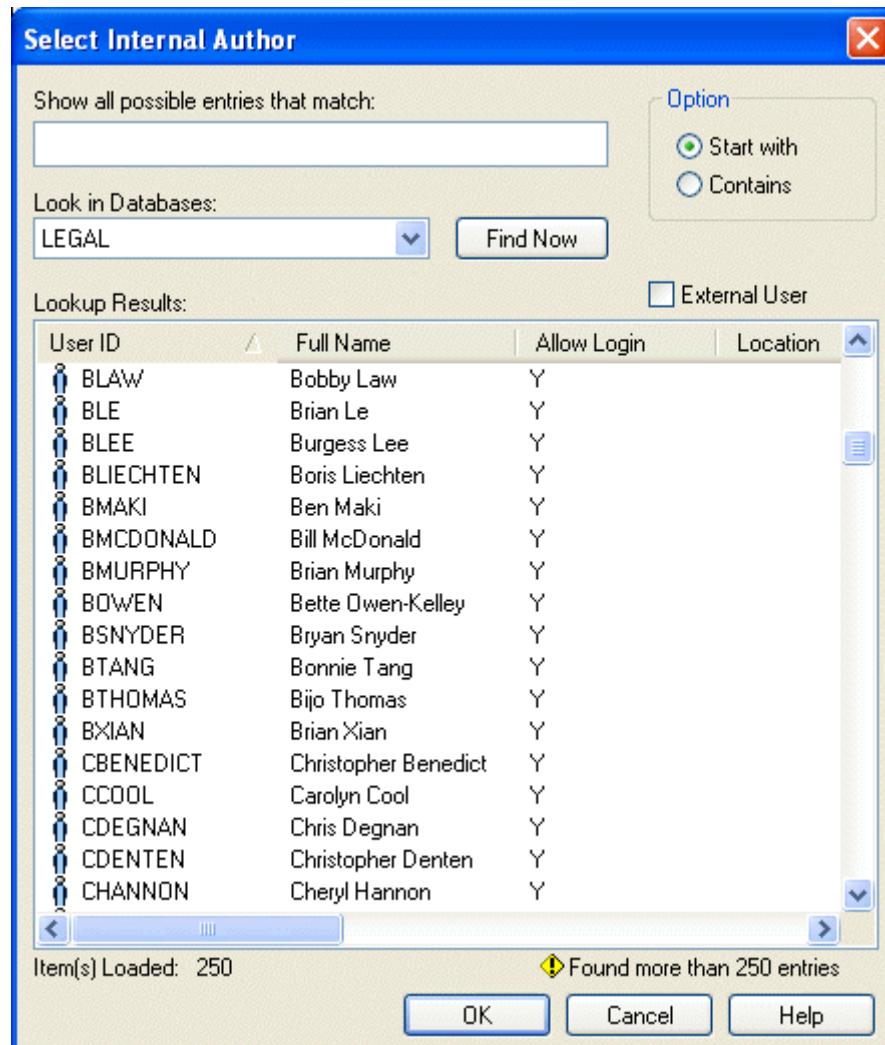
To use a *lookup* dialog box to enter values:

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 82 for information about external users and groups.

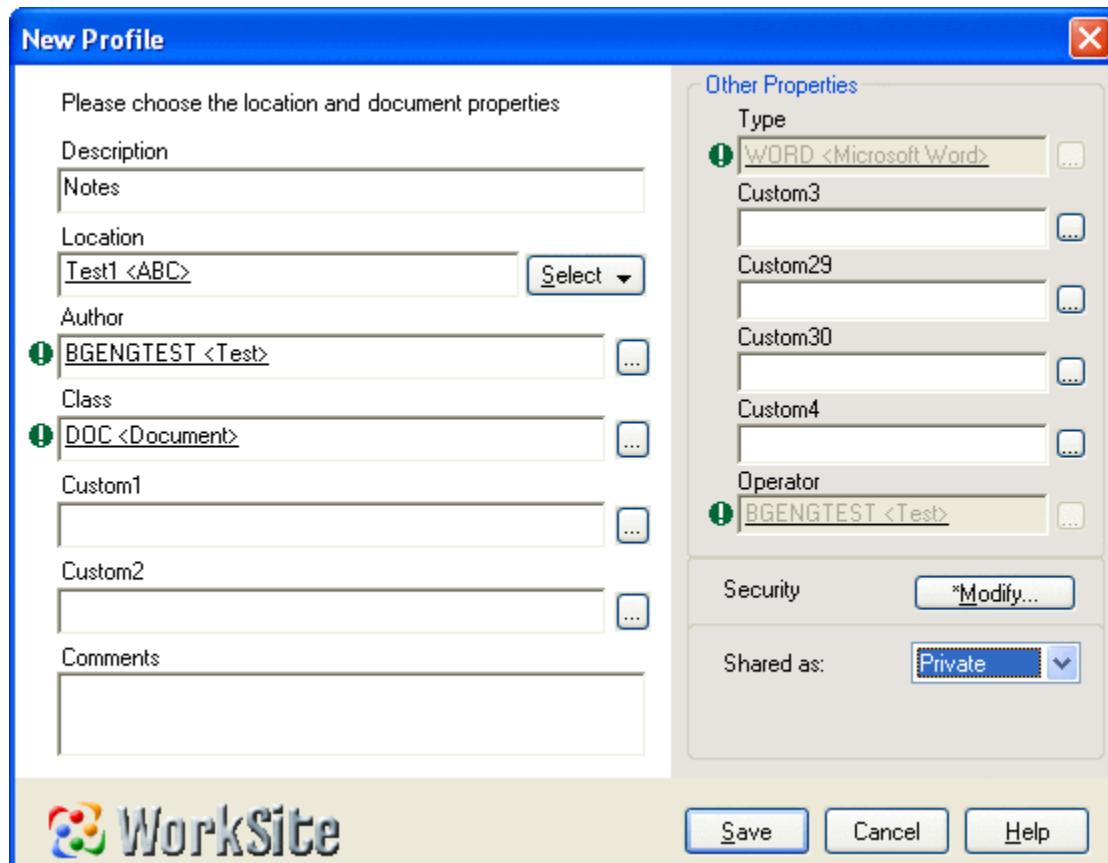
4. Select a WorkSite library from the **Look in Databases** list. Click **Find Now** to search the list. The search results are displayed again.
5. Select an entry from the list and click **OK**. This entry appears in the relevant field of the document’s profile record.

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.

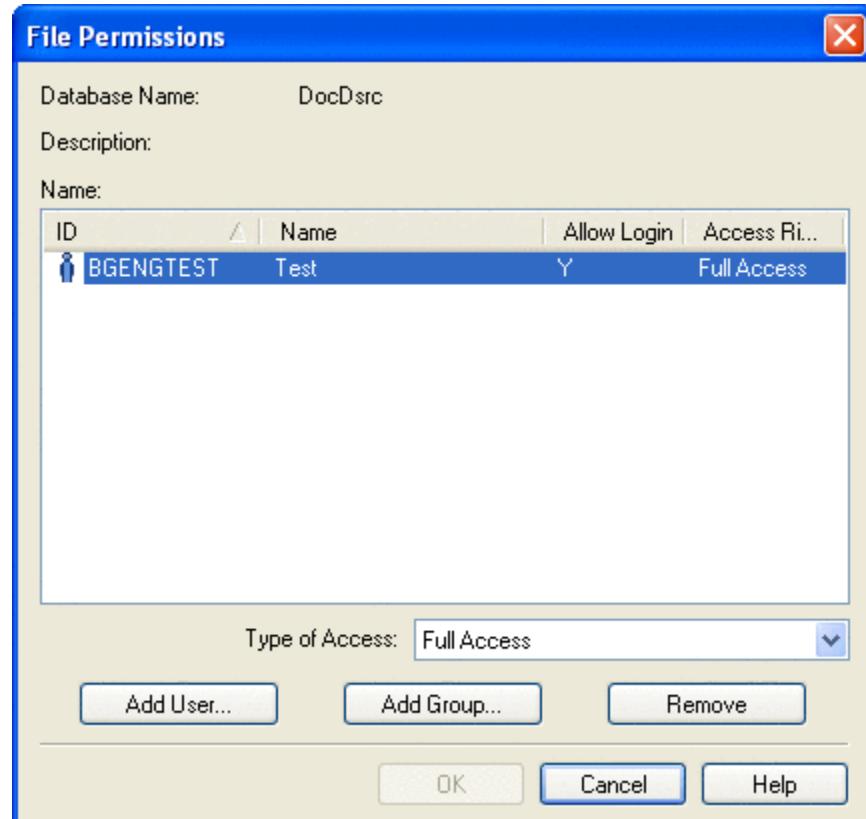
NOTE The warning icons do not appear on the profile dialog box if Accessibility Features are turned on. See “[Other Options](#)” on page 62 for more information on how to turn on/off Accessibility Features.



NOTE To use a **Lookup** button, see “[Using Lookup dialogs](#)” on page 136 for more information.

2. To set the Default Security, make a selection from the **Shared as** list. See “[Default Security](#)” on page 81 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 81 for more information.
5. Click **OK** to close the File Permissions dialog box.
6. Click **Save** to close the New Profile dialog box.

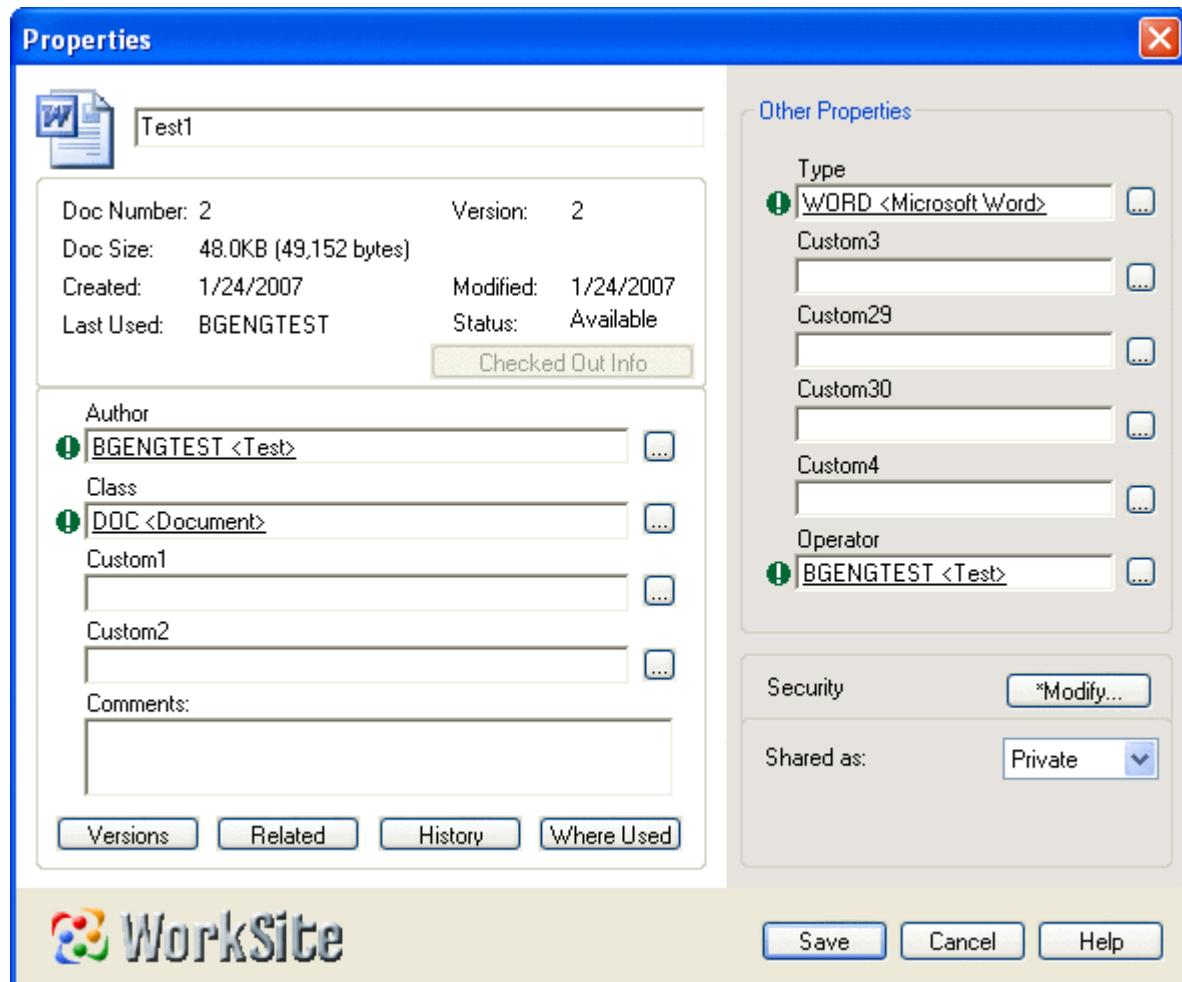
Editing Document Profile Information

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 138 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 62 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 the document type. The document header displays in the native application with the document number (assigned by FileSite), the database in which the document is stored, and the document description as specified in the Properties window.



NOTE In Excel and PowerPoint, the document header may display only the document number without the database or the document description.

Opening Documents Sent as NRL Links

When you receive an e-mail with an NRL link attached, you can open the document by clicking the NRL link.

A prompt displays, asking you to select the version you want to open. To select the version that was originally sent, click **This Version**. To select the most recently worked on version, click **Latest Version**.

If you select **Latest Version** but do not have permission to access the most current version of the document, an error message displays.

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 357](#) 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 157](#)" 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 158](#)" 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 24 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. Right-click the folder to display the Folder menu, and select **Add Document**, or click the  **Add Documents** icon in the toolbar.

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

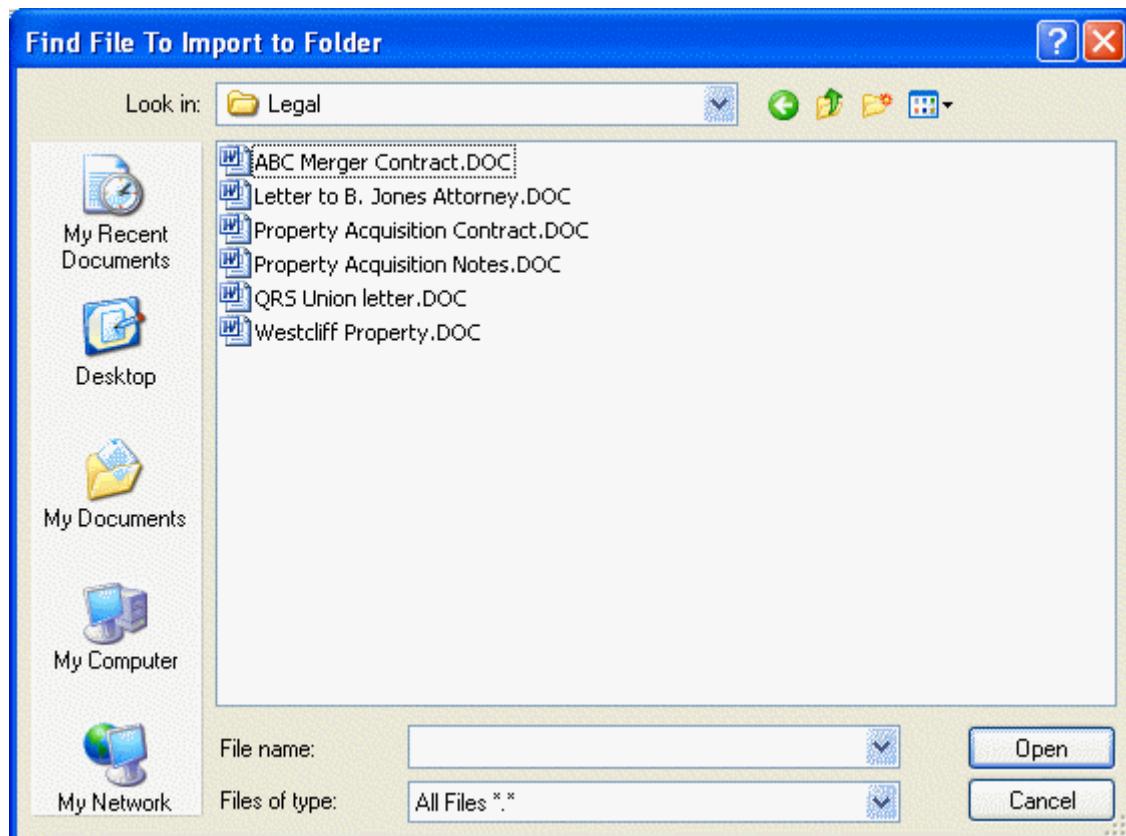
A standard Windows Find File to Import to Folder dialog box opens.



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 60](#) 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 6](#).
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 257](#) 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.

NOTE In the case that FileSite does not automatically recognize the Comma Separated Value file format, if you are importing an Excel file saved in .csv format, you must manually specify the **Type** value.



- a. From the Save As dialog box, click the **Detail** button. The New Profile dialog displays with the **Type** field showing ANSI <Windows Ansi Text> as the document type.
- b. Click the button to the right of the Type field. The Select Type dialog box displays.
- c. Select **CSV** from the list of file types.
- d. Click **OK** to set the file type, then click **Save** to save the properties and close the New Profile window.

- 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.

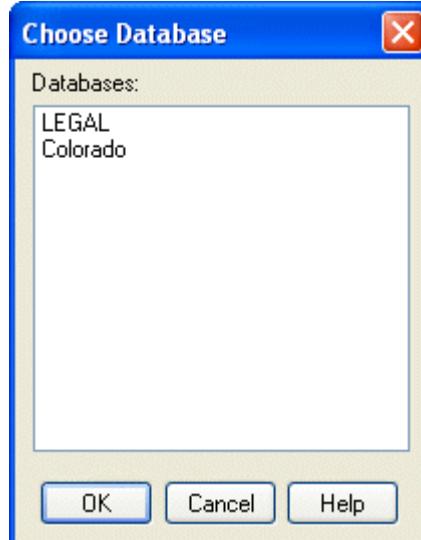
If the folder's metadata does **not** include all required fields, the New Profile dialog box opens for you to enter profile information. You can also open the New Profile dialog box by clicking **Detail**.

6. 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:

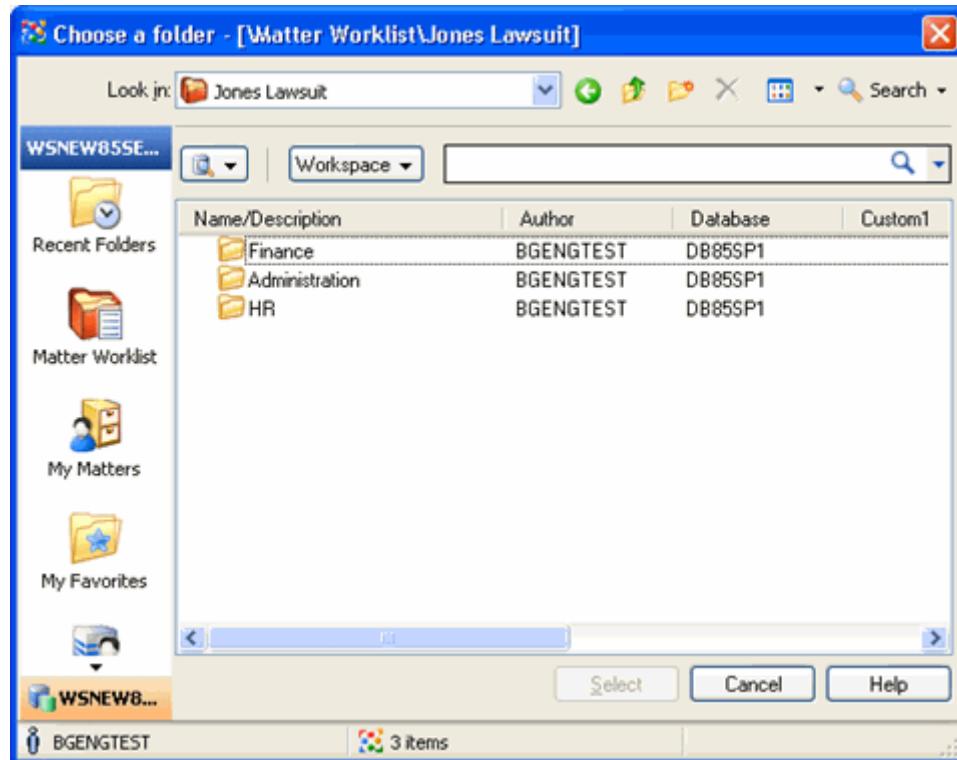
- Databases and folders you have recently accessed
- All Databases.** All libraries you are currently connected to are selected.
- Choose Database.** The Choose Database dialog box opens.

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

7. 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 257](#) for more information on using this panel.

To navigate within this dialog box:

- 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.
- 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.

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

NOTE Because FileSite does not automatically recognize the Comma Separated Value file format, if you are importing an Excel file saved in .csv format, you must manually specify the **Type** value.



- a. Click the button to the right of the **Type** field. The **Select Type** dialog box displays.
- b. Select **CSV** from the list of file types.
- c. Click **OK** to set the file type and return to the **New Profile** dialog box.

NOTE Information marked by the icon is required.

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 179 and “[Copy E-mails to WorkSite](#)” on page 181.



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.

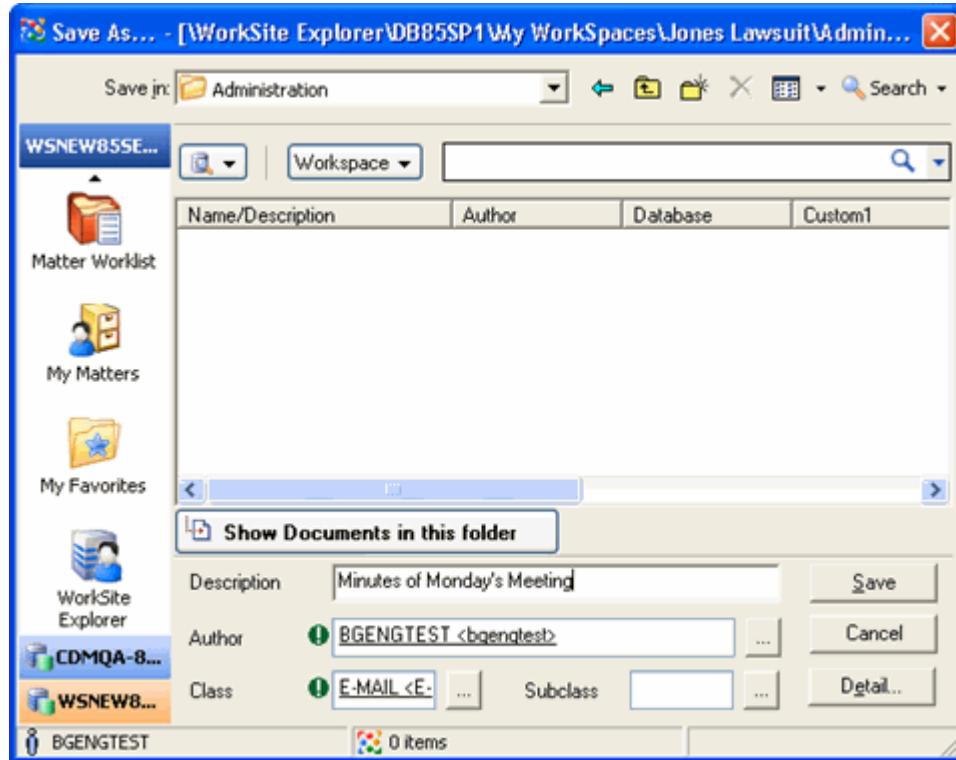
To import an e-mail message:

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 57), 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 257 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**.

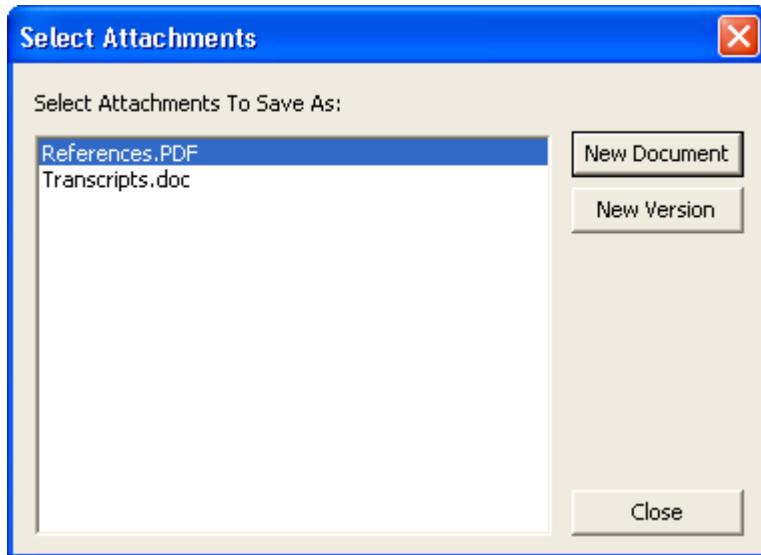
To save the attachment as a new version of an existing WorkSite document:

- 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.

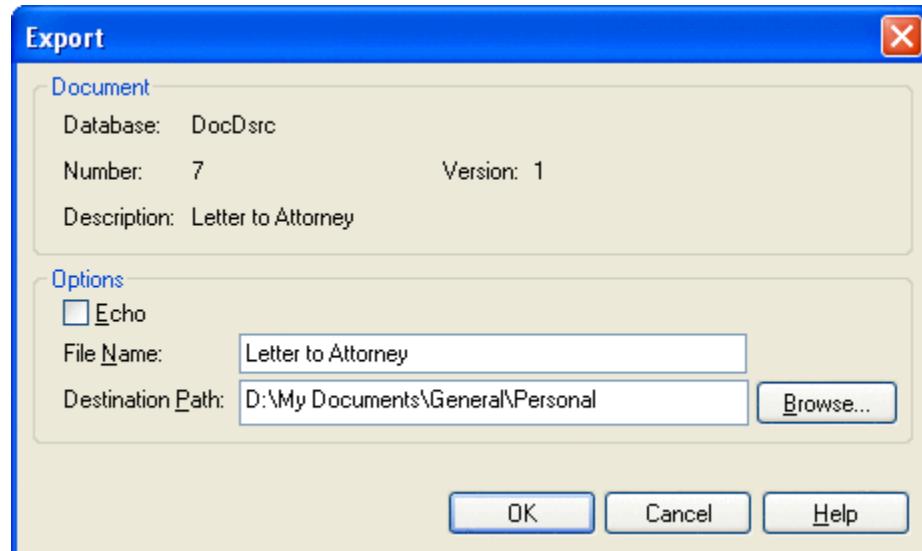


NOTE If you try to export a document that is currently in your Echo directory with changes that have not been synchronized with the document in the WorkSite library, FileSite warns you that you are about to overwrite the document in the Echo directory. This feature prevents you from overwriting changes 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 63](#).

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 338 for more information.

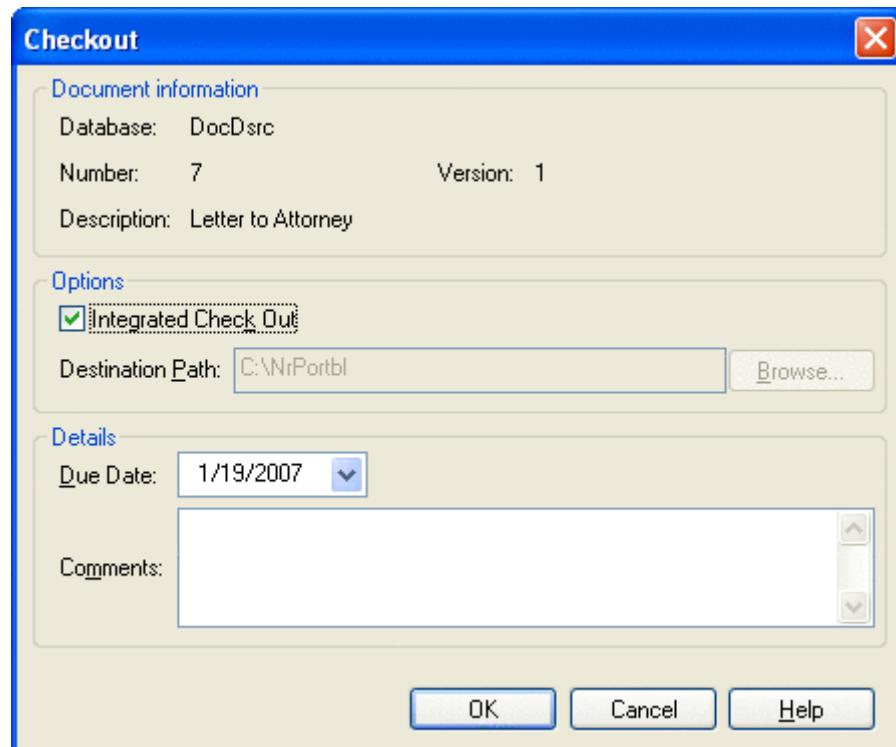
The document's number and version becomes its filename when it is checked-out. For example, if you check out a Microsoft Word document with a document number of 378446 and a version number of 2, the document will be stored on your local or network drive with a filename of 378446_2.doc.

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 178 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.



NOTE If you have OffSite installed, when you attempt to check out a document, WorkSite checks whether a local copy of the file exists in your OffSite cache. If a local copy is found, it is used instead of the copy stored in WorkSite.

Checking In Documents

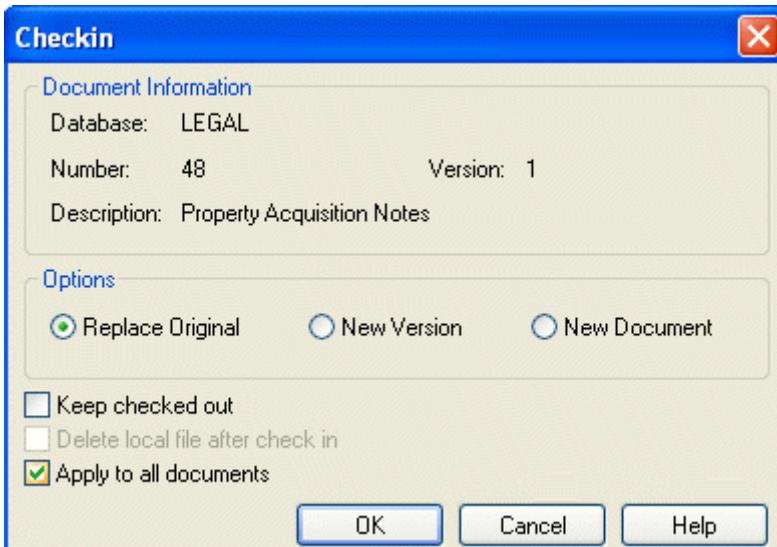
You can return modified documents to FileSite using the **Check in** function.

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 138](#) 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 138](#) 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 138 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 138 for more information.

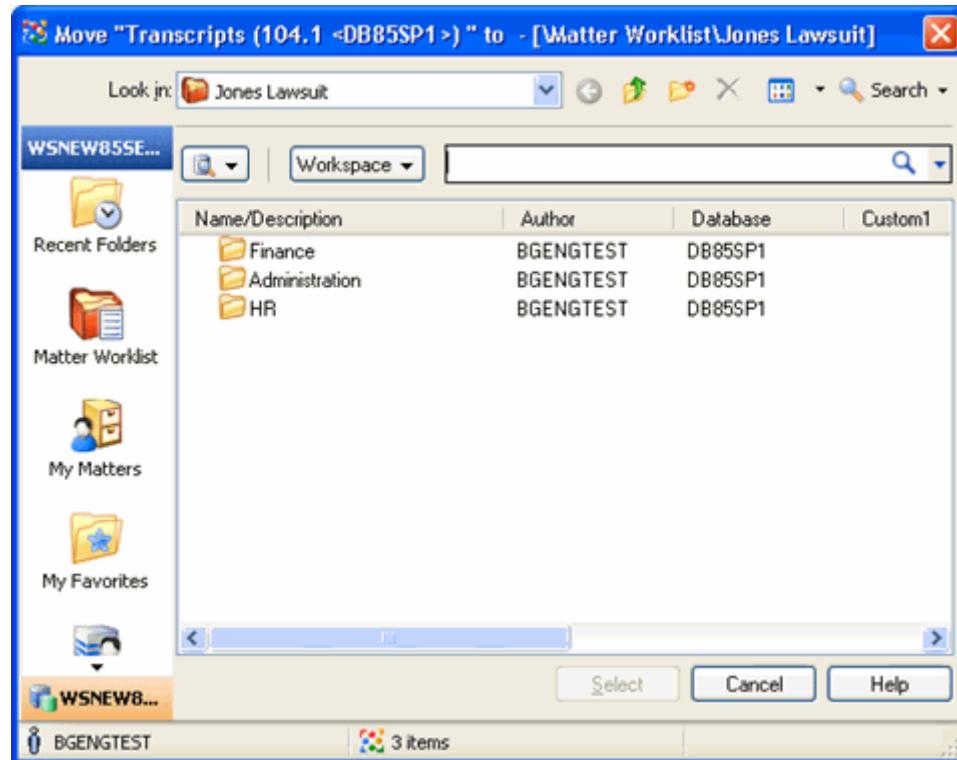


NOTE You can copy a document even when it is “In use” or checked-out. The copy will duplicate the last version of the document that was saved to the WorkSite library. You cannot copy a document as a new version if it is checked-out.

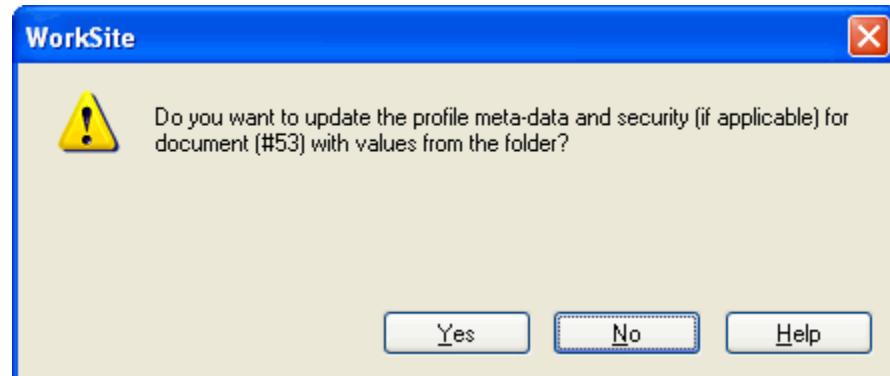
Moving Documents

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 or 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 257](#) 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.

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 67](#) 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



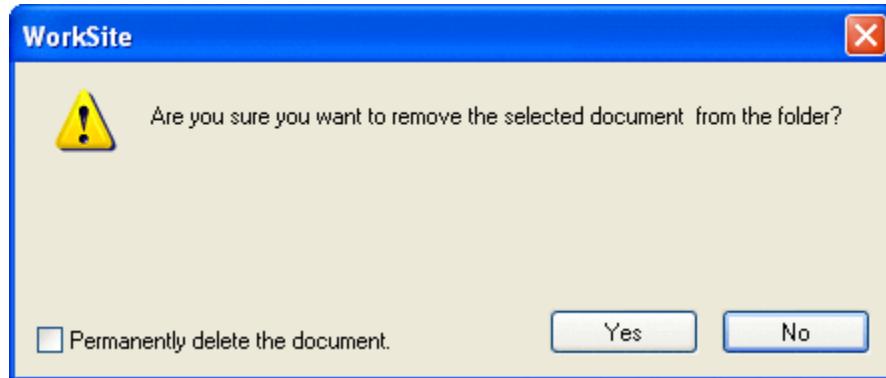
3. Double-click the document icon to view it in its associated application.

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 115.

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** without selecting the **Permanently delete the document** check box, the document is removed from the folder but stays in the WorkSite library. To permanently delete the document from the WorkSite library, select the **Permanently delete the document** check box before clicking **Yes**.

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

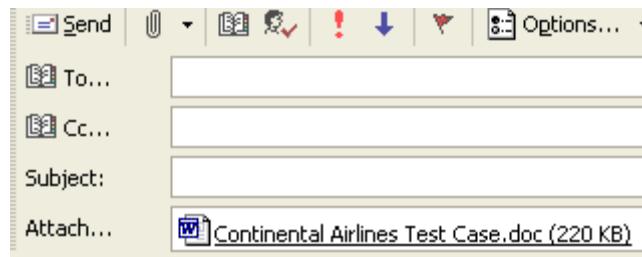
You can send a copy of a WorkSite document either as a forwarded e-mail or as an attachment.

1. Select the document in the Document Grid.
2. If the document is an e-mail, select **Forward**.
3. If the document is not an e-mail, select **Send Document**.

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.

The document appears as an attachment in the new e-mail message.

Figure 70 Document attached to e-mail message



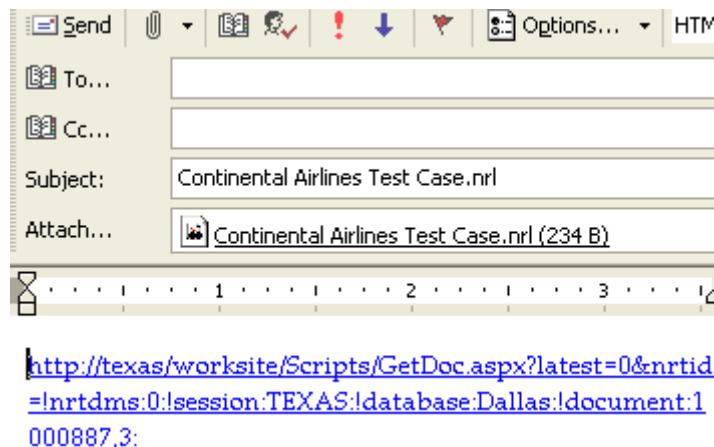
4. Enter the e-mail address of the recipient and click **Send**.

Send NRL/URL to WorkSite Item

You can e-mail a link to a WorkSite document, folder, or Workspace using the **Send NRL/URL** option on the **Document** (right-click) menu.

1. Select the document, folder, or Workspace in the Document Grid or the WorkSite tree.
2. Right-click the selected item and point to the **Send NRL/URL** option.
For a document, select from the following version options:
 - To This Version**. Opens a new e-mail message with a link to the current version of the document as an attachment.
 - To Latest Version**. Opens a new e-mail message with a link to the most recent version of the document as an attachment.

You can also create a new e-mail message and drag the WorkSite document, folder, or Workspace into the e-mail. The WorkSite item 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.

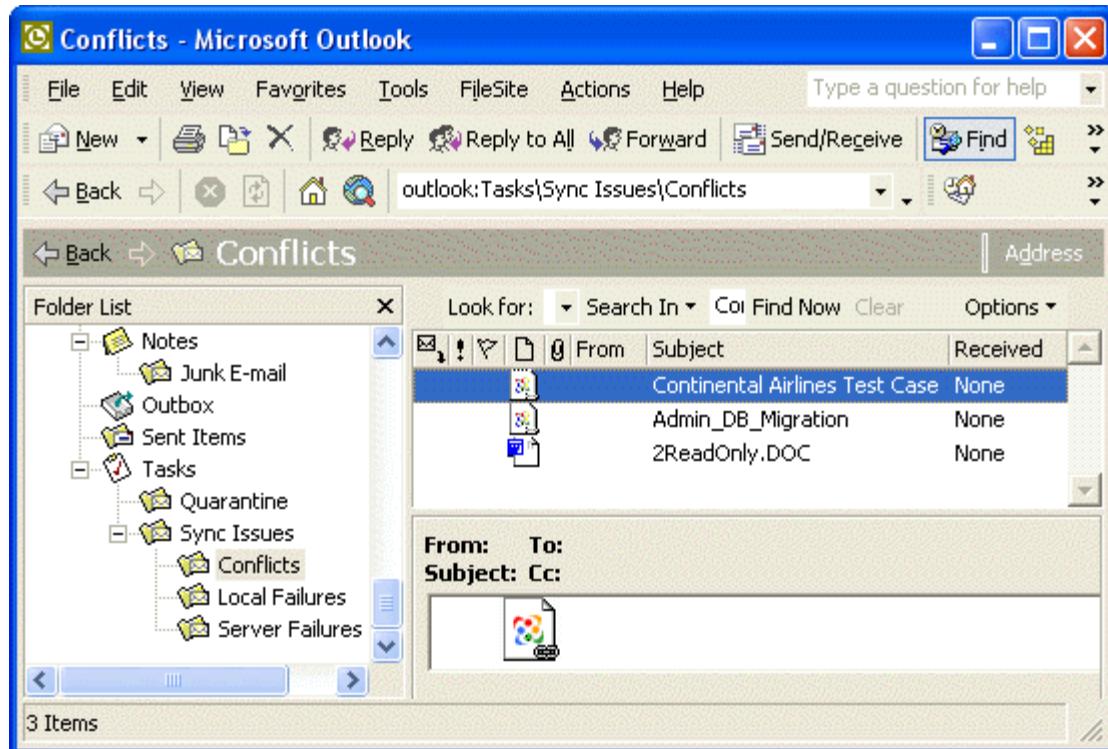
Drag and Drop

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 25](#) shows how the documents relate.

Table 25 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 unrelated 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.

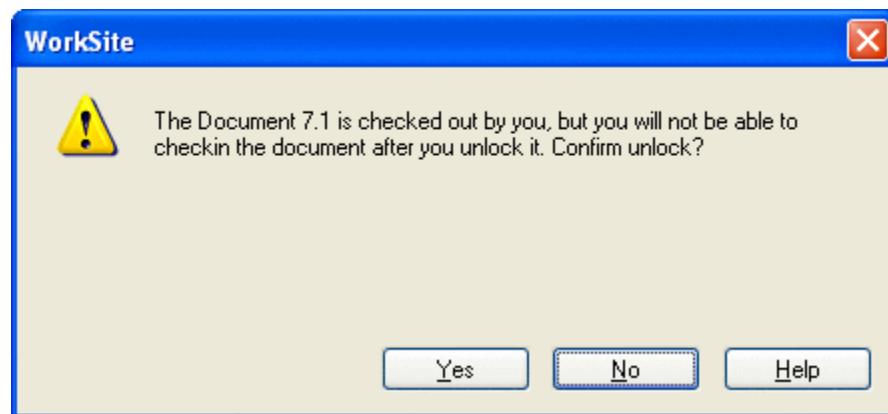
Any copy of the document that exists locally will be “orphaned” from the network version after an Unlock is complete. You can put the local document into WorkSite as a new document or use the **Add Version** option to import it as a new version. You should only use the **Unlock** option to free up documents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

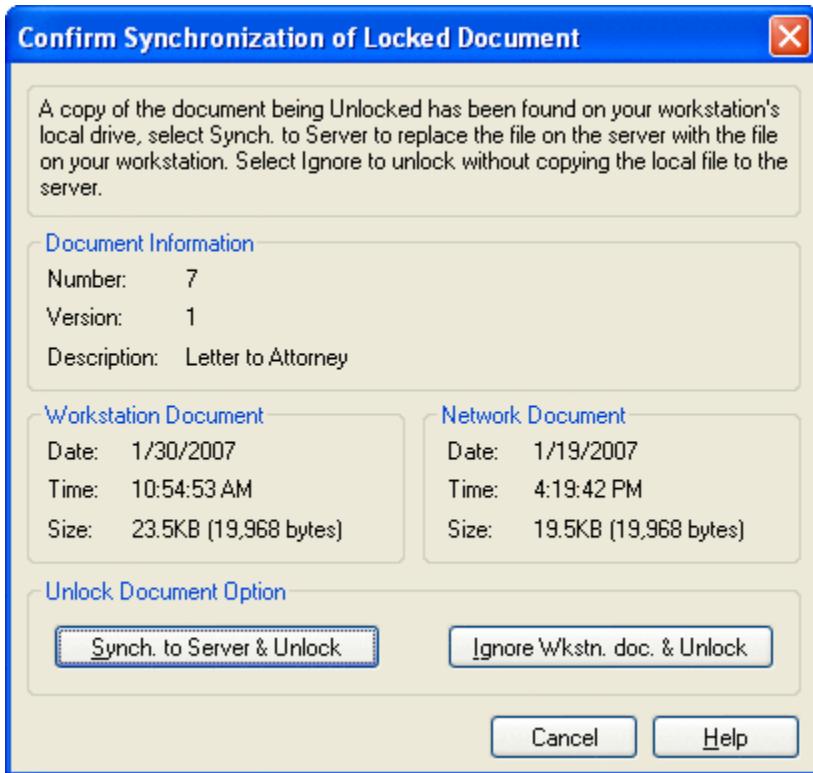
1. Select the document from the Document Grid.
2. Choose **Unlock** from the **Document** menu. A message asking you to confirm the Unlock operation appears. See [Figure 73](#).

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 Wkstn. 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

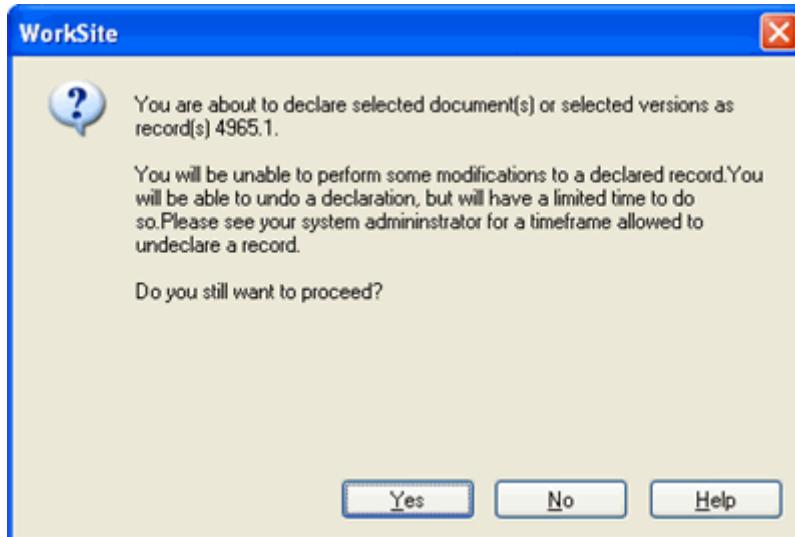
You can declare a document to be a *record*. You can use the **Open** command to open the declared document in its native application, make changes, and subsequently save it back to the WorkSite library as a new document or a new version of the original document.

When you declare a document as a record, the action is recorded in the document's history. See ["History Tab" on page 77](#) 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 173](#).

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 128](#).

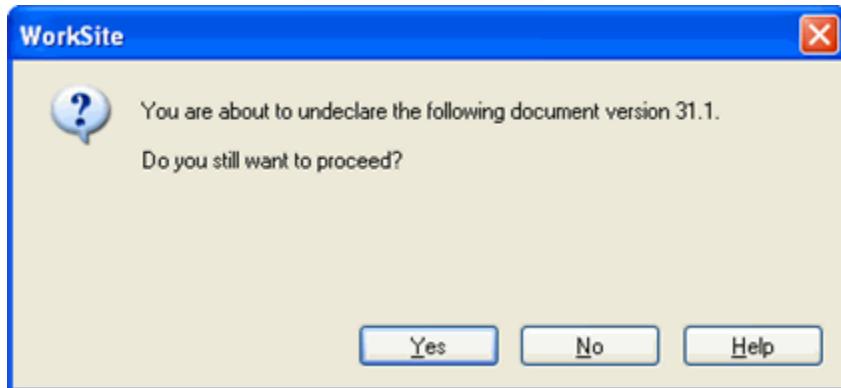


NOTE Only users with at least Read/Write access to the declared document can undeclare it. Contact your WorkSite Administrator for more information.

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



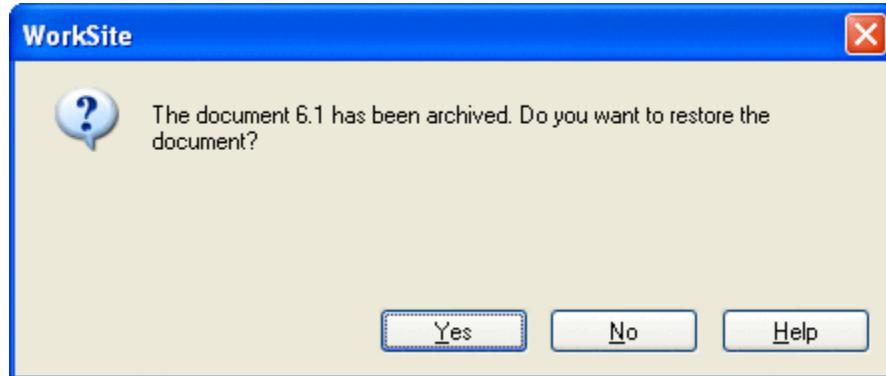
3. Click **Yes** to undeclare the document.

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



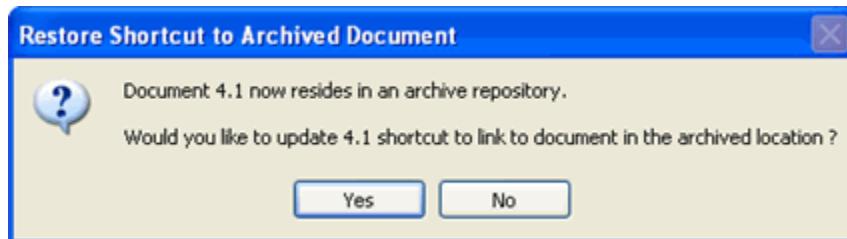
If you click **Yes**, FileSite retrieves the archived document from the archive location. If the archive file is not available to the server, FileSite will mark the file for restoration by your WorkSite Administrator.

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 and optionally navigate to that location.



NOTE You can navigate to a document's location only if it is placed inside a folder residing in a Workspace.

Versions

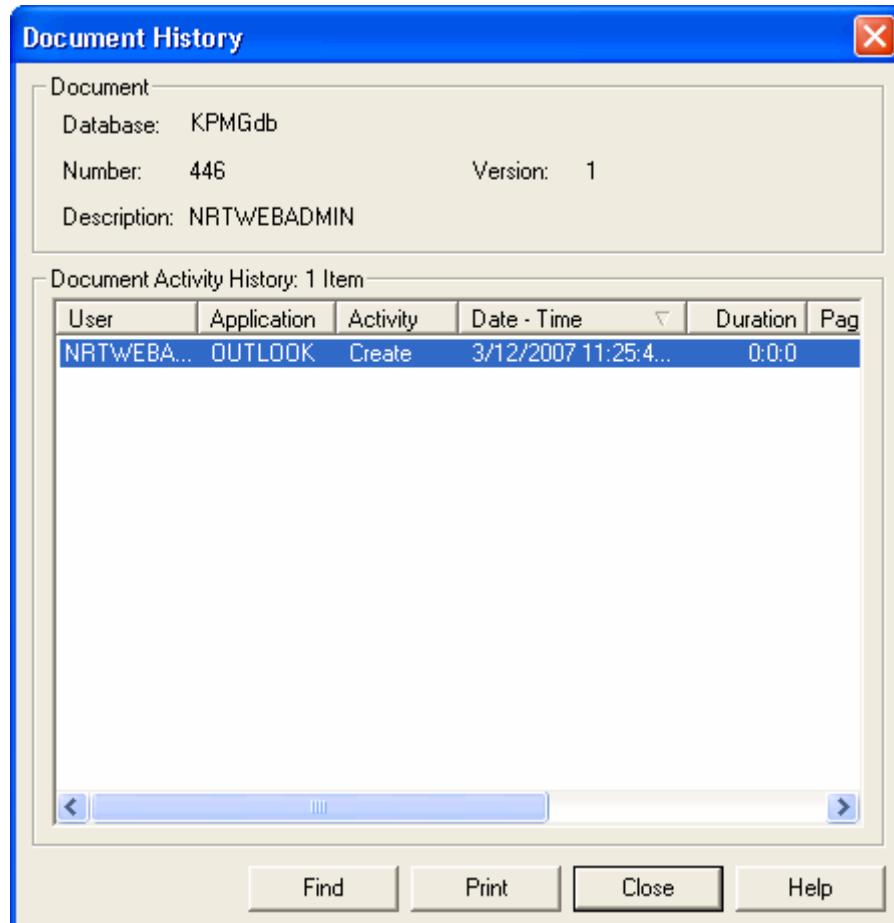
1. Select the document from the Document Grid.
2. From the **Document** menu, point to **Document Info** and select **Versions**.

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

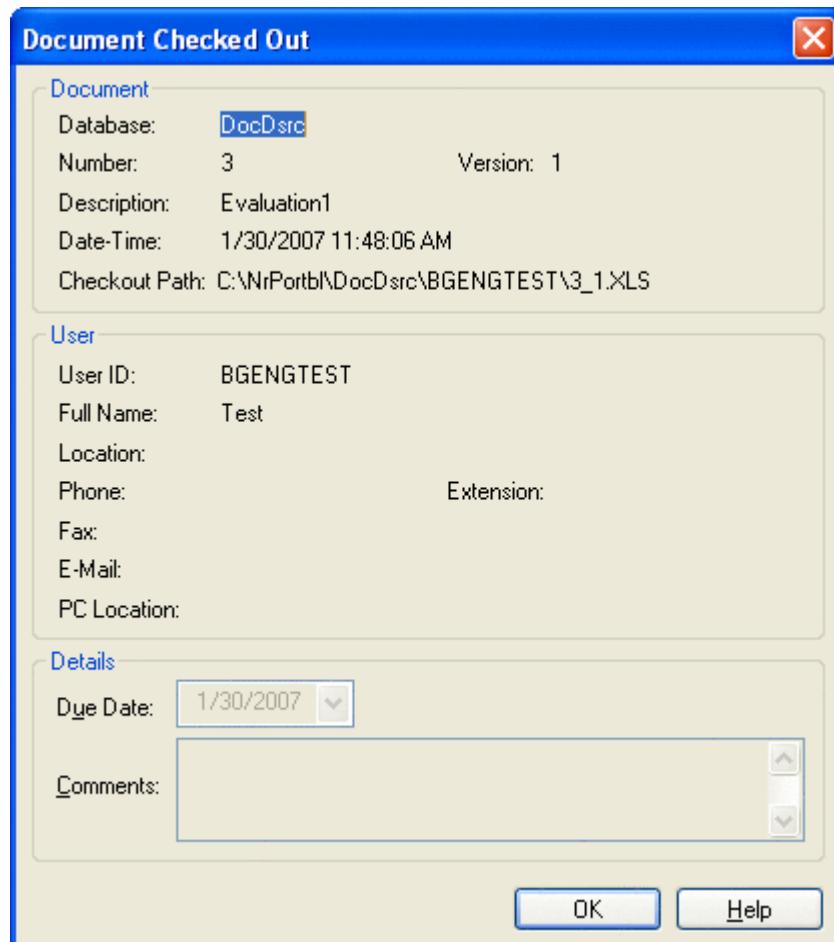
1. Select the document from the Document Grid.
2. From the **Document** menu, point to **Document Info** and select **Related Documents**.

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 the document's location(s).
3. (Optional) Select a location and click **Open Folder** to navigate to the specified folder.



NOTE You can navigate to a document's location only if it is placed inside a folder residing in a Workspace.

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).

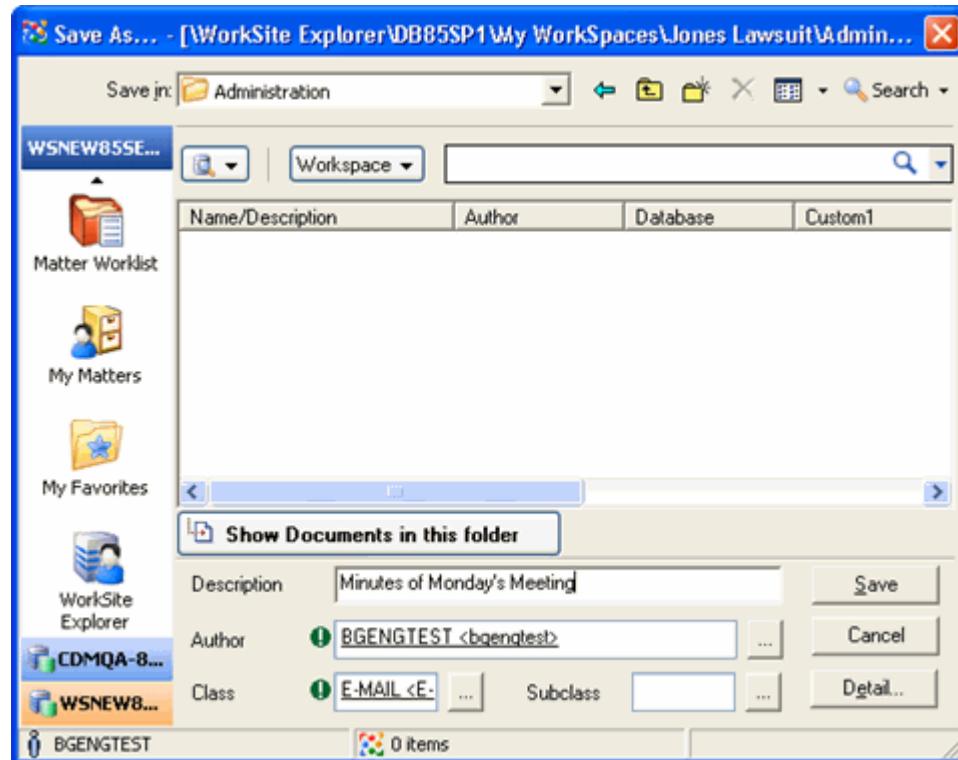


NOTE You can also move and copy e-mail to WorkSite using the **Move to Folder** and **Copy to Folder** options in the native Outlook application.

Move E-mails to WorkSite

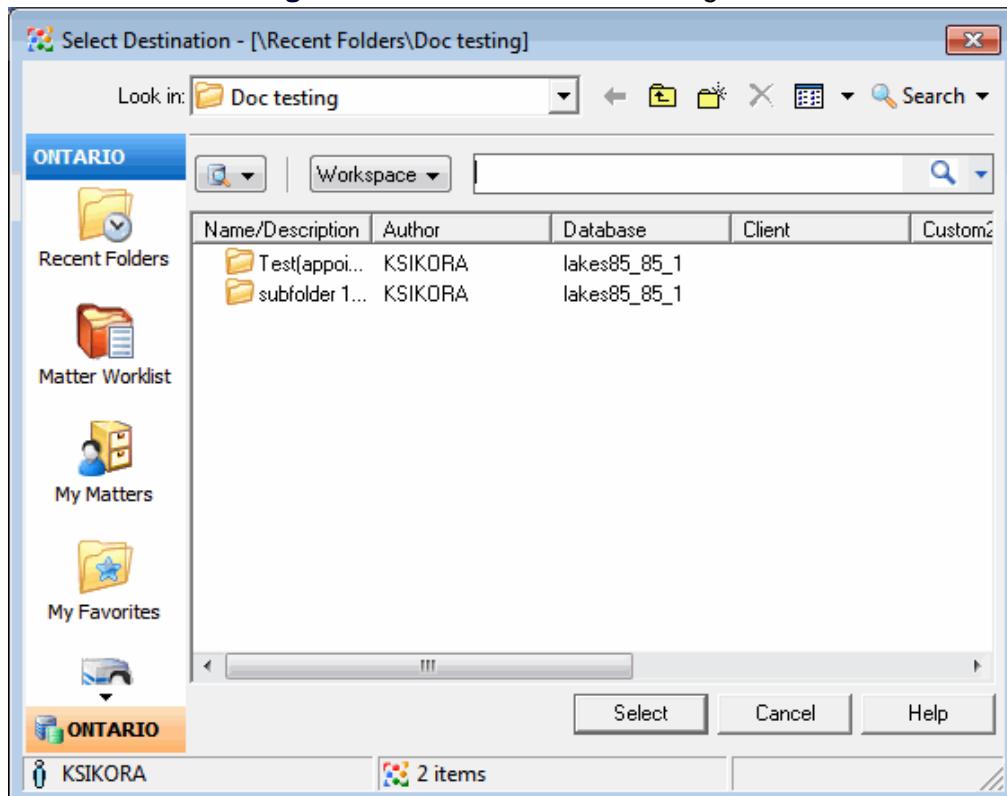
1. Select one or more e-mail from the Outlook Inbox or other Outlook folder displayed in the Document Grid.
2. Click the  **Move Email** icon on the WorkSite toolbar. The Save As dialog box opens.

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 257](#) 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 257](#) 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

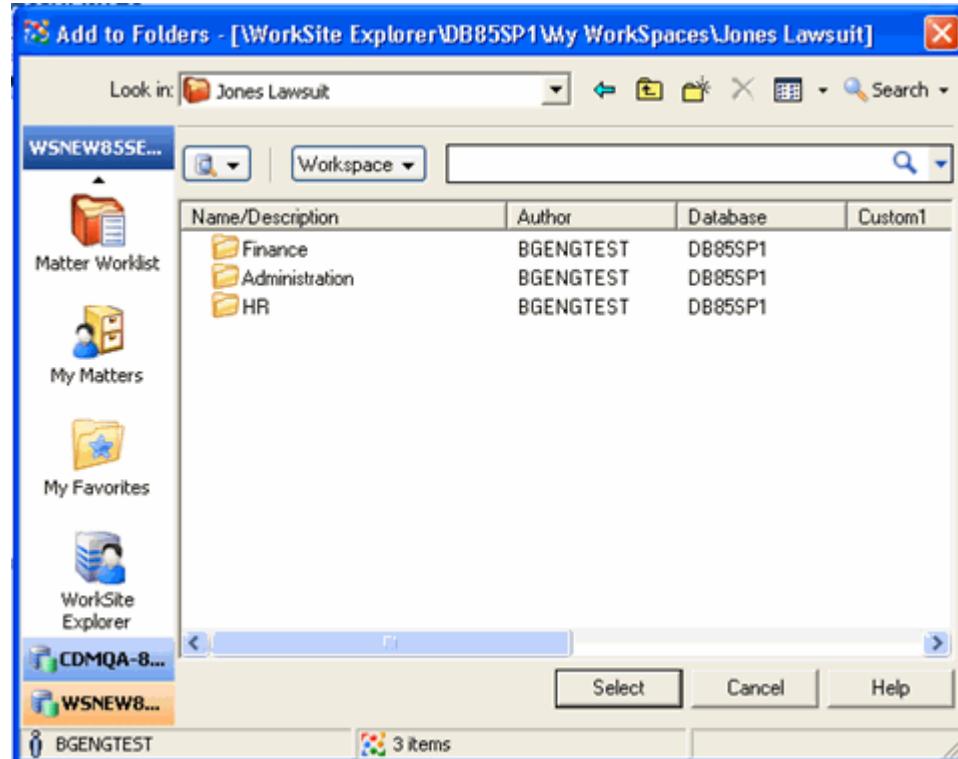
When you move or copy an Outlook folder to a WorkSite library, you first create a new folder and then file the documents from the original folder to the new folder.

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

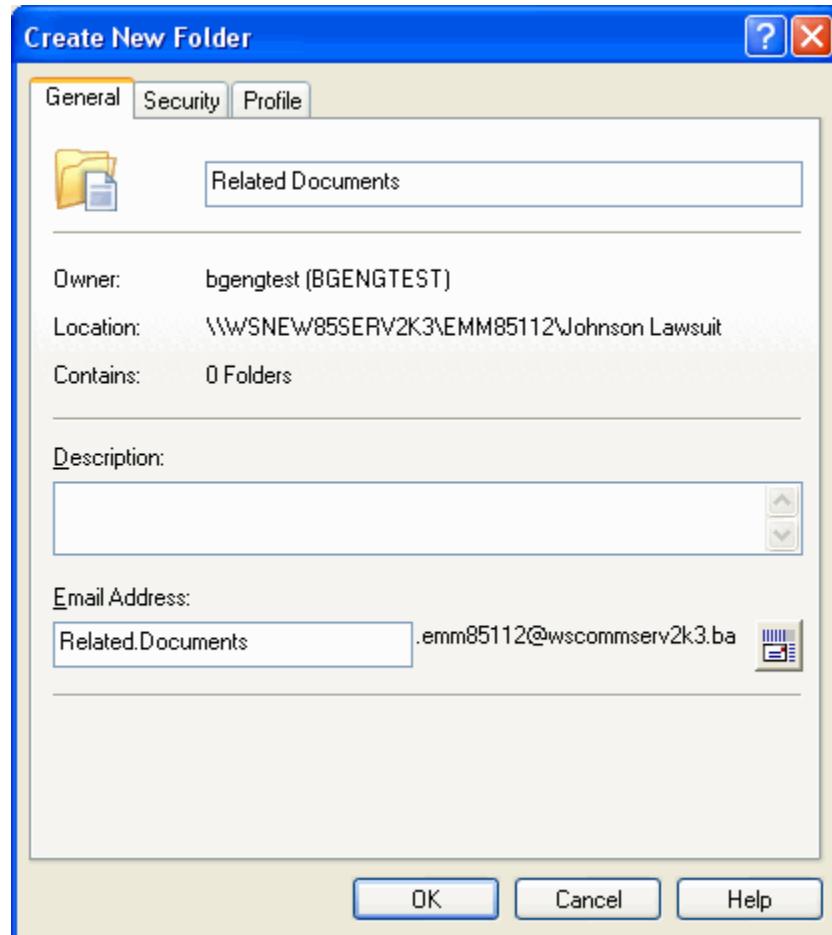
In Outlook 2010, click the  **Move Folder** icon from the Actions area of the **WorkSite** tab.

The Add to Folders dialog box opens.

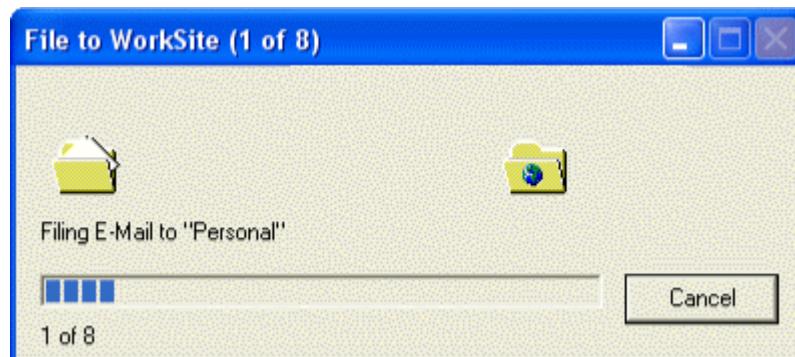
Figure 83 FileSite Add to Folders dialog box



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 257 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 105](#).
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 151](#).
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 257](#) 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 105](#).
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 151](#).
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 Professional installed on your machine for the PDF Add-ons to work.



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

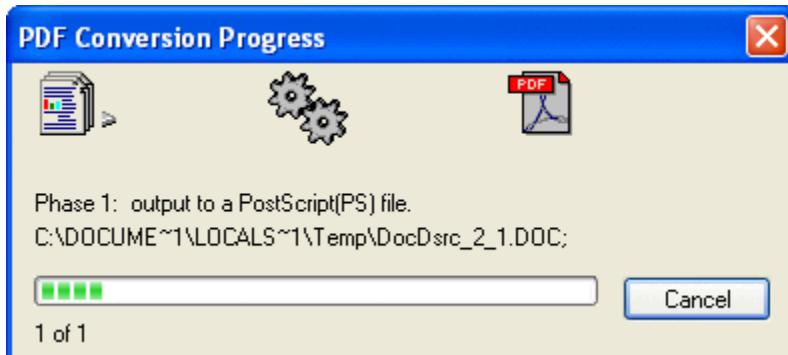
Convert to PDF Add-on

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.

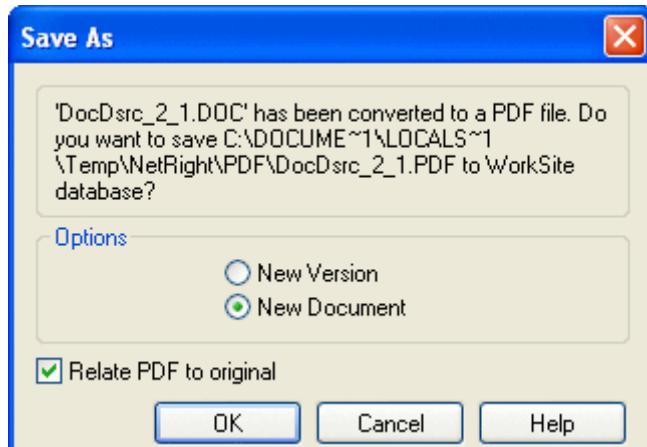
Figure 86 PDF Conversion Progress dialog box



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 169 for more information on creating relations between documents.
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 138.

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**.

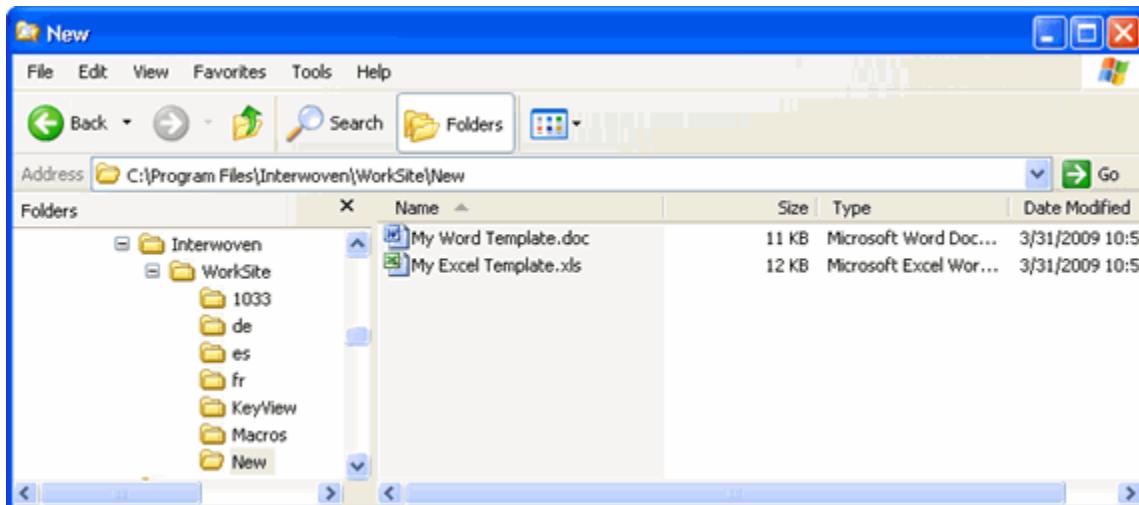
Creating New Documents

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.

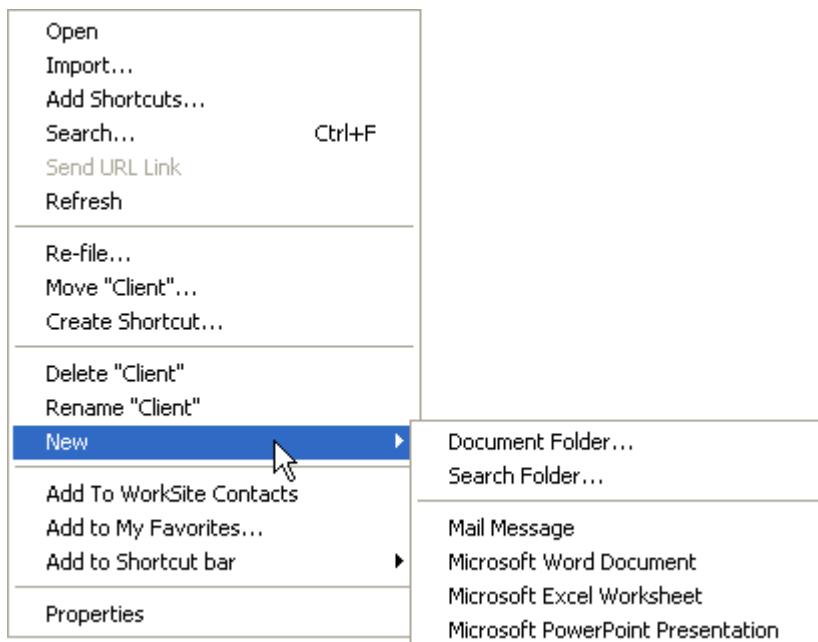
To create a new document:

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

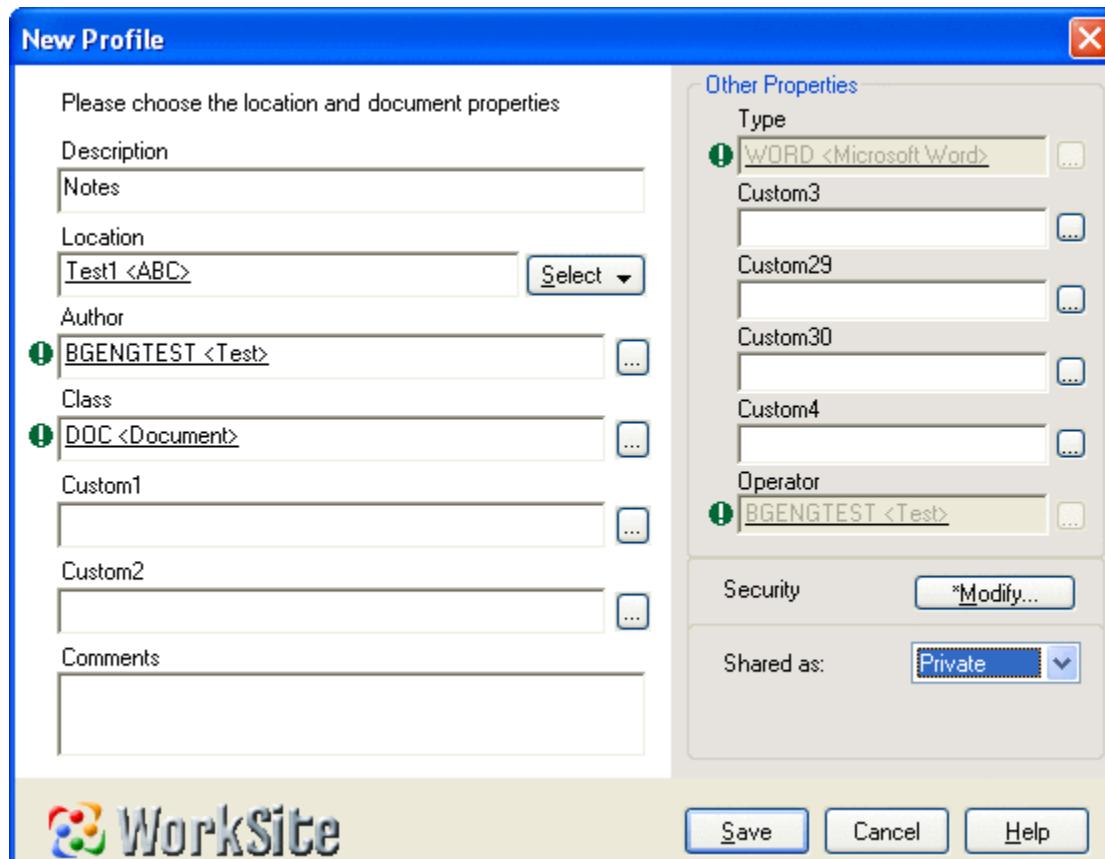


NOTE The **New** submenu is customizable from your computer's registry. Your WorkSite Administrator can add items, for example, document templates from other applications, such as WordPerfect or Visio.

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 138 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 197 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.

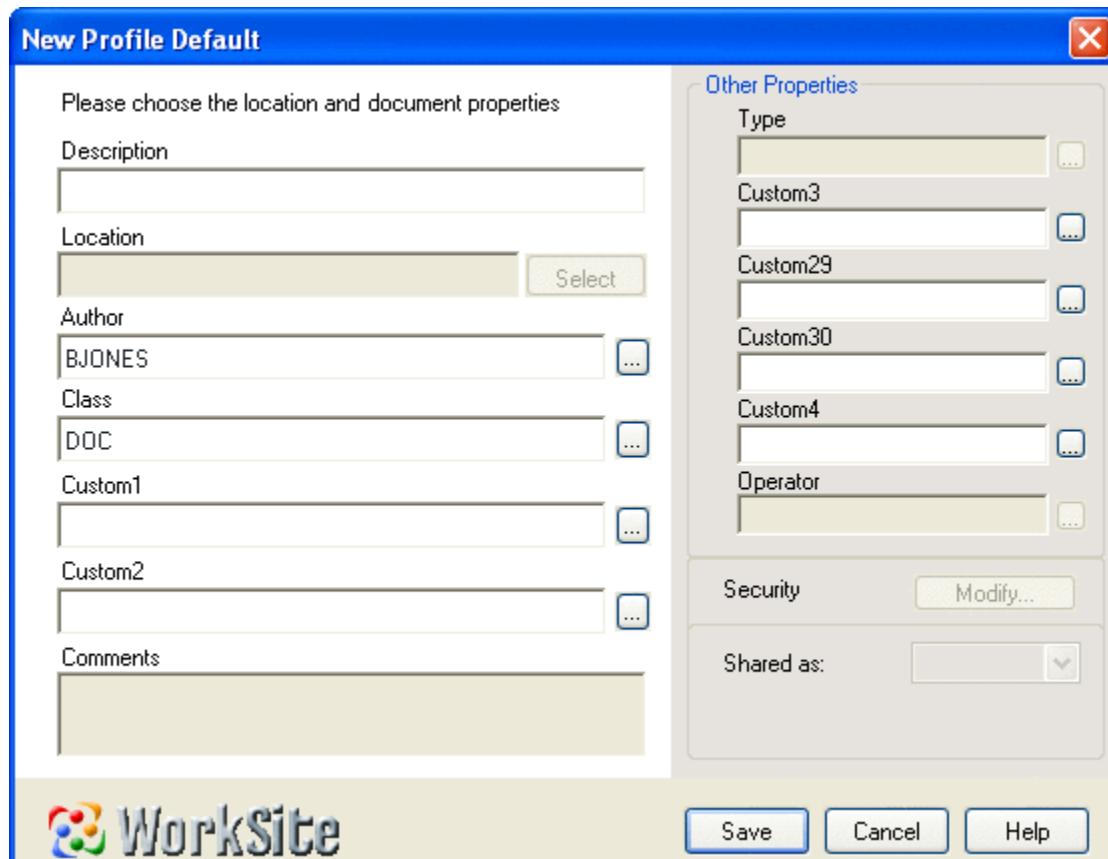
To create a new document default profile:

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 138](#) 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 140](#) for more information. You *do not* have to use the default values.

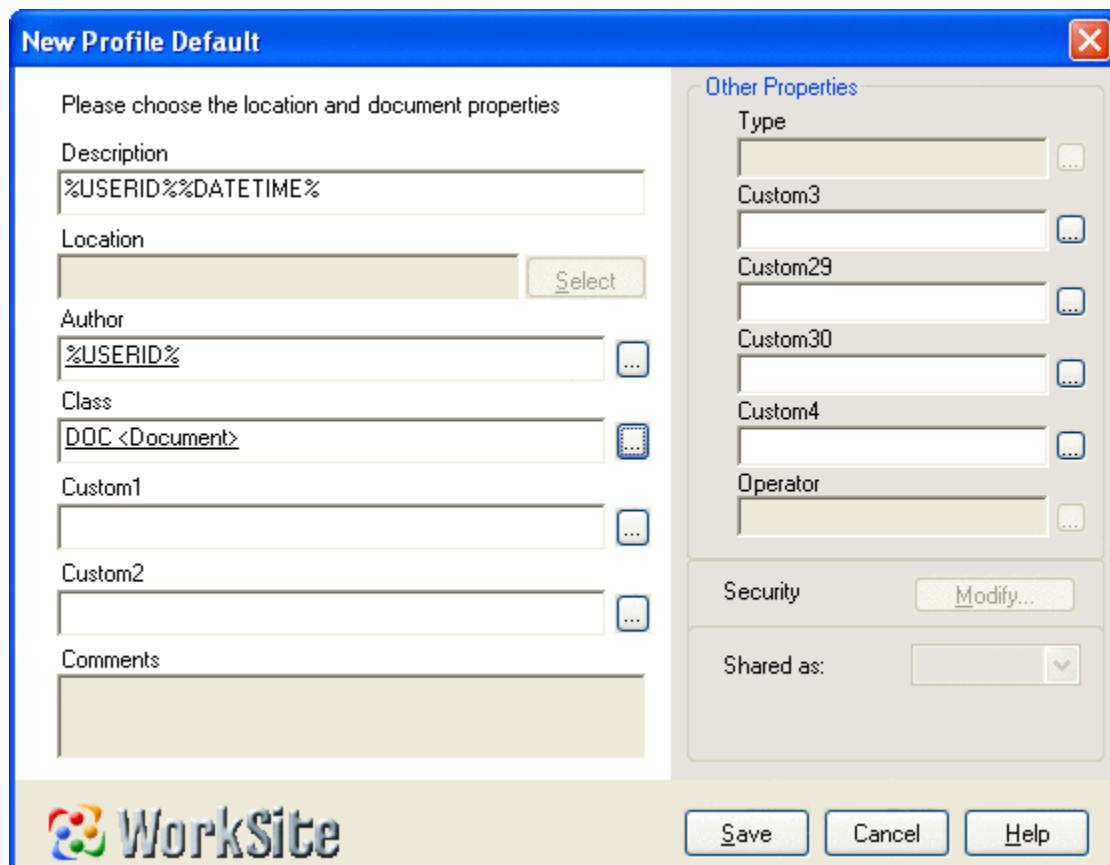
Keyword Variables in Default Profiles

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

Table 26 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 189 for more information on creating default document profiles.

Table 27 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 197 for more information on creating security templates.

To create a new e-mail profile default:

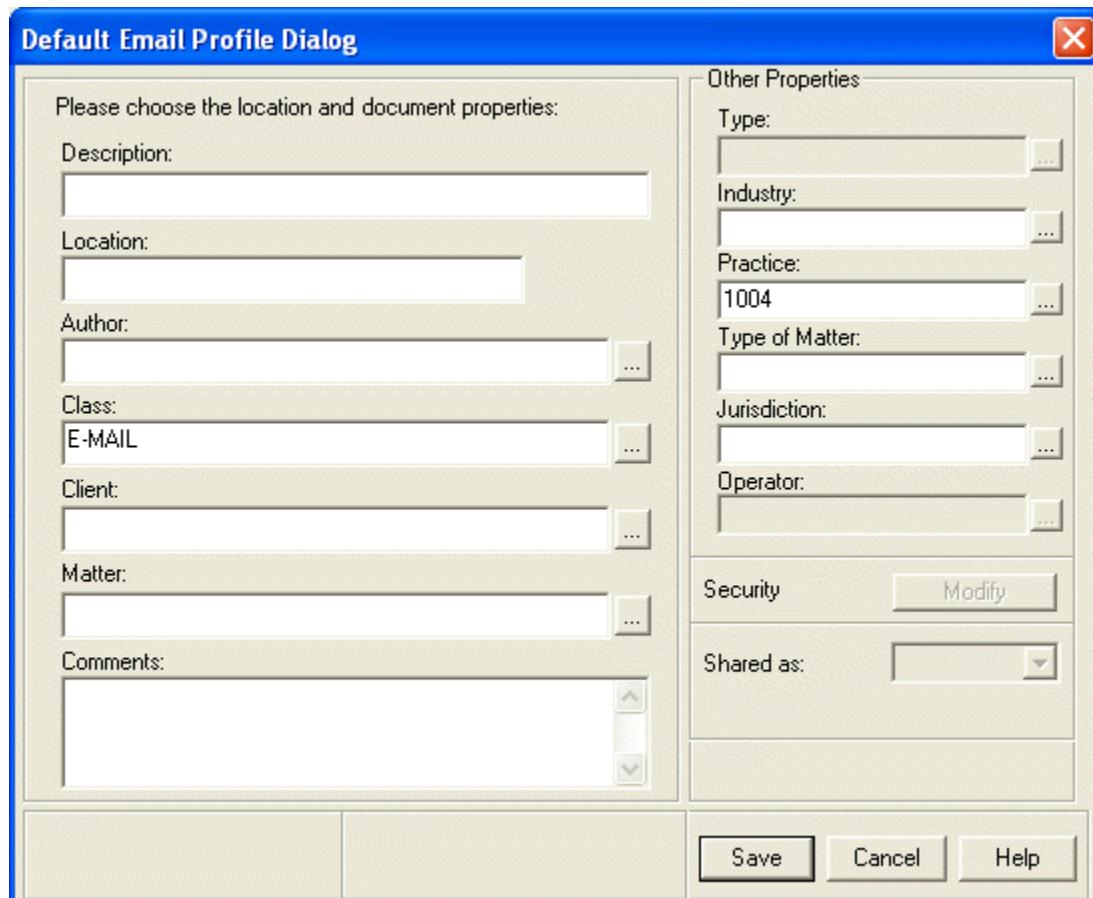
1. From the **WorkSite** menu, point to **Configure**, and select **Email Profile Defaults**.

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 138 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 140](#) 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 26](#) 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 194](#) for more information on creating default e-mail profiles.

Table 28 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 197](#) and “[Applying a Security Template](#)” on [page 200](#) 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 202](#) 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.

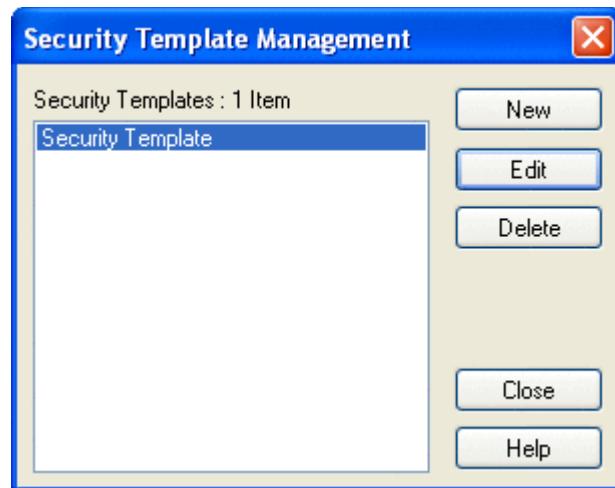
1. From the **WorkSite** menu, point to **Configure**, and select **Security Templates**.

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](#).

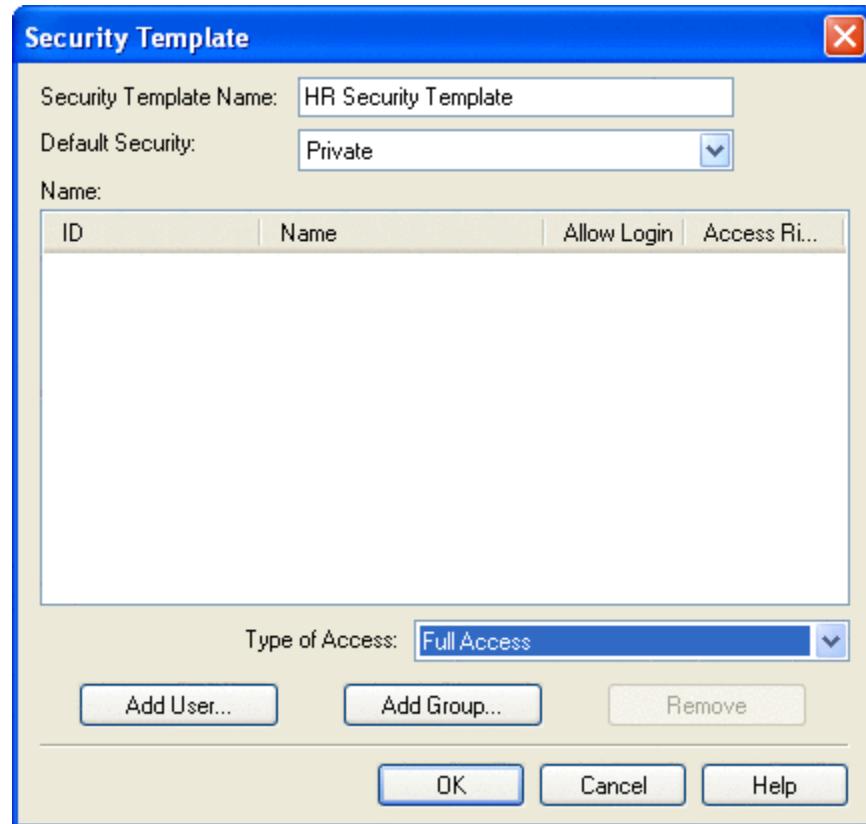
To move between fields in the following dialog boxes, use the **TAB** key, arrow keys, or **ALT** key plus underscored letter.

Figure 94 Security Template Management dialog box



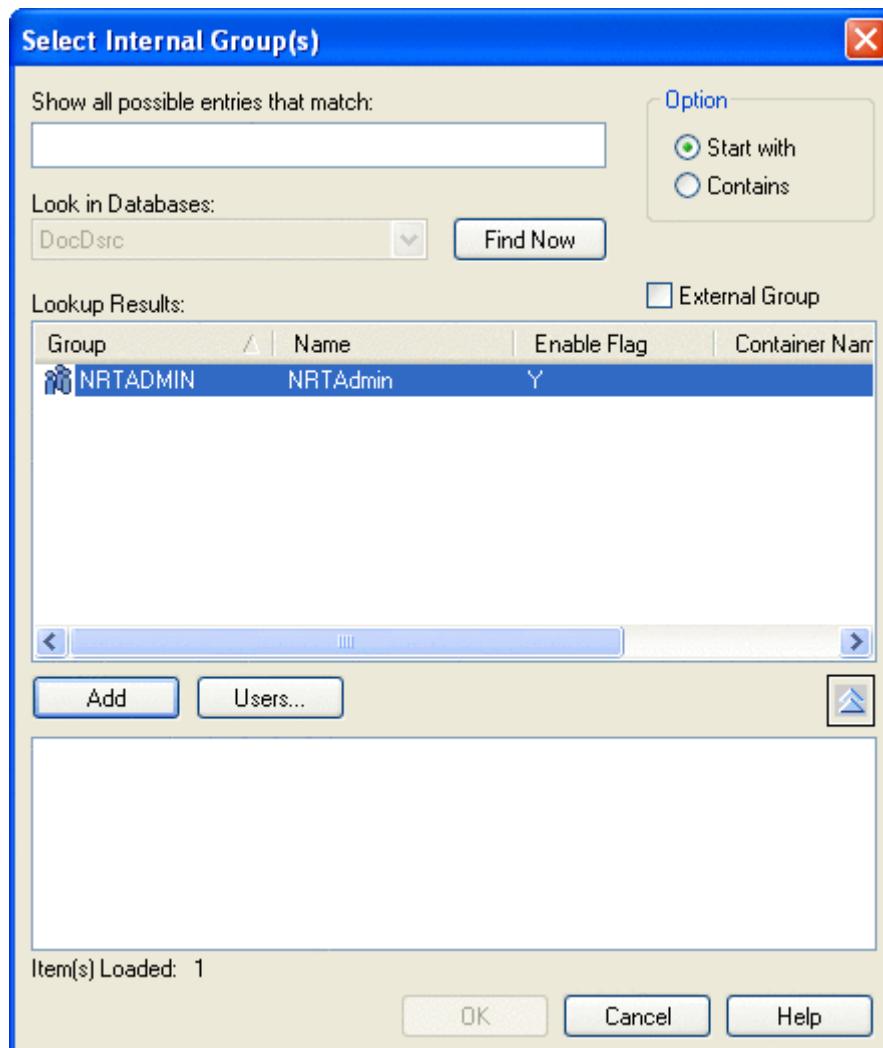
2. Click **New**. This launches the Security Template dialog box.

Figure 95 Security Template dialog box



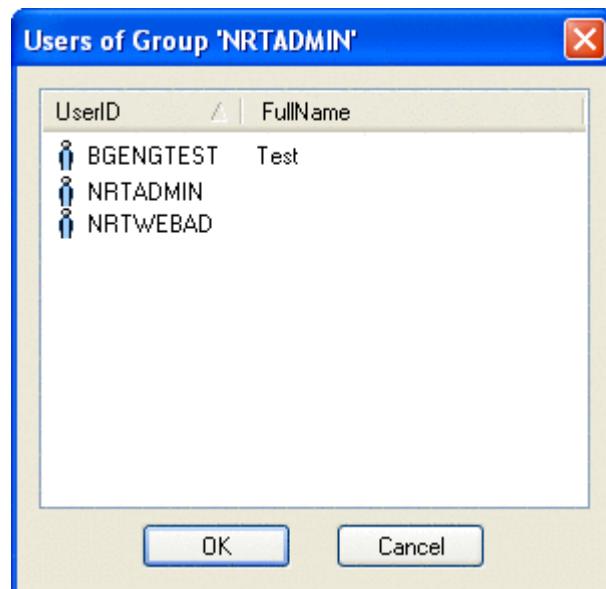
3. Enter a name for the template in the **Security Template Name** field. After you enter the template name the other fields become available.
4. Select a default level of security from the **Default Security** list to assign security access to users who are not accounted for in your explicit access control list. Author and Operator are automatically given Full Access. The default security defaults to **Private**. See ["Default Security" on page 81](#) 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 81](#) 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.



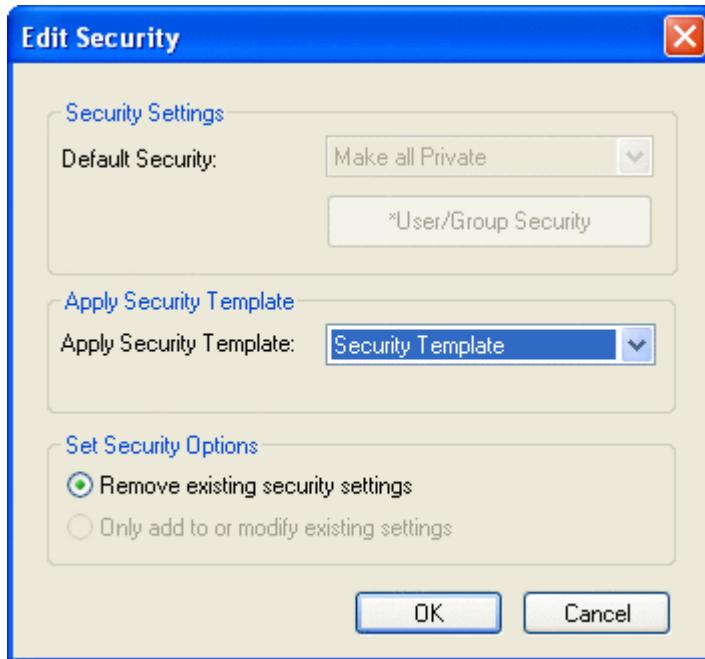
NOTE If the **Security Template** list does not appear in the New Profile dialog box or the New Version dialog box, your WorkSite Administrator must enable this feature.

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**. Keeps 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 140](#) 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



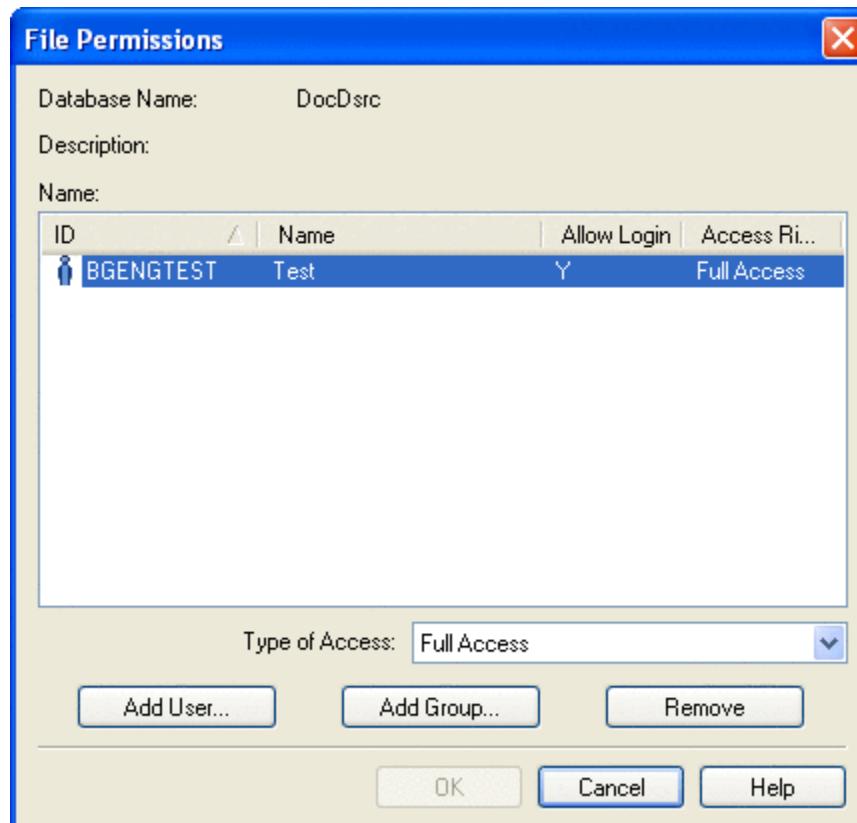
3. Select the Default Security for all the documents from the **Default Security** list. You can select from the following options:
 <no change>

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

See “[Default Security](#)” on page 81 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 81 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.** Keeps 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

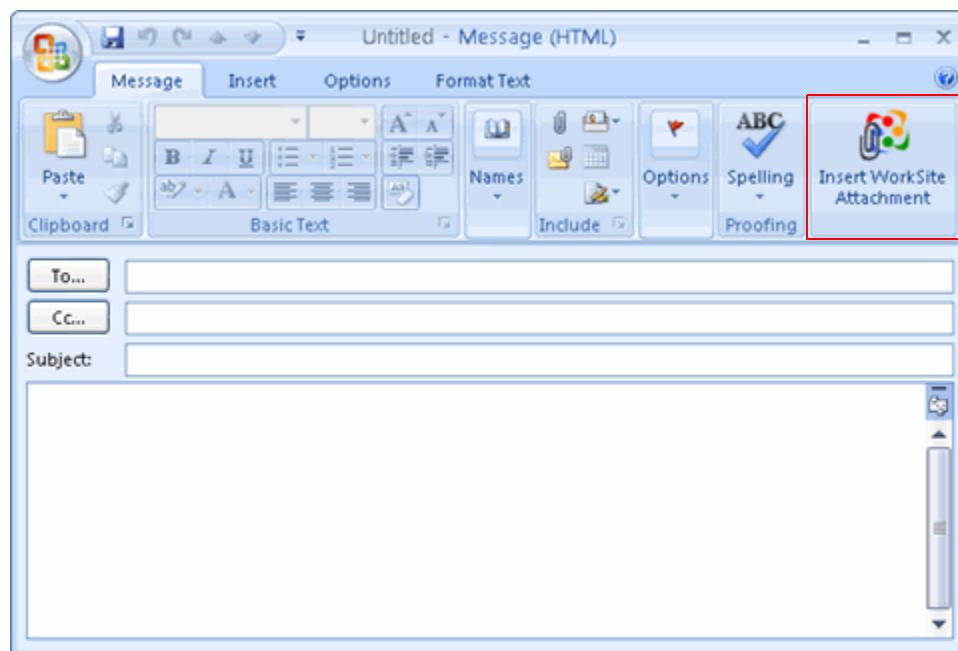
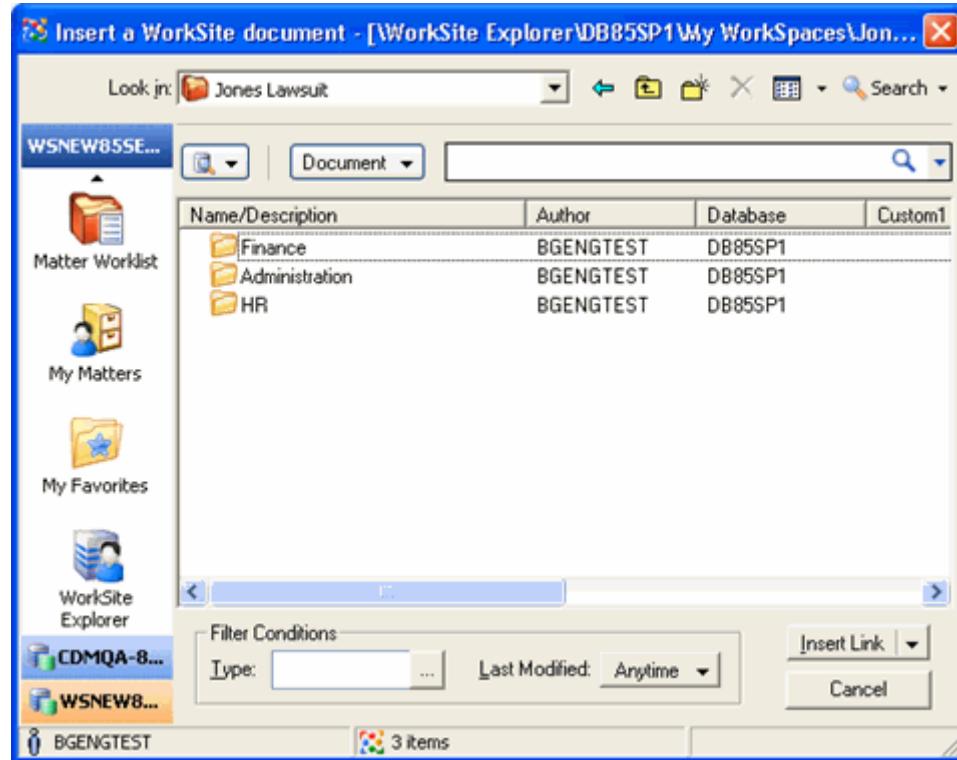


Figure 103 Insert a WorkSite document dialog box

2. Navigate to the document. You can also use the Express Search panel to find the document. See “[Express Search Panel](#)” on page 257 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 105). 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:

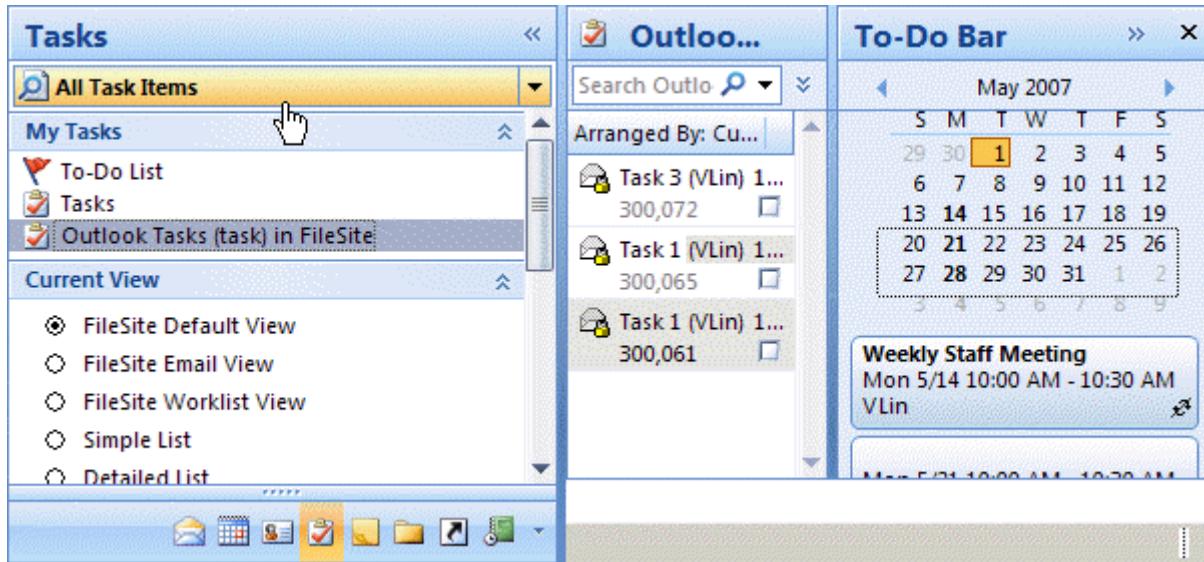
Table 29 Outlook Folder Types

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.

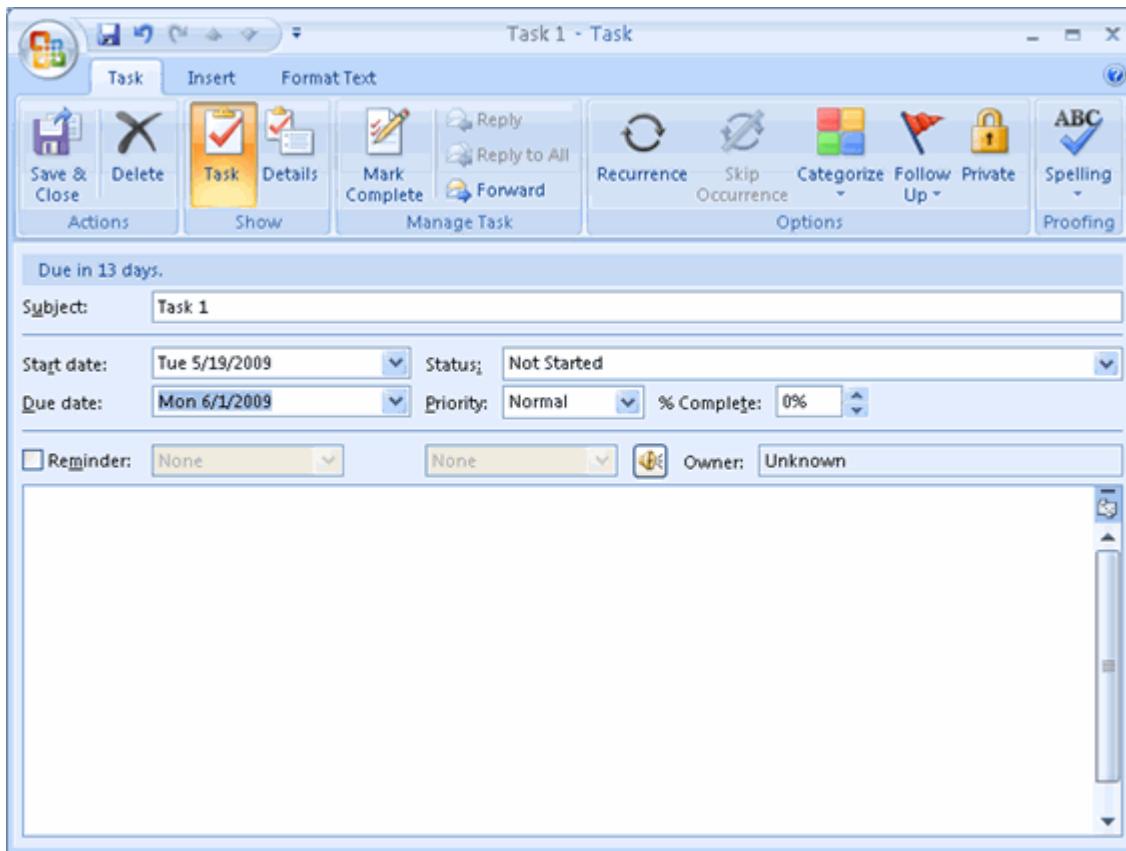
Tasks

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

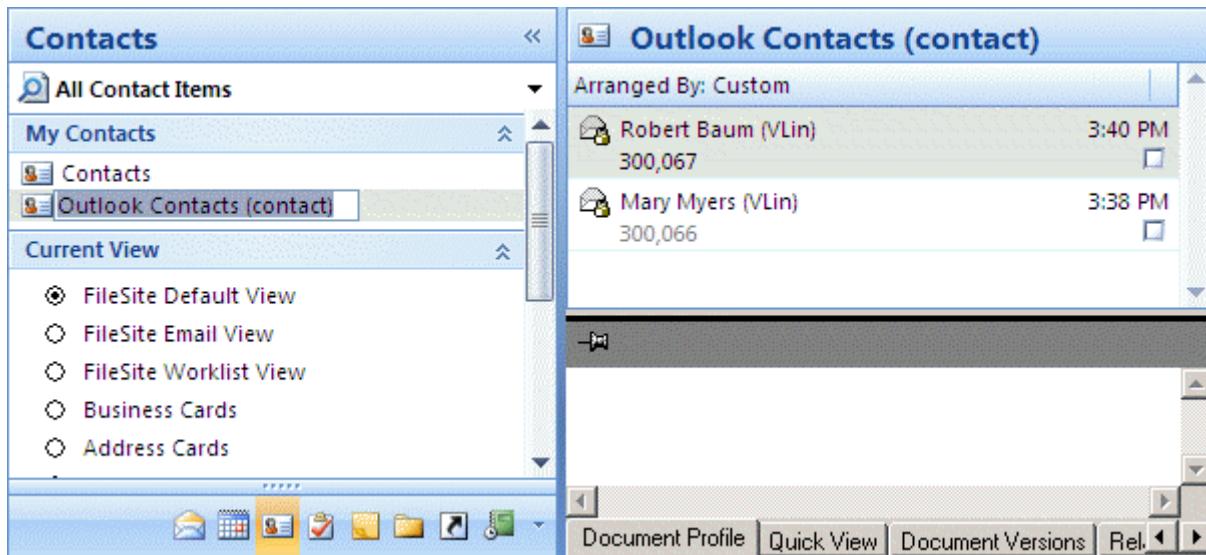
Contacts

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.

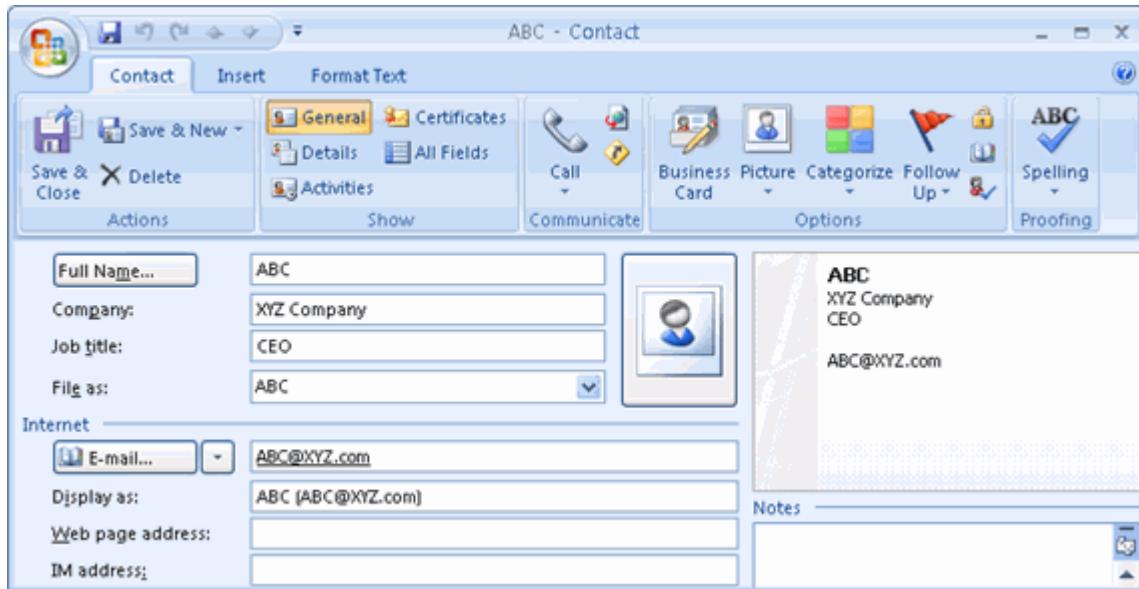


NOTE The special folders are visible in the navigation pane only when the Folder List is displayed. If you do not see the Contacts (contact) folder, click the  Folder List icon at the bottom of the navigation pane to display all folders.

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.

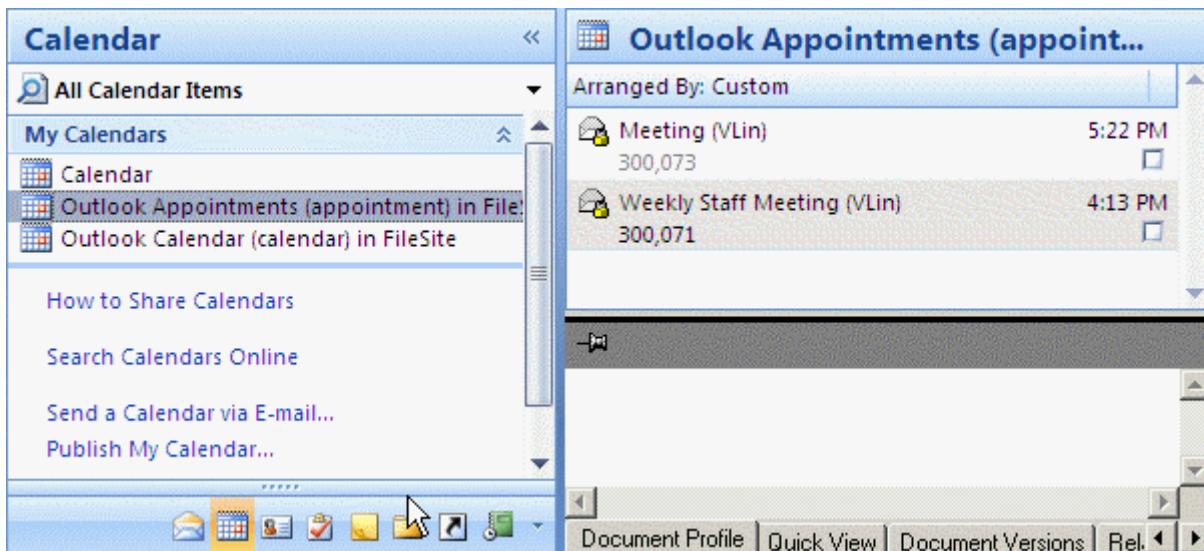


NOTE The special folders are visible in the navigation pane only when the Folder List is displayed. If you do not see the Calendars (calendar) or Appointments (appointment) folder, click the **Folder List** icon at the bottom of the navigation pane to display all folders.

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.

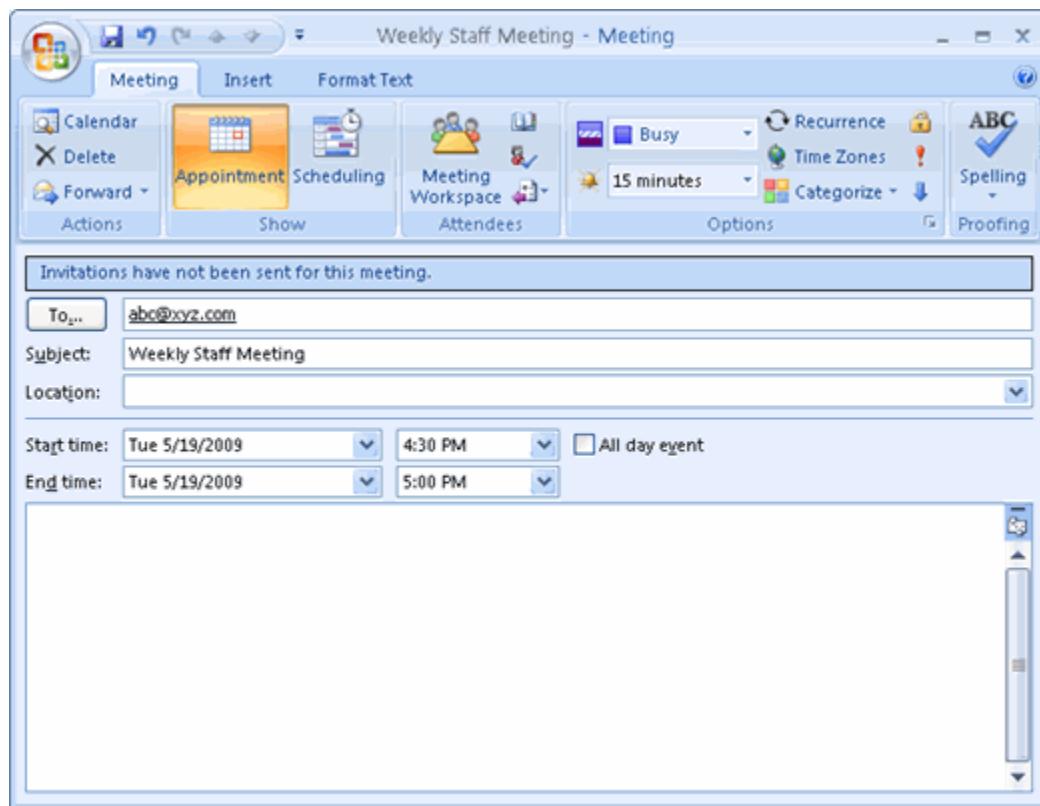
You can view appointments and calendars by clicking the Calendar (calendar) or Appointments (appointment) folder in FileSite. or by clicking the **Calendar** icon at the bottom of the navigation pane and then opening the **Calendar (calendar)** in FileSite or **Appointments (appointment)** in FileSite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

Figure 109 Calendars and Appointments 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



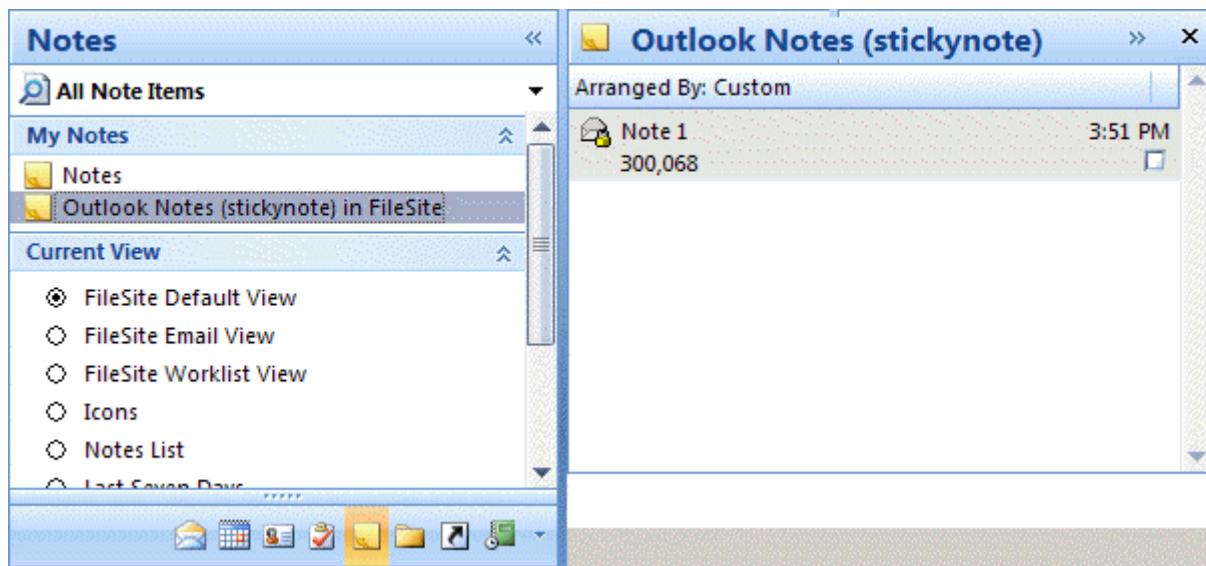
Notes

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.

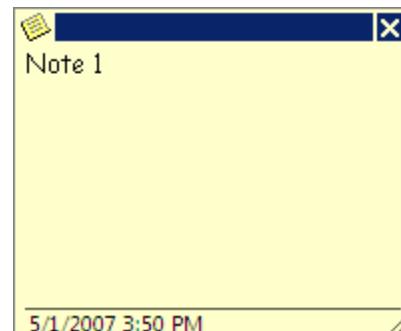


NOTE The Notes (stickynote) folder is visible in the navigation pane only when the Folder List is displayed. If you do not see it, click the  **Folder List** icon at the bottom of the navigation pane to display all folders.

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.

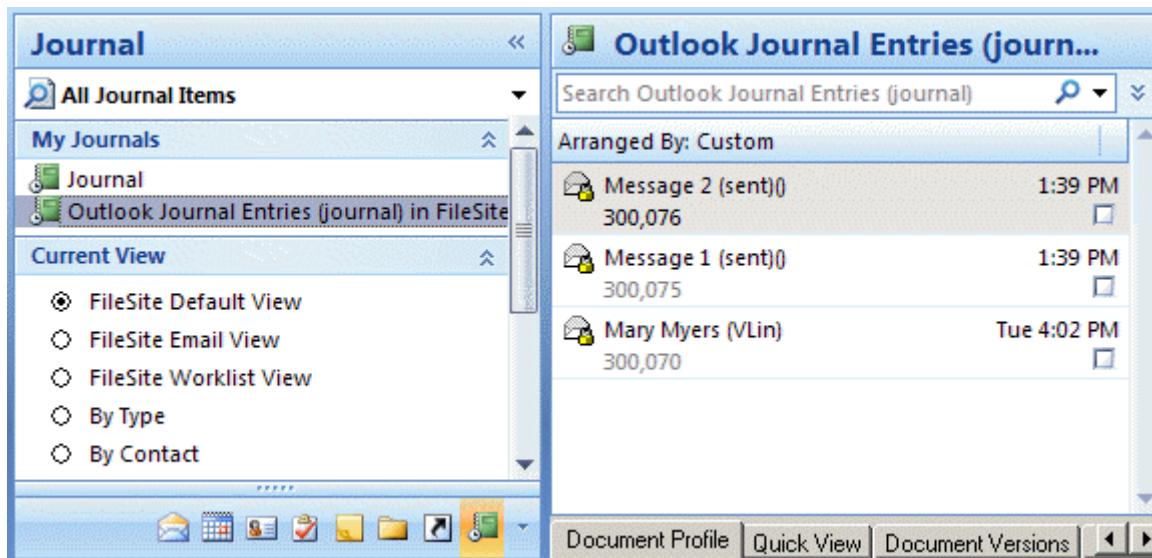
Drag notes from the Outlook Contacts list and save them to the WorkSite library as documents of type E-MAIL. When you perform this operation, a new e-mail message linked to the journal entry opens, and you are prompted to enter profile information for the e-mail and save it to FileSite. You can also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

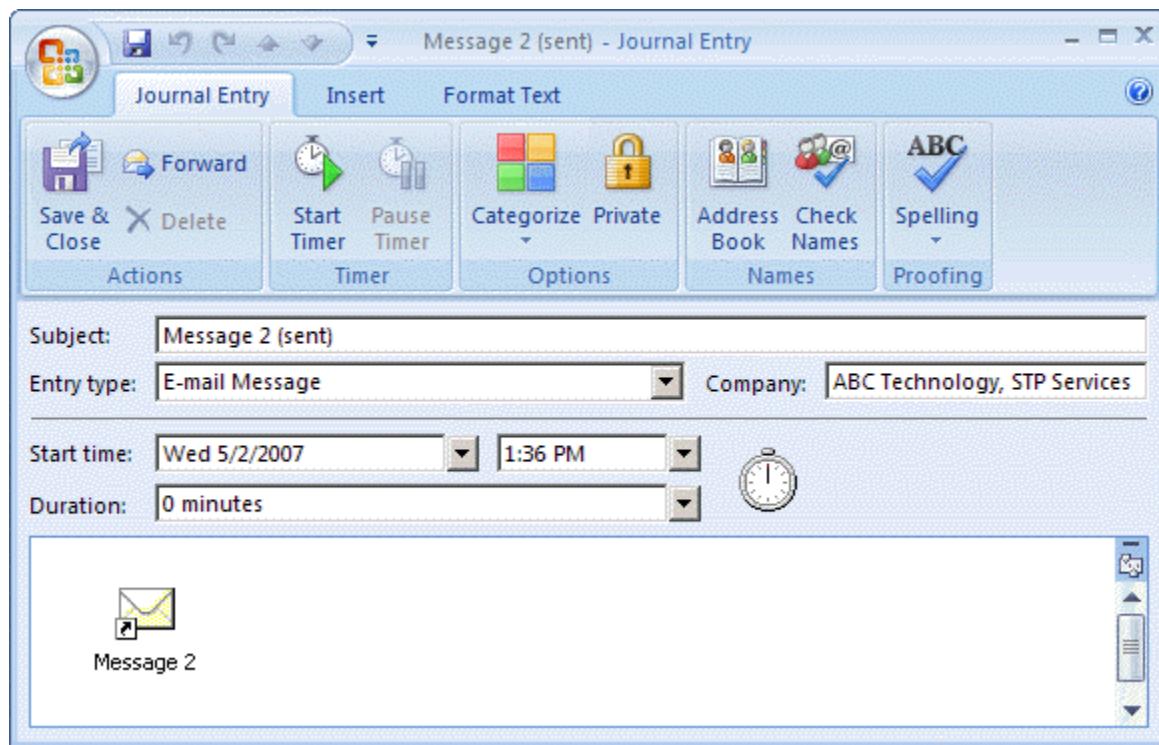
You can view journal entries by clicking the Journal Entries (journal) folder in FileSite or by clicking the  **Journal** icon at the bottom of the navigation pane and opening the **Journal Entries (journal)** Folder in FileSite.

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 Variables

WorkSite supports the following search variables for searching profile information.

%USERID% - populates the current user's ID information

%MYEMAIL% - populates the current user's e-mail address

%MYFULLNAME% - populates the current user's full name

These variables are case sensitive.

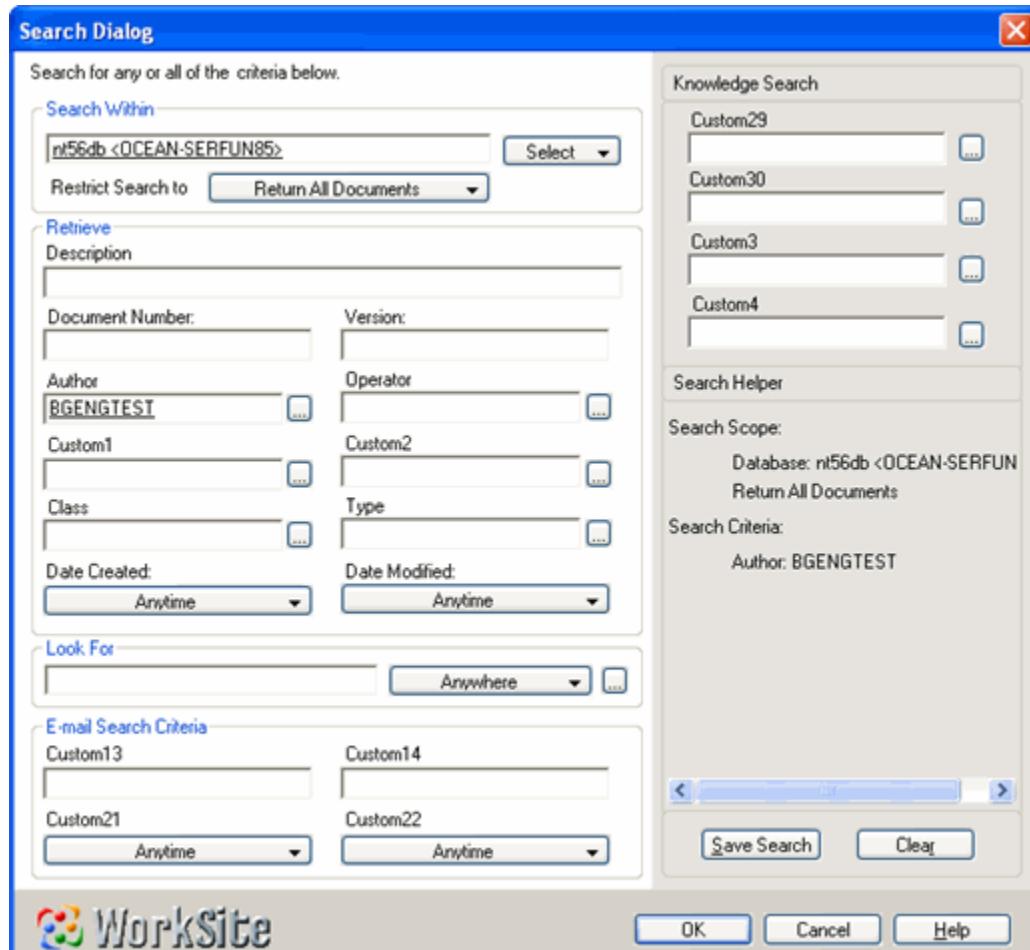
Search Dialog Box

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**.

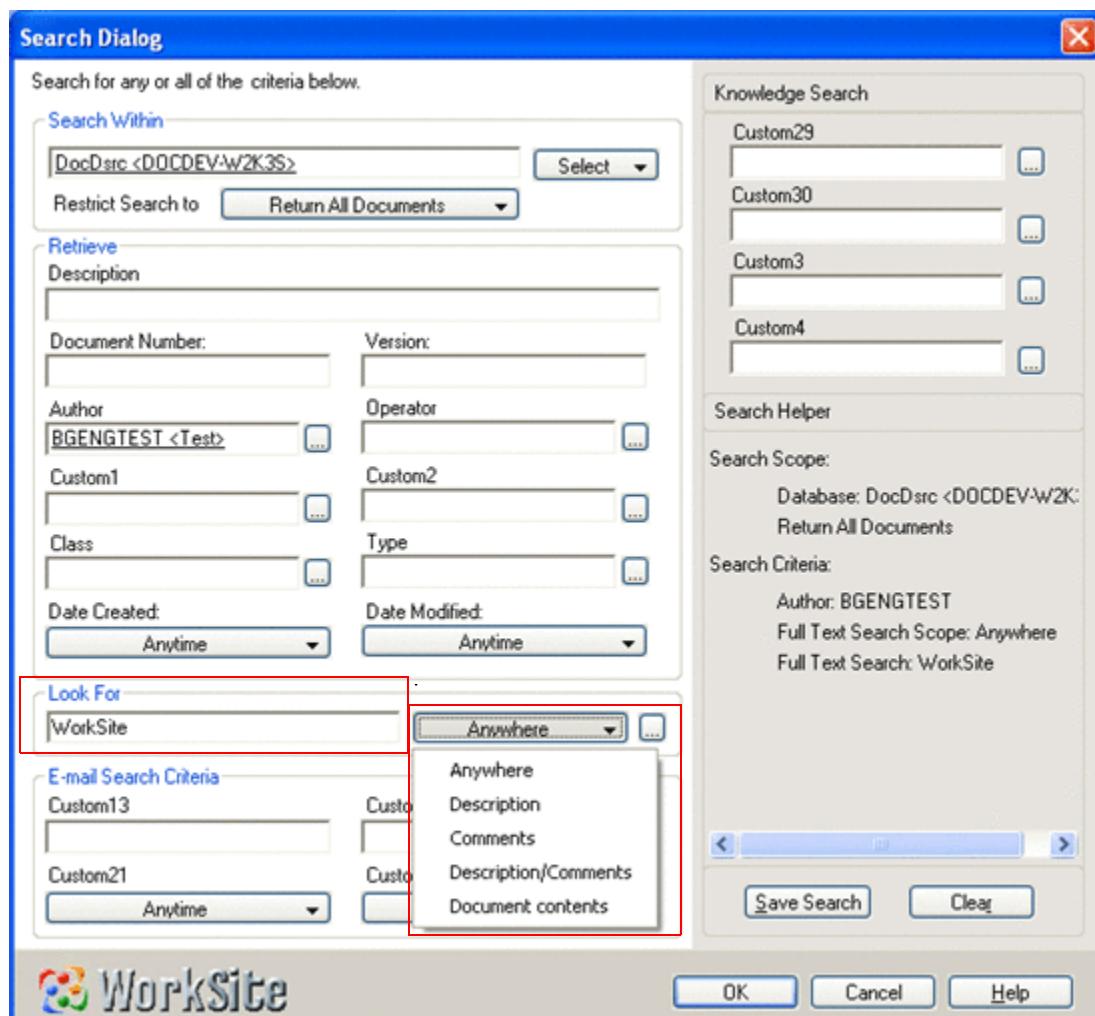
A full-text search can be performed in conjunction with a search on profile information. The search returns documents that meet both the profile search criteria *and* contain the words or phrases specified by the full-text search criteria.



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.

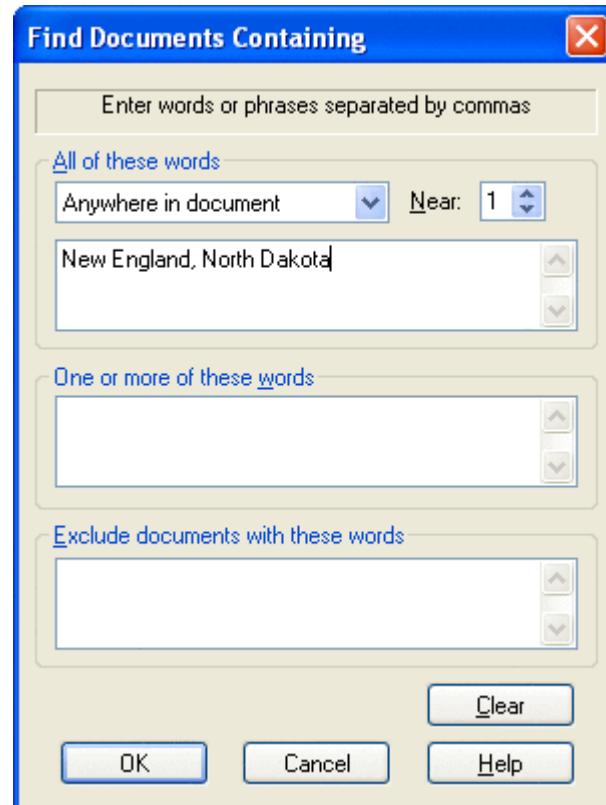
Figure 116 Search dialog box, full-text information



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 30 lists the operators that work only on profile fields.

Table 30 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 than 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 31 lists the search operators supported for full-text searches. All operators must be entered in all UPPERCASE letters.

Table 31 Full-text Search Operators

Search Operator	Description	Example
""	<p>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.</p> <p>When search terms are included in quotes, WorkSite Indexer stems the search terms by default. Stopwords (common words like <i>and</i>, <i>or</i>, <i>the</i>) are removed from queries using quotes.</p>	<p>To find documents that contain the phrase <i>new york</i>, enter:</p> <p><code>"new york"</code></p> <p>If you do not use quotation marks, your results will include matches for <i>new</i>, <i>and</i>, <i>york</i>.</p>
AND	The AND operator locates documents containing both the terms on either side of it.	<p>To find documents that contain the words <i>England</i> and <i>North</i>, enter:</p> <p><code>England AND North</code></p>
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.	<p>To find documents with one or both of the words <i>red</i> and <i>green</i>, enter:</p> <p><code>red OR green</code></p>
NOT	<p>The NOT modifier is used with the AND and OR operators, to exclude documents that contain a given term.</p> <p>Note: In order for the NOT modifier to work, you must first enter a positive search criteria.</p>	<p>To find documents that contain the words <i>mushrooms</i> and <i>olives</i> but not the word <i>anchovies</i>, enter:</p> <p><code>mushrooms AND olives AND NOT anchovies</code></p> <p>The following example query would not return any results:</p> <p><code>NOT anchovies</code></p>
~	<p>Adding a tilde before a search term returns results which match the case of the search term.</p> <p>The <code>AdvancedSearch</code> and <code>AdvancedCaseSearch</code> parameters must be enabled for WorkSite Indexer to process case sensitive searches.</p>	<p>To find documents that contain the word <i>President</i>, enter:</p> <p><code>~President</code></p> <p>Occurrences of <i>president</i> or <i>PRESIDENT</i> would be ignored.</p>
?	<p>The question mark (?) replaces any single alphanumeric character.</p> <p>Note: You can use more than one question mark within a term.</p> <p>Note: If you want a wildcard character to be interpreted as text and not as a wildcard, precede the character with a backslash (\).</p>	<p><code>b?rn</code> would match the words <i>born</i>, <i>barn</i>, or <i>burn</i>.</p> <p><code>sh??e</code> would match the words <i>shore</i> and <i>shade</i>.</p>

Search Operator	Description	Example
*	<p>The asterisk (*) is used as a wildcard operator to represent any number of alphanumeric characters (including none).</p> <p>Note: When using the asterisk wildcard, try to narrow the potential scope of the wildcard entry as much as possible.</p> <p>Note: If you want a wildcard character to be interpreted as text and not as a wildcard, precede the character with a backslash (\).</p>	<p>To find documents about automobiles, enter: auto*</p> <p>Matching documents include words such as auto, automobile, and automotive, but also include autobiography, autocracy, and autograph. A more specific query would be:</p> <p>auto OR automo*</p> <p>Searching for *vert* would return matches for the words convertible, inverted, vertigo, and covert.</p>
()	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.	<p>To find documents that contain either cat or dog.</p> <p>cat EOR dog</p> <p>cat XOR dog</p> <p>Documents which contain both cat and dog are not returned.</p>
NEARn	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.	<p>To find documents with the words red and green within seven words of each other, enter:</p> <p>red NEAR7 green</p>

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

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.

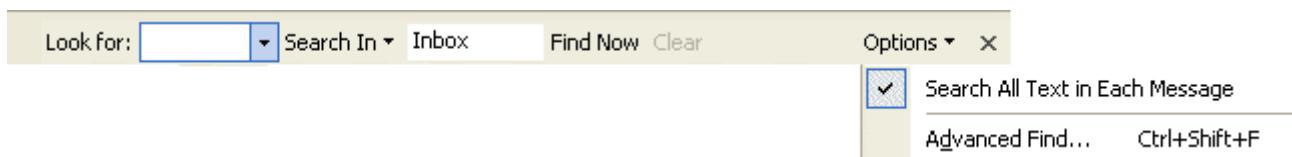


NOTE Using the FileSite desktop, you can search only for the content within a folder, not for a folder itself. Using the WorkSite Integrated Desktop search function, you can search for the content within a folder or the actual folder. See “Search” on page 256 for more information.

Microsoft Outlook Search

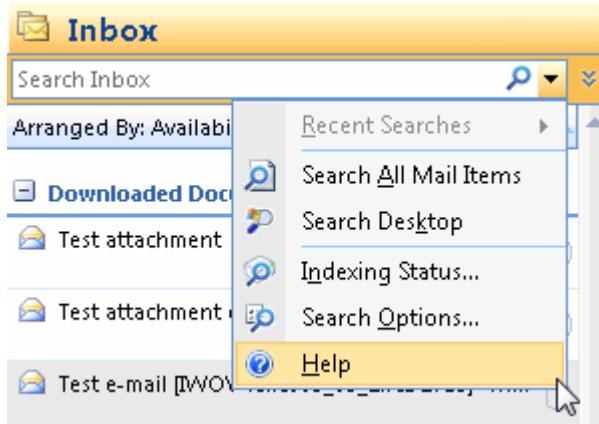
FileSite supports the use of Microsoft Outlook’s native searching functions to search for FileSite documents. From the **Tools** menu, point to **Find** and choose the **Find** or **Advanced Find** option to perform the search.

Figure 118 Microsoft Outlook Quick Search toolbar



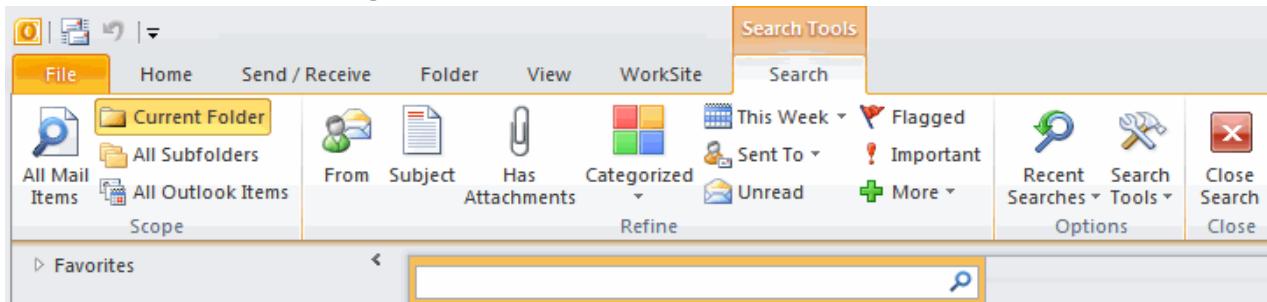
In Outlook 2007, click the **Instant Search** box located under the **Inbox** heading to perform an Outlook search. Click the drop-down menu for search options.

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 117 for more information.
- Viewing the search results. When you select a search folder in the Folder List, FileSite re-runs the search to see whether 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 122 for more information.

WorkSite Container Searches

You can search in WorkSite libraries and other containers for WorkSite objects.

Database Search

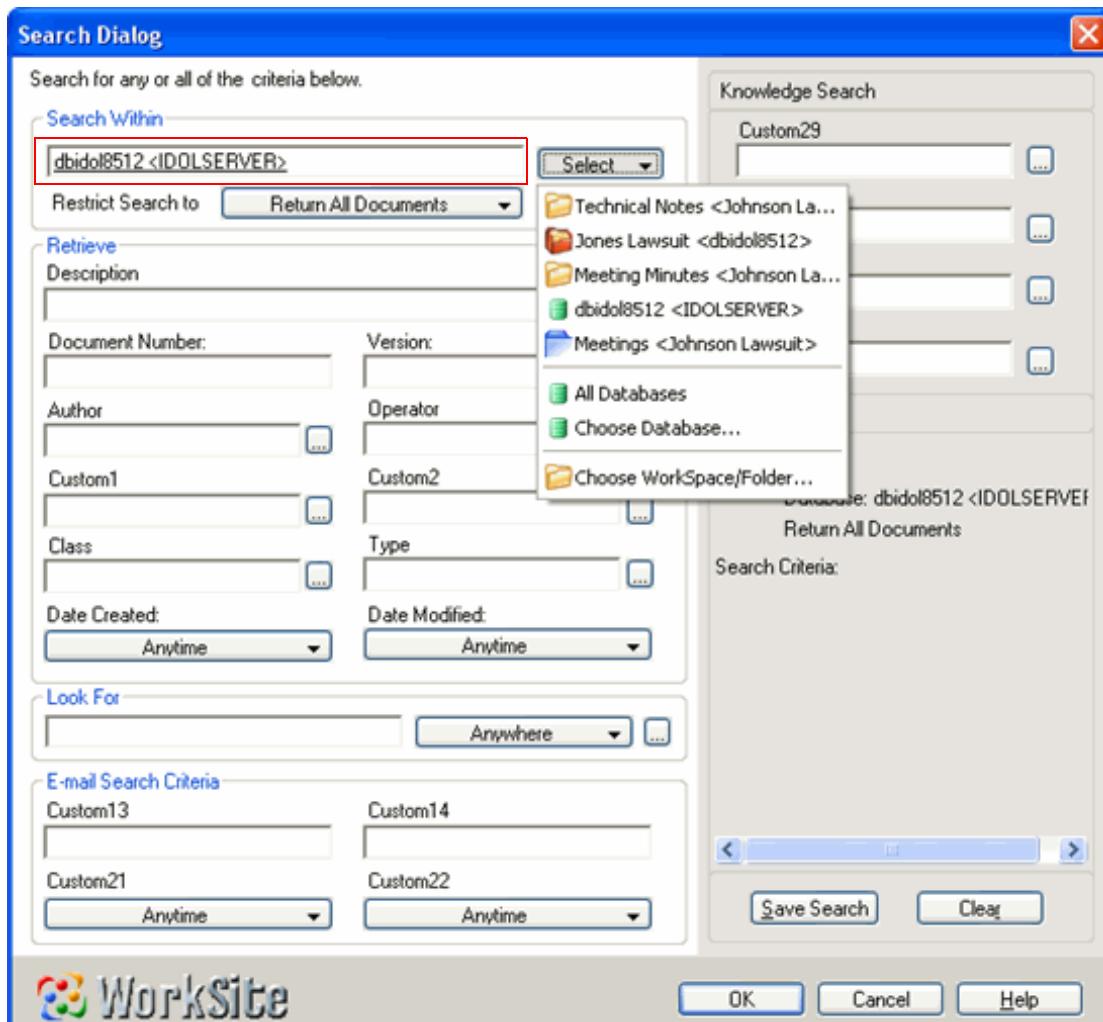
In FileSite, you can perform searches on one or more WorkSite databases/libraries that you are currently logged into. The search results appear in the Document Grid.

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.

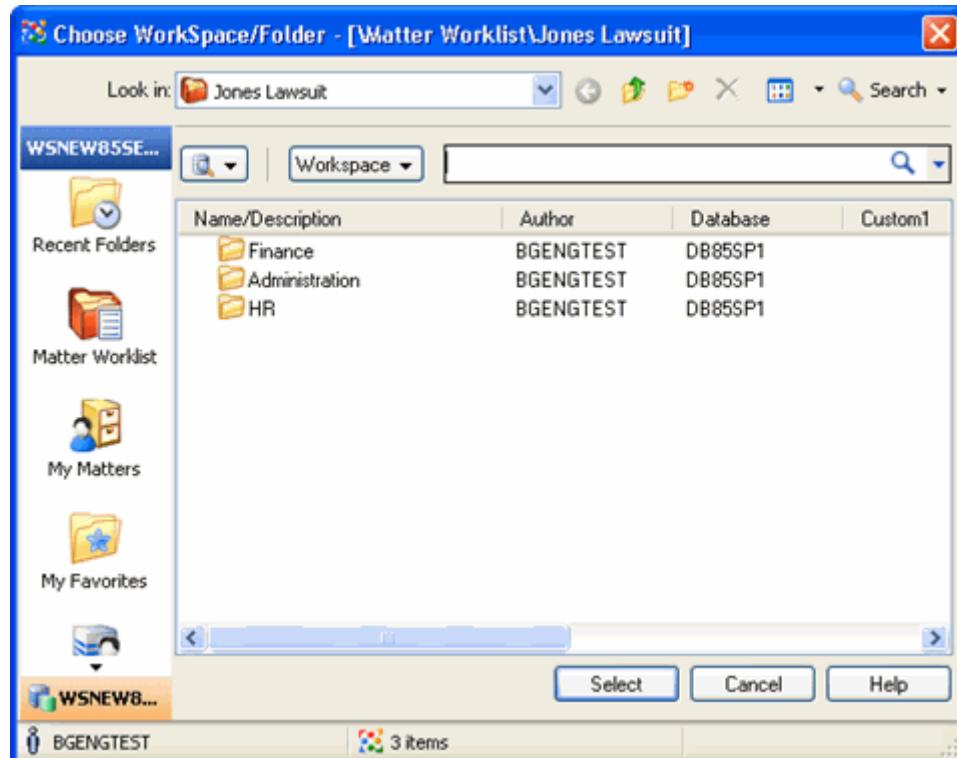
NOTE You can also perform a search on a specific WorkSite library by expanding the

 **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 257 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 117 to continue.

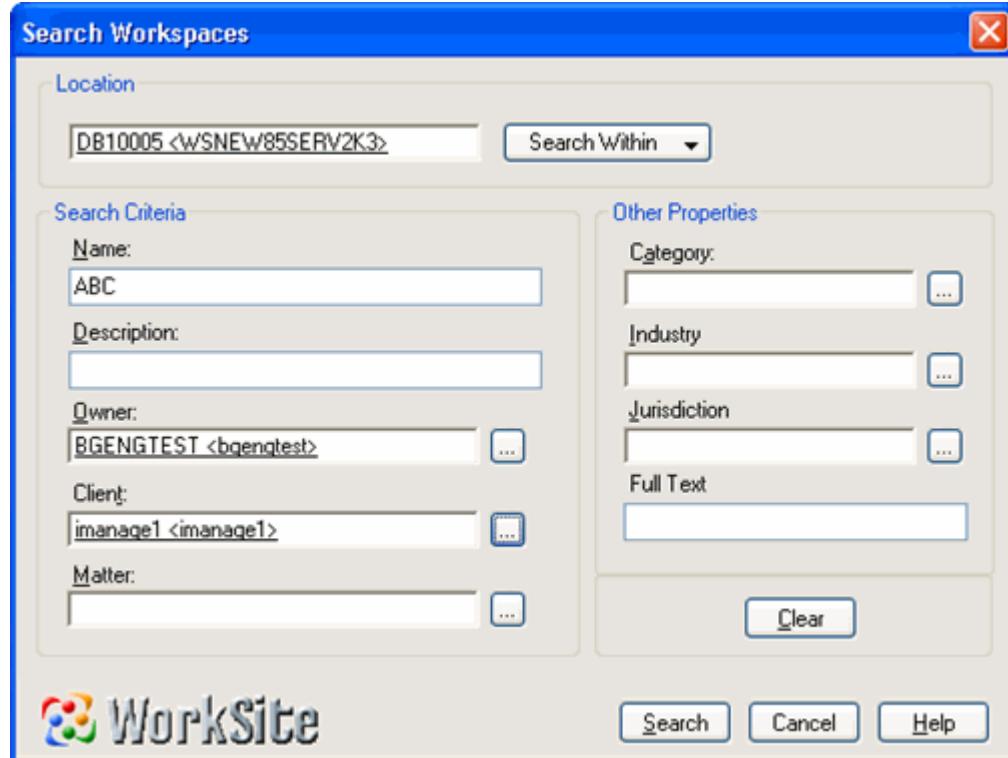
Workspace Search

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



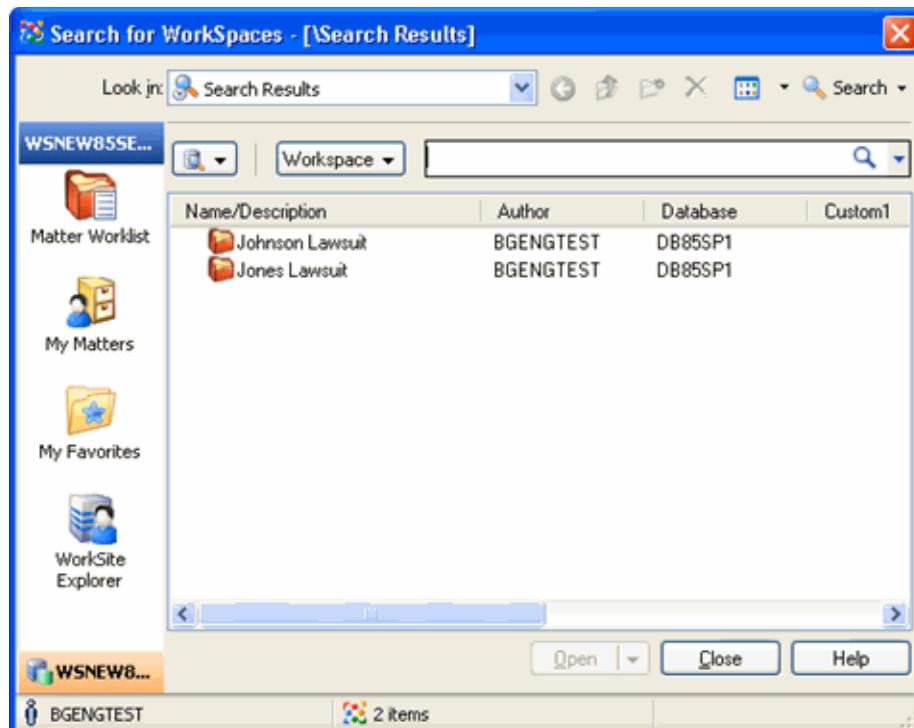
2. Enter profile information search criteria. You can also enter full-text search criteria in the **Full Text** field.



NOTE The Full Text search field is an optional feature that can be added using the Dialog Editor. Refer to the *WorkSite Server Administrator's Guide* for details.

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 233.

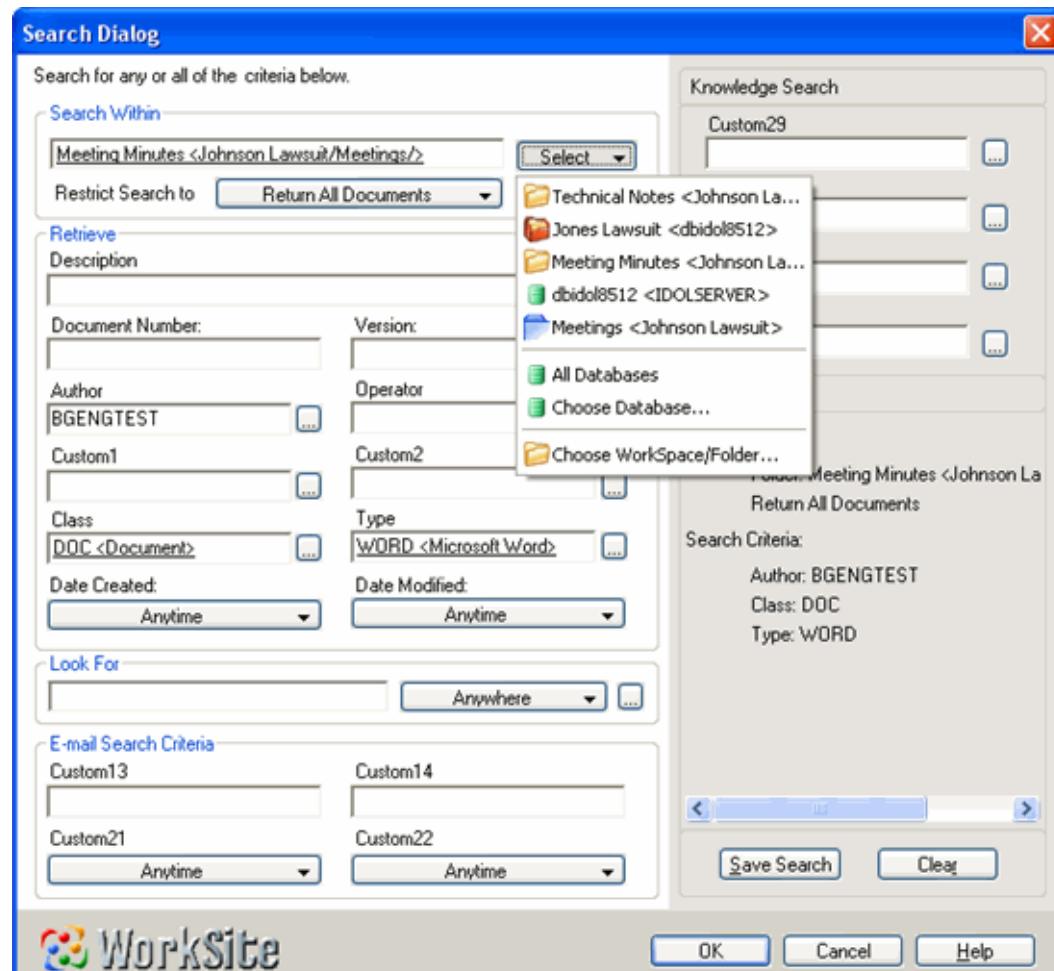
Folder Search

You can search within multiple folders or confine your search to a single document folder. The search results appear in the Document Grid.

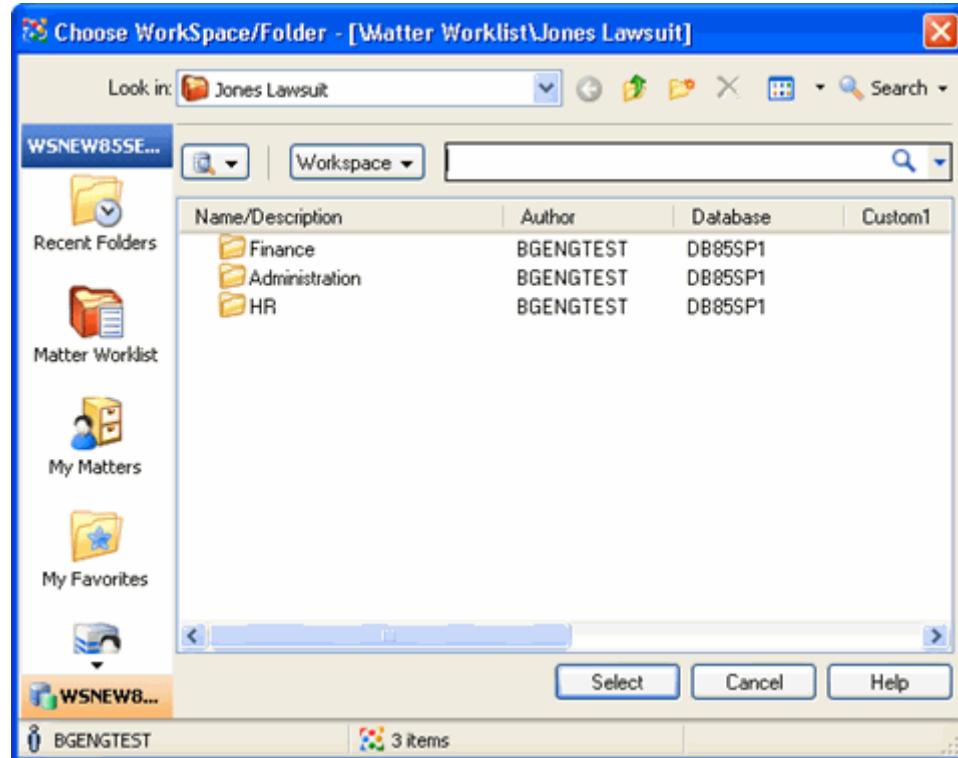


NOTE Using the FileSite desktop, you can search only for the content within a folder, not for a folder itself. Using the WorkSite Integrated Desktop in an integrated application, you can search for the content within a folder or for the folder itself. See “[Search](#)” on page 256 for more information.

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 257 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 uses the same steps as the procedure for saving a database search. See “[Saving a Database Search](#)” on page 233.

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

FileSite and Microsoft Office Integration for WorkSite support Microsoft Office 2007 and Microsoft Office 2010, which have a new look and feel from Office 2003. 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 [Chapter 7 on page 240](#).

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

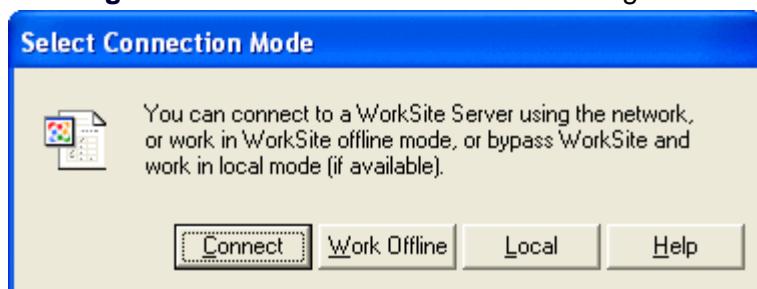
The behavior of the integrated application at startup depends on how your system is configured and whether other WorkSite components are running. The Microsoft Office Integration Module can prompt you to select a connection mode at startup or can automatically start in online mode.

Choice of Connection Mode

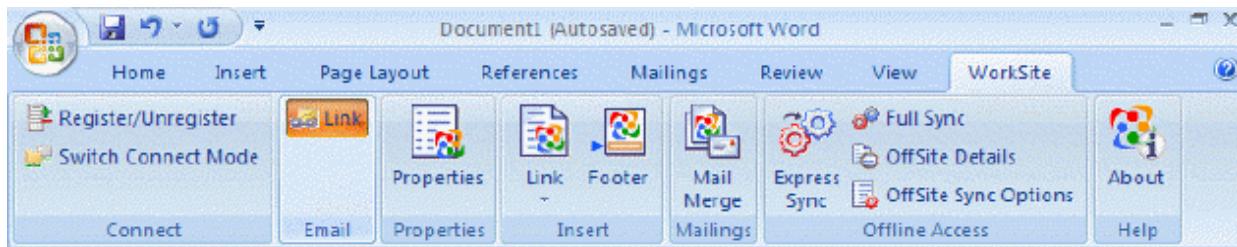
When you launch an integrated application, you are prompted to select the connection mode under the following circumstances:

- 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 127 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 128 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 51](#) 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.

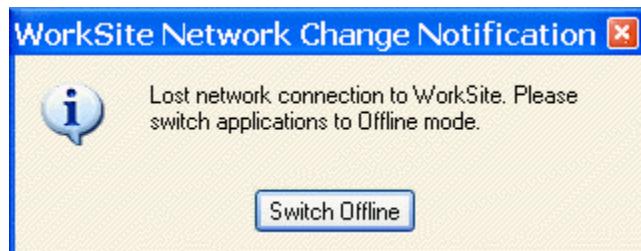
Automatic Online Mode

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 240 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 129 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 130 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 242](#).

 **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 242](#) 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 `$worksuite_install_path$\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.

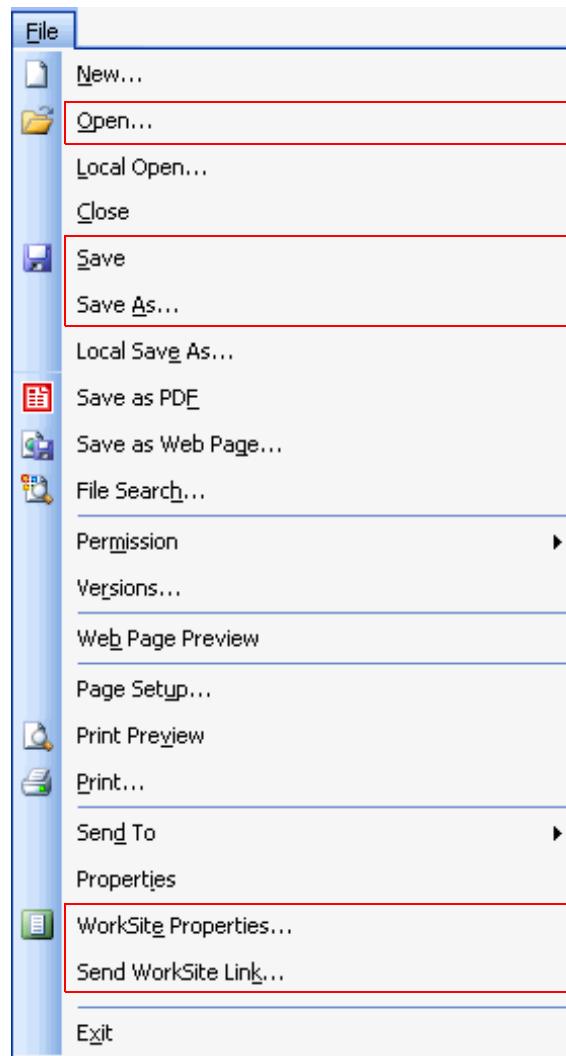
File Menu

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 131](#) illustrates an example of the Microsoft Word **File** menu when actively integrated with FileSite.

Figure 131 Example File menu, Active Integration



NOTE In Office 2007 Integration or Office 2010 Integration, the **Properties** and **Send NRL/URL** 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 253 and “Classic Application Integration” on page 268 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 253 and “[Classic Application Integration](#)” on page 268 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.

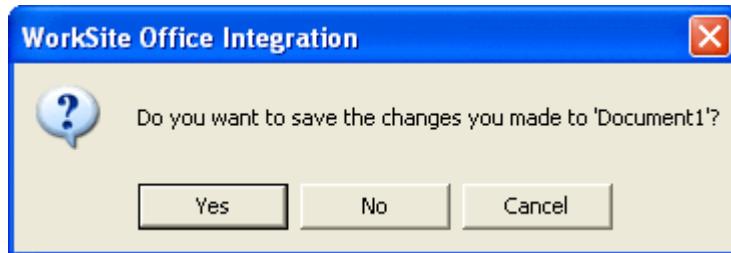


NOTE **Local Save As** may be disabled in selected applications by your WorkSite Administrator.

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 132](#) shows an example of the message that appears when you close a document in an integrated application.

Figure 132 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.

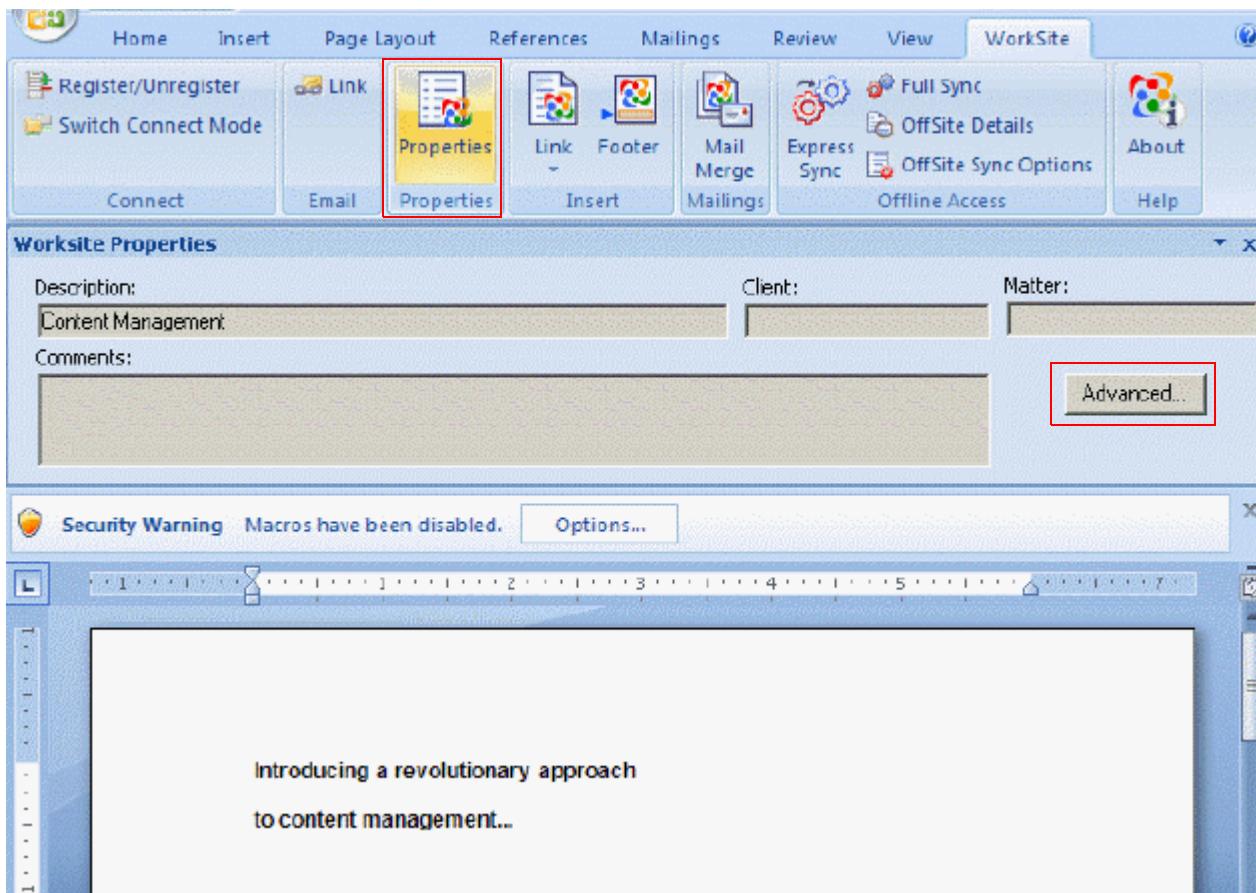
WorkSite Properties

When you select **WorkSite Properties** from the **File** menu, the Properties dialog box for viewing or editing document profile information appears. See [Figure 134](#).

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 133](#).

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 134](#).

Figure 133 WorkSite Properties quick view

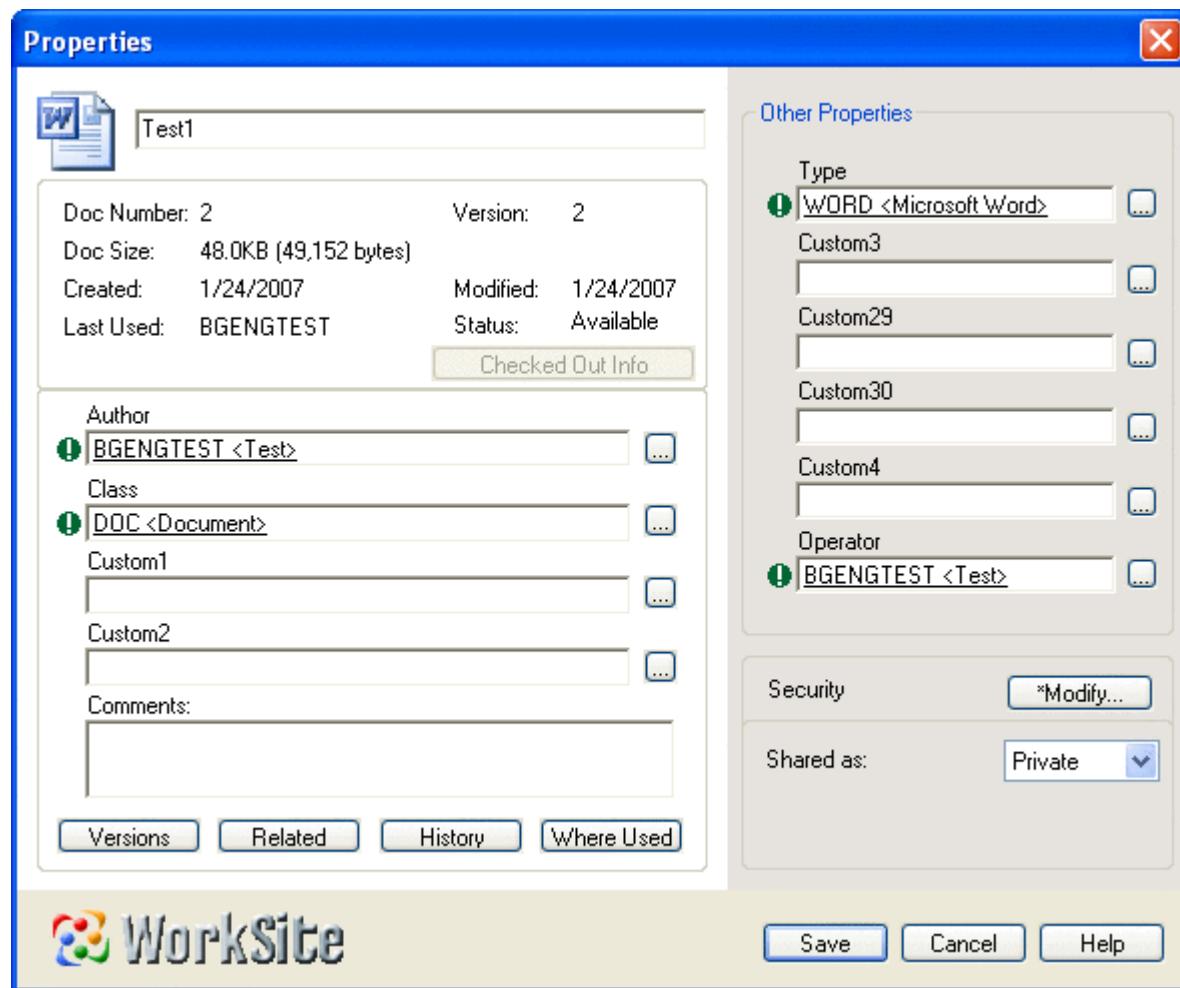


Users who have Read access to a document cannot change the information displayed in the Properties dialog box. Users with Read/Write access can change certain fields, such as the **Comments** field. Only the Author and Operator of a document have the full authority to change the access privileges on 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 134](#).

Figure 134 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.

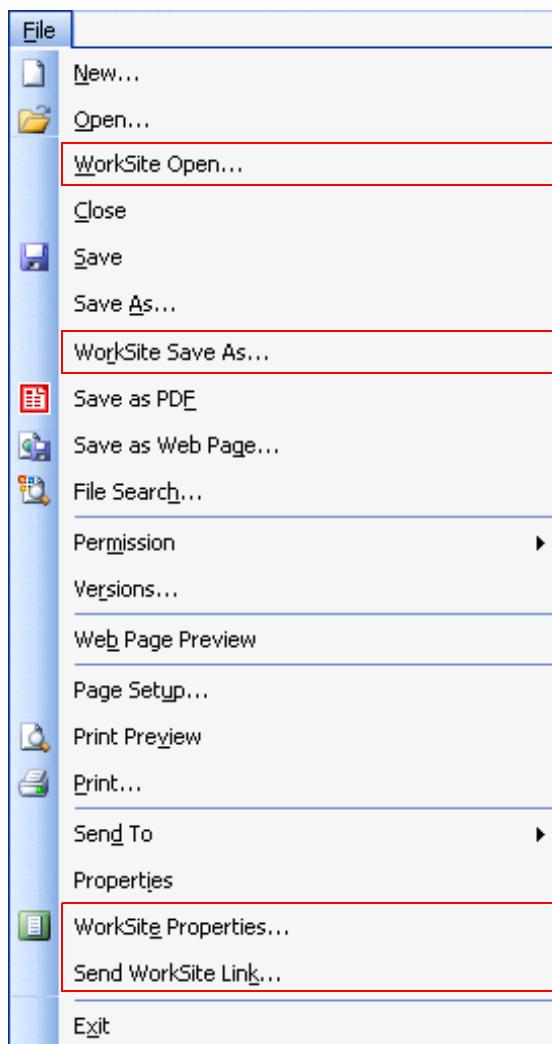
In Office 2007 Integration or Office 2010 Integration, the **Send NRL/URL** option is available from the **WorkSite** tab and the **Home** tab on the ribbon bar.

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 135 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 253 and “[Classic Application Integration](#)” on page 268 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 253 and “[Classic Application Integration](#)” on page 268 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 253](#) for more information.

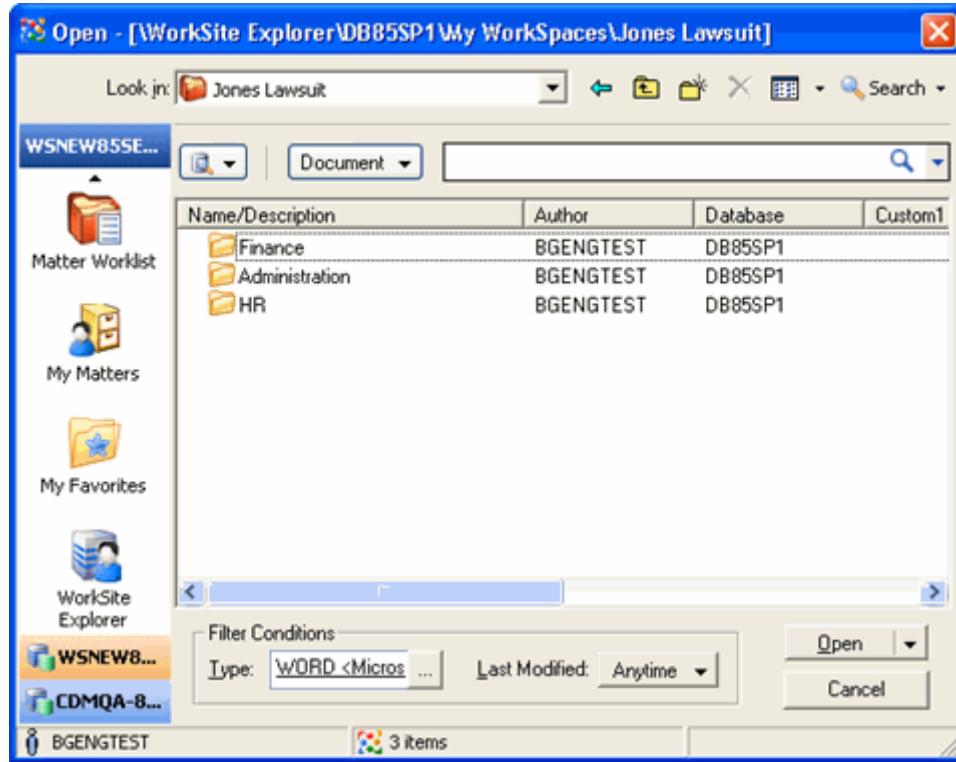
In the Classic Application Integration desktop, you are always prompted to enter document profile information when saving content to WorkSite from an integrated application.

See ["Classic Application Integration" on page 268](#) 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 136 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

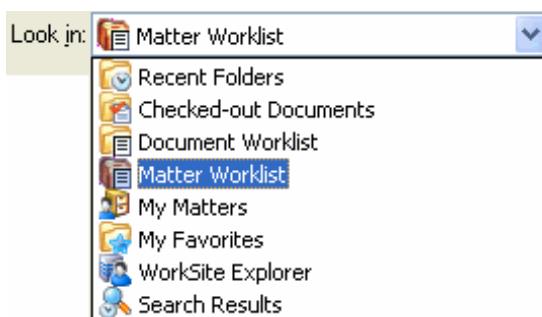
Toolbar

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 137) to start looking for the document you want to open.

Figure 137 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

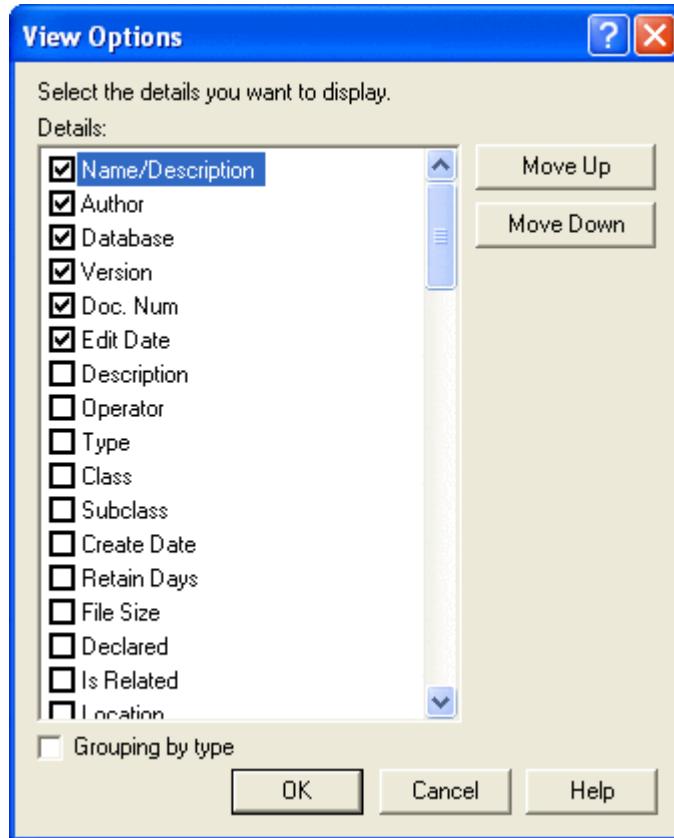
The **Delete** icon is enabled when you have Full Access to the document that is selected in the Document Grid. To delete a document, select the document from the Document Grid and click the **Delete** icon. Users who have Read/Write access can remove a document from the folder but cannot delete it from 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 138 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.

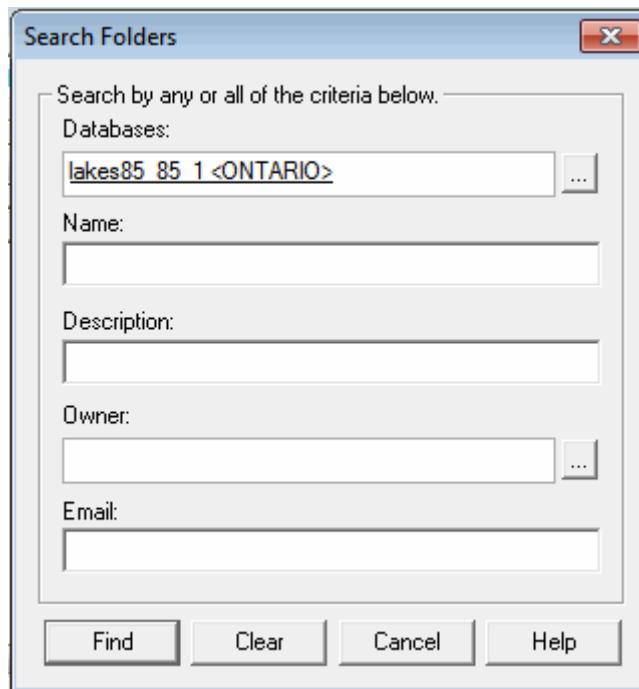
Search

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 257 for information on using this panel to perform searches.
- **Advanced Workspace Search.** Opens the Search Workspaces dialog box. See “[Workspace Search](#)” on page 234 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 139 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 236](#).

- **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:

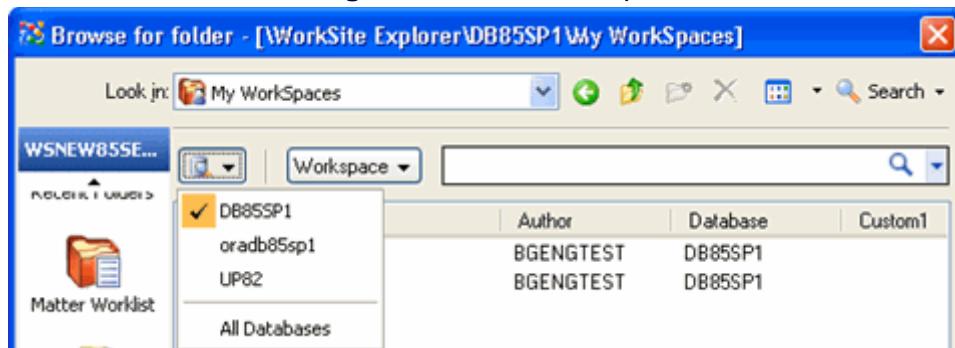
- [Database Scope](#)
- [Type Selection](#)
- [Recent Search](#)

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 140](#).

Figure 140 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.

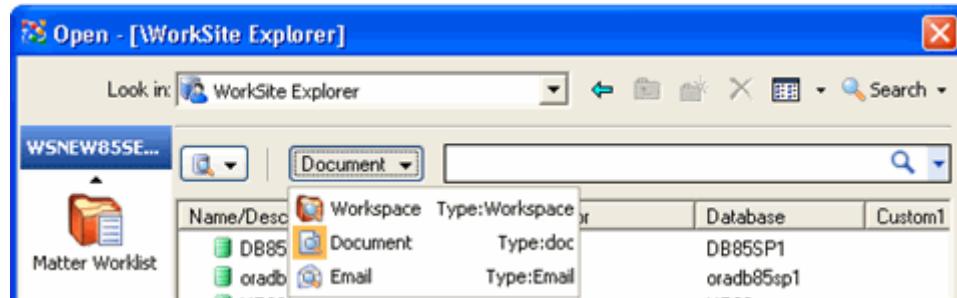


NOTE If you run a search query using the Scope keyword, this query takes precedence over the databases that were selected from the drop-down menu. However, the databases selected from the drop-down menu are retained as your default scope.

Type Selection

You can use the **Type Selection** drop-down menu to select the desired search type (see [Figure 141](#)).

Figure 141 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 142](#)).

Figure 142 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 143](#)).

Figure 143 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 144](#)).

Figure 144 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 144](#). 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 257](#) 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 257](#) 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 140](#) 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 134](#).

Saving Documents

1. To save a new document, select **Save** or **Save As** from the **File** menu of the integrated application. The WorkSite Integrated Save As dialog box appears (see [Figure 146](#)).

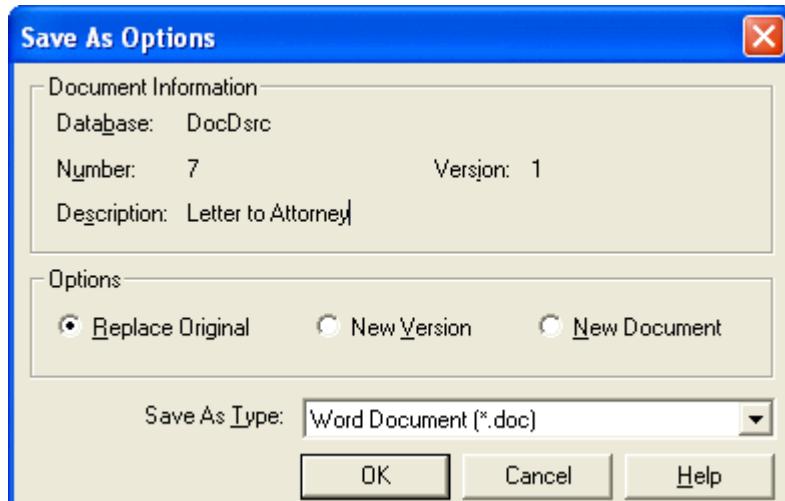
To save an existing WorkSite document that is open in the integrated application, when you select **Save As**, the Save As Options dialog box appears (see [Figure 145](#)).



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.

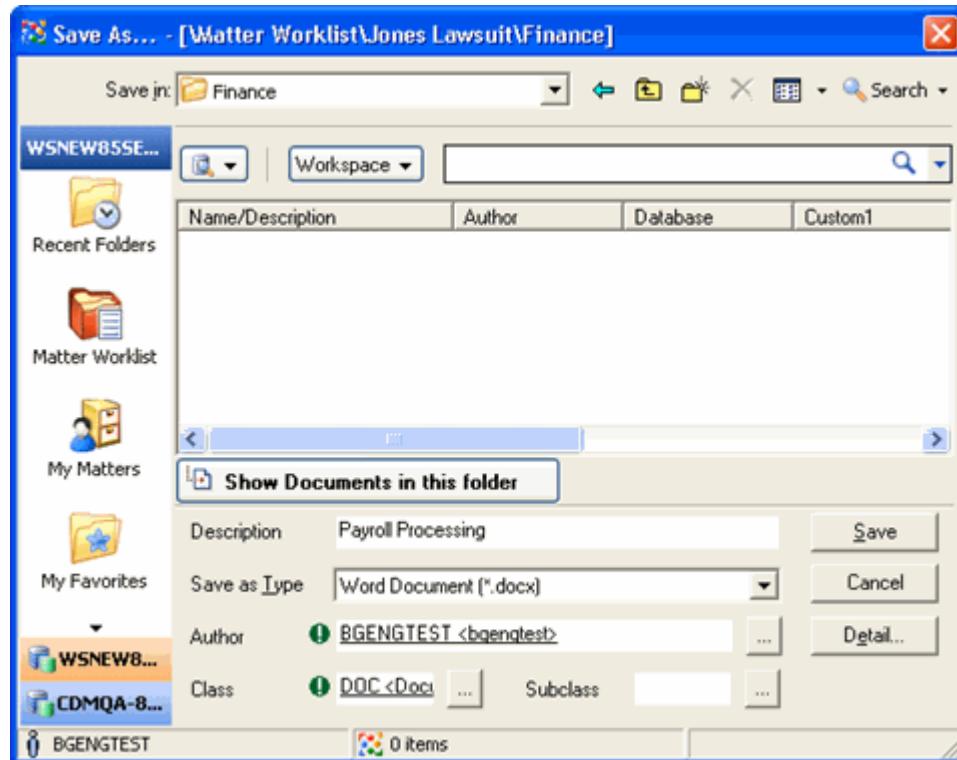
Figure 145 Save As Options dialog box



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 146](#)).

Figure 146 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 257](#) 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 157 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 158 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 154 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 115 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 165 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 170 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 128 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 128 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 128 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 178 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 147 Open dialog box on the Classic Integrated Desktop

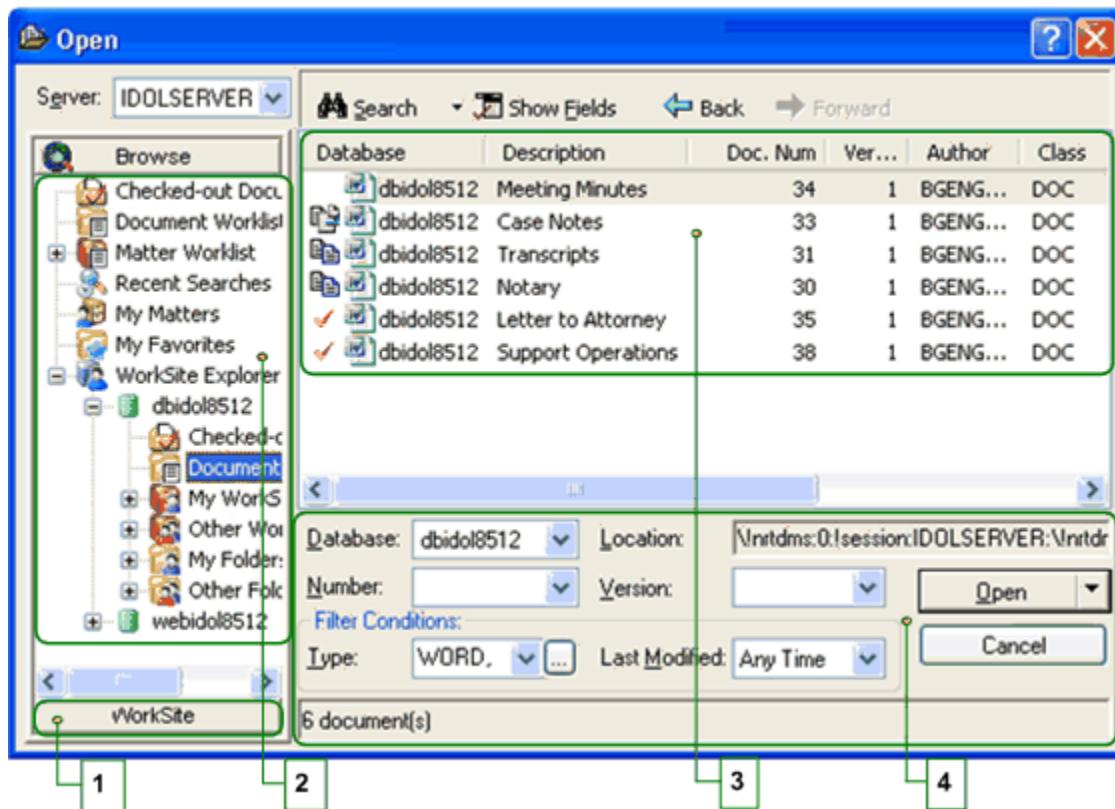


Figure 147 consists of the following elements:

- 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 70 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 262](#) for information on the other document functions.

Opening Documents

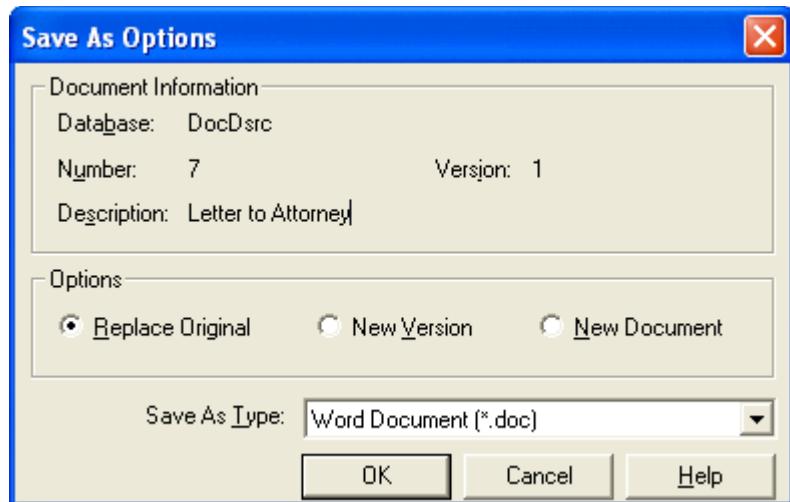
To use the Classic Integrated Desktop to access a document in WorkSite, select the document in the Document Grid and click **Open** at the bottom of the desktop. By default, FileSite opens the document when you click the **Open** button. Other options are available from the **Open** menu:

- **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 148 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.

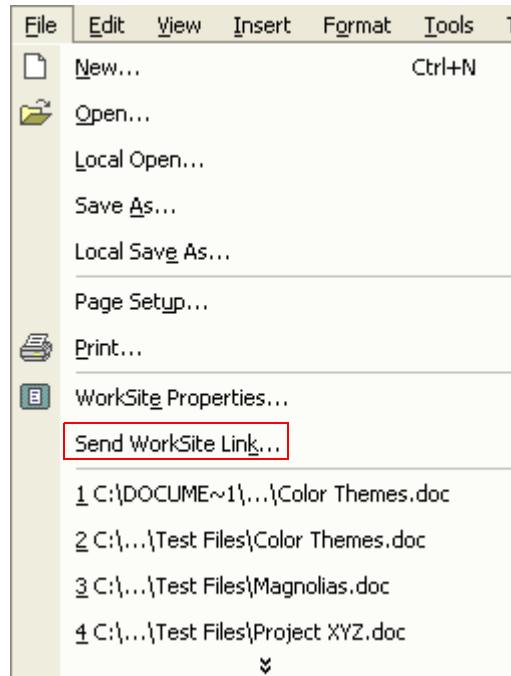
Working with WorkSite Links in Office Integration

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 149 Microsoft Word integrated File menu



In Office 2007 Integration or Office 2010 Integration, the **Send NRL/URL** option appears on the **Home** tab and the **WorkSite** tab of the ribbon bar.

Edit Menu

From the **Edit** menu, you can perform the following operations in WorkSite documents containing linked objects (see [Figure 150](#)):

- Importing Documents containing Linked Objects
- Editing Links in Documents containing Linked Objects
- Replacing Links in Documents containing Linked Objects

Figure 150 Edit menu

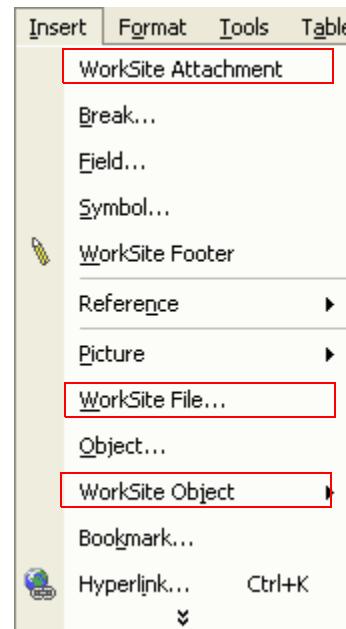


Insert Menu

From the **Insert** menu, you can perform the following linking functions:

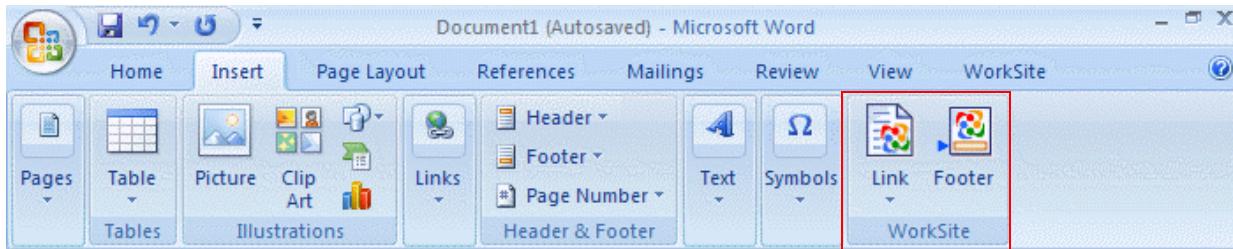
- Inserting links in documents
- Inserting files in documents
- Inserting hyperlinks in documents

Figure 151 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 152 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 276.
- **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 153 Example Insert Link menu on WorkSite ribbon bar



See [Chapter 8](#) for more detailed information.

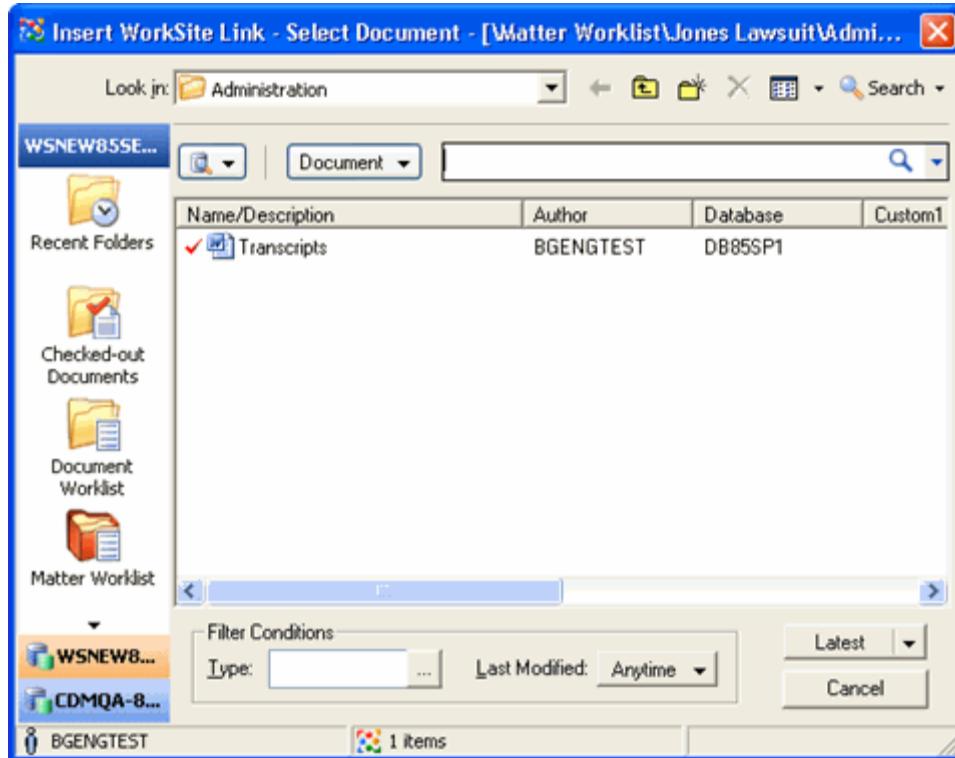
Inserting a WorkSite Hyperlink

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 153](#)).

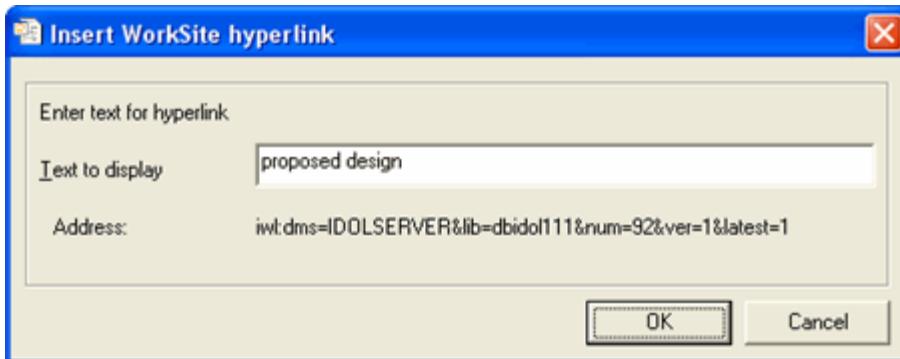
Figure 154 Insert WorkSite Link dialog box



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 155 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 153 on page 275](#).

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 32](#).

Table 32 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

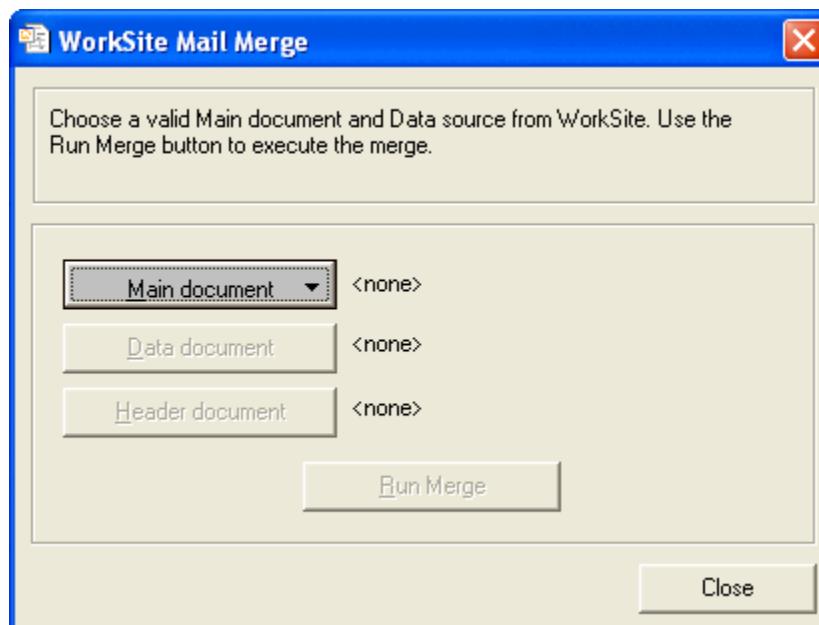


NOTE You may want to display the Microsoft Word Mail Merge toolbar and use the buttons when performing a WorkSite Mail Merge.

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 156 Example WorkSite ribbon bar, Mail Merge option

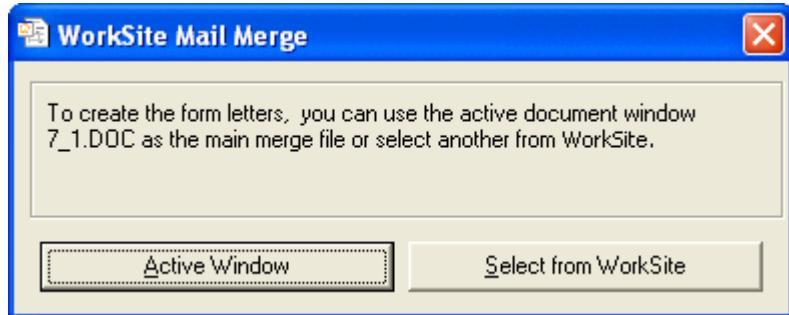
The WorkSite Mail Merge dialog box appears.

Figure 157 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.

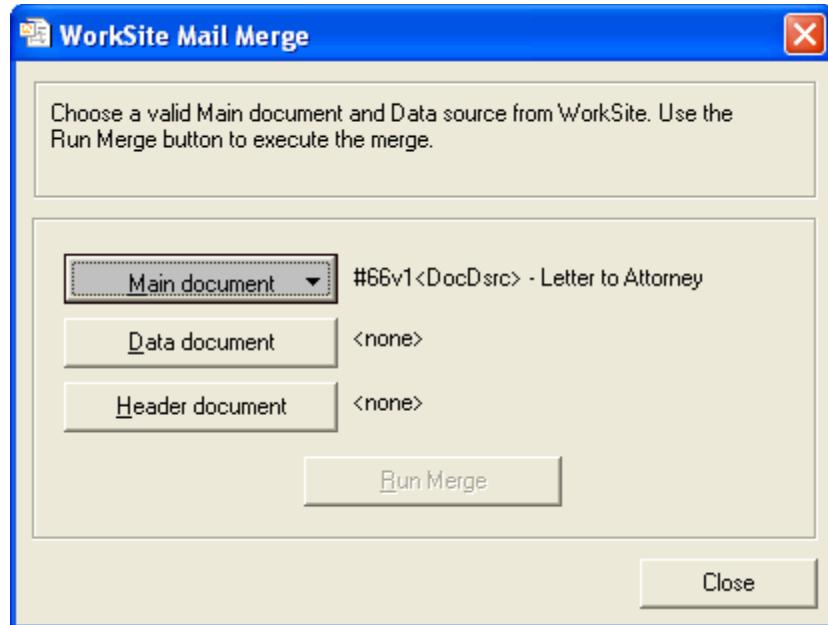
The following dialog box opens.

Figure 158 WorkSite Mail Merge dialog box, Main document selection

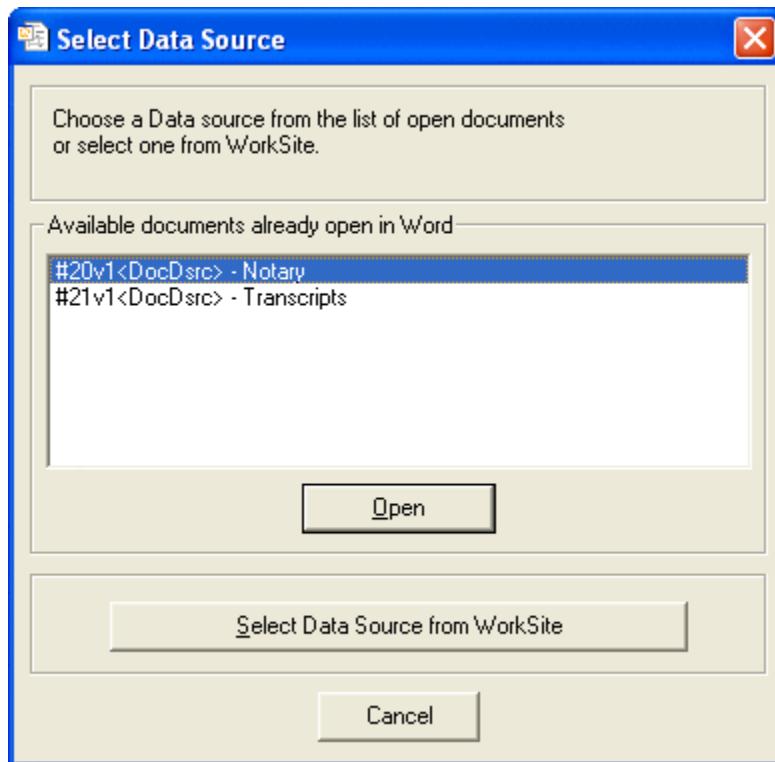


3. If your Main document is in WorkSite, click **Select from WorkSite**. The WorkSite Integrated Open dialog box opens.
4. Browse and open the document from the WorkSite Integrated Open dialog box. The WorkSite Mail Merge dialog box opens with the selected document name appearing against the **Main document** button, as shown in [Figure 159](#).

Figure 159 WorkSite Mail Merge dialog box, Main document selected

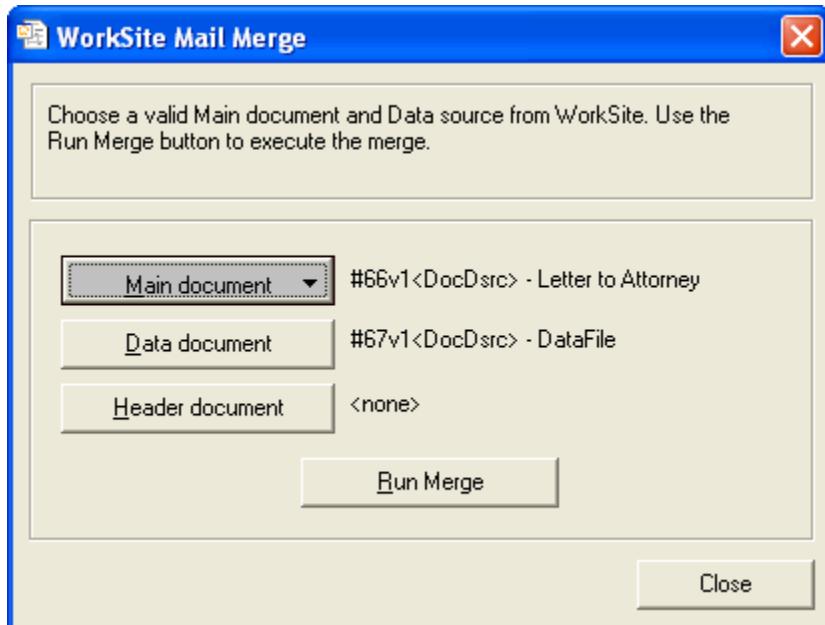


5. Click **Data document** on the WorkSite Mail Merge dialog box. The Select Data Source dialog box opens.

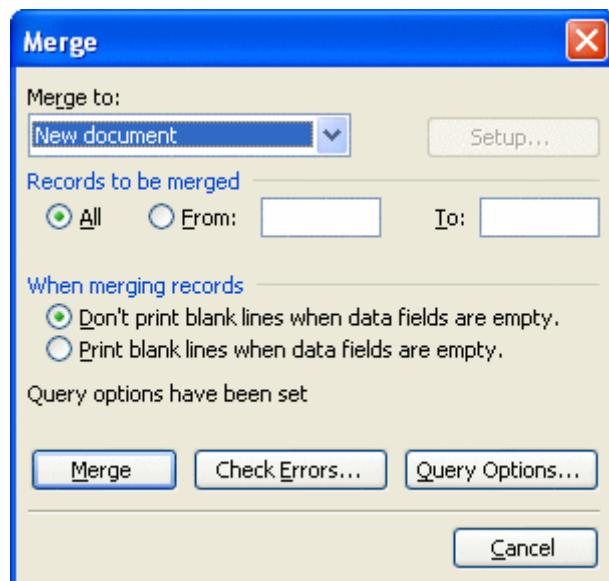
Figure 160 Select Data Source dialog box

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 161](#).

Figure 161 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 162 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.

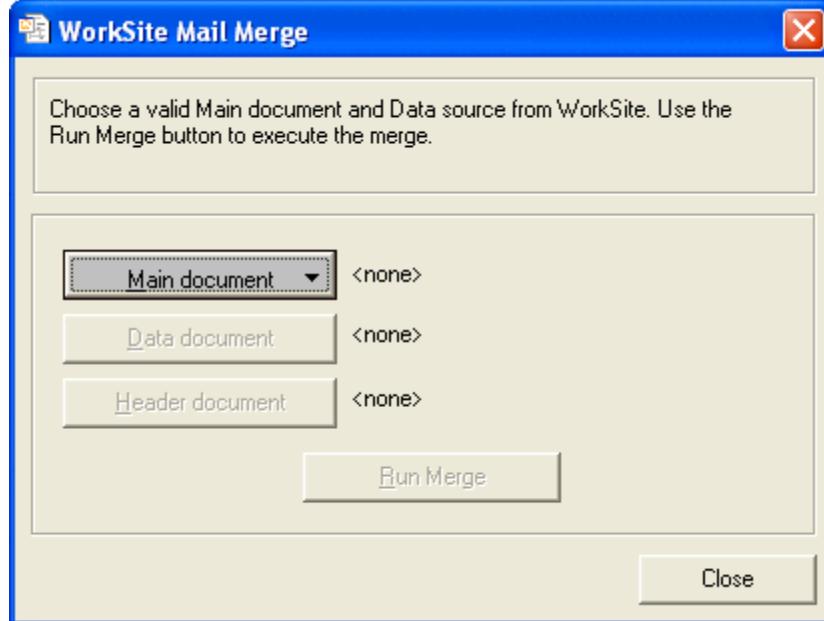
Performing a Mail Merge Using Newly Created Documents



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 163 WorkSite Mail Merge dialog box

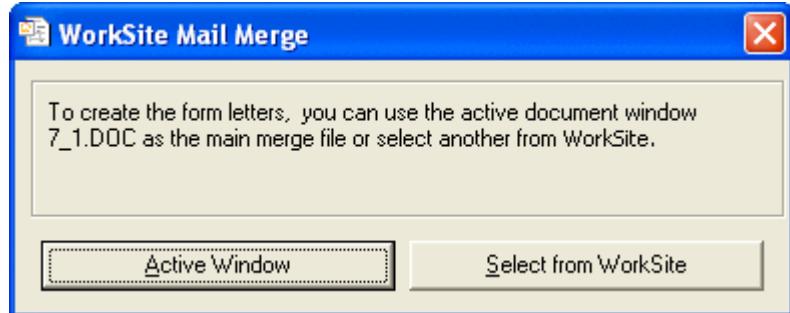


4. Click the **Main document** button drop-down arrow and choose the type that corresponds to your main document.
 - Form letters
 - Mailing labels
 - Envelopes
 - Catalog

- Click **Restore to normal Microsoft Word document** to restore the document selected as the main document to a non-mail merge document.

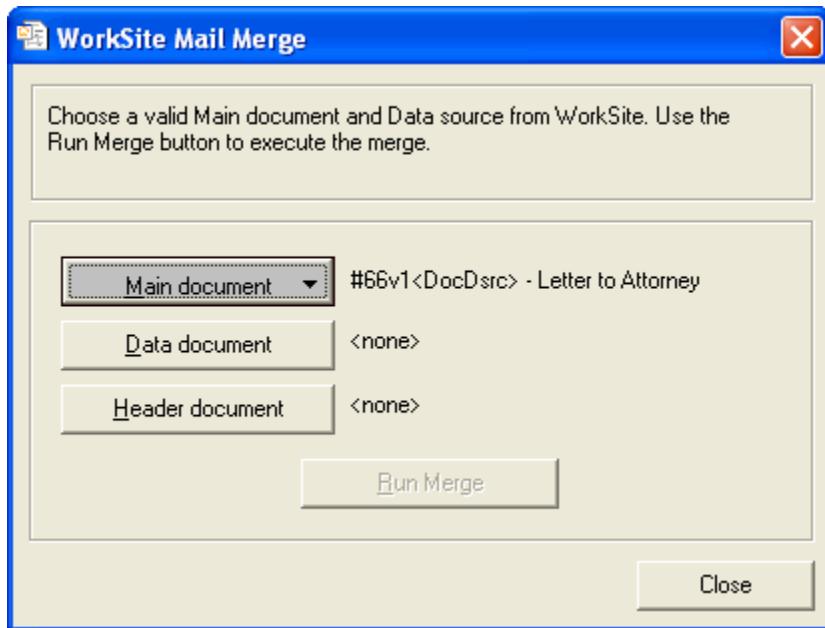
The following dialog box opens.

Figure 164 WorkSite Mail Merge dialog box, Main document selection

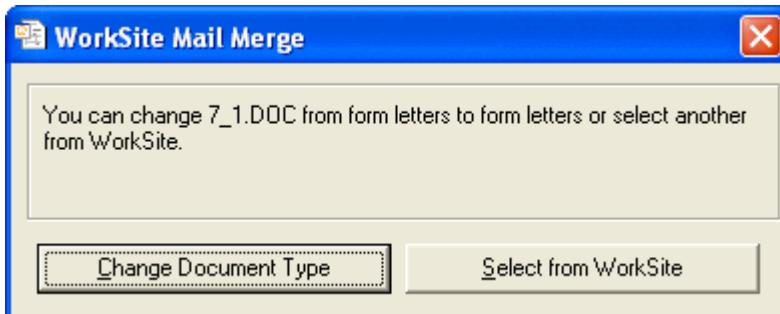


5. Click **Active Window** to return to the WorkSite Mail Merge dialog box. The active document name appears against the **Main document** button, as shown in [Figure 165](#).

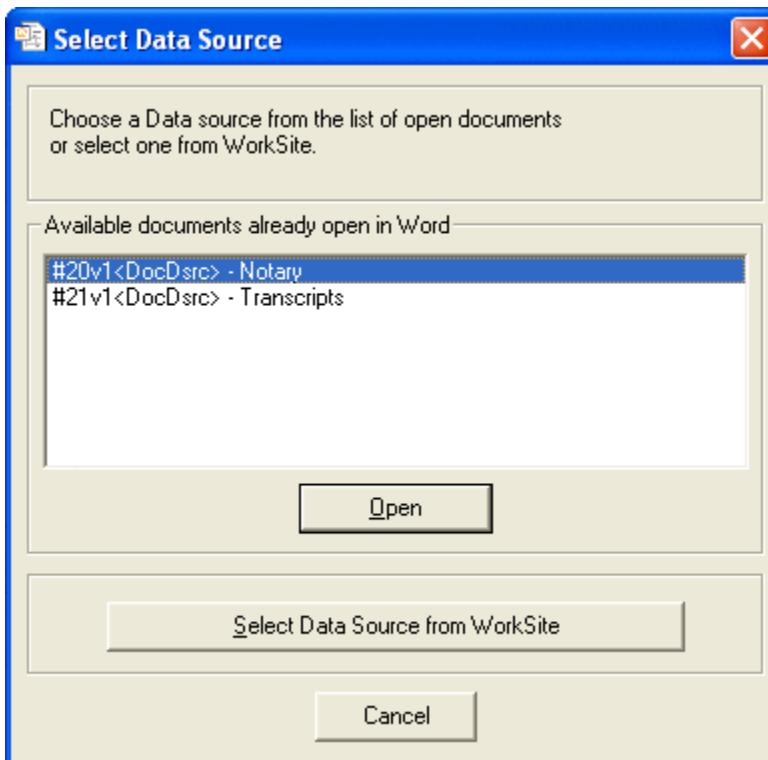
Figure 165 WorkSite Mail Merge dialog box, Active document selected



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 166](#) appears.

Figure 166 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 167 Select Data Source dialog box

The remaining procedure varies according to the type of Data Source document.

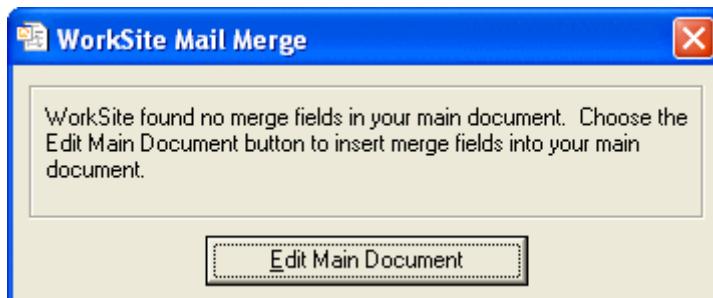
- ❑ If your data source is a Microsoft Word or Excel document, proceed to [Step 9](#).
- ❑ If your data source is a Microsoft Outlook Contacts list, proceed to [Step 10](#).

- 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 168 Edit Main Document message box



- If you do not need to create merge fields in your Main document, proceed to [Step 10](#).

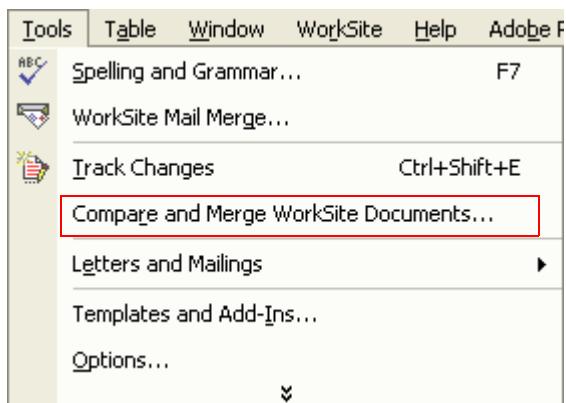
10. Click **Close** to close the WorkSite Mail Merge dialog box.

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**.

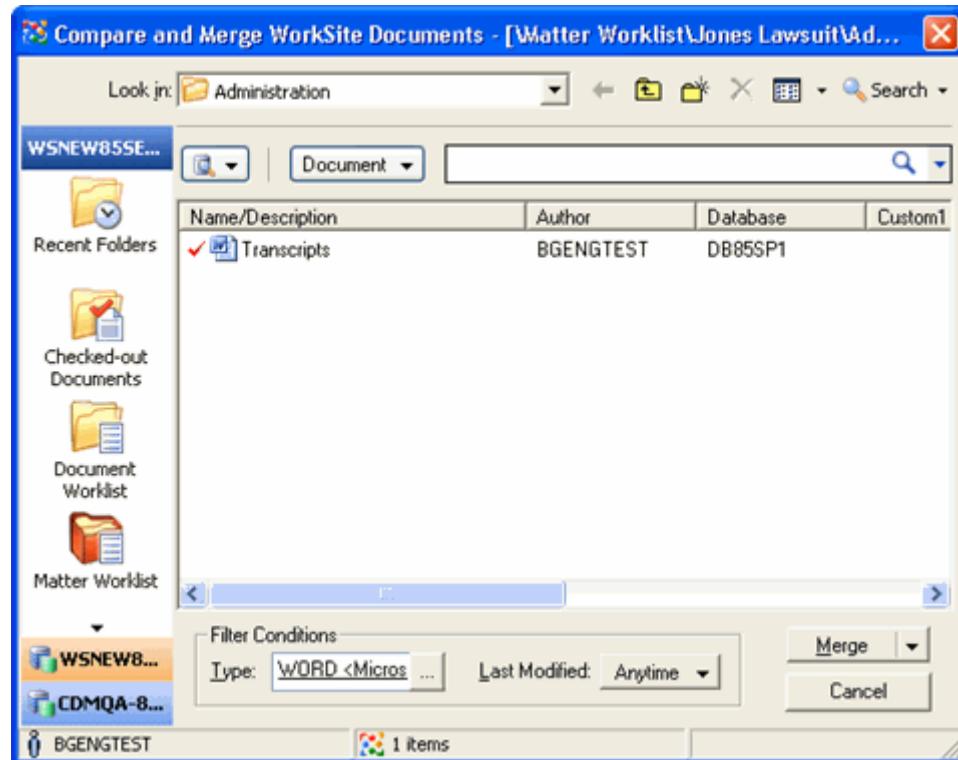
Figure 169 Tools menu

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.

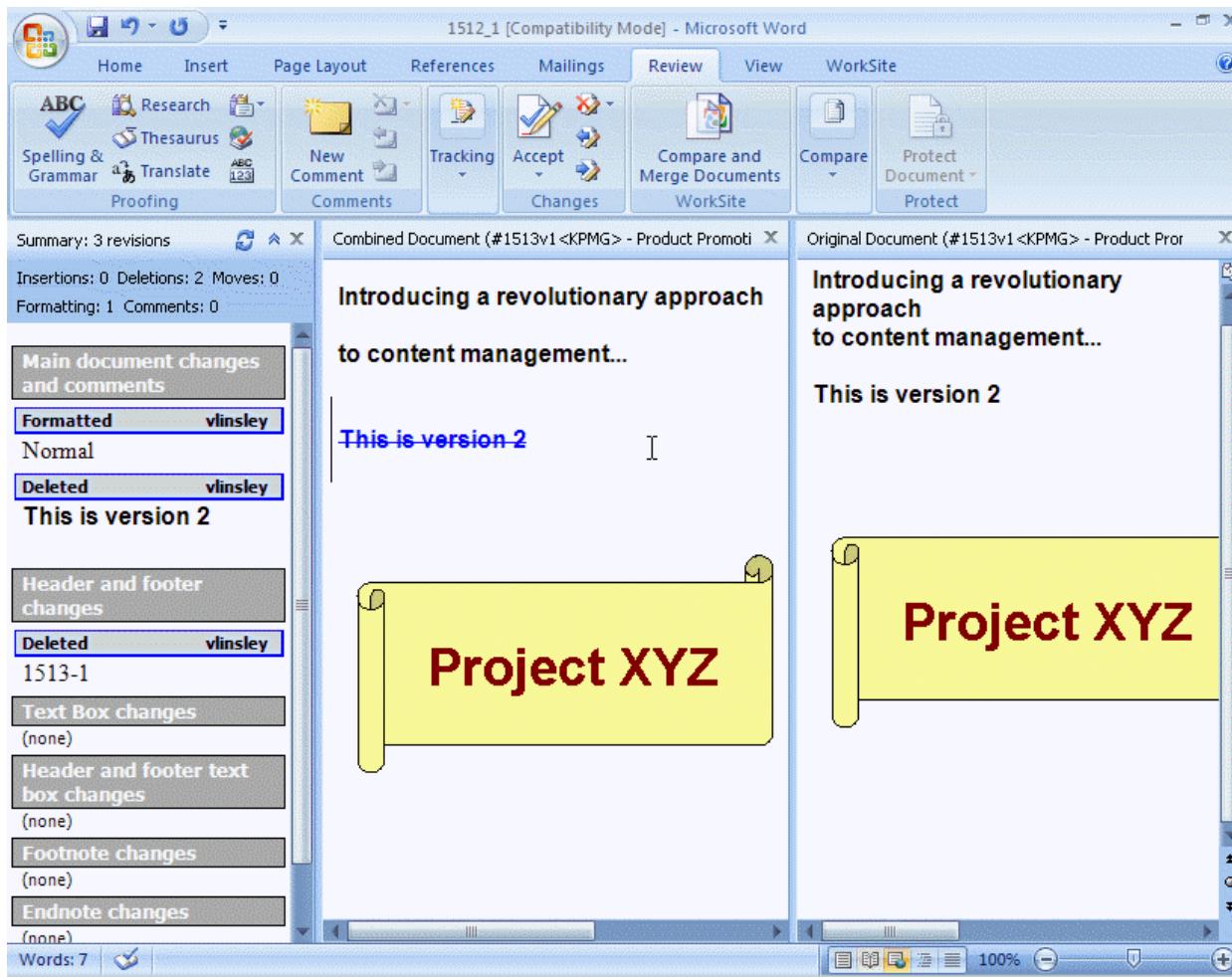
Figure 170 Review ribbon bar, Compare and Merge WorkSite Documents

The WorkSite Integrated Compare and Merge WorkSite Documents dialog box opens.

Figure 171 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 257](#) 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 172 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 290](#).
- Performing synchronization tasks. See ["Synchronization Tasks" on page 290](#).
- Viewing information about the Integration module. See ["About the Integration Module" on page 290](#).

- Changing the connection mode. See “[Switch Connection Mode](#)” on page 291.

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 50 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.

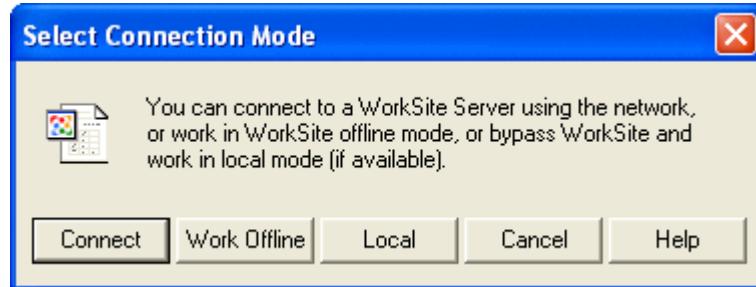
Figure 173 Example WorkSite ribbon bar, About WorkSite option

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 127](#), but includes a **Cancel** button, which is used to close the dialog box without changing the connection mode.

Figure 174 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 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 to use the Adobe Acrobat Integration Module:

- Adobe Acrobat or Acrobat Reader
- FileSite

The Adobe Acrobat Integration Module is automatically installed during the installation of FileSite.

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 240](#).

- Automatically starts in online mode.

For more information, see [“Automatic Online Mode” on page 242](#).



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 Professional **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 175](#) illustrates the Adobe Acrobat or Acrobat Reader **File** menu when integrated with FileSite.

Figure 175 Integrated Adobe Acrobat 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 253 and “Classic Application Integration” on page 268.

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 253 and “[Classic Application Integration](#)” on page 268 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 253 and “[Classic Application Integration](#)” on page 268 for more information.

Working with Documents in the Integrated Application

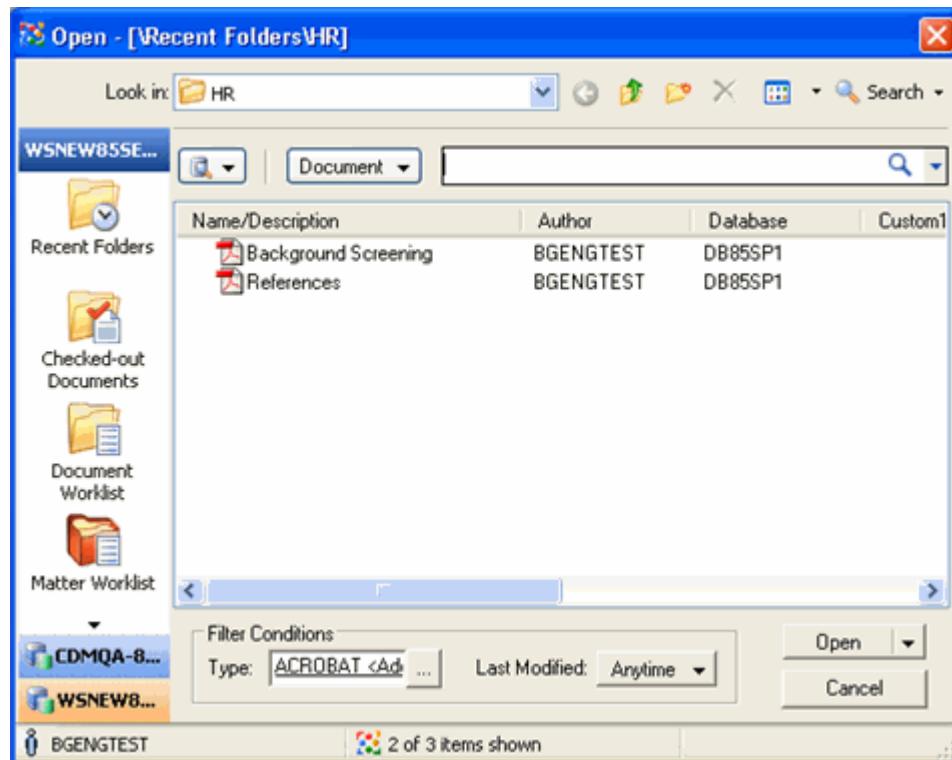
The document functions you can perform in the Adobe Integration module are similar to those you can perform in the Microsoft Office Integration module, though Adobe uses the **Open from WorkSite** and **Save to WorkSite** menu commands.

See “[Working with Documents in the Enhanced Integrated Desktop](#)” on page 262 and “[Working with Documents in the Classic Integrated Desktop](#)” on page 271 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 176 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 257](#) for more information on using this panel.

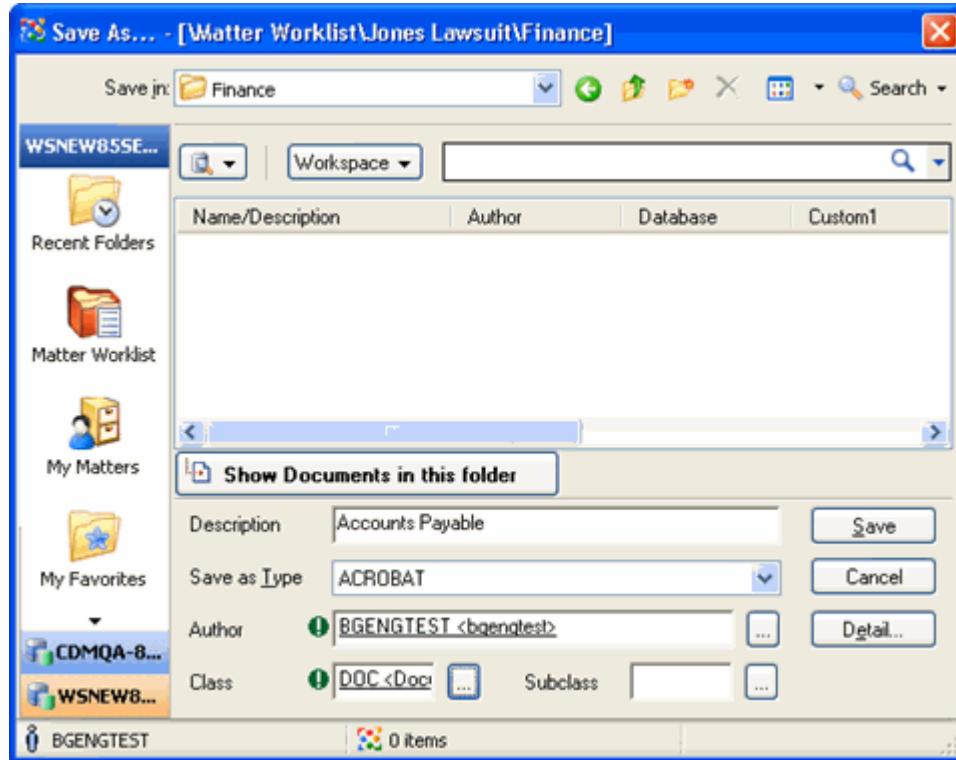
Only Acrobat documents will display; however, you have the option of selecting a different document type using the **Type** lookup button in the **Filter Conditions** area.

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 177 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 257](#) 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 290.
- View and edit document profile information. See “[Properties](#)” on page 297.
- Send WorkSite document links. See “[Sending WorkSite Links](#)” on page 297.
- Change the connection mode. See “[Switch Connection Mode](#)” on page 291.
- Perform synchronization tasks. See “[Synchronization Tasks](#)” on page 290.
- View information about the Integration module. See “[About the Integration Module](#)” on page 297.

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 140.

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

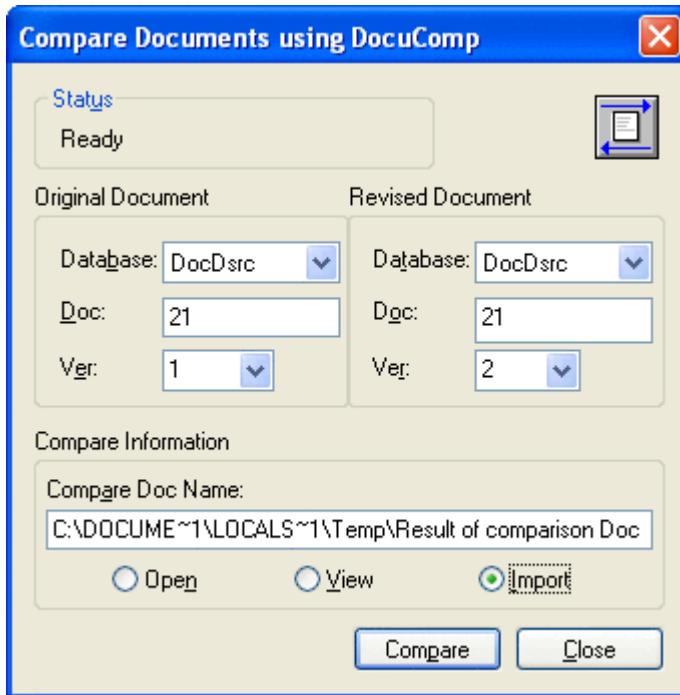
1. In FileSite, select the document whose versions you want to compare from the Document Grid.
2. From the **Document** menu, point to **Document Info** and select **Versions**. A list of the document's version is displayed in the Document Versions window.
3. From this list, select the two versions of 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 64](#) 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 178 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 298.

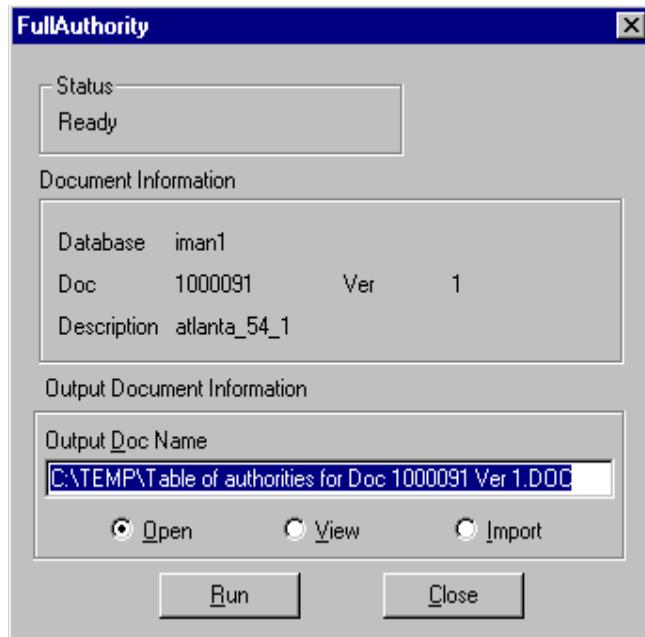
Integration with FullAuthority

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 179 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 300](#).

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 165](#) 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

This chapter contains the following information about linking WorkSite documents:

- [“Introduction”](#)
- [“Creating Linked Items Outside of WorkSite”](#)
- [“Configuring WorkSite for Linking”](#)
- [“Working with Linked Items in WorkSite”](#)

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 2007
- Excel 2007
- PowerPoint 2007

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 link parts of documents into other documents. See “[Using the Paste Special Option](#)” on [page 310](#).
- **Cell links.** Link groups of Excel cells to other Excel worksheets.
- **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.

Linking Definitions

The following terminology is used to define the object linking and embedding functionality in WorkSite:

- **Destination document** - 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** - 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 always to use the current version.
- **Cached information** - The information in the destination document that is contained in the link.

Example of OLE Linking

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.

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 WorkSite 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.

Creating Linked Items Outside of WorkSite

OLE linking is a feature of Microsoft Office that can be configured and used through the WorkSite DMS. However, you can create OLE links locally in a Microsoft Office application using Microsoft functionality without any WorkSite options.

You can create an OLE linked item in Microsoft Office using two methods: the **Insert** option or the **Paste Special** option.

Use the following steps to create linked items in Microsoft Office applications.

 **NOTE** See “Importing Documents Containing Linked Objects” on page 312 for details on importing a locally created document with linked items into WorkSite.

NOTE Once a document containing linked items has been imported into WorkSite, you should use only WorkSite functionality to control linking options.

Using the Insert Option

1. Open the destination document.
2. Place the cursor in the spot where you want to insert the link.
3. From the **Insert** menu, select **Object**.

For Office 2007 Integration, click the **Insert** tab and, from the Text area, select **Object**.

The Object dialog box displays.

4. From the Object dialog box, select the **Create from File** tab.
5. Click **Browse** and locate the file.
6. Select the **Link to file** check box and click **OK**. The link to the source document appears in the destination document.

 **NOTE** Select the **Display as icon** check box to insert an icon that represents the source document if you do not want to insert the entire document.

NOTE When you import a document that contains a linked item into the WorkSite library, both the destination document and the source document are imported.

Using the Paste Special Option

1. Open the destination document and the source document.
2. Highlight and copy the portion of the source document to be linked to the destination document.
3. In the destination document, place the cursor in the spot where you want to insert the link.
4. From the **Edit** menu, click **Paste Special**.

For an Office 2007 Integration, from the Home tab, click the **Paste** drop-down menu and select **Paste Special**.

The Paste Special dialog box displays.

5. Select the file type of your source document based on the following table:

Table 33 Source Document File Type Selection

Source Document	File Type to Select
Word document	Microsoft Office Word Document Object
Excel workbook	Microsoft Office Excel Worksheet Object
PowerPoint presentation	Microsoft Office PowerPoint Slide Object

6. Select the **Paste link** radio button and click **OK**. The link to the source document displays in the destination document.



NOTE Select the **Display as icon** check box to insert an icon that represents the source document if you do not want to insert the entire document.

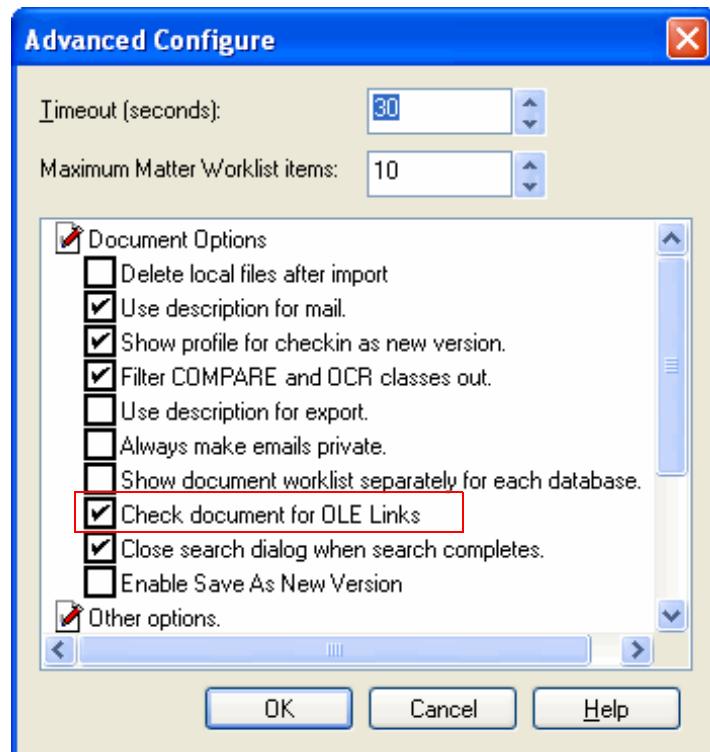
NOTE When you import a document that contains a linked item into the WorkSite library, both the destination document and the source document are imported.

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 180 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 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, then click **OK** again to close the Configure dialog box.

Working with Linked Items in WorkSite

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 documents with linked objects using the following Microsoft Office functionalities, which you can access from the integrated application:

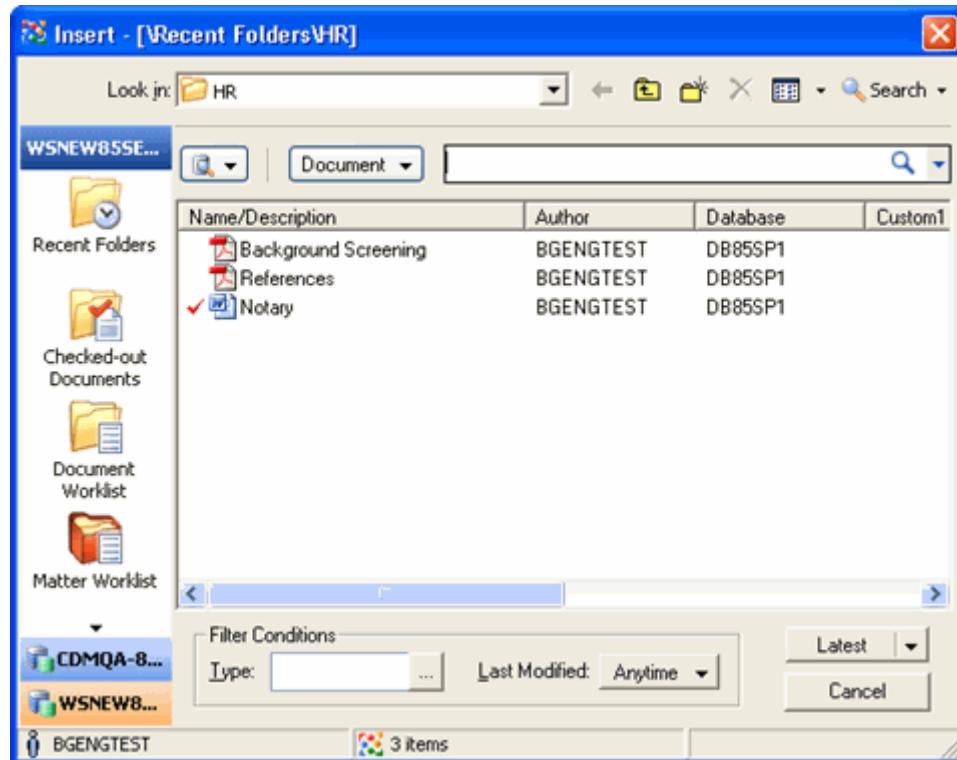
- “Using the Insert Option”
- “Using the Paste Special Option”

Using the Insert Option

1. From FileSite, 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**.

In Office 2007 Integration, from the Insert area of the WorkSite ribbon tab, click the **Link** drop-down menu and select **Insert Link**.

The WorkSite Integrated Insert dialog box opens.

Figure 181 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 257](#) 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 If you insert a link to an e-mail into an Excel document, the link will display with only the document number instead of the text of the 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 (or for Office 2007 Integration, select **Insert Link as Icon** from the **Link** drop-down menu on the WorkSite tab) in [Step 3](#). The remaining procedure is the same.

Using the Paste Special Option

1. From FileSite, open the document in which you want to insert the link. This is the destination document.
2. From FileSite, 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**.

In Office 2007 Integration, from the Clipboard area of the Home ribbon tab, click the **Paste** drop-down menu and select **Paste Special**.

Figure 182 Paste Special Option, Office 2007 Integration



A Microsoft Paste Special dialog box opens.

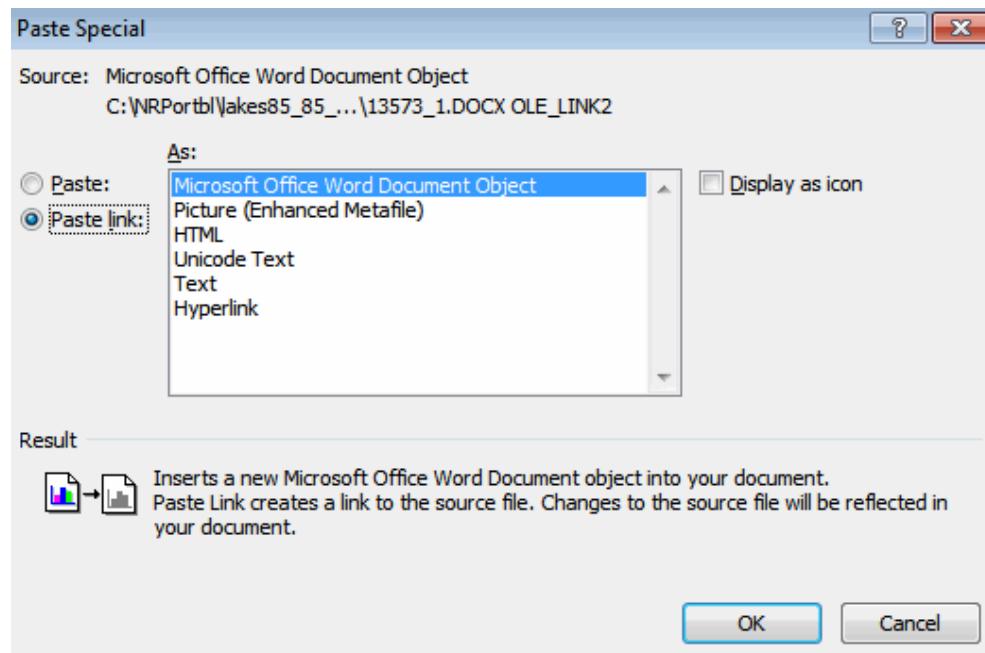
6. In the Paste Special dialog box, under the **As** heading, select the file type for your source document based on the following table:

Table 34 Source Document Paste As Selection

Source Document Type	Paste As Selection
Word document	Microsoft Office Word Document Object
Excel workbook	Microsoft Office Excel Worksheet Object
PowerPoint presentation	Microsoft Office PowerPoint Slide Object

7. Select the **Paste link** radio button and click **OK**.

Figure 183 Paste Special dialog

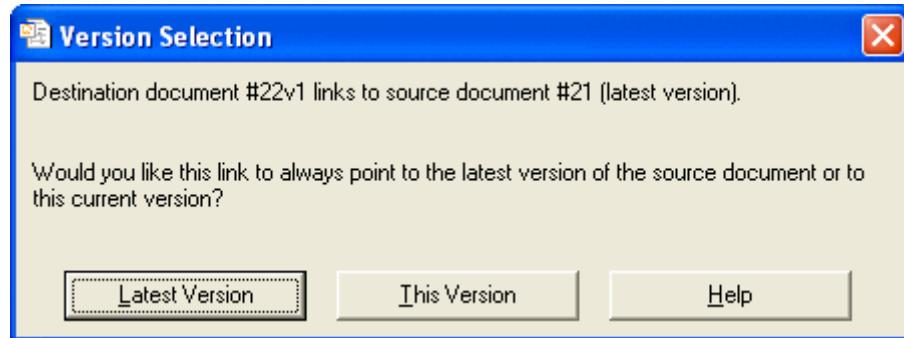


NOTE Select the **Display as icon** check box to insert an icon that represents the source document if you do not want to insert the entire document.

8. Repeat [Step 2](#) to [Step 7](#) until you have linked all required objects from the source documents into your destination document.

9. Save your document. The Version Selection dialog box opens.

Figure 184 Version Selection dialog box



10. Select a version option:

- 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.

11. Once you have linked all required objects from the source documents into your destination document, close the source documents.

12. Close the destination document to check it in to FileSite.

Importing Documents Containing Linked Objects

You can import existing local documents that contain linked objects into the WorkSite library. You can also import source documents to be linked to destination documents that already reside in the WorkSite library.

There are two options for inserting links into destination documents using Microsoft functionality. You can use the **Insert** option to insert a linked item, or you can insert a linked item using the **Paste Special** function.

When importing documents into WorkSite, there are two scenarios than can occur. [Table 35](#) indicates the steps to take in each scenario.

Table 35 Importing Linked Documents

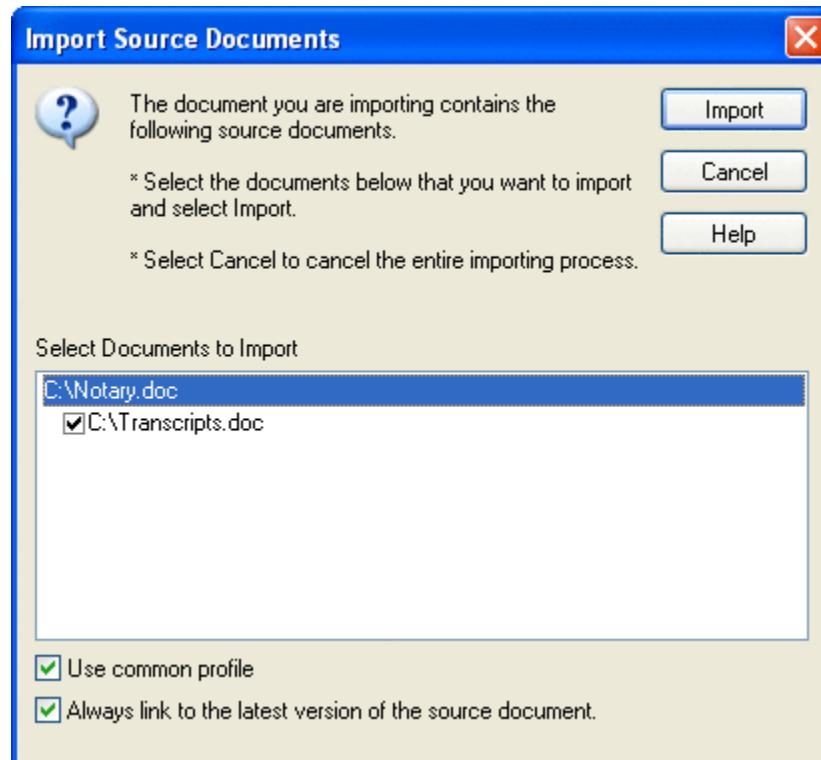
If	Then
Neither the destination nor source documents are in WorkSite.	Follow the procedure given in " Importing Destination and Source Documents into WorkSite ".
The destination document is in WorkSite, but the source document is not.	Follow the procedure given in " Importing Source Documents into WorkSite ".

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 185 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. Clear the check box of any linked source document you do not want to import.
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 cleared 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 for any linked item later. See ["Editing Links in Documents Containing Linked Objects" on page 317](#).

7. Click **Import** to import the documents into WorkSite.



NOTE If you create an Excel document locally and insert a hyperlink to another local document into the Excel document, when you import the Excel document into WorkSite, the hyperlink will not function correctly. When you click the hyperlink, the error "Cannot open the specified file" displays.

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**.

In Office 2007 Integration, from the Clipboard area of the Home ribbon tab, click the **Paste** drop-down menu and select **Paste Special**.

A Microsoft Paste Special dialog box opens.



NOTE See Step 6 through Step 7 of ["Using the Paste Special Option" on page 310](#) for details on using the Paste Special dialog box.

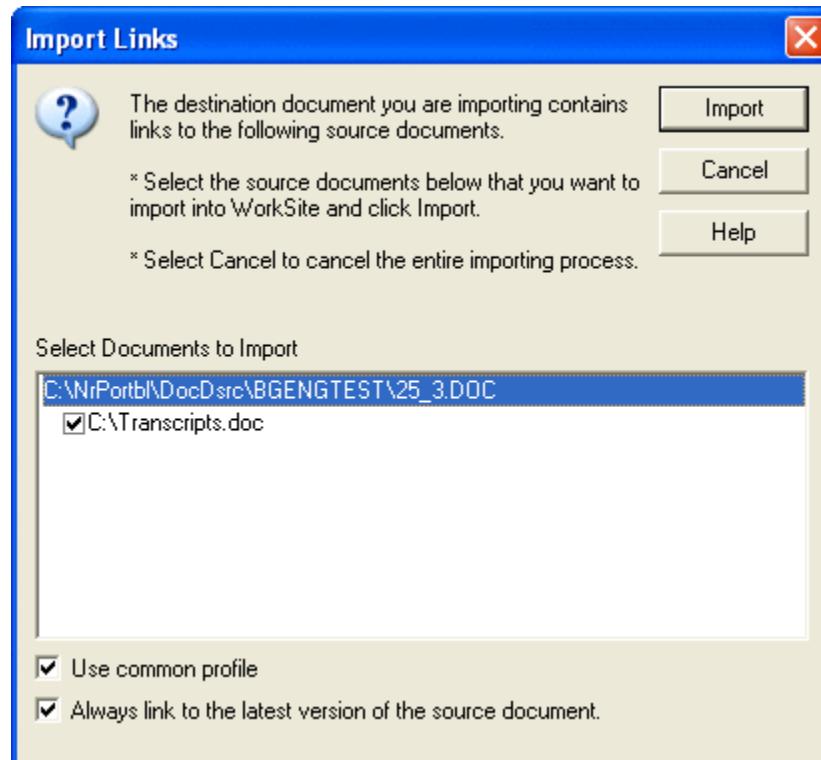
When you have completed pasting the links, you can import the linked source documents into WorkSite.

6. In the destination document, select **Import WorkSite Links** from the **Edit** menu.

In Office 2007 Integration, from the Insert area of the WorkSite ribbon tab, click the **Link** drop-down menu and select **Import Links**.

The Import Links dialog box opens.

Figure 186 Import Links dialog box



7. The local source documents that are linked to the destination document appear in the list. Select the check box for each linked source document you want to import.
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 the selected source documents being imported. You can change this setting for any linked item later. See ["Editing Links in Documents Containing Linked Objects" on page 317](#).

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.

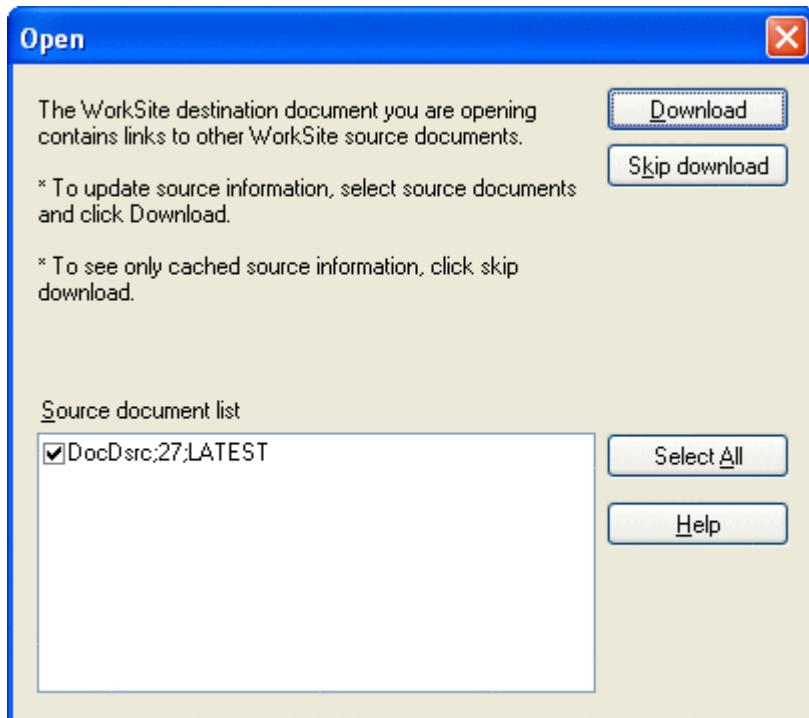


NOTE Read-only copies of the source documents are downloaded. You must have at least Read access to the documents to download them.

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 187 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. To update, click **Yes**. To keep the existing information, click **No**.

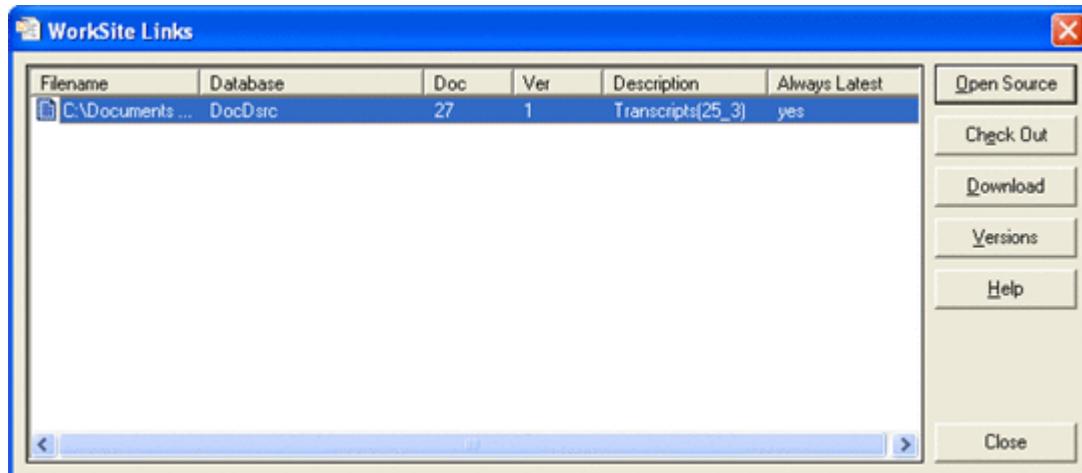
Editing Links in Documents Containing Linked Objects

You can edit source documents that are linked to a destination document if you 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**. In Office 2007 Integration, from the Insert area of the WorkSite tab, click the **Link** drop-down menu and select **Edit Links**.

The WorkSite Links dialog box opens.

Figure 188 WorkSite Links dialog box



The WorkSite Links dialog box enables you to perform the following functions.

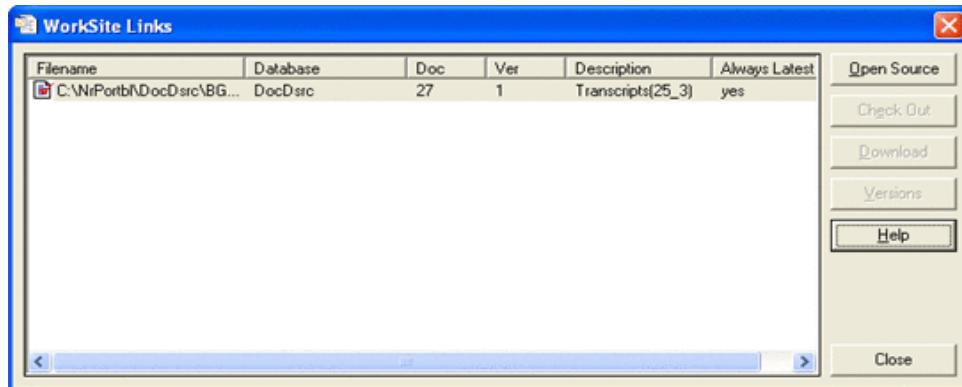
- **Open Source** - Open and edit the source document.

NOTE If you edit the source document without checking it out, you are prompted to save the document as a new document in WorkSite. The new document appears in the folder where the destination document resides.



- **Check Out** - Check out the document from the WorkSite library. 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 189](#)) to reflect its checked-out status.

Figure 189 WorkSite Links dialog box, checked-out document



After the document is checked out, click **Open Source** to open and edit the source document.

- **Download** - Download the document.
- **Versions** - Select whether the link always points to the latest version of the source document or to the selected version.

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 323](#).

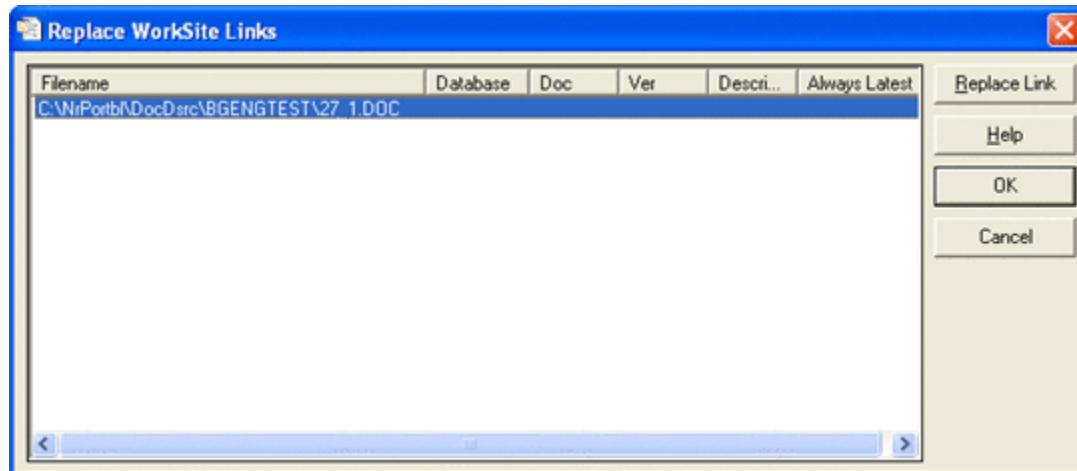
Replacing Links in Documents Containing Linked Objects

In the destination document, you may want to replace a link to an existing source document with a different one.

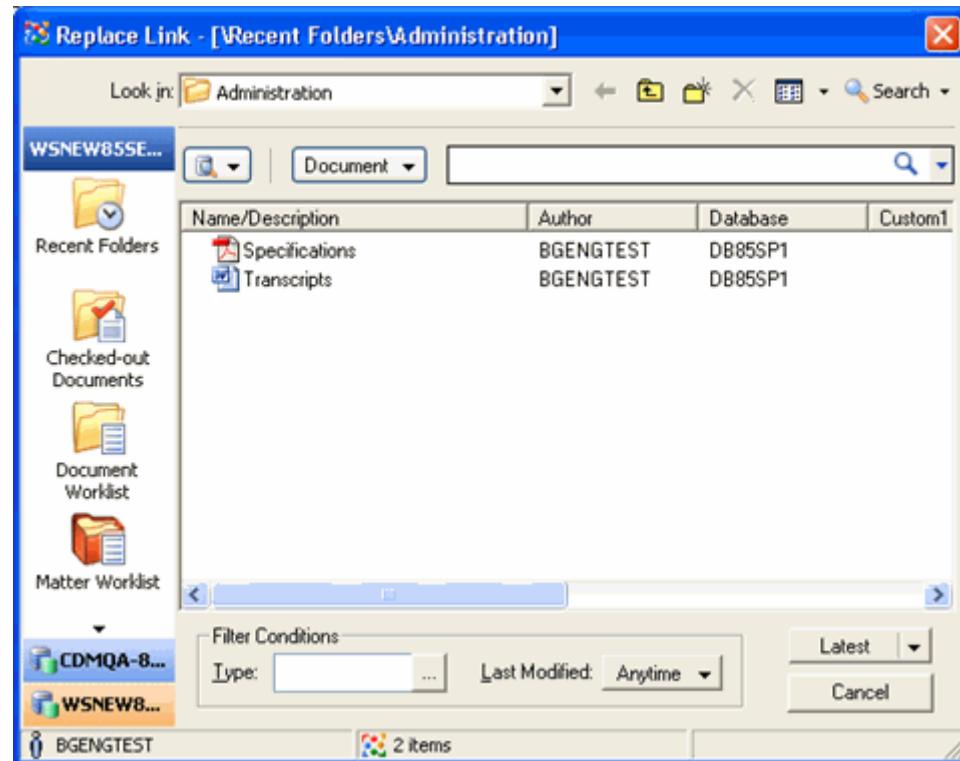
1. Open the destination document.
2. From the **Edit** menu, select **Replace WorkSite Links**.

In Office 2007 Integration, from the Insert area of the WorkSite ribbon tab, click the **Link** drop-down menu and select **Replace Links**.

The Replace WorkSite Links dialog box opens.

Figure 190 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 191 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 257 for more information on using this panel. You can link any version of the source document.

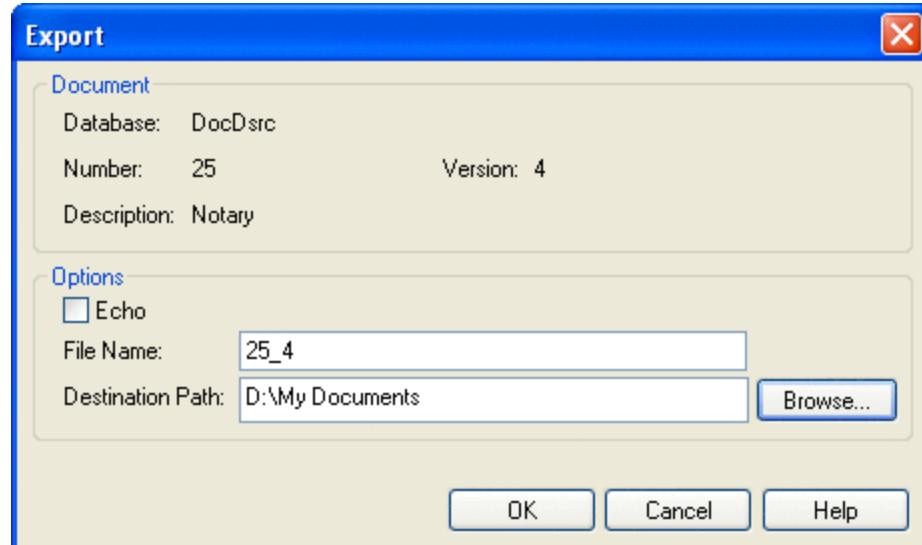
6. Click the **Latest** button drop-down arrow to display the following options:
 - Latest**. Inserts the link that will always point to the most current version of the source document to which you have access.
 - This Version**. Inserts the link that will always point to the selected version of the 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

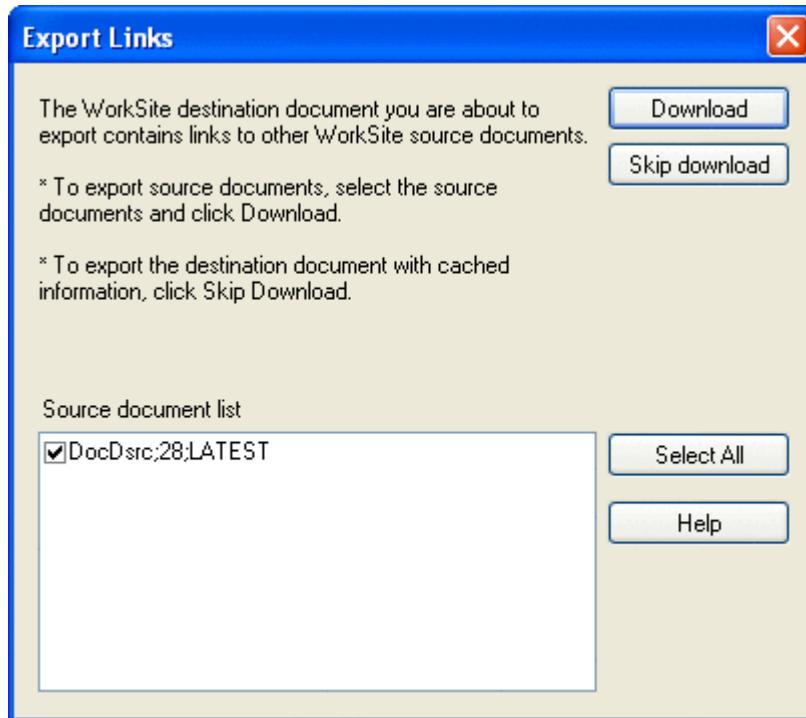
You can export a destination document and its linked source documents to a folder on your local or network drive.

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 192 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 193 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.

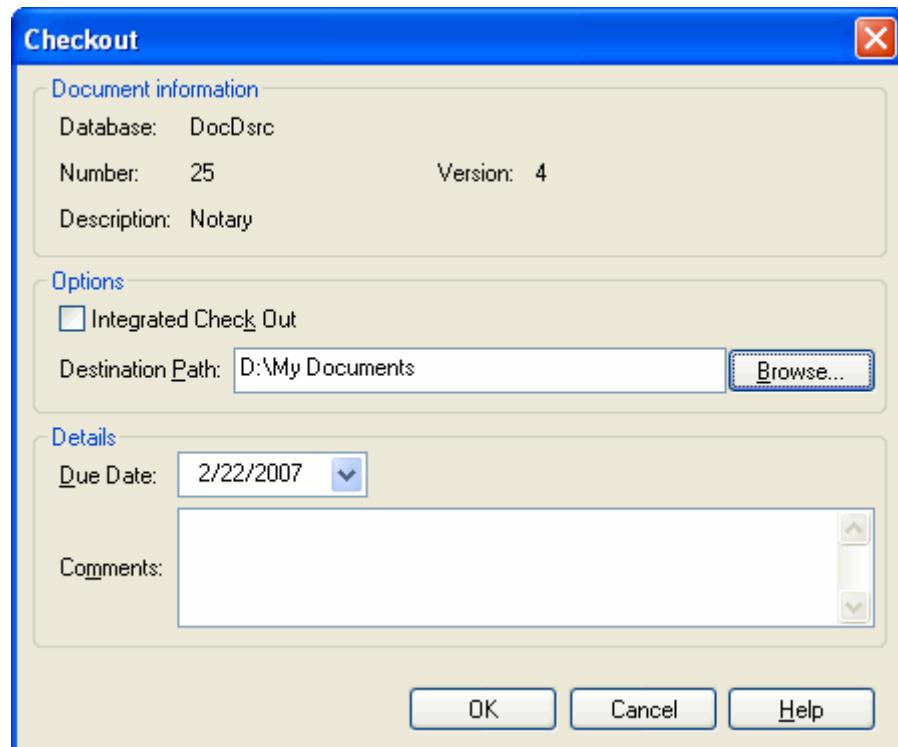


NOTE If the document is already checked out by another user, the **Checked out** icon appears against it in the Document Icon column of the Document Grid in FileSite.

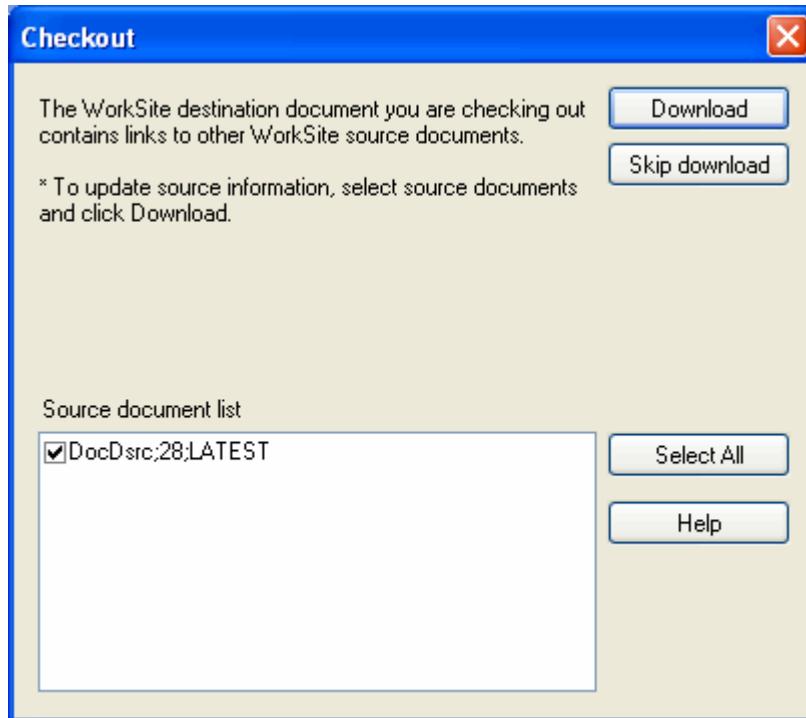
To check out a document containing linked objects:

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 194 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 195 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.

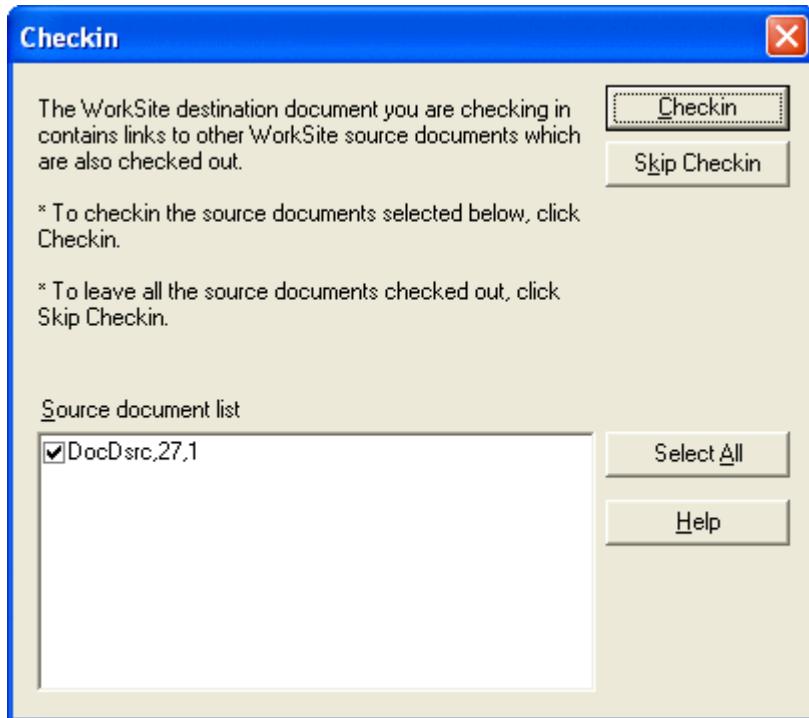


NOTE The instructions given in this section apply to documents checked out to your local or network drive. See ["Checking Out Documents Containing Linked Objects" on page 321](#) for instructions on how to check out a document and its linked source documents.

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 196 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”
- “WorkSite Viewer Window”
- “Viewing Documents”
- “Searching Text of Documents”
- “Copying Documents”
- “Printing Documents”
- “Setting Document Display Options”

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

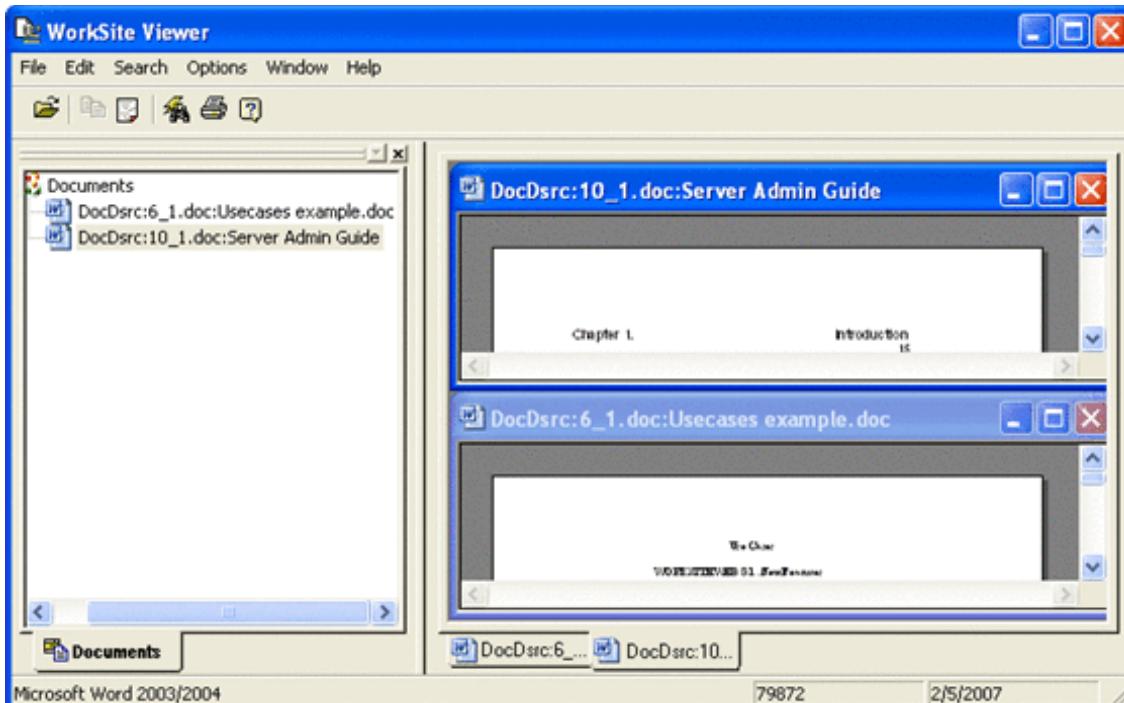
- Adobe Reader PDF (text only)
- Adobe Acrobat

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.

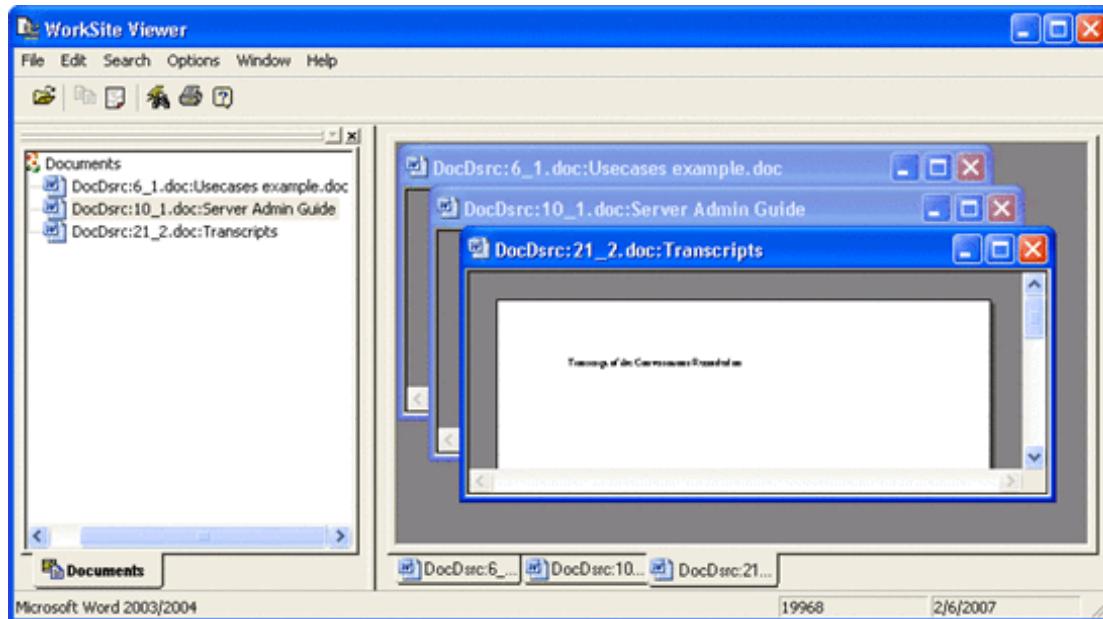
[Figure 197](#) is an example of the WorkSite Viewer window displaying two documents in *tile* format.

Figure 197 WorkSite Viewer window, Tile format



[Figure 198](#) is an example of the same WorkSite Viewer window displaying three documents in *cascade* format.

Figure 198 WorkSite Viewer window, Cascade format



Viewing Documents

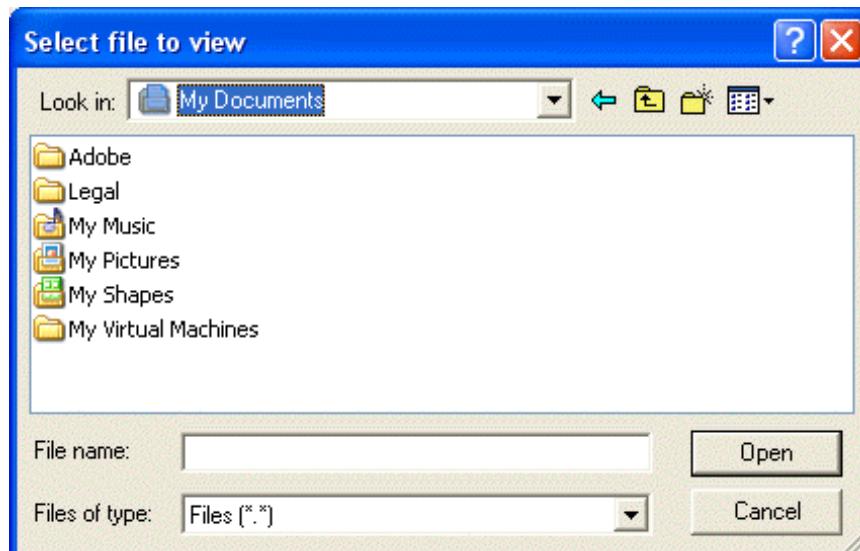
You can use WorkSite Viewer to view:

- Local documents
- WorkSite documents

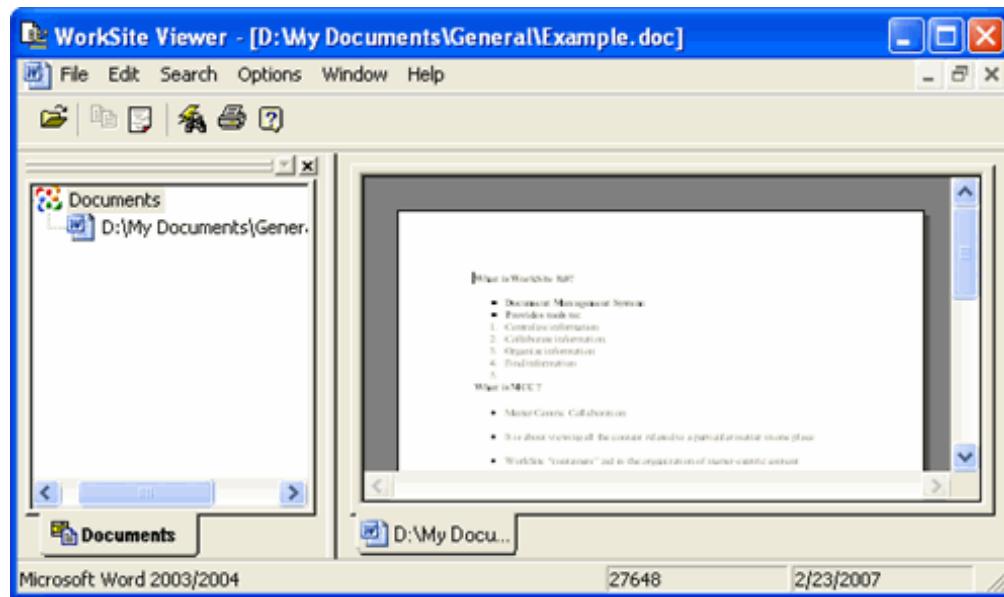
Viewing Local Documents

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 199 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 200 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.

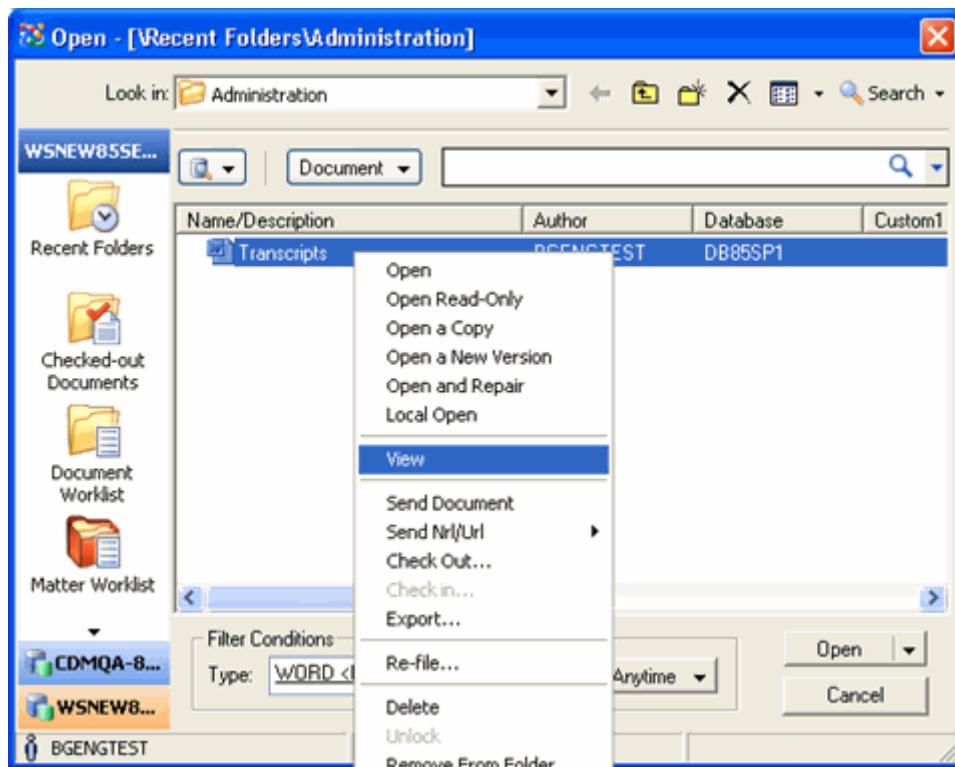


NOTE When you view documents using WorkSite Viewer, the documents are not locked or checked out of the WorkSite library. Instead, WorkSite Viewer makes a temporary copy of the document, which is displayed in read-only format.

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 201](#). WorkSite Viewer launches with the documents displayed in the WorkSite Viewer window.

Figure 201 WorkSite Integrated Open dialog box



Searching Text of Documents

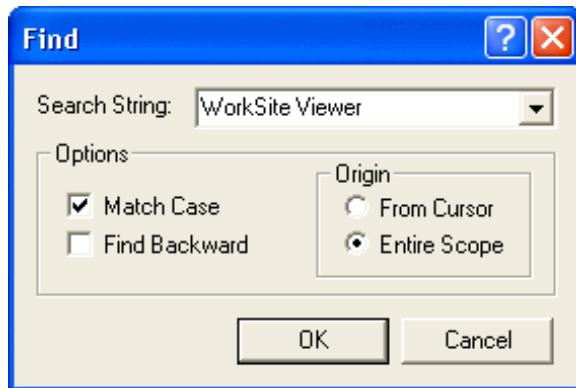
You can search the full text of a document displayed in the WorkSite Viewer window.

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 202 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 333.

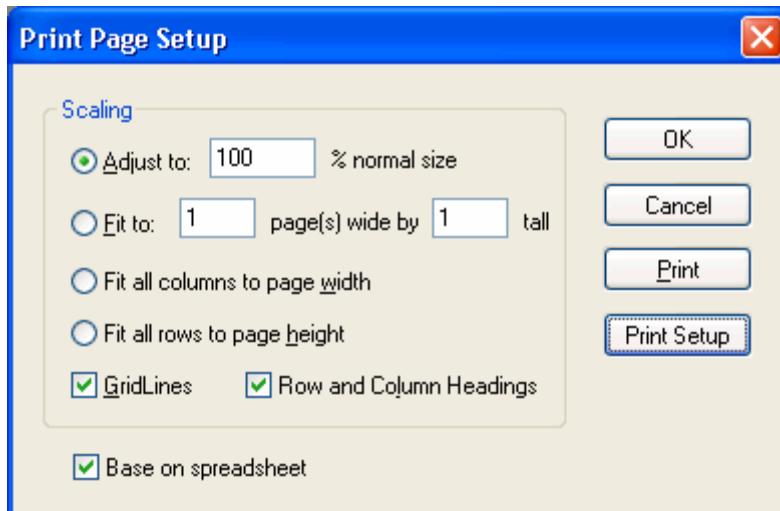
2. Enter your printer settings.

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 203 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

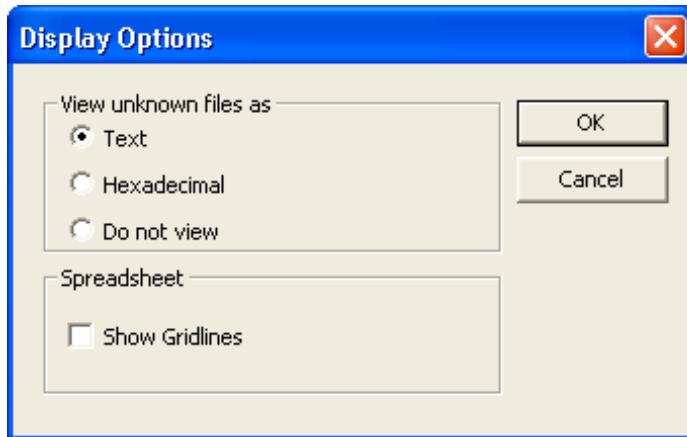
You can adjust the size of vector graphics files that are displayed. Select the window in which the vector graphic is displayed. From the **Options** menu, point to **Vector**. Select a size from the submenu of available sizes.

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 204 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 338](#) for more information.

This chapter contains the following information about working offline with FileSite:

- [“Portable Mode Versus OffSite”](#)
- [“Working in Portable Mode” on page 338](#)

Portable Mode Versus OffSite

[Table 36](#) provides a comparison of the functionality available in OffSite and Portable.

Table 36 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

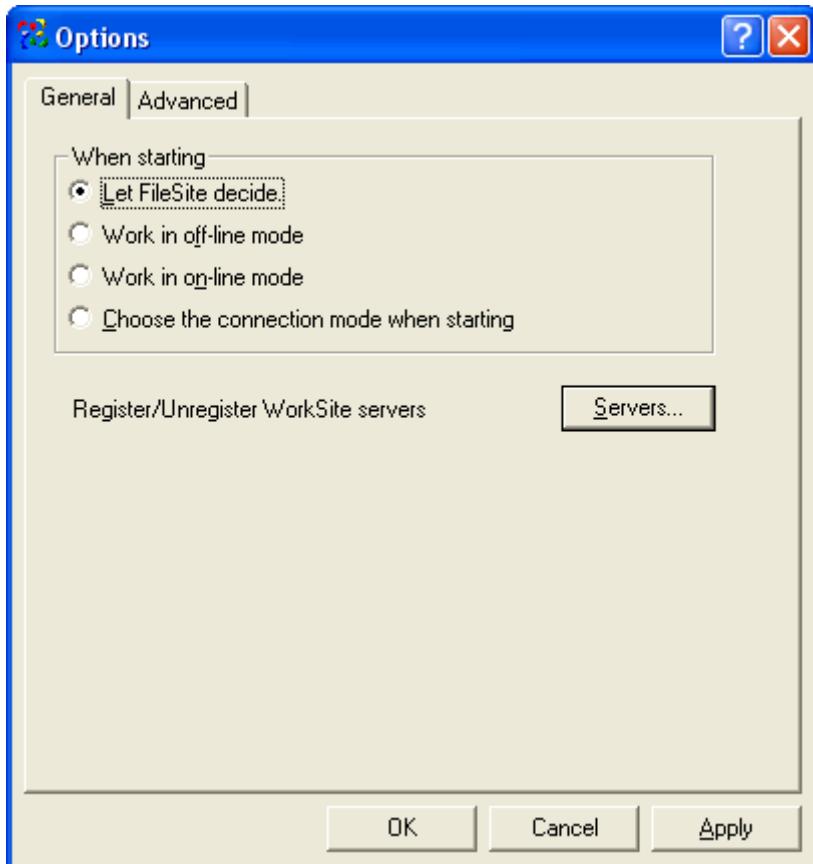
To switch from online mode to portable mode:

1. In FileSite, from the **WorkSite** menu, point to **Configure**, and select **General Options**.

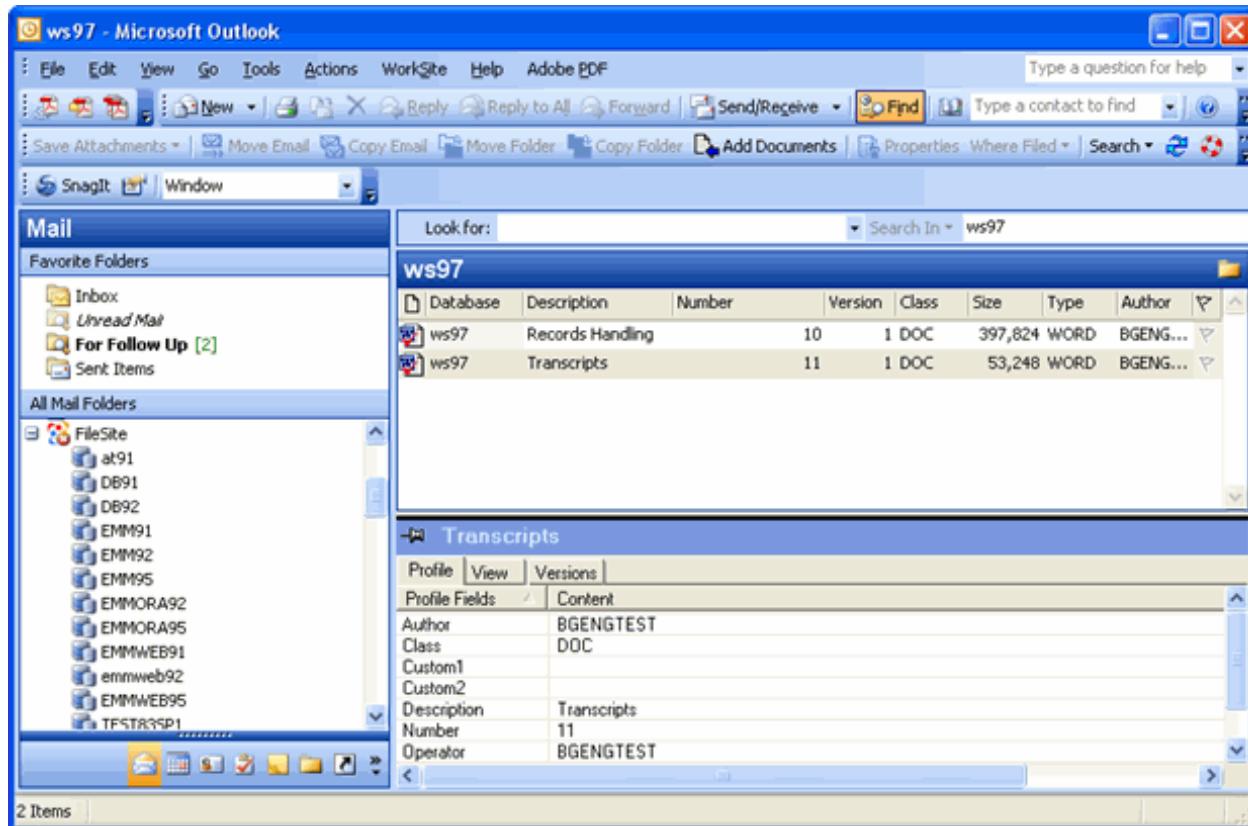
In Outlook 2010, on the **WorkSite** tab, click the  **General Options** icon from the Configure area.

The Options dialog box opens with the **General** tab selected.

Figure 205 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 206](#).

Figure 206 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 63](#) 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 207 Example Document Grid, Portable mode

	Portable Checkedout or Echo	Database	Description	Number	Version	Class	Size	Type	Author
W	□	DocDsrc	Letter to Attorney	30	2	DOC	19,968	WORD	BGENTGTEST
W	□	DocDsrc	ABC	31	5	DOC	19,968	WORD	BGENTGTEST
W	□	DocDsrc	ABC	71	1	DOC	19,968	WORD	BGENTGTEST
W	✓	DocDsrc	Form A	73	1	DOC	19,968	WORD	BGENTGTEST
W	✓	DocDsrc	Form B	76	1	DOC	27,648	WORD	BGENTGTEST
W	✓	DocDsrc	Travel Invoices	-9,998	1	DOC	19,968	WORD	BGENTGTEST

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 37](#).

Table 37 Document Status Icons

Icon	Portable Documents	Echo Documents
✓	The document is checked out.	
DOC	The document is an orphan document in the <code>NrPortbl</code> directory.	The document is an unmodified document in the <code>NRTEcho</code> directory.
DOC		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](#)”

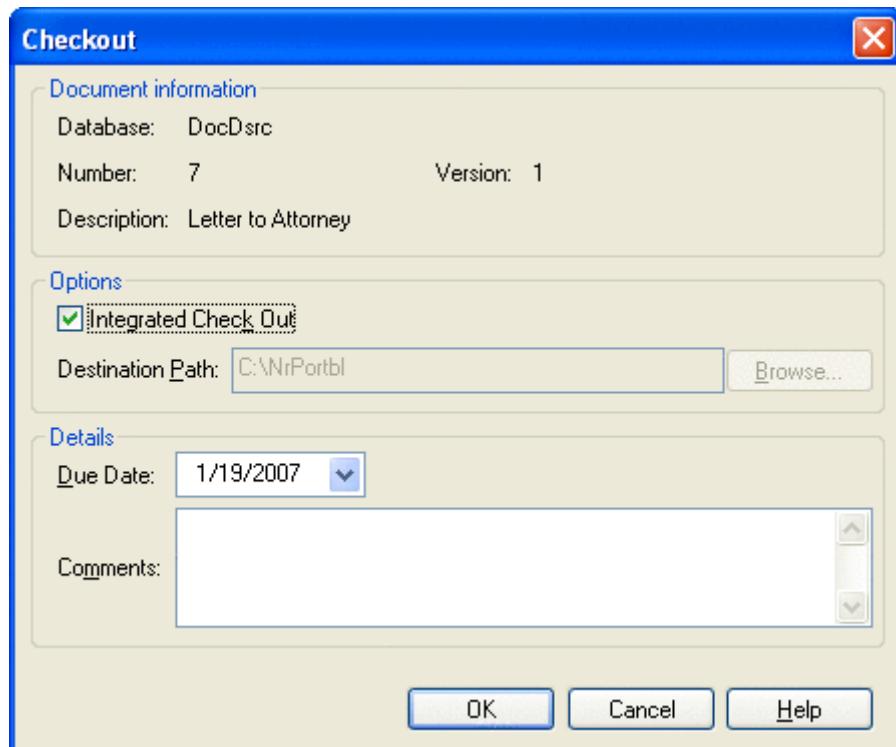
Checking Out Documents from Online into Portable Mode

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 208 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.

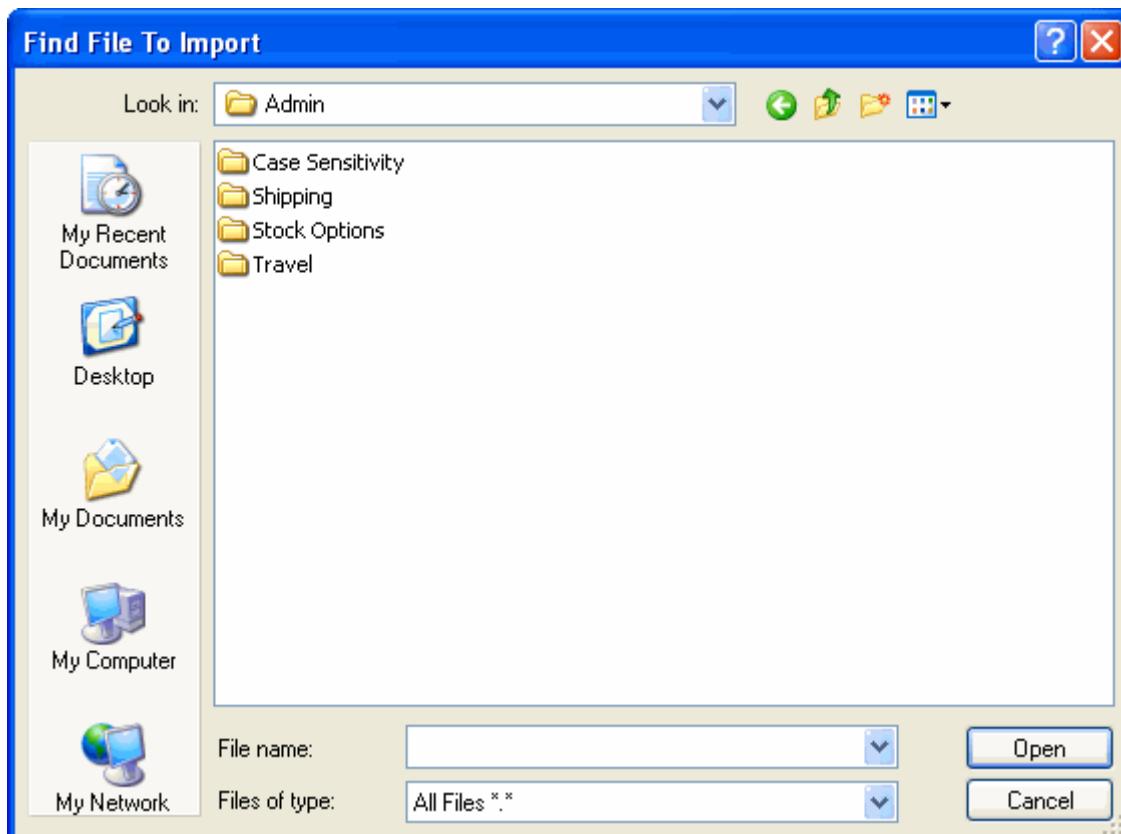
To import a document from your local machine into the portable mode:

1. Open FileSite in portable mode. See “[Switching to Portable Mode](#)” on [page 339](#) 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 209 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 62 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 339](#) for more information. The list of portable checked-out documents appears in the Document Grid as shown in [Figure 206](#).



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/Send Document** and **Send NRL/URL** options on the **Document** menu to send a copy or a link to a portable document by e-mail.

Send a Document

1. Select the document from the Document Grid.
2. Right-click to access the **Document** menu. If the document is an email, select **Forward**. The e-mail will be forwarded to the recipient you choose.

If the document is not an e-mail, select **Send Document**. 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 NRL/URL**. The **Send NRL/URL** 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 62” for more information on setting this option.

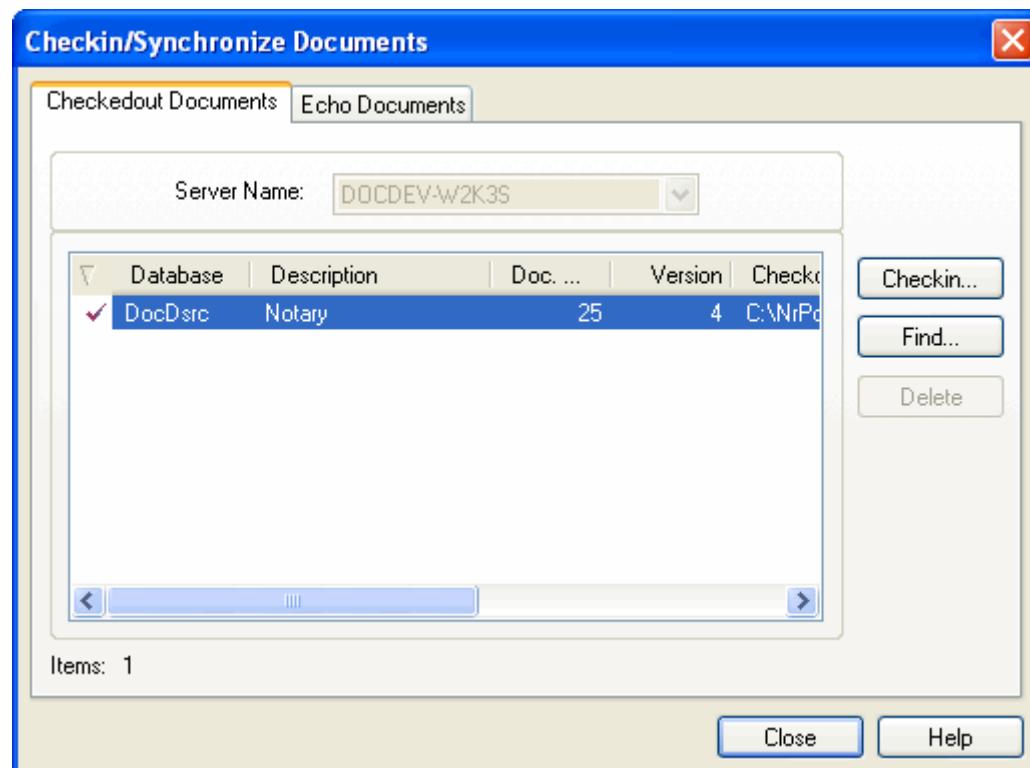
4. Click **OK** or press **ENTER**.

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 352 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 210](#).
3. Select the document from the **Checkedout Documents** tab.

Figure 210 Checkin/Synchronize Documents dialog box, Checkedout Documents

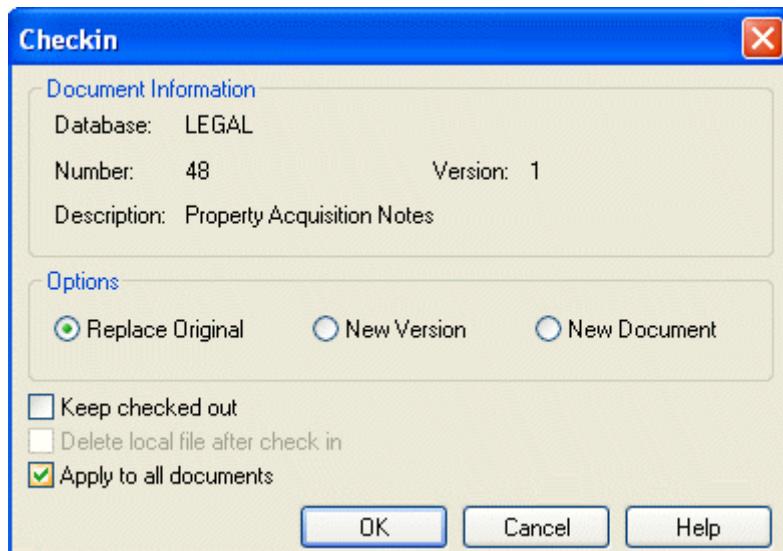
4. The checked-out documents appear in the display table with their profile fields as column headings.
 - ❑ Use the horizontal scroll bar to display more profile fields.
 - ❑ Use the vertical scroll bar or **PAGE UP** and **PAGE DOWN** buttons to display all the checked-out documents.
 - ❑ Click **Find** 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 37](#).

5. Select the documents you want to check in.
6. Click **Checkin** or type **ALT+C**. The Checkin dialog box opens.

Figure 211 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:

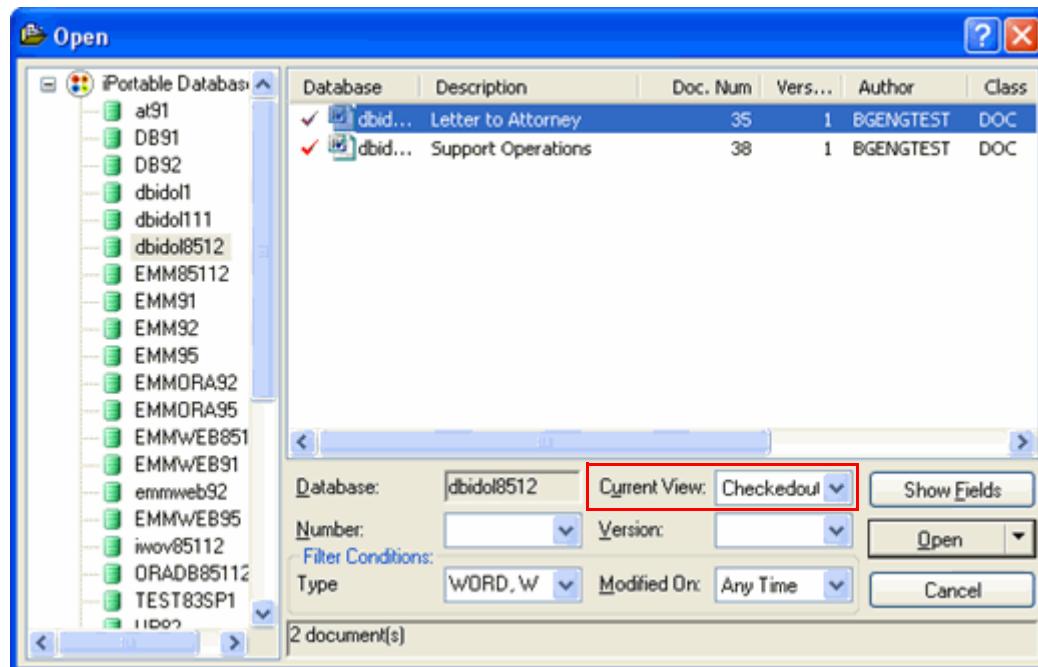
10. Click **OK** or press **ENTER** to check in the documents.

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 212 WorkSite Integrated Portable Open dialog box



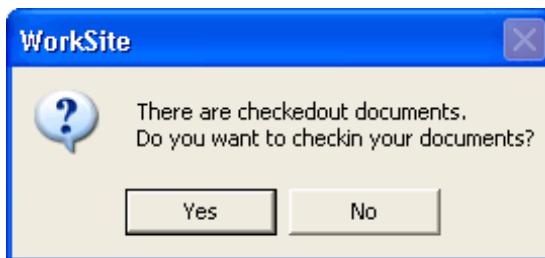
3. From the **Current View** list, select **Checkedout documents**.
4. Browse within the portable libraries listed and navigate to the file you want to open.
5. Select the file and click **Open** button drop-down arrow to display the **Open** list, as shown in [Figure 212](#). Choose one of the following 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 263 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 205](#).
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 213 Checked-out Documents message



5. Click **Yes** to checkin the documents. See "["Checking In Documents from Portable to Online Mode" on page 348](#) 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 339 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 357 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 338 for more information.

Several of the document functions performed with portable documents can be performed with echo documents. [Table 38](#) provides a summary.

Table 38 Summary of Echo Document functions

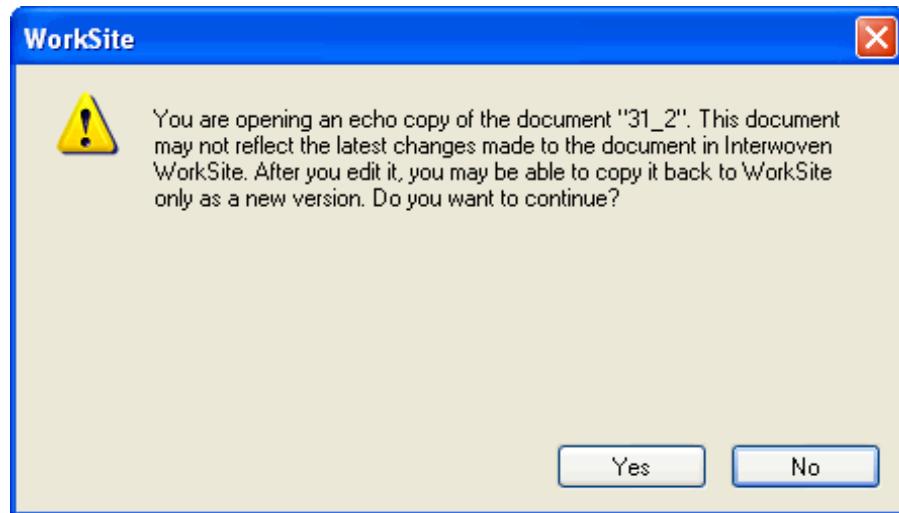
To	See
Open echo documents	“ Opening Echo Documents ” on page 355
Print echo documents	“ Printing Portable Documents ” on page 346
View echo documents	“ Viewing Portable Documents ” on page 346
E-mail echo documents	“ E-mailing Portable Documents ” on page 347
View an echo document’s profile information	“ Viewing Echo Document Profile Information ” on page 356

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 207](#) on page 342.

2. Open the desired WorkSite document. A message appears (see [Figure 214](#)), 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 214 Echo document warning message



3. Click **Yes** to continue. The document opens in its associated local application.

Viewing Echo Document Profile Information

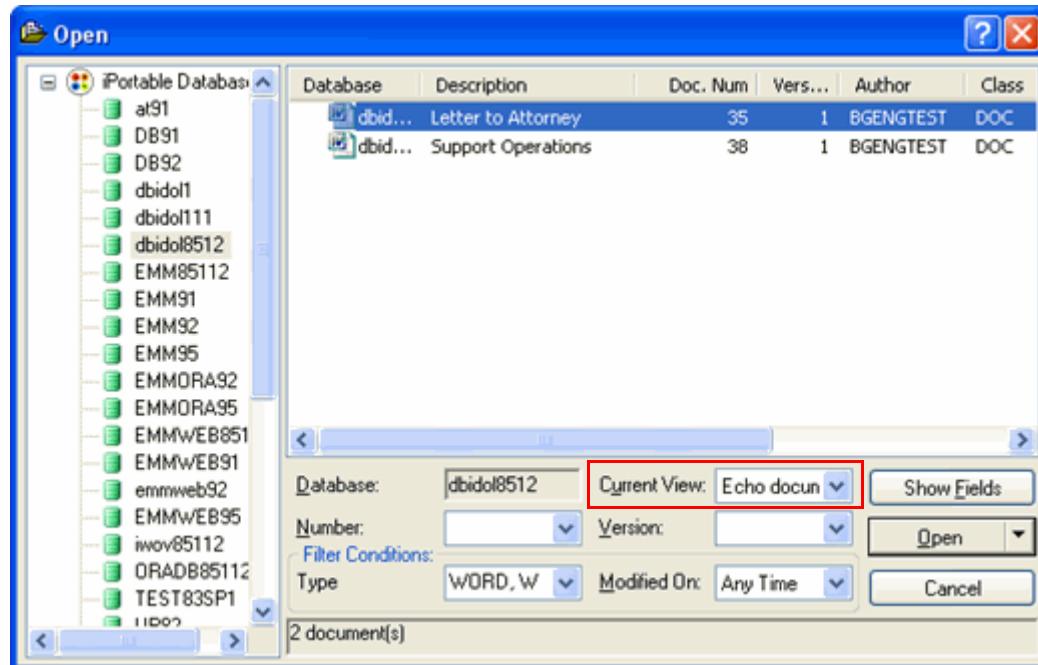
You can view document profile information of the echo documents, but you *cannot* edit profile information.

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 207 on page 342](#).
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 215 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 215](#). 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 263](#) 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*.

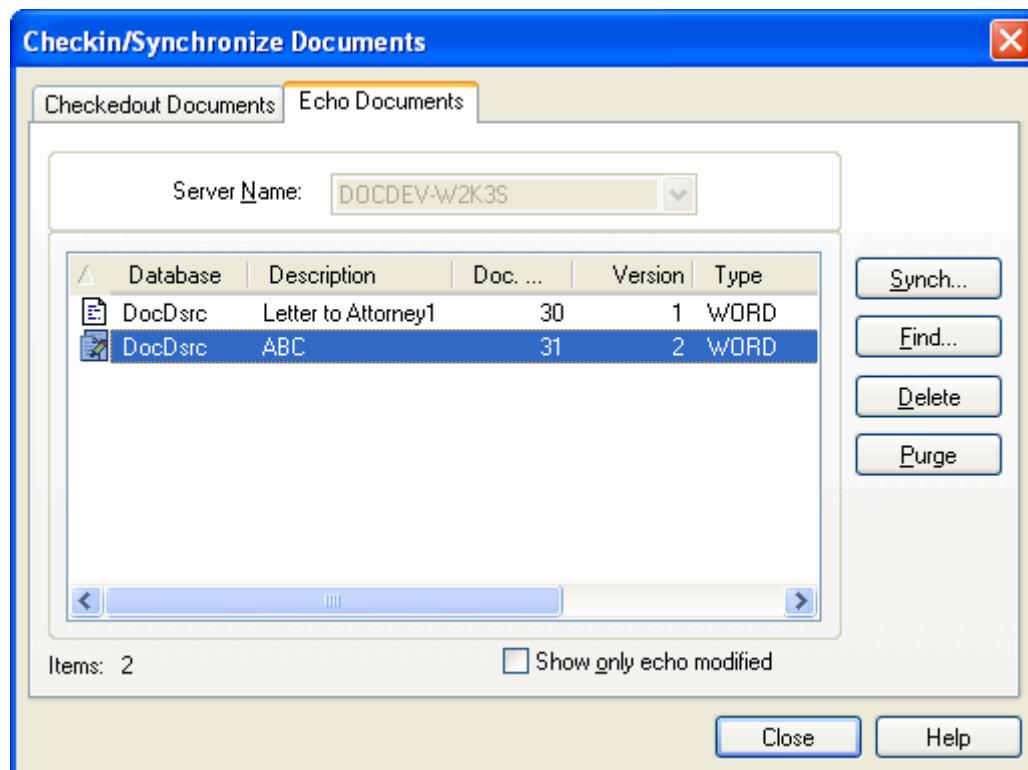
When you start FileSite, if you have echo documents with changes that are not reflected in the copies in the WorkSite library, you are prompted to synchronize. This feature prevents you from overwriting changes made to the document.

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 216](#).
3. Select the **Echo Documents** tab to display the list of echo documents.

Figure 216 Checkin/Synchronize Documents dialog box, Echo Documents

4. The echo documents appear in the display table with their profile fields as column headings.

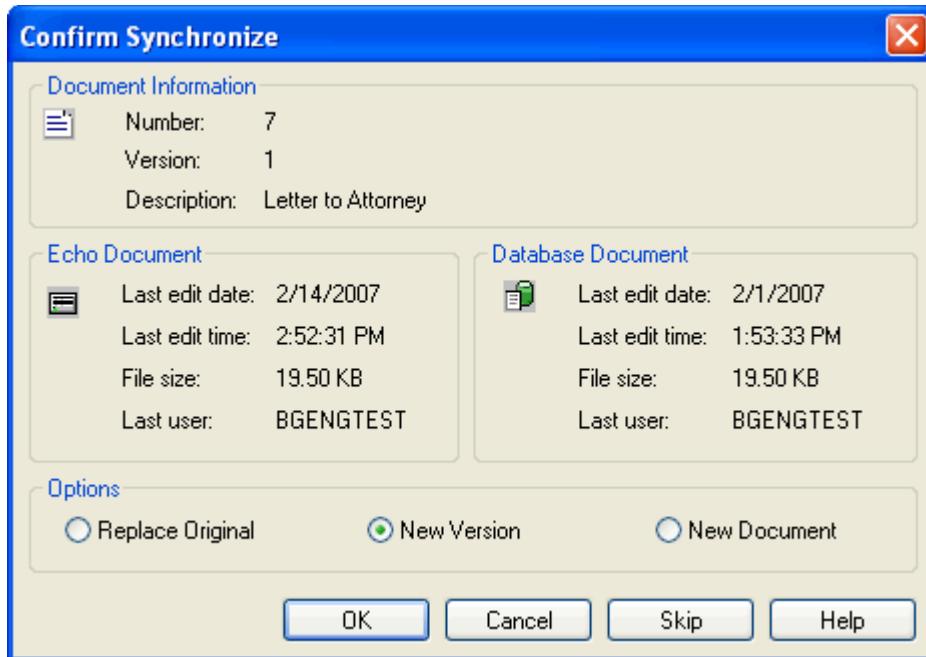


NOTE Document icons that appear against the documents indicate their status. See [Table 37](#).

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 361](#) for more information.

- Click **Synch** to begin the synchronization process. The Confirm Synchronize dialog box opens.

Figure 217 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.

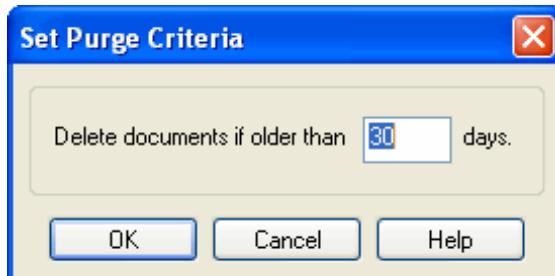
10. Click **OK** to synchronize the document. Click **Cancel** if you want to cancel synchronizing all the selected documents. Click **Skip** to cancel synchronizing a specific document.

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 216](#).
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 218 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

A

access rights 81
 full 81
 read 81
 read/write 81
accessibility
 feature overview 36
 turn on 62
adding FileSite 43
Adobe integration 291
 additional functions 297
 software requirements 292
application table 206
archive document
 restoring 175
Autocomplete
 Express Search 259

B

base path
 setting URL 59
bitmap viewing 334

C

category
 modify 90
 overview 74
checked-out documents
 information 178
 list 71
 modifying 84
checking in
 document 158

OLE links 323
portable document 348
checking out
 document 157
 OLE links 321
 portable document 343
CiteRite application 301
classic desktop 268
classic integration 268
collaboration
 matter-centric 31
column
 document grid 75
CompareRite application 300
configuring
 FileSite 54
 OLE linking 307
 Viewer 335
connecting
 server 50
connection mode
 choosing 55
container
 category 74
 folder 74
 modify 90
 setting security 80
 tab 74
 workspace 74
copying
 document 160
 document links 164
 viewer document 332
creating
 document 187

- document default 189
- OLE links 308, 312
- D**
 - database
 - list 73
 - search 231
 - worklist 61
 - default
 - document template 189
 - e-mail template 194
 - deleting
 - document 165
 - DeskSite
 - installing 41
 - desktop
 - classic integration 268
 - document grid 75
 - document results frame 76
 - enhanced integration 254
 - folder list 70
 - icons 67
 - links 164
 - menu 67
 - display
 - default options 335
 - document options 334
 - DMS
 - defined 27
 - DocuComp application 298
 - document
 - adding to folder 114
 - adding to My Favorites 88
 - auto-profile setting 57
 - changing profile information 140
 - checked-out document list 71
 - checking in 158
 - checking in OLE links 323
 - checking out 157
 - checking out OLE links 321
 - commands 133
 - comparing and merging 286
 - convert PDF 185
 - copying 160
 - creating 187
 - creating defaults 189
 - creating OLE links 308
 - creating profile information 138
 - creating relations 169
 - declaring record 172
 - deleting 165
 - detect OLE link 61
 - display checkedout information 178
 - display history 176
 - display information 176
 - display options 334
 - display relations 177
 - display versions 176
 - echo functions 355
 - editing security 204
 - e-mail option 61
 - e-mailing 165
 - e-mailing link 166
 - export setting 61
 - exporting 154
 - exporting OLE links 320
 - folder 74
 - history tab 77
 - import setting 57
 - reuse profile 58
 - importing 145
 - importing OLE links 312
 - importing to folder 115
 - integrated application functions 262, 271, 294
 - links 163
 - location 179
 - modifying OLE links 317
 - moving 161
 - OLE linking 308
 - opening 142
 - opening echo documents 143
 - opening OLE links 316
 - orphan 352
 - portable functions 342

printing 168
profile information 32
profile tab 76
purging 361
quick view tab 76
related documents tab 76
relating 35
relation types 169
removing from folder 115
removing relations 170
replacing OLE links 318
restoring archive 175
security template 197
selecting 123
send PDF 186
sorting in grid 123
unlocking 170
versions tab 76
viewer word processing modes 334
viewing 144
viewing supported formats 326
worklist 71
worklist per database 61
worklist per library 61
WorkSite mail merge 277
document grid
 columns 75
 customizing 124
 document version options 64
 modify 123
 navigating 127
 refreshing contents 123
 sorting documents 123
document results frame
 modify 127
 push pin 129
 tabs 76

E

echo
 document functions 355
 document storage location 354

enabling 354
opening echo documents 143
purging documents 361
software requirements 354
synchronizing 357
e-mail
 adding to folder 116
 auto-profile setting 57
 default security 61
 default template 194
 duplicate notification 58
 echo document 355
 importing 151
 integration 301
 management 31
 portable document 347
 sending to folder 117
enhanced desktop 254
exporting
 document 154
 OLE links 320
Express Search
 autocomplete 259

F

FileSite
 accessibility 36
 assistive technology 36
 choosing connection mode 55
 configuring 54
 defined 29
 features 30
 hardware requirements 40
 portable document functions 342
 programs 30
 setting startup properties 54
 software requirements 40
 starting 50
 timeout options 60
 turn on accessibility 62
 uninstalling 64
 update forms and captions 62

- folder
 - adding documents 114
 - adding e-mails 116
 - defined 74
 - deleting 117
 - document folder profile information 113
 - document folder refiling 113
 - e-mail address 106
 - importing documents 115
 - maximum document display 59
 - overview 74
 - recent searches 72
 - removing documents 115
 - search 236
 - search folder 75
 - search folder profile information 122
 - sending e-mail 117
- folder list
 - elements 70
 - modifying 83
 - modifying elements 84
 - node 73
 - overview 70
- footer 277
- full access rights 81
- FullAuthority application 300
- full-text search 221
 - simplified 223
- G**
- graphics
 - bitmaps 334
 - vector 335
- H**
- help 27
- history 176
- I**
- icon
 - profile information 139
- toolbar 67
- importing
 - attachment 153
 - deleting local file 60
 - document 145
 - e-mail 151
 - OLE links 312
 - portable documents 344
- installing
 - FileSite 41
- integrated desktop
 - classic 268
 - enhanced 254
- integration
 - active 245
 - additional Microsoft Office 289
 - Adobe Acrobat 291
 - application launching 240, 292
 - CiteRite 301
 - classic 253
 - Close 248
 - CompareRite 300
 - comparing and merging documents 286
 - DocuComp 298
 - document functions 262, 271, 294
 - echo document functions 356
 - e-mail 301
 - FullAuthority 300
 - Local Open 247
 - Local Save As 247
 - mail merge 277
 - Microsoft Office 240
 - modes 252, 294
 - Open 246, 252
 - Open from WorkSite 293
 - other applications 298
 - passive 251
 - portable document functions 351
 - Print 248
 - quick open 261
 - quick search 261
 - Save 247, 294

Save As 247, 252, 294
Save to WorkSite 294
Send WorkSite Link 250
WorkSite footer 277
WorkSite menu 289, 297
WorkSite Open 252
WorkSite Properties 248
WorkSite Save As 252

K

KeyView
localized resources 47

L

library
list 73
overview 73
worklist 61
link
creating 163
e-mailing 166
OLE 303
Outlook object 167
Send WorkSite link 250
Local Open command 247
Local Save As command 247
localization
KeyView resources 47
language settings 47
log in
server 50
time out 60
lookup dialog 136

M

mail merge 277
matter worklist
display options 60
modify 85
matter-centric
collaboration 31

navigation 31
metadata 32
entering 138
modify
category 90
checked-out documents 84
document folder 105
document grid 123
document results frame 127
document worklist 84
folder list 83
folder list elements 84
matter worklist 85
My Favorites 87
My Matters 86
recent searches 85
search folder 117
tab 101
worksheets explorer 89
Workspace 94
moving
document 161
My Favorites
adding documents 88
defined 32
modify 87
overview 73
My Matters
defined 31
modify 86
overview 73

N

navigation
document grid 127
matter-centric 31
non-integrated application 302
opening document 144

O

Office integration 240

additional functions 289
OLE link
 checking in 323
 checking out 321
 configuring 307
 creating 308
 definitions 304
 detecting 61
 exporting 320
 importing 312
 modifying 317
 opening 316
 replacing 318
 types 303
Open from WorkSite command 293
opening
 document 142
 echo documents 355
 OLE links 316
 portable documents 346
options
 default display 335
 document display 334
 printer 332, 333
orphan document 352
Outlook object link 167

P

PDF
 convert document 185
 send document 186

portable
 directory 63
 document functions 342
 setting default drive 63
 software requirements 339
 starting 339

pre-profiling template 244

printing
 document 168
 echo document 355
 options 332, 333

portable document 346
viewer document 332
private security level 81
profile
 tab 76
profile information
 auto-complete field 62
 changing 140, 347
 creating 138
 document folder 113
 icons 139
 search folder 122
 searching 220
 Workspace 98
profile record 32
purging
 echo documents 361
push pin 129

Q

Quick Open 261
Quick Search 261

R

read access rights 81
read/write access rights 81
refiling
 document folder 113
 tab 104
 Workspace 99
registering
 server 51
relating
 create relations 169
 document 35
 document tab 76
 remove relations 170
 types of relations 169

S

Save to WorkSite command 294

search dialog 220
 auto-close 61
 auto-complete field 62
 search container warning 62
searching 35
 auto-close Search dialog 61
 auto-insert wildcard characters 62
 database 231
 folder 236
 maximum search results 59
 operators 224
 profile information 220
 proximity 224
 query 224
 query-by-form 220
 recent searches 72
 search container warning 62
 search folder 75
 simplified 223
 syntax 224
 terms 224
 time out 60
 viewer documents 331
 Workspace 234
security 35
 access rights 36
 default e-mail security 61
 default levels 81
 document 204
 private 81
 public 81
 roles 35
 rules 82
 template 197
 view 81
server
 connecting 50
 list 71
 logging in 50
 logging in timeout 60
 maximum libraries 59
 registering 51

 unregistering 52
settings
 language 47
starting
 FileSite 50
 setting startup properties 54
synchronization
 echo documents 357
syntax 224

T

tab
 document profile 76
 document results frame 76
 document versions 76
 history 77
 modify 101
 overview 74
 quick view 76
 refiling 104
 related documents 76
template
 default document 189
 default e-mail 194
 security template 197
toolbar
 overview 67

U

uninstalling
 FileSite 64
unlocking
 document 170
unregistering
 server 52

V

versions 176
view security level 81
Viewer
 bitmap 334

configuring 335
copying documents 332
display font 334
printing documents 332
searching documents 331
supported formats 326
vector 335
viewing documents 328
window 327
word processing modes 334

viewing
document 144
echo documents 355
portable documents 346

W

window
cascade 327
tile 327

Work Online/Offline 69

worklist
defined 32
document 71
matter 72

WorkSite footer 277

WorkSite integrated desktop
classic 268
enhanced 254

WorkSite menu 289, 297

WorkSite Open command 252

WorkSite Save As command 252

Workspace
defined 31
modify 94
refiling 99
search 234

Autonomy Inc.

One Market, Spear Tower, 19th Floor,
San Francisco, CA 94105, USA
Tel: +1 415 243 9955
Fax: +1 415 243 9984
Email: info@us.autonomy.com

Autonomy Systems Ltd

Cambridge Business Park,
Cowley Rd, Cambridge CB4 0WZ, UK
Tel: +44 (0) 1223 448 000
Fax: +44 (0) 1223 448 001
Email: autonomy@autonomy.com

Other Offices

Autonomy has additional offices in Antwerp, Barcelona, Beijing, Boston, Calgary, Cambridge, Chicago, Dallas, Kuala Lumpur, London, Madrid, Mexico City, Milan, Munich, New York, Paris, Pleasanton, Rome, San Francisco, Santa Clara, Shanghai, Singapore, Santiago, Sao Paulo, Stockholm, Sydney, Tokyo, Utrecht and Washington, D.C.

Copyright © 2011 Autonomy Corp. All rights reserved. Other trademarks are registered trademarks and the properties of their respective owners.
Product specifications and features are subject to change without notice. Use of Autonomy software is under license.