Hummingbird

Installation Guide

PowerDOCS

Version 3.5.1

Contents

Appendix C   DOCSFusion Security Regeneration Tool

Preface

About This Guide

This guide gives instructions for installing PowerDOCS and provides the information you need to configure and maintain integration for the applications your users require.

Who Should Read This Guide

This document is intended for the person who will be installing and configuring PowerDOCS.

How This Guide Is Organized

This book has five chapters and three appendices.

- Chapter 1: PowerDOCS Installation Overview

  This chapter lists the workstation requirements and provides a checklist for you to follow to ensure that you perform all the necessary preinstallation and installation tasks.

- Chapter 2: Installing the PowerDOCS Admin Kit

  This chapter describes the process you must follow to create the installation kit for your user workstations.

- Chapter 3: Installing PowerDOCS on a Workstation

  Now that the Install Kit has been created, you must run the kit to install PowerDOCS on a workstation.

- Chapter 4: PowerDOCS Implementation Tool

  This chapter describes how you can use the PowerDOCS Implementation Tool to create a master registry file for future PowerDOCS installations.

- Chapter 5: Uninstalling DOCSFusion and PowerDOCS Components

  This chapter provides brief instructions on uninstalling PowerDOCS.

- Appendix A: Configuring Application Integration for PowerDOCS

  This appendix provides details on integrating your user applications with PowerDOCS.

- Appendix B: PowerDOCS E-Mail Integration

  This appendix discusses integrating PowerDOCS with your e-mail system.

- Appendix C: DOCSFusion Security Regeneration Tool

  This appendix briefly discusses using the DOCSFusion Security Regeneration tool.

Documentation Conventions

This book uses the following fonts and styles to indicate different types of information.

Convention	Meaning
Regular Italic font	Indicates a new term or variable in a command line. For example, replace *filename* with the name of a file.
`Monospaced font`	Indicates a file, directory, drive or command name, program code, or other text that appears on the computer screen. For example, the default Oracle library is usually `ORACLE_HOME/DBS` or `ORACLE_HOME/RDBMS73`.
Bold	In instruction steps, indicates information you must type. In text, indicates emphasis.
>	Separates items on more than one cascading menu or successive choices of icons or program groups.

Related Manuals

In addition to this manual, you may find the following documents helpful.

- *DOCS Designer and Data Dictionary* - Explains enhancing DOCS Open with the DOCS Designer utility, including: creating forms, adding tables and columns, and adding and changing filters.

- *DOCSFusion 3.1 Setup and Administration Guide* - Provides detailed instructions on installing and configuring your DOCSFusion server.

Training Classes

Hummingbird (Document and Knowledge Management Solutions) offers courses at authorized Training Centers worldwide. For more information or to register for classes, call Hummingbird Education Services at (613) 238-1761.

Where to Go for Information

On the Web

Our website at http://www.hummingbird.com/support/dkm/ carries the most up-to-date information on DOCSFusion and PowerDOCS. This information is presented in technical bulletins and in WebSupport Solutions, each dealing with a specific topic that is not covered or that updates printed information. Before installing DOCSFusion/PowerDOCS, we suggest you browse through the bulletins for items that may be pertinent to your installation. For WebSupport, you will be asked to enter your user name and password for authentication. If you have not requested logon access to WebSupport, you can do so at http://www.hummingbird.com/support/dkm/ .

On the Fusion Family CD

The 3.5.1 Release Notes reside in the \PowerDOCS folder in a file called PowerDOCSReadme.rtf, which can be read by most editors and word-processing programs. The release notes contain information that came to light after the documentation was printed. Known bugs and workarounds are also detailed in the Release Notes.

The 3.5.1 Release Notes reside in the \PowerDOCS folder in a file called PowerDOCSReadme.rtf, which can be read by most text editors and word-processing programs. The release notes contain information that came to light after the documentation was printed. Known bugs and workarounds are also detailed in the Release Notes.

The DOCSFusion product line's online manuals, which are published in PDF format, are provided on the Fusion Family CD. To read these manuals, you will need a copy of Adobe Acrobat Reader installed on your machine. A setup program for Acrobat Reader 4.05 is provided on the DOCSFusion CD. If you do not already have a copy, follow the instructions below.

1. Insert the Fusion Family CD in your computer's CD-ROM drive.

2. The DOCSFusion Product Line Installation menu will be displayed. Click Documentation.

3. Click Install Acrobat Reader. The Acrobat Reader version 4.05 install program will launch.

4. Follow the onscreen instructions and install the program. When complete, exit the DOCSFusion Product Line Installation menu.

The PowerDOCS manuals are found in the `..\Program Files\PCDOCS\PowerDOCS` directory. To access these manuals, start Acrobat Reader and select File>Open. Navigate to the `..\Program Files\PCDOCS\PowerDOCS` directory and select the file you want to open.

*   **PowerDOCS.PDF.** The *PowerDOCS User's Guide*

*   **PDInstall.PDF**. The *PowerDOCS Installation Guide*

*   **PDAttache.PDF.** The *PowerDOCS Attaché User's Guide*

To access the entire DOCSFusion documentation set:

1. Insert the Fusion Family CD in your computer's CD-ROM drive.

2. The DOCSFusion Product Line Installation menu will be displayed. Click Documentation.

3. Select Browse Documentation. Double-click the `PDFs` directory.

4. Double-click `COVERDOC.PDF`. Acrobat Reader will launch and a menu listing the DOCSFusion documentation set will appear.

5. To open a document, click the document name.

The entire DOCSFusion product line documentation set, which includes the online manuals and the Windows Help files, can be installed on a network drive or any local machine. This gives you access to the documentation from the Start menu. To do this, follow steps 1 and 2 above. Select Install Documentation and follow the onscreen directions.

By default, the PowerDOCS Help files are installed with PowerDOCS. To access Help while using PowerDOCS, press F1.

Technical Support

If you have questions about installing or administering PowerDOCS, you can contact Hummingbird Technical Support Department from 8:00 A.M. to 8:00 P.M. EST.

PowerDOCS Technical Support

124 Marriott Drive

Tallahassee, FL 32301

Phone: 850.942.5000

Fax: 850.942.8085

Email: supportTLH@hummingbird.com

Asia/Pacific Technical Support

Level 12

80 Mount Street

North Sydney, NSW 2060

Phone: +61.2.9923.2011

Fax: +61.2.9922.3097

Email: SupportSyd@hummingbird.com

European Technical Support

2 rue Rouget de L'Isle

92137 Issy-les-Moulineaux, France

Phone: +33.1.46.29.07.40

Fax: +33.1.46.29.55.22

Email: support.eu@pcdocs.com

1

PowerDOCS Installation Overview

In This Chapter

This chapter provides the minimum and recommended workstation requirements and a high-level overview of the entire PowerDOCS installation and configuration process.

PowerDOCS Workstation Requirements

Make sure the computer where you will install the PowerDOCS components meets or exceeds the following specifications:

Processor	Recommended:	Pentium 200+
Memory	Recommended:	128 MB
Operating System	Microsoft Windows NT Server 4.0 with Service Pack 5 or later (required by the DOCSFusion Server), Microsoft Windows NT Workstation 4.0 with Service Pack 5.0 or later, Windows 98, or Windows 2000.	
Certified DOCS Open Libraries	DOCS Open 3.8 or later.	

NOTE Your users must have a network domain account or a DOCS Open Unplugged account with a password. They cannot log in to the DOCSFusion server with a null password.

To use PowerDOCS Attaché, your users must have a DOCS Open Unplugged account with a password.

Checklist for Installing PowerDOCS

Use the steps below as a checklist to follow when installing and implementing PowerDOCS for your organization.

1. Complete all of the preinstallation tasks for DOCSFusion. See the *DOCSFusion 3.1 Setup and Administration Guide.*

2. Run the combined setup program from the distribution CD. See the *DOCSFusion 3.1 Setup and Administration Guide.*

   a. Install the DOCSFusion Server.

   b. Install the DOCSFusion Client API.

   c. Install the PowerDOCS Admin Kit component. Refer to "Running the PowerDOCS Admin Kit Setup" on page 6.

3. Make the PowerDOCS Installation Kit available in a user-accessible location. See "Setting Up the PowerDOCS Client" on page 21.

4. Install the PowerDOCS client on a workstation to access the Interceptor Configuration Tool.

   a. To install the PowerDOCS client on a Windows 95 workstation:

      i. Install DCOM for Windows 95. See *"Installing DCOM on Windows 95 Workstations" on page 18.*

      ii. Run the PowerDOCS client installation. See "Setting Up the PowerDOCS Client" on page 21.

   b. To install the PowerDOCS client on a Windows 98, Windows 2000, or Windows NT workstation:

      i. Run the PowerDOCS client installation. See "Setting Up the PowerDOCS Client" on page 21.

5. Configure end-user applications using the Interceptor Configuration Tool. See "Configuring Application Integration for PowerDOCS" on page 85.

6. Once you have configured the applications, export this information to a registry file and give your users access to this file. This allows proper application configuration with no additional setup on individual workstations. See "Exporting the Interceptor Settings" on page 133.

N O T E Adminstrators can use the Implementation Tool to create a registry file for configuring items other than application integration. See "PowerDOCS Implementation Tool" on page 43.

7. Instruct each user to install the PowerDOCS client software by following these steps:

   a. To install the PowerDOCS client on a Windows 95 workstation:

      i. Install DCOM. See *"Installing DCOM on Windows 95 Workstations" on page 18.*

      ii. Run the PowerDOCS client installation. See "Setting Up the PowerDOCS Client" on page 21.

   b. To install the PowerDOCS client on a Windows 98, Windows 2000, or Windows NT workstation:

      i. Run the PowerDOCS client installation. See "Setting Up the PowerDOCS Client" on page 21.

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Installing the PowerDOCS Admin Kit

In This Chapter

This chapter describes how to install the PowerDOCS Admin Kit. Follow the "Checklist for Installing PowerDOCS" on page 3. The instructions in this chapter assume that you are starting with the combined installation program for DOCSFusion Product Line as delivered on the distribution CD. If you are starting directly from the PowerDOCS Admin Kit installation program, skip past the first three steps on the next page.

Running the PowerDOCS Admin Kit Setup

The PowerDOCS Admin Kit is the first component you must install after completing the DOCSFusion server installation (for information, see the *DOCSFusion Installation Guide*).

1. Insert the DOCSFusion Product Line CD into your CD drive. The DOCSFusion Product Line Installation Menu appears. Select Install Products.

2. Select PowerDOCS. The PowerDOCS Admin Kit welcome dialog box appears.

Figure 2.1

PowerDOCS Admin Kit welcome dialog box

3. Click Next to continue. The Software License Agreement dialog box appears.

Figure 2.2

PowerDOCS Admin Kit Software License Agreement dialog box
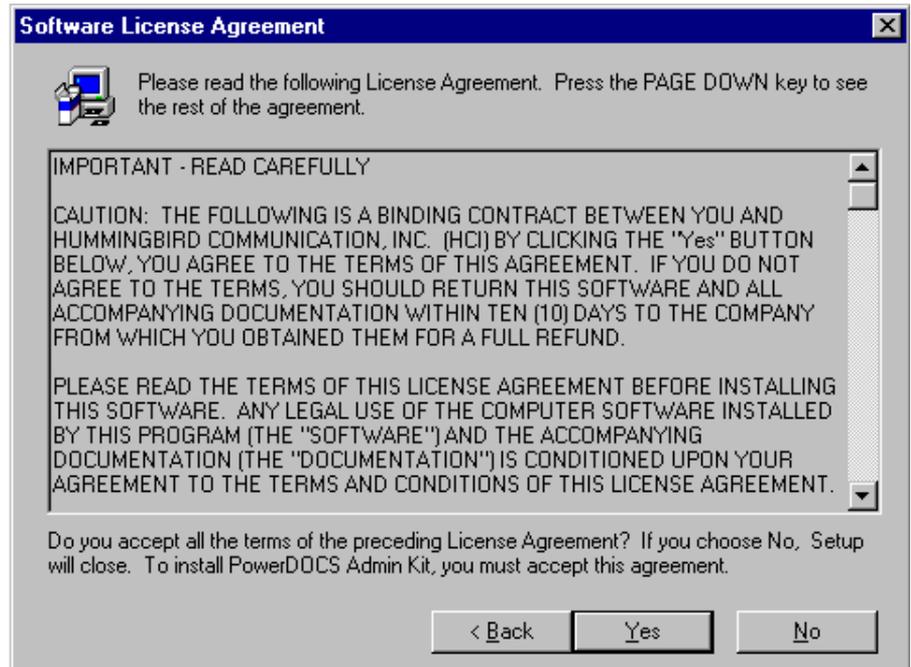
Read the agreement and click Yes if you agree to the terms. If you do not agree, click No and the setup program will terminate without making changes to your workstation.

4. The Licensing dialog box appears. Type the serial number and password you received with this CD and click Next to continue.

Figure 2.3

PowerDOCS Admin Kit Licensing dialog box
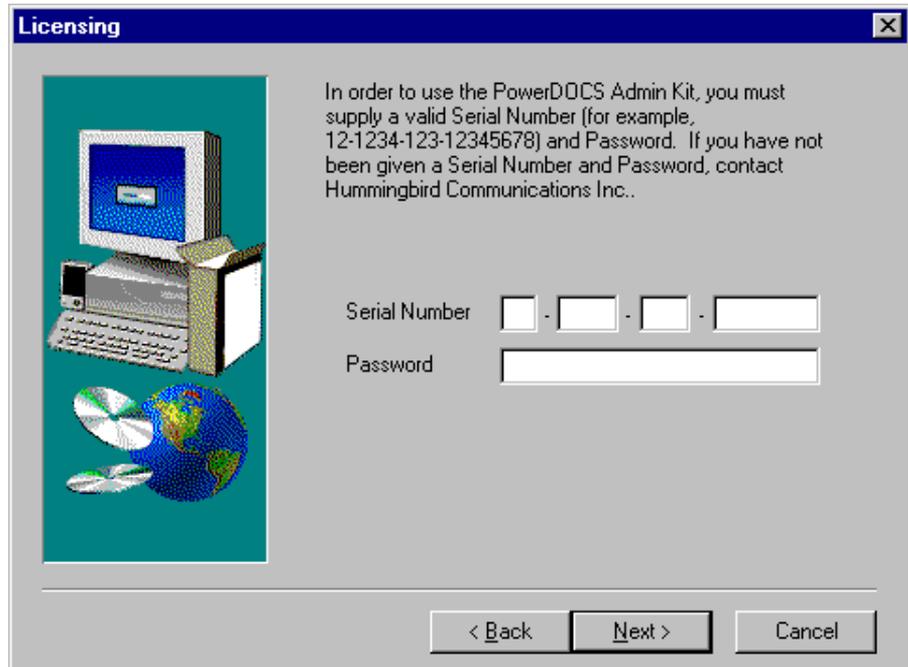
5. The Select Install Kit Type dialog box will appear. Click on the type of Install Kit you want to create. Your may choose between Typical and Custom.

Figure 2.4

PowerDOCS Admin Kit Select Install Kit Type dialog box
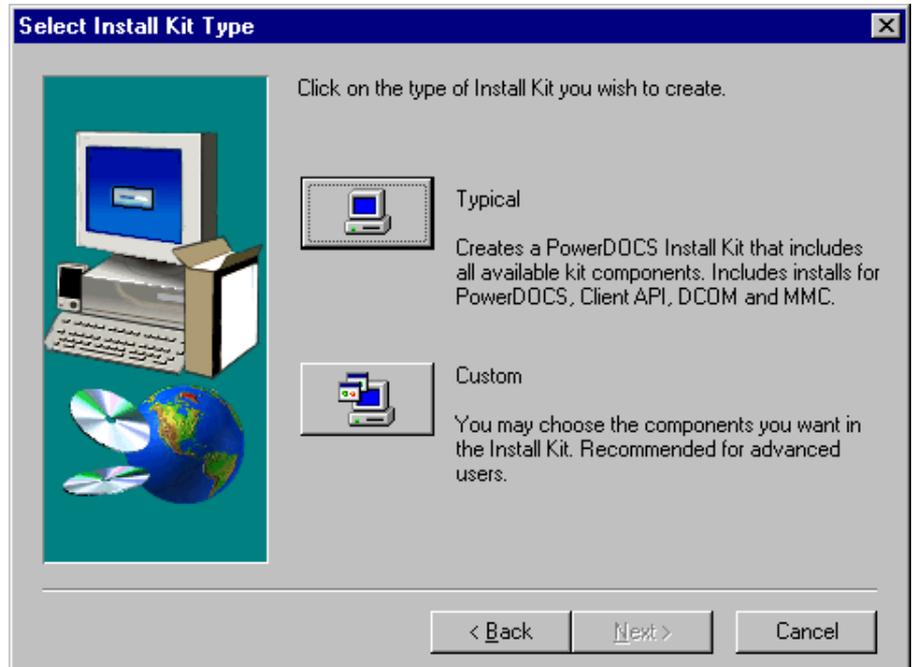
Select the type of installation you want to perform:

— Typical will install the components that are most frequently required for the majority of sites.

— Custom allows you to specify the components you require.

If you select the Custom option, the Select Components dialog box appears. Select the components you want to install and click Next.

Figure 2.5

*Select Components
dialog box*
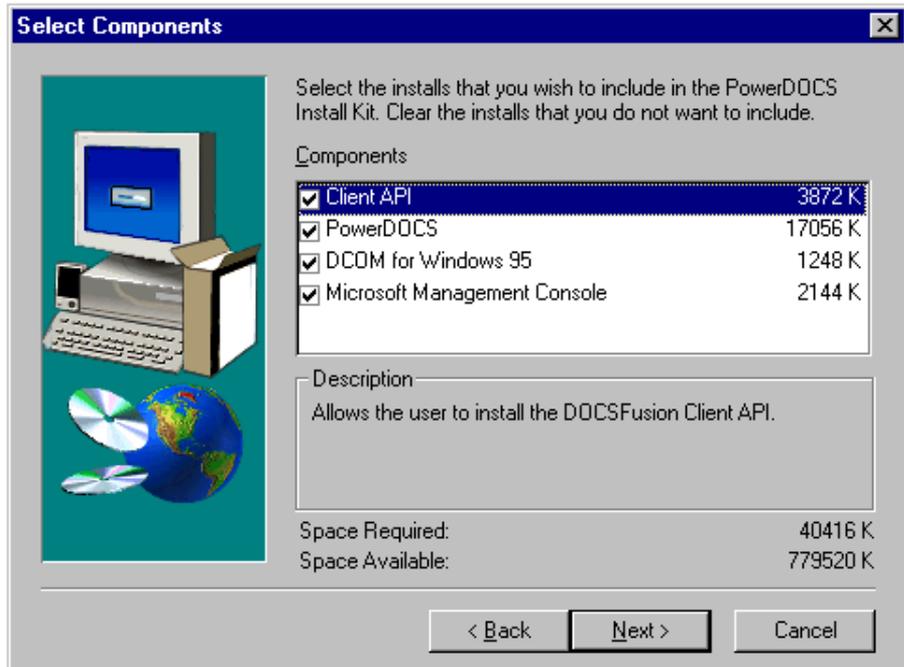
NOTE The Microsoft Management Console (MMC) option copies the files necessary for installation of the MMC. Refer to "Installing the Microsoft Management Console" on page 45.

6. The Choose Destination Location dialog box appears.

Figure 2.6

*PowerDOCS
Admin Kit Choose
Destination
Location dialog box*

7. You may accept the default Destination Directory or select a different directory. To select a different directory, click Browse.

N O T E This will be the Install Kit directory that your users will need to access to install the PowerDOCS client on their workstations.

The Choose Folder dialog box appears. Select the desired folder
and click OK.

Figure 2.7

*Choose Folder dialog
box*
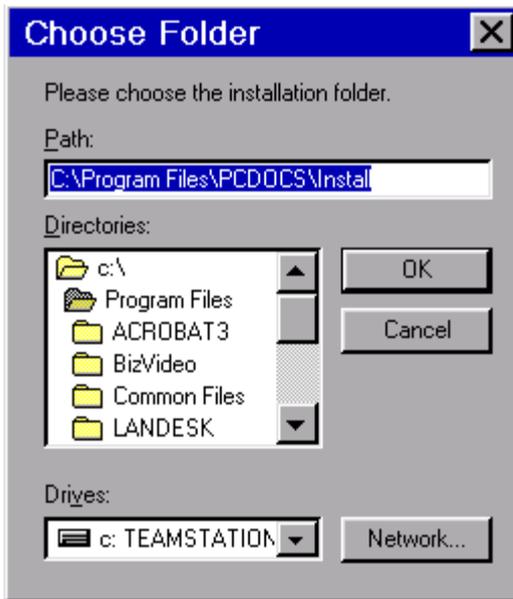
8. The Start Copying dialog box will appear. Ensure that the components shown are the appropriate ones and click Next to continue or click Back to return to the previous dialog box.

Figure 2.8

Start Copying dialog box
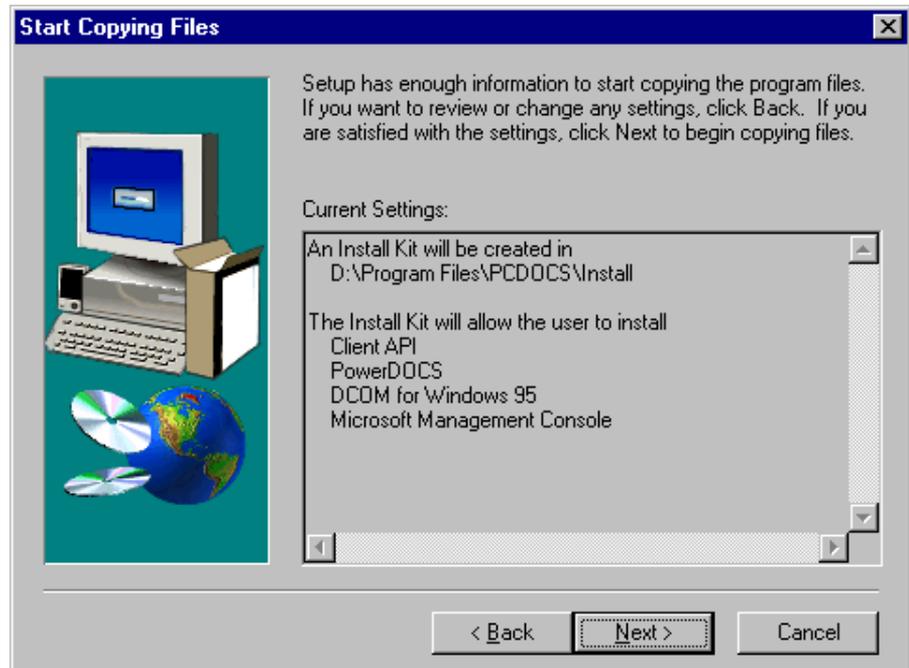
9. The installation program copies files to the target directory. When all files have been copied, the Setup Complete dialog box appears.
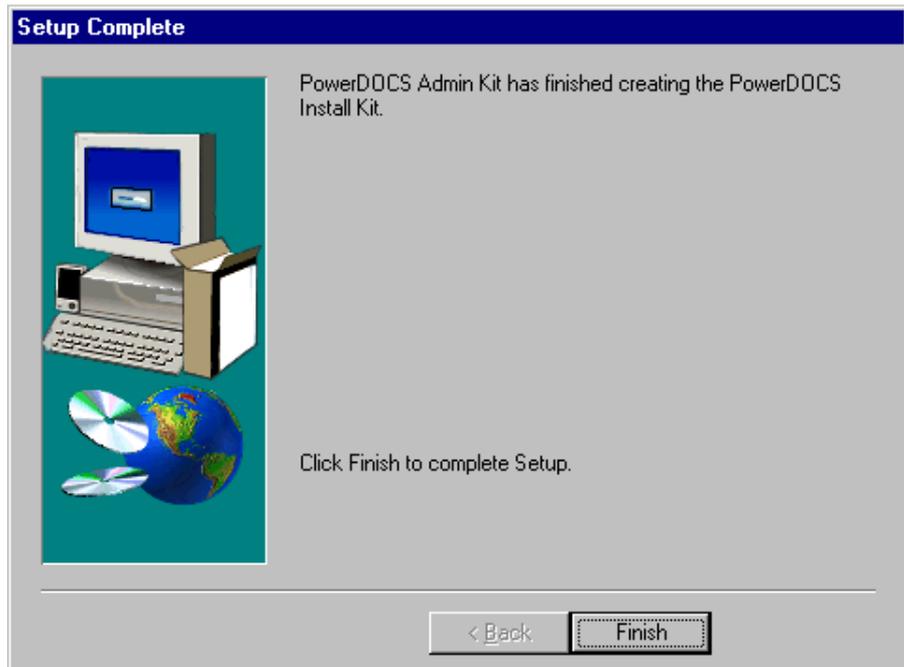
10. Click Finish to complete the installation. The PowerDOCS Admin Kit has been installed.

11. The DOCSFusion Product Line Installation Menu will appear. Click Main, then Exit

The PowerDOCS Admin Kit has created the directories for your users to install the PowerDOCS client software. You must ensure that they have access to this location (the default location is `C:\Program Files\PCDOCS\Install`). You can do this from the Windows Explorer by selecting the Install directory and opening the Properties dialog box (File>Properties), then setting the appropriate values on the Sharing tab.

If you will be creating and exporting registry setting files using the Implementation Tool, Email Configuration Tool, and Interceptor, you can place these registry files in the installation directory (the default location is `C:\Progam Files\PCDOCS\Install\PowerDOCS`) and they will be included with the PowerDOCS client installation.

3

Installing PowerDOCS on a Workstation

In This Chapter

This chapter describes running the PowerDOCS Install Kit from the user's workstation.

Windows 98, Windows 2000, and Windows NT users. If you are installing the PowerDOCS client on a Windows 98, Windows 2000 or Windows NT workstation, proceed to "Setting Up the PowerDOCS Client" on page 21.

Windows 95 users. Before you install the PowerDOCS client on a Windows 95 workstation, you must complete one task:

•   Install DCOM for Windows 95.

The following section walks you through the preinstallation steps.

Preparing Windows 95 Workstations

Installing DCOM on Windows 95 Workstations

Before you install the PowerDOCS client on a Windows 95 workstation, you must install DCOM. This is not required for Windows 98, Windows 200, or Windows NT workstations.

1. Open the DCOM folder located in the PowerDOCS Install directory (the default directory location is `C:\Program Files\PCDOCS\Install`).

N O T E If you do not install DCOM before starting the PowerDOCS Client Install procedure, the PowerDOCS Install program will notify you that DCOM needs to be installed.

2. Double-click `Dcom95.exe`. The following dialog box appears.

Figure 3.1

DCOM for Windows 95 confirmation dialog box
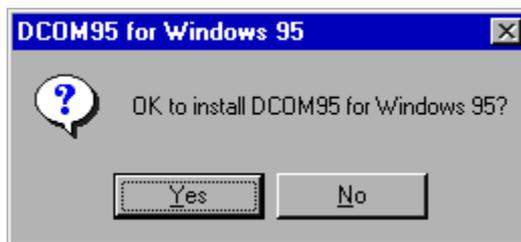
3. Click Yes to continue. The license agreement is displayed.

Figure 3.2

DCOM95 for Windows 95 license dialog box
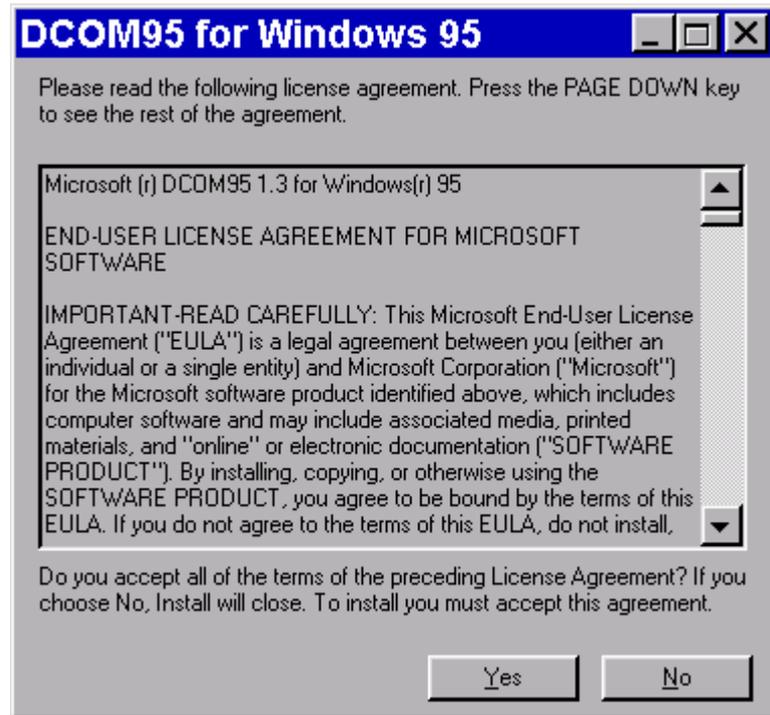
4. Click Yes if you accept the conditions stated. If you do not accept the license agreement, click No. The setup program will exit without making changes to your system configuration.

5. When the DCOM files are finished copying, you are asked if you want to restart your computer. Click Yes.

Figure 3.3

DCOM95 for Windows 95 reboot dialog box
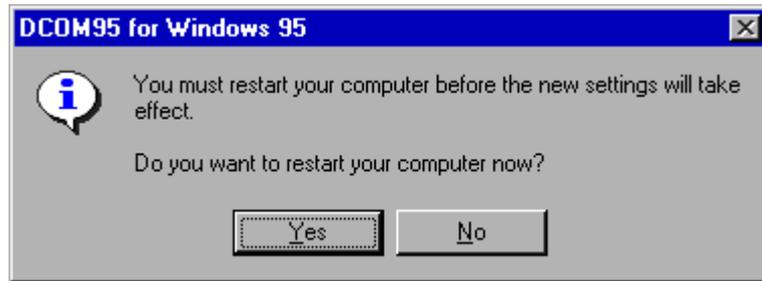
Setting Up the PowerDOCS Client

The PowerDOCS Admin Kit installation program creates a client installation kit for you to place on a user-accessible location on your network. After you create the installation kit, your users can run the PowerDOCS installation program to install the PowerDOCS client on their workstations.

1. Run the PowerDOCS Install Kit setup program (default is `C:\Program Files\PCDOCS\Install\setup.exe`).

2. The welcome dialog box for the PowerDOCS Install Kit appears.

Figure 3.4

PowerDOCS Install Kit 3.5.1 welcome dialog box
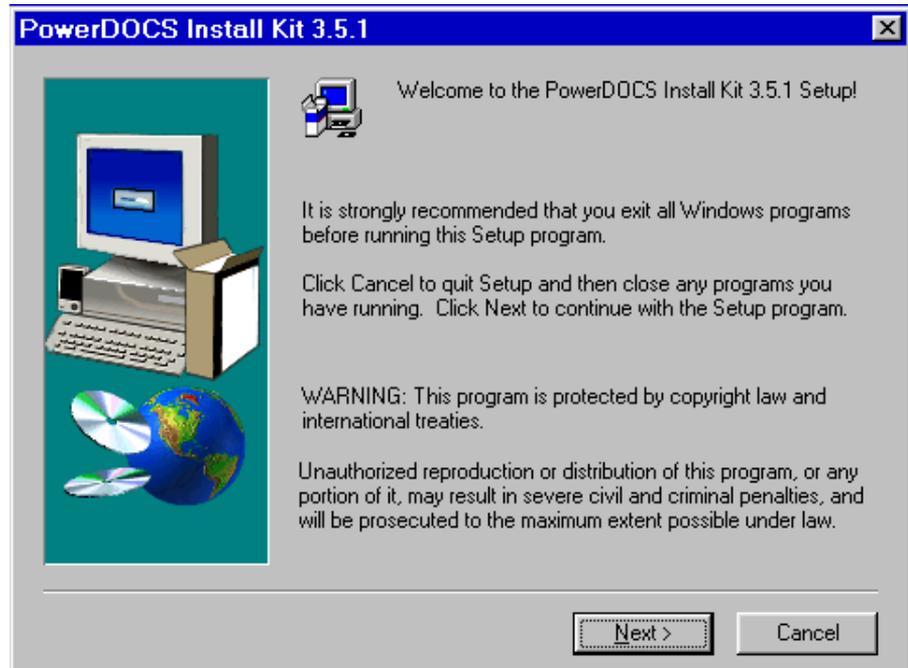
3. Click Next to continue. The Software License Agreement dialog box will appear. Click Yes to accept the terms of the agreement.

Figure 3.5

PowerDOCS Install Kit Software License Agreement dialog box
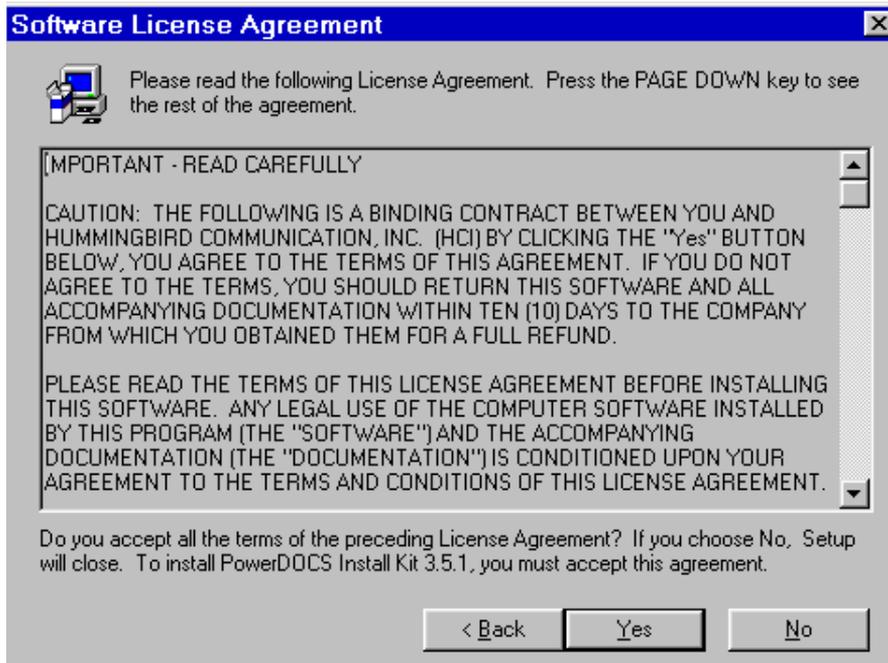
4. The Select Components dialog box appears.
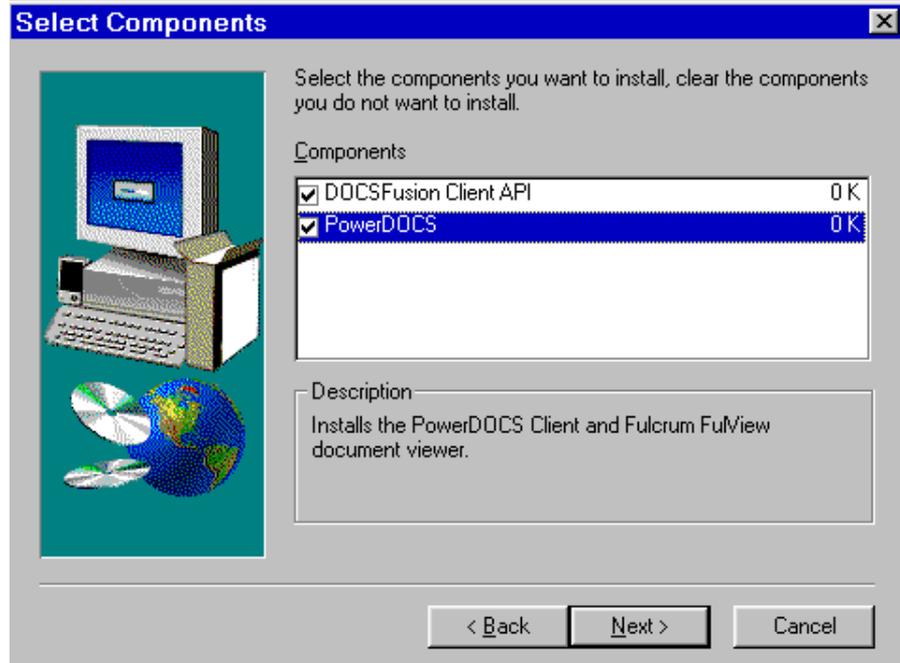
Select the components and click Next to continue with the installation:

DOCSFusion Client API This provides the communications path between client applications and the DOCSFusion server and must be installed on each user's workstation in order for PowerDOCS to run.

PowerDOCS This is the client software for the user's workstation and includes the PowerDOCS Desktop, PowerDOCS Explorer, and Fulcurm FulView. Fulcrum Fulview must be installed to use the Viewer and Profile Add-on features.

5. The Start Copying Files dialog box appears. Ensure that the current settings are correct and click Next.

Figure 3.7

PowerDOCS Install Kit Start Copying Files dialog box
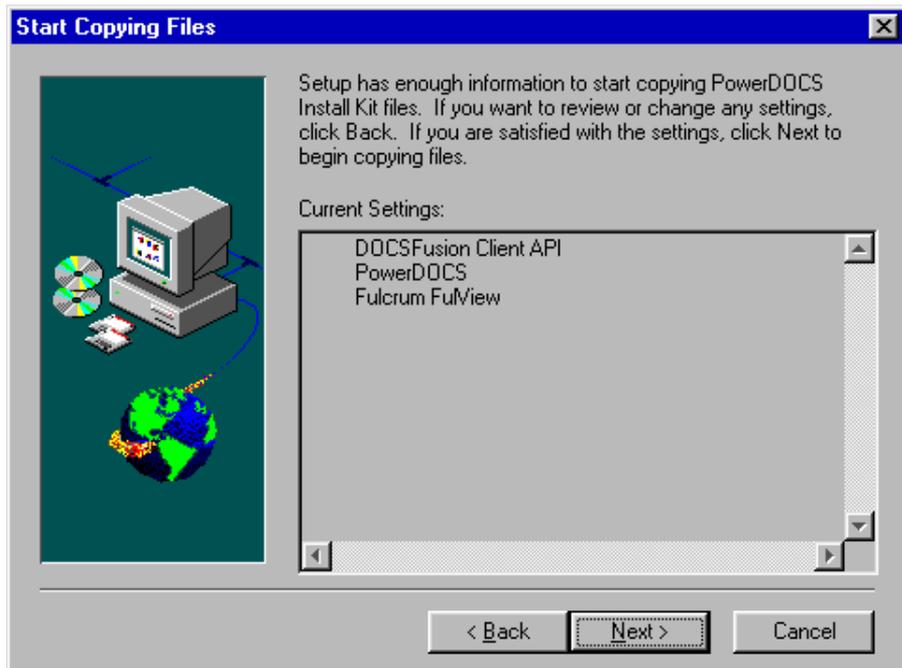
At this point, the PowerDOCS Install Kit begins to install the first component. The DOCSFusion Client API welcome dialog box appears. Click Next to continue.

Figure 3.8

DOCSFusion Client API welcome dialog box
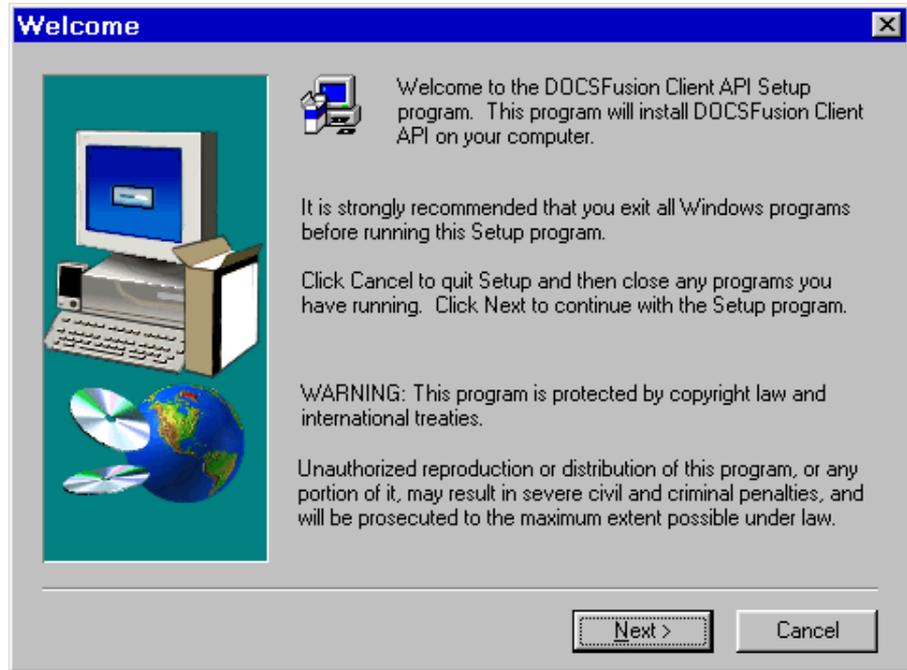
6.   The Software License Agreement dialog box appears. If you accept the conditions stated there, click Yes to continue with the installation.

Figure 3.9

DOCSFusion Client API Software License Agreement dialog box
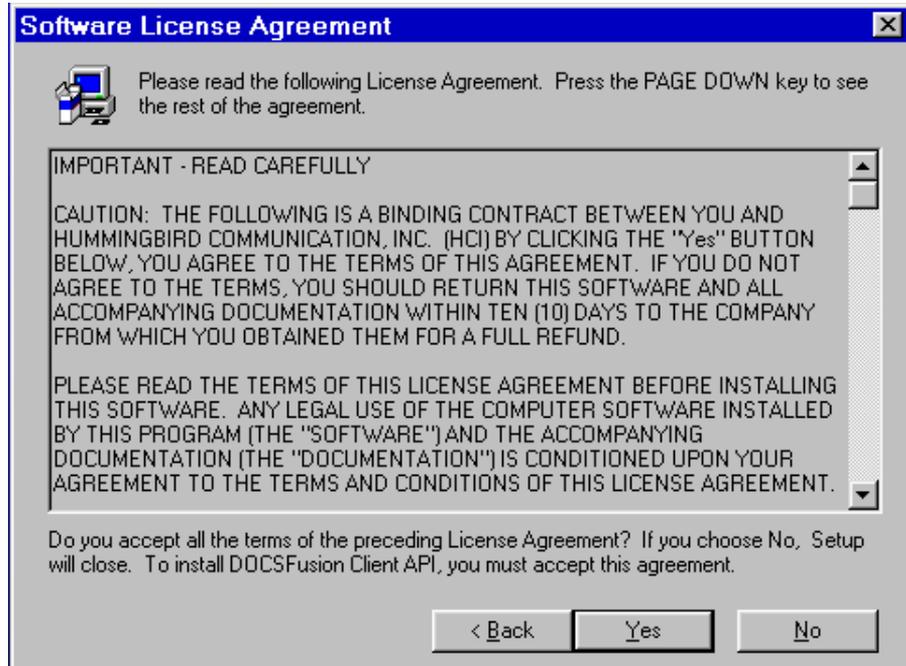
7. The Setup Type dialog box appears.

Figure 3.10

DOCSFusion Client API Setup Type dialog box
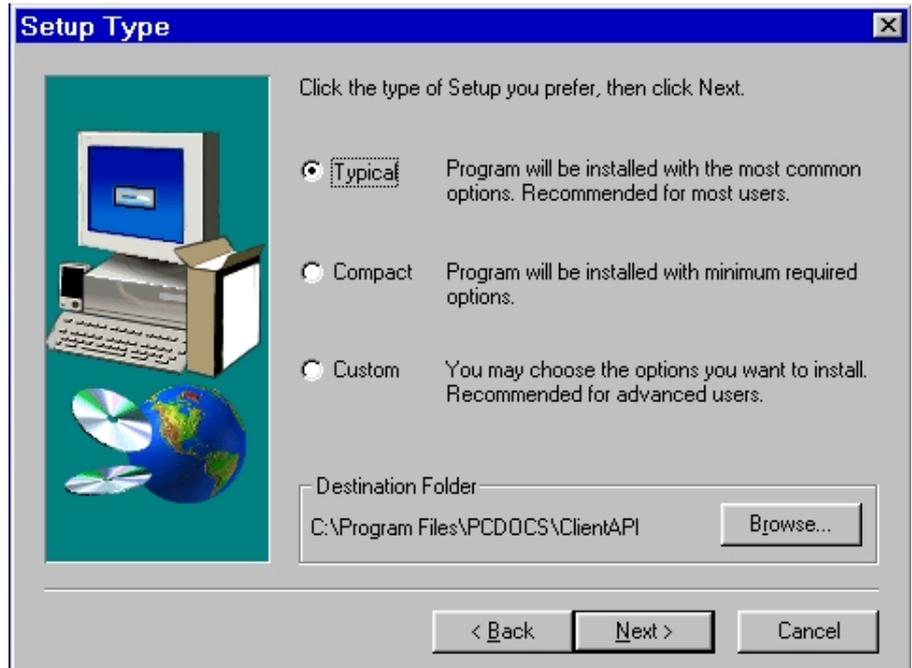
Select a Setup option and click Next.

Typical	Installs the most commonly used options. This option is recommended for initial installation and for most users.
Compact	Installs only those files required to run the program.
Custom	Lets you to specify the options you want installed. This option is recommended only for advanced users.

You may accept the default Destination Directory or select a different directory. To select a different directory, click Browse.

The Choose Folder dialog box appears. Select the desired folder and click OK.

8. The Select Program Group dialog box will appear. Click Next to continue.

9. The Start Copying Files dialog box appears. Verify the Current Settings you have chosen, and click Next to copy the DOCSFusion Client API files.

Figure 3.11

DOCSFusion Client API Start Copying Files dialog box

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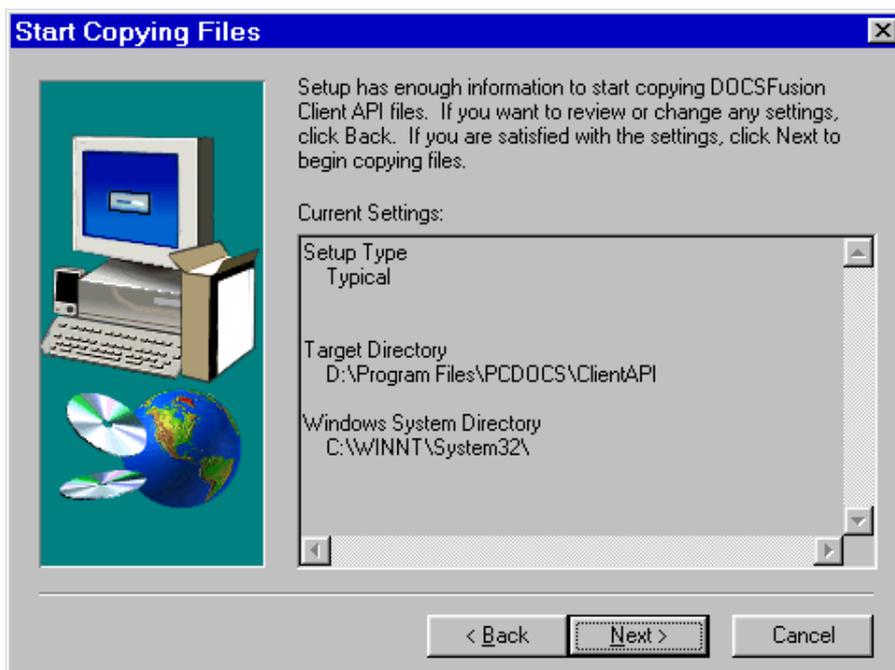
10. After the files are copied to your machine, click Finish from the Setup: Reboot Required dialog box.   You computer will reboot.

Figure 3.12

DOCSFusion Client API Setup: Reboot Required dialog box

11. After the computer has restarted, the DOCSFusion Client API install will continue. The Setup Complete dialog box will appear. Click Finish.

Figure 3.13

DOCSFusion Client API Setup Complete dialog box
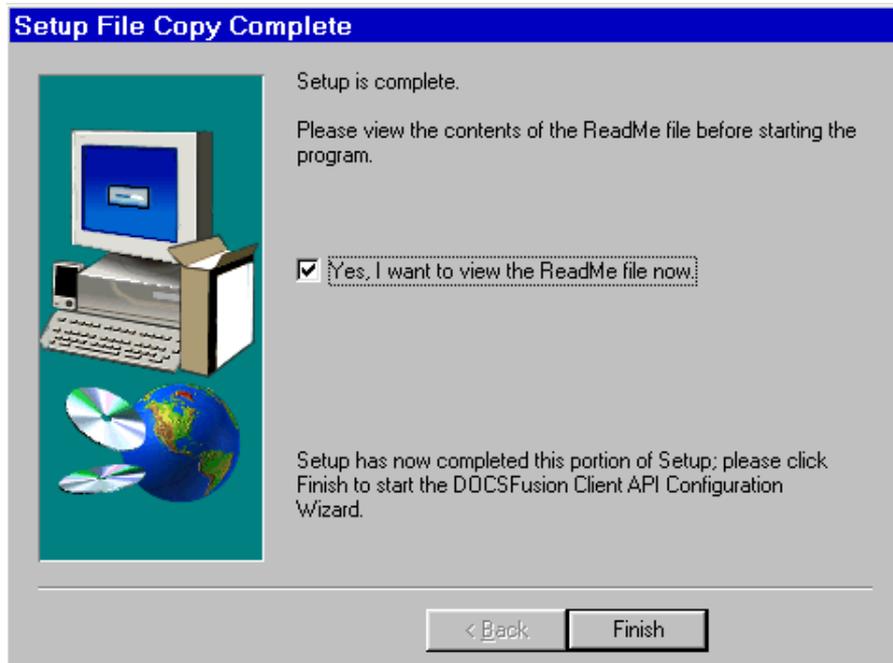
12. The DOCSFusion Client API Configuration Wizard will launch. The Welcome screen will appear first. Click Next to continue.

13. Enter your DOCSFusion Server Name in the space provided. The field may already contain the name. If not, contact your PowerDOCS administrator for this information.

    If your organization utilizes the Fail-over and Load Balancing feature, check the FOLB box.

14. Click Next to continue. Click Finish to complete the configuration.

15. The PowerDOCS 3.5.1 Install Program will launch. The Welcome dialog box will appear first.

Figure 3.14

PowerDOCS Setup program Welcome dialog box
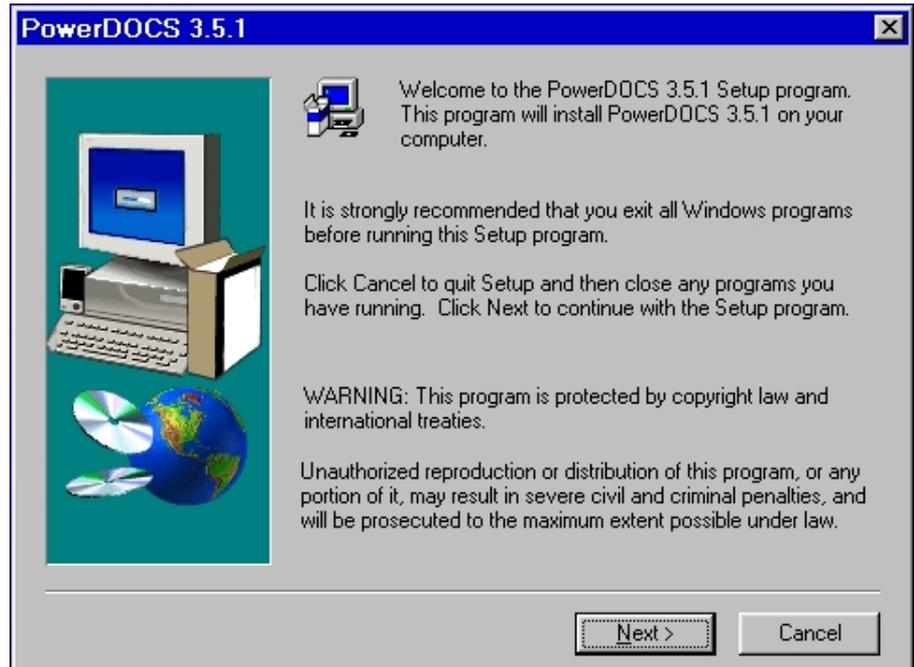
16. Click Next to continue. The Select Directory dialog box will appear.

Figure 3.15

PowerDOCS Setup program Select Directory dialog box
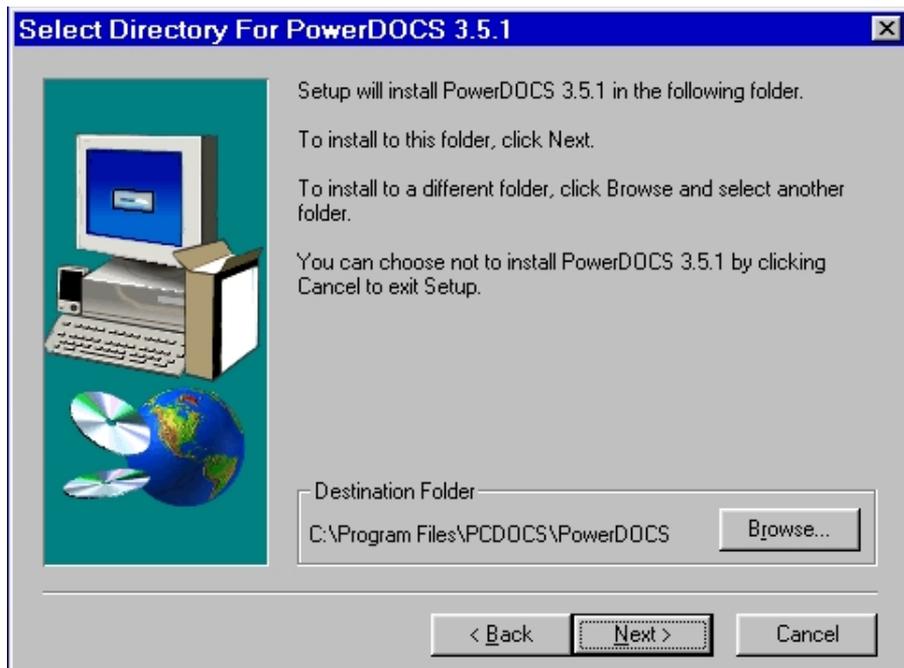
You may accept the default Destination Directory or select a different directory. To select a different directory, click Browse.

The Choose Folder dialog box appears. Select the desired folder and click OK.

17. Click Next to continue. The Select Components dialog box appears.
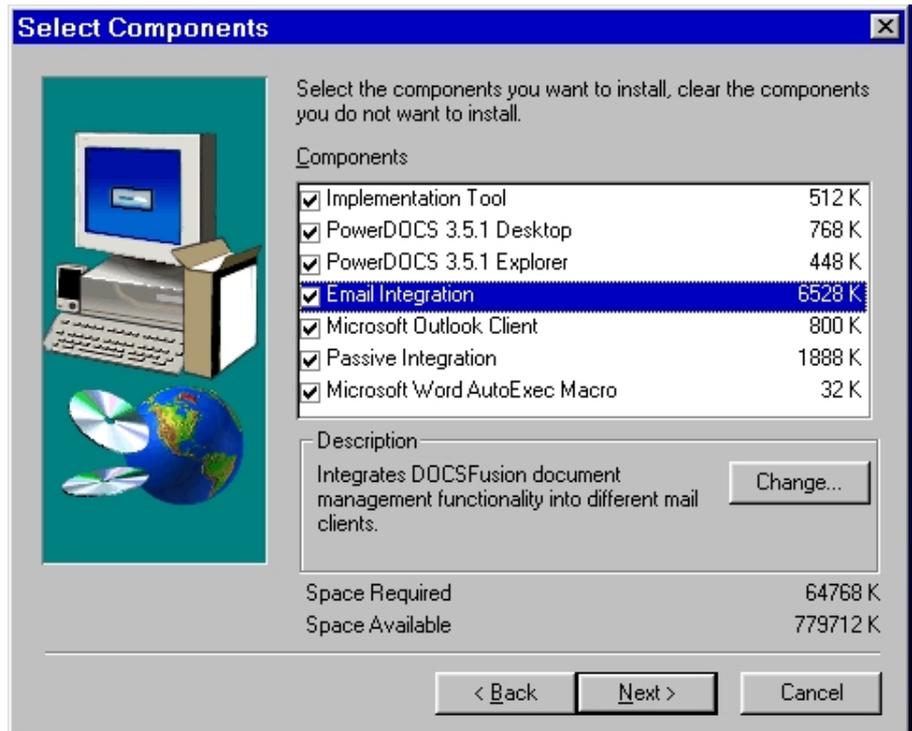
The components from which you may select are as follows:

- **Implementation Tool:** This utility will help PowerDOCS administrators manage all aspects of the PowerDOCS product. It allows you to create a single registry file that stores information about your PowerDOCS settings. This registry file can then be distributed to desktop installations of PowerDOCS 3.5.1.

N O T E   Use of the Implementation Tool is restricted to DOCS_Supervisors. Microsoft Management Console version 1.1 must also be installed. Refer to "Installing the Microsoft Management Console" on page 45.

- **The PowerDOCS 3.5.1 Desktop:** The Desktop serves as the program's "home base" and allows you to view and act on the contents of PowerDOCS libraries. All functions and features are available from the Desktop.

- **The PowerDOCS 3.5.1 Explorer:** This option puts the functionality of PowerDOCS Desktop into the Windows Explorer.

- **Email Integration:** This option puts the DOCSFusion document management functions into the Microsoft Outlook email client, the Novell GroupWise email client, and the Lotus Notes client.

   If you select Email Integration and you do not have a supported email client installed, the following information message will be displayed. Click OK and deselect the Email Integration option.

Figure 3.17

Email Integration information message

Information

Email Integration requires a supported version of either Microsoft Exchange, Microsoft Outlook, Lotus Notes or Novell GroupWise to be installed. Please refer to the documentation for a list of the supported versions.

OK

N O T E   E-mail integration is required if you intend to install the Outlook Client.

If you have installed one of the supported email clients, additional options (including message formatting) can be set. Click the Change button. After making your changes, click Continue.

Figure 3.18

PowerDOCS Setup Program Email Integration Component Selection
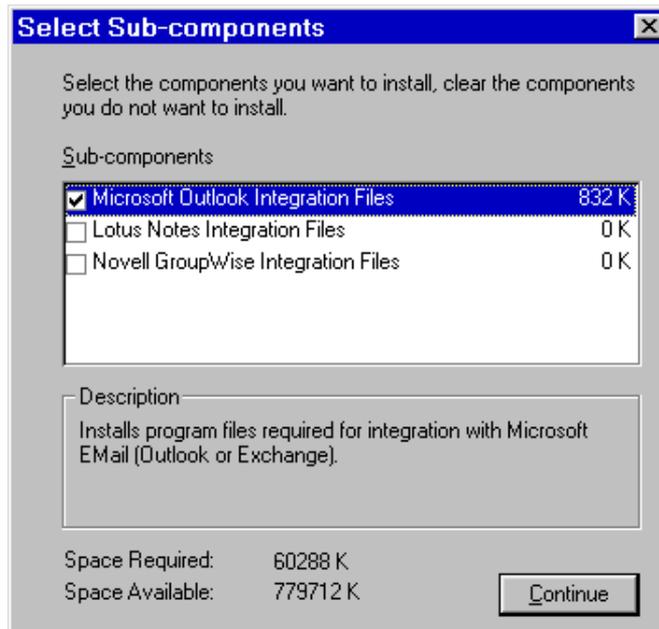
N O T E   Installation of the Lotus Notes integration will require you to have at minium, Designer level access to the Lotus Notes mail base on the Domino Mail server.

If you have this access and have selected Lotus Notes e-mail itnegration, you will be required to enter your Notes password during the installation process. A DOS window will display and you will not see a cursor. Type your password and press Enter.   After a short delay, the installation will continue.

- **Microsoft Outlook Client:** Gives Outlook users the ability to use PowerDOCS libraries and documents from within Microsoft Outlook.

- **Passive Integration:** This option adds DOCSFusion document management functions into Microsoft Word, Excel, Project 98, and Adobe Acrobat 4.0 applications. You can select which applications to integrate by clicking the Change button and selecting the specific applications from the dialog box..

N o t e   If it becomes necessary to use another integration type for an application that was installed with Passive Integration, it will be ncessary to uninstall PowerDOCS and reinstall PowerDOCS.

Figure 3.19

PowerDOCS Setup program Passive Integration Component Selection
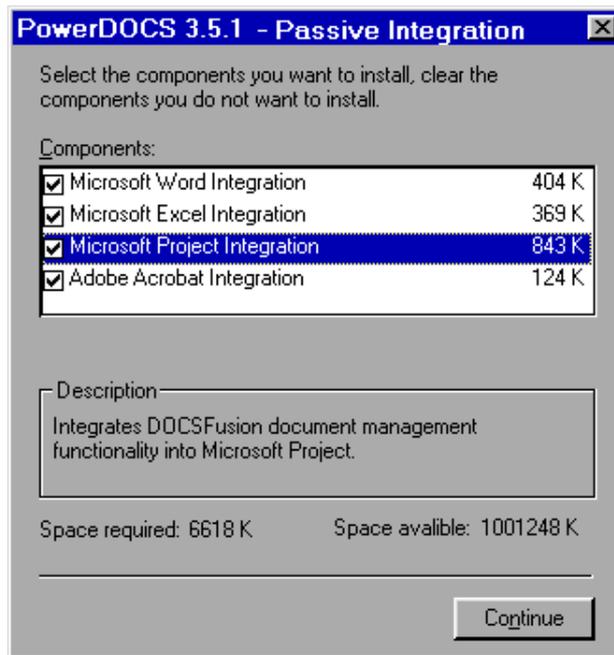
If the computer on which you are installing PowerDOCS has never used the installed copies of Microsoft Word or Excel, it will be necessary to open the program at least one time to fill out and register the User Information. If this registration process has not

been performed prior to beginning the PowerDOCS Installation, the warning messages shown on the next page will be displayed. Open Word or Excel, complete the registration process and close the application. Proceed with the PowerDOCS install.

Figure 3.20

Passive Integration In-stallation Warning - Microsoft Word and Microsoft Excel
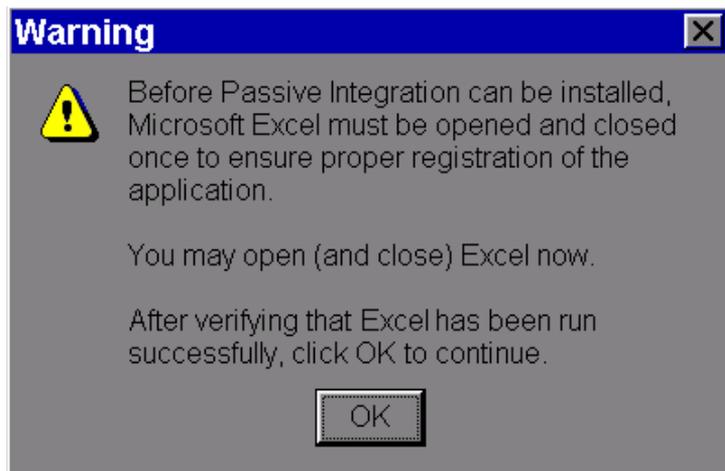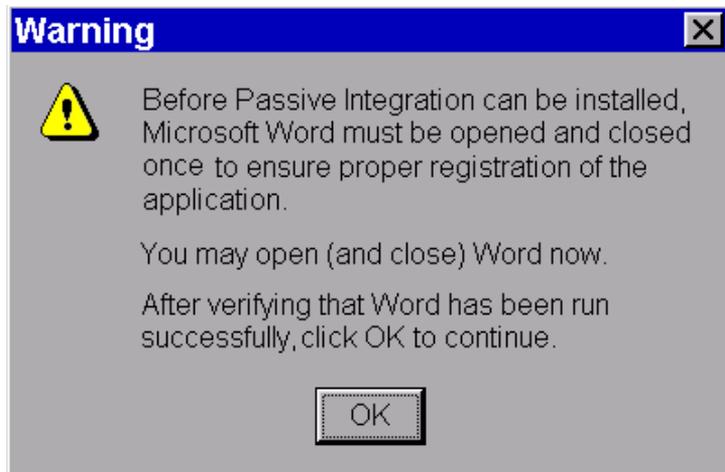
- **Microsoft Word AutoExec Macro:** Installation of this macro prevents multiple instances of Microsoft Word being launched.

Make your selections and click Next.

18. If you have selected Microsoft Outlook Integration and if you want to save messages in MSG format, select Save message in MSG or RTF format. If you do not want to save messages in MSG format, select Save messages in RTF format only.

Figure 3.21

PowerDOCS Setup program Select Option: E-mail Message Type dialog box
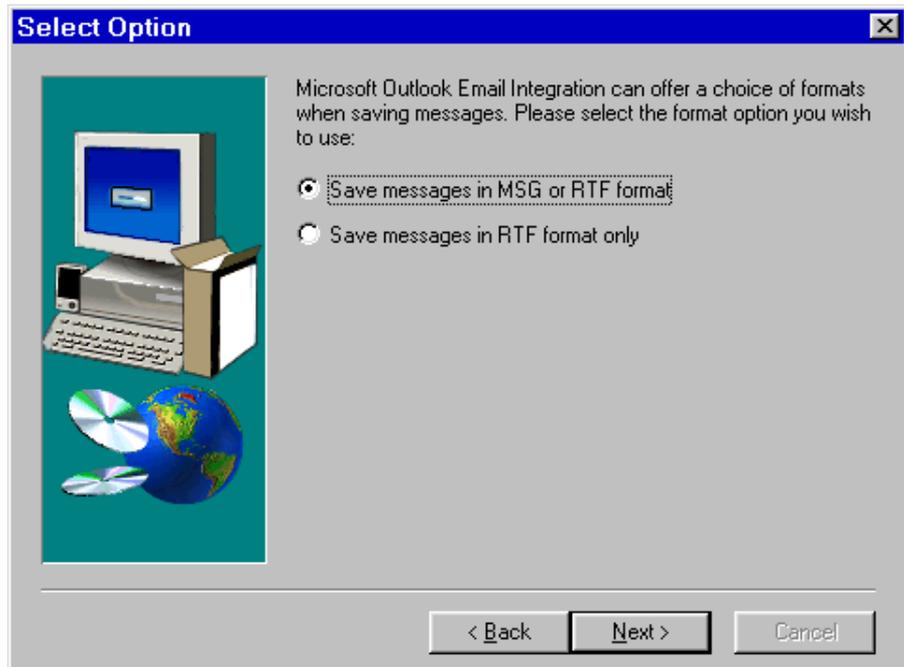
19. Click Next to continue. The Fast Start Selection Option dialog box will be displayed. This option loads PowerDOCS in the

background during Windows startup. Select Yes to have this feature activated. Select No if you do not want to use Fast Start.

Figure 3.22

PowerDOCS Setup program Select Option: Fast Start dialog box

20. Click Next to continue. The setup program has the information necessary to begin installing. The Start Copying Files dialog box shows the current settings. If you want to change anything, click Back. To continue with the installation, click Next.

Figure 3.23

PowerDOCS Setup program Start Copying Files dialog box
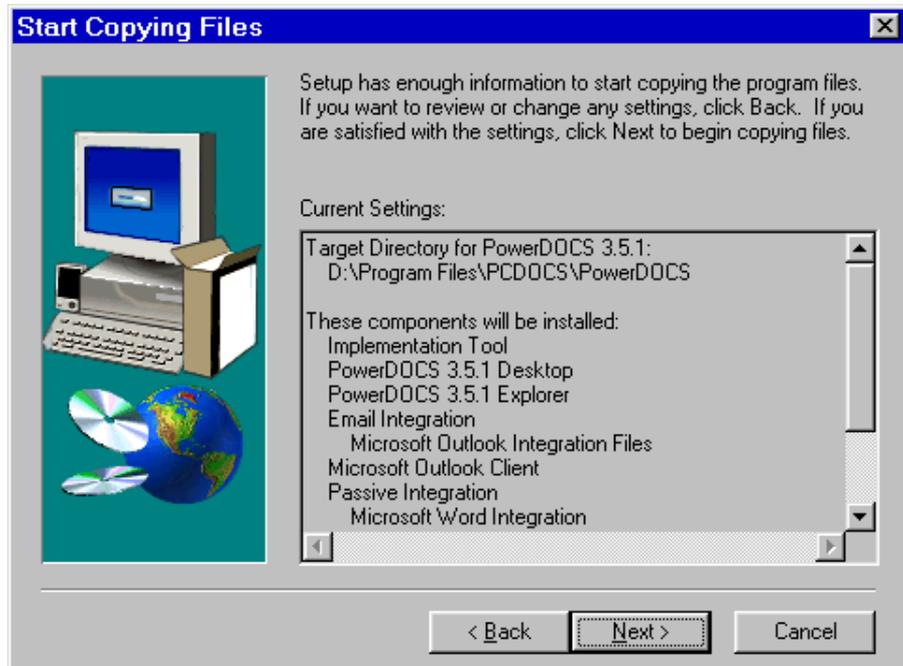
21. The following message will be displayed, informing you that you will need to reboot your computer. Failure to comply will cause PowerDOCS to function incorrectly. Click OK.

Figure 3.24

PowerDOCS Reboot reminder message

Information ☒

> (i) NOTICE: A reboot is required in order to complete this installation.
>
> Some files could not be installed because they are currently in use.
> Before attempting to use this product, you must complete the installation by restarting Windows or rebooting your machine.
>
> OK
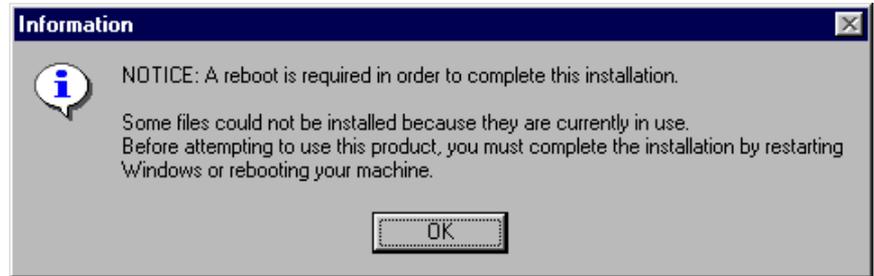
22. The message box shown below will be displayed. Click Finish to proceed with the installation of the FulView application.

Figure 3.25

First Setup Complete dialog box

Setup Complete

Setup has finished copying PowerDOCS files to your computer.

NOTICE: Remember to restart Windows or reboot your machine when the install is complete!
You must do this before attempting to use this product.

Click Finish to complete Setup.
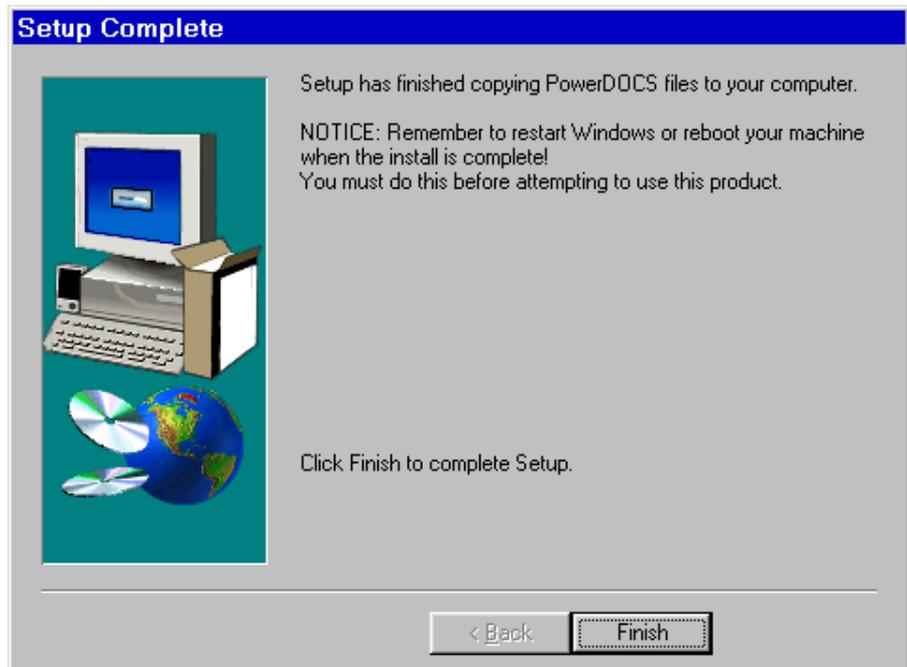
< Back   Finish

23. Click Finish to exit the installation program and start the Fulcrum FulView install procedure.

Figure 3.26

Second Setup Complete dialog box
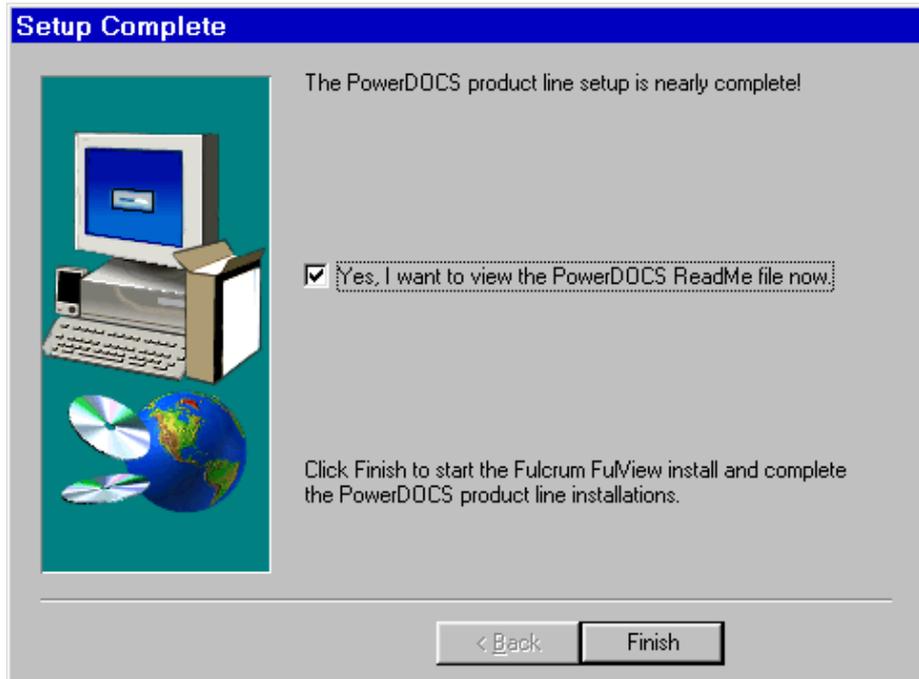
24. The Fulcrum FulView Setup program Welcome dialog box will appear. Click Next.

25. Fulcrum Fulview will be installed to your computer. After the installtion has finished, restart your computer.

4

PowerDOCS Implementation Tool

In This Chapter

This chapter explains how PowerDOCS administrators can use the
Implementation Tool to centrally manage the entire PowerDOCS
installation.

The PowerDOCS Implementation Tool

The PowerDOCS Implementation Tool is designed to allow administrators to centrally manage the entire PowerDOCS Desktop installation by creating a set of registry snapshot files that represent the PowerDOCS settings on the administrator's computer. This registry file can be placed in the PowerDOCS installation directory and automatically installed when the user installs PowerDOCS. Alternately, the registry files can be provided to users who then merge these settings into their local registries.

The Implementation Tool includes configuration of the PowerDOCS User Interface, custom forms, add-ons, and plug-ins.

The Implementation Tool works from within the Microsoft® Management Console (MMC) utility. MMC version 1.1 must be installed on your computer in order to use the Implementation Tool and Email Integration. The MMC install kit is included as part of the standard DOCSFusion Family setup. Installation instructions are listed on the next page.

In addition to having the MMC installed, you should be a DOCS Open Supervisors Group member.

Installing the Microsoft Management Console

The installation files for the Microsoft Management Console are copied into the PowerDOCS installation directory when the PowerDOCS Admin Kit is installed.

1. Locate the MMC installation directory. The default location is `C:\Program Files\PCDOCS\Install`. Double-click the file `IMMC.exe`. The Microsoft Management Console Setup Welcome screen will appear.

Figure 4.1

Microsoft Management Console Setup Welcome Screen

2. Click Next. The License Agreement dialog box appears. If you agree to the terms of the license, click Agree, then click Next.

If you do not agree with the terms of the license, click I Disagree. The installation program will terminate.

Figure 4.2

Microsoft Management Console License Agreement
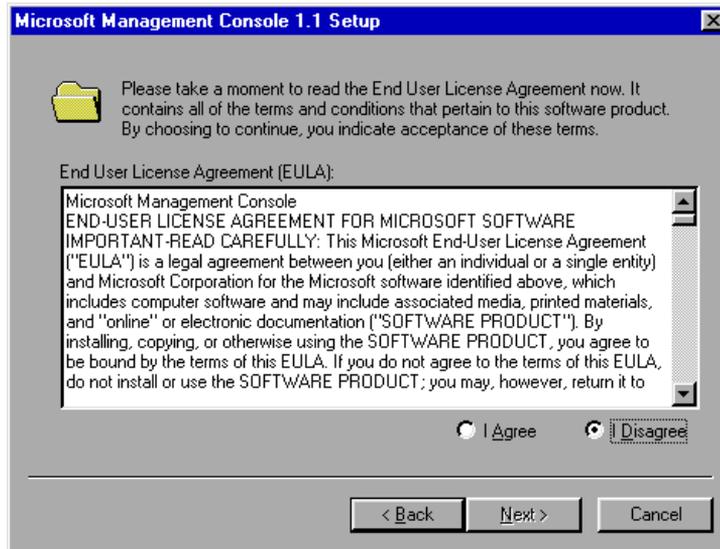
3. The Setup dialog box will appear. Enter your name and company information. Click Next.

Figure 4.3

Microsoft Management Console Setup dialog box
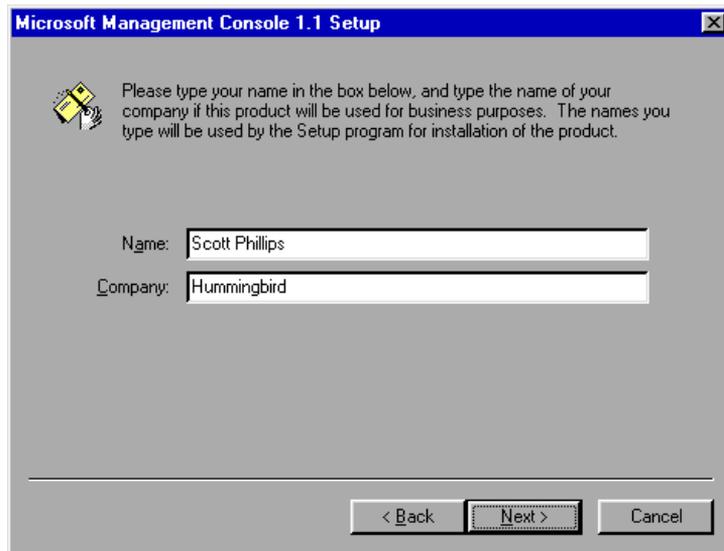
4. The installation will proceed. When complete, the following dialog box will be displayed. Click Finish to exit the installation program.

Figure 4.4

Microsoft Management Console installation complete dialog box
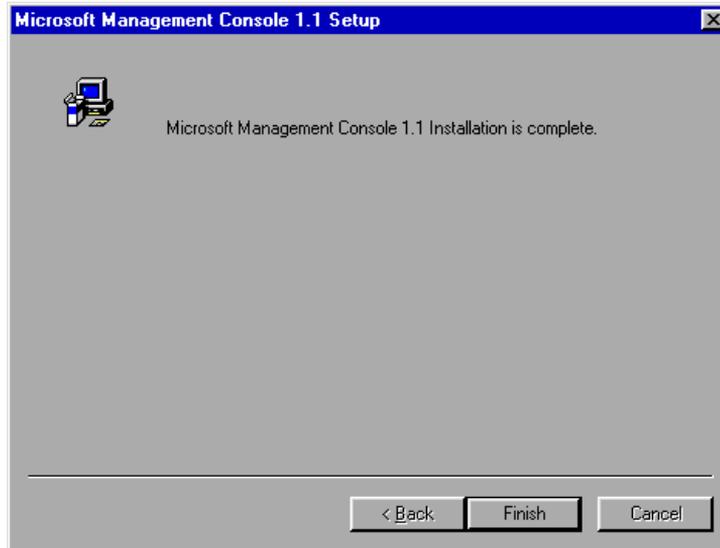
Starting the Implementation Tool

The Implementation Tool is accessed through the PowerDOCS Program Group.

N O T E You must have administrator rights to your computer to use the PowerDOCS Implementation Tool.

On your Windows desktop, click Start>Programs>PowerDOCS3.5.1

1. Select Implementation Tool.

2. The Microsoft Management Console will launch.

Figure 4.5

The Implementation Tool Welcome Screen
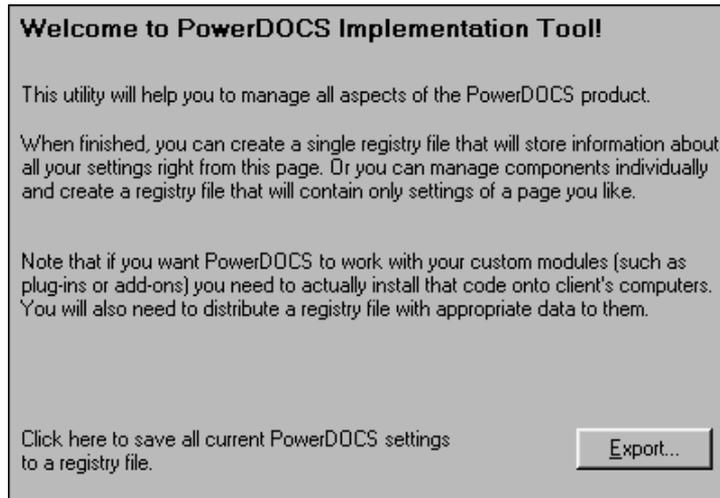
3. Click the plus sign to expand the PowerDOCS Admin Central tree.

4. Click to expand the Plug-ins tree. If necessary, log in to PowerDOCS.

5. Continue expanding the tree until you can view all the options available to you.

Figure 4.6

PowerDOCS Implementation Central Options
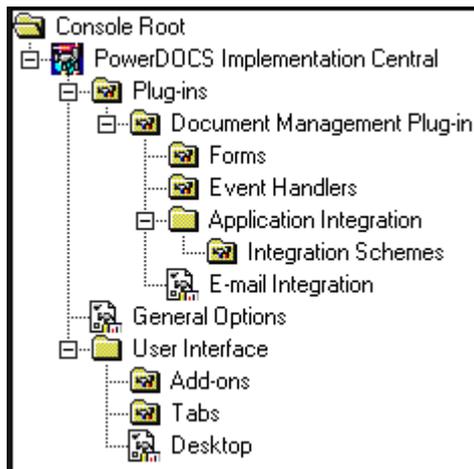
6. Select each option by clicking it one time. Detailed descriptions of each option follow.

The Plug-ins Configuration Screen

A plug-in is an extension module that provides additional functionality to PowerDOCS. All registered plug-ins will be shown in the same order as their respective InsertAt registry entry. If you have more than one plug-in installed, you can change the load order of the plug-in.

Highlight the plug-in and use the up and down arrows to move its position within the list.

Figure 4.7

Plug-Ins Configuration screen

Plug-ins Configuration

Plug-in is a PowerDOCS extension module that provides additional functionality to the product. This page lists all the plug-ins the user can work with.

Click an arrow button to change plug-ins load order.

Plug-ins:

| Fusion |
| Attache |

Fusion

   Location: D:\Program Files\PCDOCS\PowerDOCS\FsPlugin.dll
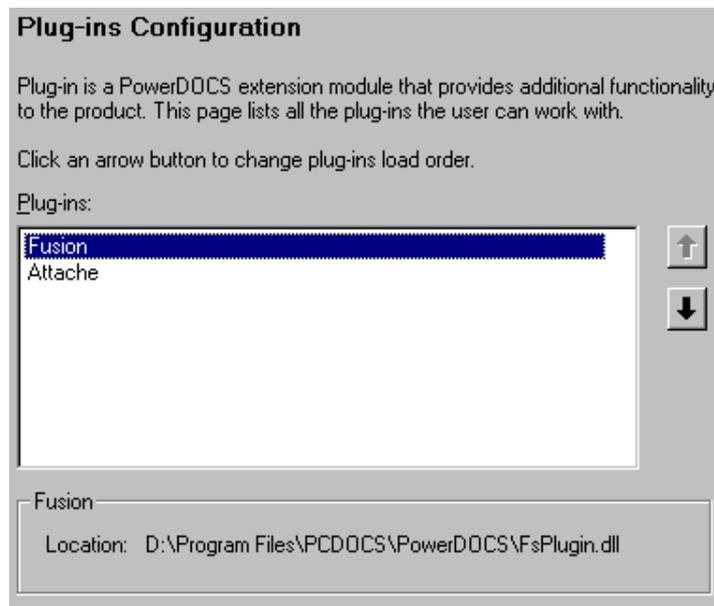
Document Management Configuration

There are three tabs of information in Document Management Configuration:

- General

- Log

- Performance

The General Tab

Basic document management settings are found on the General tab.

Figure 4.8

The General tab - Document Management Configuration

1. The Download folder displays the folder where temporary documents will be created. Specify an exact path or use an environment variable such as %Temp% to specify the temporary directory. The lookup button can be used to browse for the desired directory.

2. Settings for Quick Searches and Projects allow you to use the same column listing for all projects and all quick searches. Check the desired boxes.

3. Use the Quick Search List spinner box to change the number of documents listed in the Search Results list. You can also manually enter an integer in this space.

N O T E If the Quick Search returns more items than the list box is configured for, the results set will be truncated.

4. To change the documents displayed in the Recently Edited Documents list (RED), you have the option to use the default DOCSFusion RED or deselect the default option and indicate the number and age of documents displayed in the Recently Edited Documents list.

When DOCSFusion RED is used, the user can't control the number of documents that will be retrieved, all documents edited in the last 90 days will be shown.

The Log Tab

The Log tab allows you to enable logging and set the location of the log file. It is recommended that you do not enable logging full-time, as it is usually only used to track system information for the purposes of troubleshooting problems. The log file created with this option records activity on the Fusion server. An example of this log is shown below.

Figure 4.9

Fusion activity log file

```
Fusion plugin Log file. Compiled at Jan 26 2000,
13:28:29

Running on Windows NT 4.0. Build N 1381.
CSDVersion: Service Pack 5

Time PrId ThrId    Mask Description

09:11:54.31 312 136 00000010 Application
constructor: 0x30136C

09:11:54.38 312 136 00000010 Running on WinNT

09:11:54.67 312 136 00000040 Fusion CSI Threads -
0x0

09:11:54.67 312 127 00000040 DDEServer: init
succeeded

09:11:55.47 312 136 00000020 Fusion Client API
has been loaded.

09:11:55.47 312 136 00000020 Executing first
fusion call

09:11:55.81 312 136 00000020 Successfully returns
from first fusion call
```

Click the Log Options check box to enable. Enter the full path for the log file or use the lookup button to browse for the file location. It is recommended that the file name you give this file be unique so that it can be distinguished from other log files created by PowerDOCS.

Figure 4.10

The Log tab - Document Management Configuration
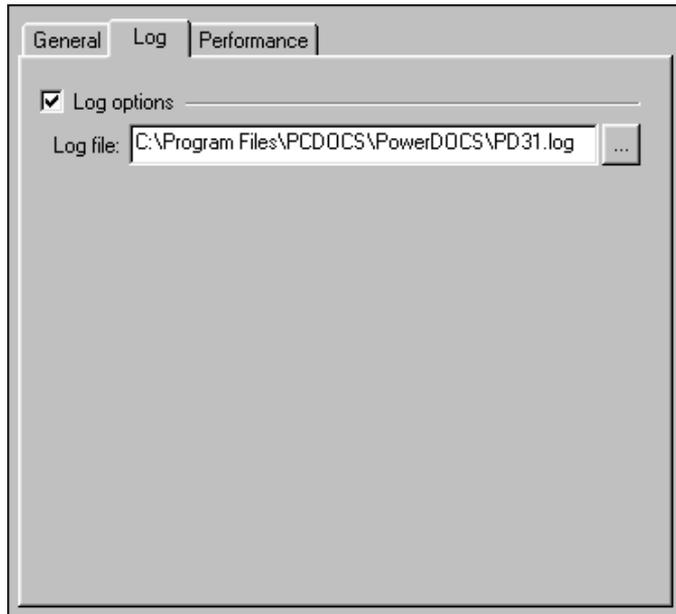
The Performance Tab

Use the Performance tab to set Cache and Chunk Factor settings.
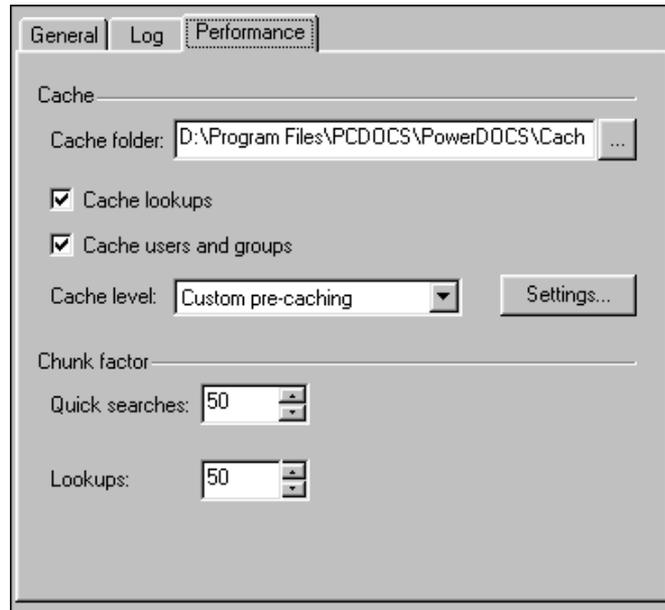
1. The Cache folder is the location where cache data will be stored. Use the lookup button to browse for a different file location.

2. To cache lookups and users and groups, select the check boxes shown. Caching users and groups will cache the list used in the Access Control list.

3. The Cache Level list specifies the amount of data to be cached. There are four options:

    •   No pre-caching

    •   Balanced pre-caching

    •   Maximum pre-caching

    •   Custom pre-caching

4. The settings for each of these Cache Levels are stored in the Cache Settings dialog box. Click Settings to view the dialog box, as shown in Figure 4.12.

Figure 4.12

Cache settings
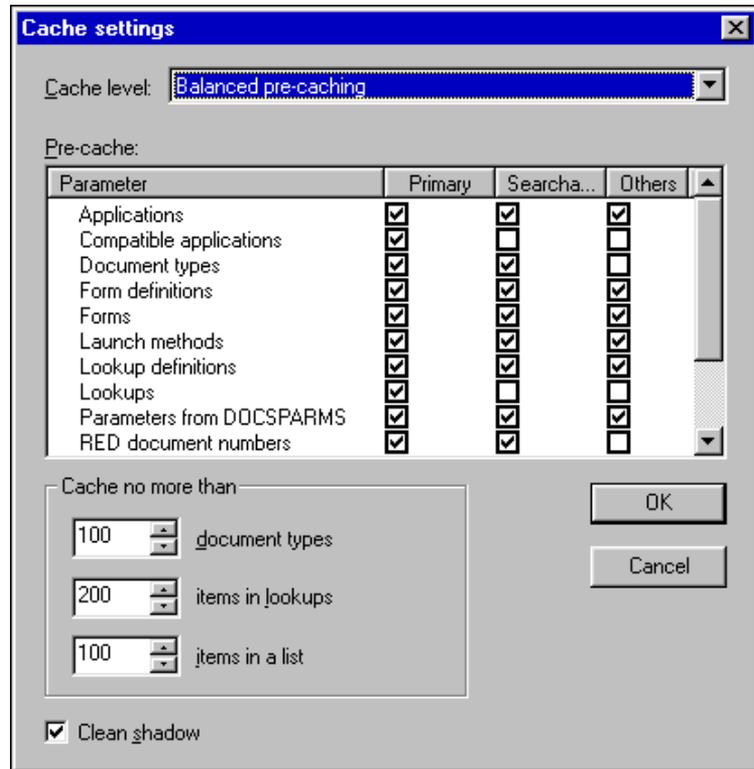
Inspect the four settings by selecting them from the Cache Level list. For each of the four settings, you can modify the Pre-Cache parameters.

5. You can set the number of document types, items in lookup, and items on a list to be cached.

6. The cleanup of shadowed documents can be controled from the Clean Shadow check box. Please refer to the section titled "Clean Shadow Check Box" on page 60.

7. Individual lookup settings can be changed by making changes to the Cache Lookups dialog box. From the Cache Settings window, scroll down until you can see the Lookups setting.

Figure 4.13

*Lookups Setting -
Cache Settings*

8. Click the Lookup button to view the Cache Lookups dialog box.

Figure 4.14

*Cache Lookups dialog
box*
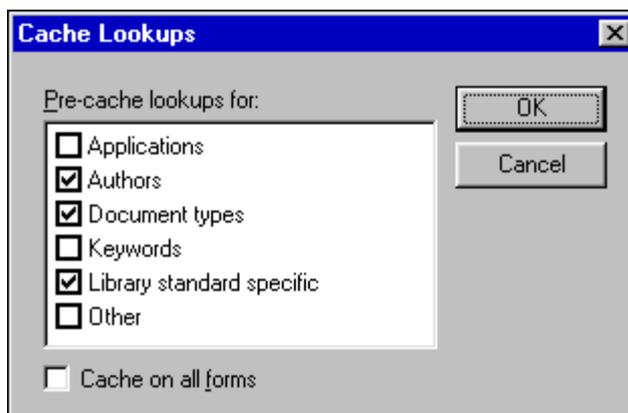
Click to select or deselect the lookup options.

9. The Cache lookups default dialog box settings will change depending on which Cache level was selected. The available choices are:

Parameter	Description / Database Table
Applications	APPS
Authors	PEOPLE
Document Types	DOCUMENT TYPES
Keywords	%KEYWORDS
Library standard specific	CLIENT, MATTER, USER_ORG, USER_DEPT
Other	All other lookups including custom ones

10. The "Cache on all forms" check box indicates whether lookups will be cached on all forms or only on the GROUP_DEF. By default, the check box is unchecked for Cache Level None or Balanced.

11. Press OK to accept these settings or click Cancel to disregard any changes that you have made.

Clean Shadow Check Box

If the Clean Shadow check box is left blank, PowerDOCS will not delete shadow documents during startup and will only delete shadow documents when specifically given the command to do so by selecting Options>Delete Shadowed Documents.

If the Clean Shadow check box is selected, PowerDOCS will clean shadowed documents according to the Cleanup Options section of Groups>DOCS Unplugged in Library Maintenance. These settings are as follows:

- Force Cleanup of Shadowed Documents: This field is disabled if Shadow Documents to Local Library is set to "No." Check this box to have PowerDOCS automatically purge shadowed documents from the local drive. Documents that are older than the Minimum Age For Delete (specified below) are deleted each time you start PowerDOCS.

- Minimal Age For Delete (Days): This field is disabled if Shadow Documents to Local Library is set to "No." Enter the minimum number of days you want documents to remain on the local drive without being edited before being deleted.

- Minimum Local Disk Space (MB): Enter the minimum allowed disk space on the local drive before shadowed documents are purged. If Force Cleanup of Shadowed Documents is set to "Yes," the purge will be run automatically. If it is set to "No," the users will be notified with a message that they should purge shadowed documents. The default value is 5 MB.

The Cleanup Options listed above work in conjunction with other Library Maintenance settings. The chart shown on the next page gives examples on how these settings work together to control document shadowing.

Remote Library> Shadow this library	System Parameters>Unplugged> Shadow local files	Groups>Unplugged> Shadow local files	Is Shadowing On or Off?
Yes	No	Default	Off for everyone
Yes	No	Yes	On for everyone
Yes	No	No	Off for everyone
Yes	Yes	Default	On for everyone
Yes	Yes	Yes	On for everyone
Yes	Yes	No	Off for this group On for everyone else
No	No	Default	Off for everyone
No	No	Yes	On for this group
No	No	No	Off for everyone
No	Yes	Default	On for everyone
No	Yes	Yes	On for everyone
No	Yes	No	Off for this group On for everyone else

For more information on these Library Maintenance settings, please refer to the Library Maintenance Help System or the *DOCS Open Administrator's Guide.*

Forms Configuration

Use the Custom Forms section to designate which custom forms PowerDOCS should display.

N O T E You must use the PowerDOCS Application Program Interface (API) Toolkit to create or modify custom forms.

Figure 4.15

Custom Forms Config-uration screen

By default, each form is set to use the default PowerDOCS internal form.

To change to a custom form:

1. Select the form name from the Forms list.

2. Enter the CLSID or ProgID of the form in the CLSID or ProgID field. CLSID and ProgID entries are found in the Windows Registry under HKEY_CLASSES_ROOT

   A CLSID is a universally unique identifier (UUID) that identifies a type of Component Object Model (COM) object. Each type of COM object item has its CLSID in the registry so that it can be loaded and used by other applications. For example, a spreadsheet can create worksheet items, chart items, and macrosheet items. Each of these item types has its own CLSID that uniquely identifies it to the system.

   A ProgID, or programmatic identifier, is a registry entry that can be associated with a CLSID. The format of a ProgID is <Vendor>.<Component>.<Version>, separated by periods and with no spaces, as in Word.Document.6. Like the CLSID, the ProgID identifies a class, but with less precision.

Event Handlers Configuration

Event handlers are custom components that extend the PowerDOCS menu and provide additional functionality. You can change the load order of the event handlers in this section.

Figure 4.16

Event Handlers Config-uration Screen
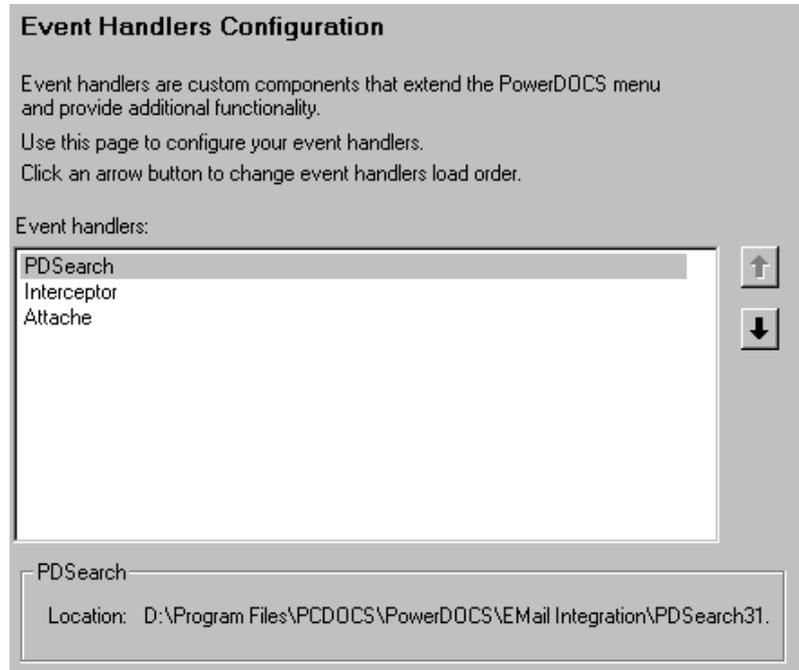
1. Select the event handler whose load order you want to modify.

2. Click the up or down arrows to the right of the event handler name.

Integration Schemes Configuration

The Integration Schemes configuration section is located within the Application Integration folder. Using this section you can enable or disable an integration scheme and change the schemes load order.

Figure 4.17

Integration Schemes Configuration Screen
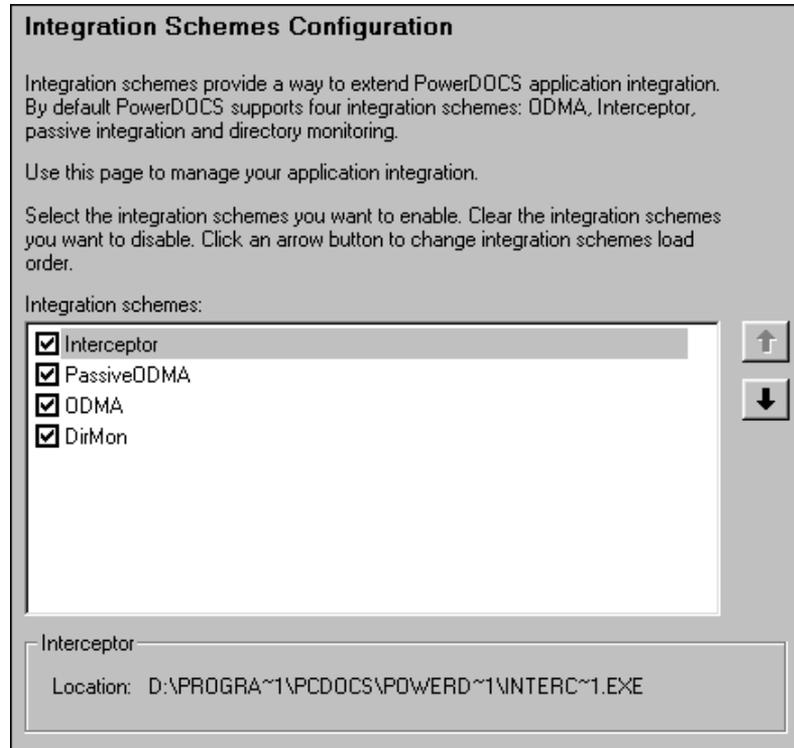
1. To disable or enable an integration scheme, click the checkbox to the left of the scheme type.

2. To change a scheme's load order, click the scheme name then use the up and down arrow buttons to the left of the screen.

E-mail Integration

E-mail Integration configuration can be configured in this section of the Implementation Tool.   Prior to configuring e-mail integration in the Implementation Tool, read Appendix B on page 155.

E-mail Integration Configuration

1. Select the Integration type from the drop down list.

Figure 4.18

E-mail Integration Configuration Screen

This entry can have the following values:

• **None**: No integration available.

- **Normal**: This integration does not store message parameters. The messages and attachments are stored in PowerDOCS as simple, separate documents.

- **Enhanced:** This integration method supports the storing of message parameters (for example: MAIL_ID, ATTACH_NUM, MSG_ITEM, DELIVER_REC, PARENTMAIL_ID and THREAD_NUM).

N O T E   Enhanced integration is only available for Microsoft Outlook. For Lotus Notes and GroupWise email integration, select Normal or None.

2.   Select the E-mail Group from the drop down list. This entry contains the E-mail User Group Name from PowerDOCS. This helps to maintain Security.

N O T E   The group you choose will be added to the Current Trustees list for Document Access if you select the **Grant Access to Email Users Group** for the **Apply Security** combo box of the **Save Email to DOCS Open** dialog box.

3.   Select the Profile form to be used for messages being saved to PowerDOCS.

4.   To enable MSG format messages for use with Microsoft Outlook, click the checkbox labeled Enable MSG format.

N O T E   If you selected MSG and RTF format for e-mail messages during the PowerDOCS install, this feature will already be enabled.

5.   To allow document names to be duplicated when saving e-mail, click the checkbox labeled Duplicate document names. This entry must correspond to the PowerDOCS database settings - to allow PowerDOCS to duplicate document names or enforce unique document names. This entry can have the following values:

— **Checked.** Allows multiple PowerDOCS documents to have the same document name.

— **Unchecked.** Requires that PowerDOCS document names be unique.

6. To set the Document type and Application for RTF messages, MSG messages and unknown attachments you must select each option in turn. These entries must be valid on the DOCUMENT TYPES table. Messages will be saved with Document Type and Application values in PowerDOCS. You can check their values in Library Maintenance (Document Types and Application lookups).

7. Using the drop down list, select a Document type for RTF messages.

8. Using the drop down list, select an Application to be associated with RTF messages.

9. Repeat steps 7 and 8 for MSG messages and unknown attachments.

E-mail Integration - Header Fields

The Header Fields tab allows you to assign email header information to a field on the Profile form.

Figure 4.19

E-mail Integration Configuration - Header Fields tab
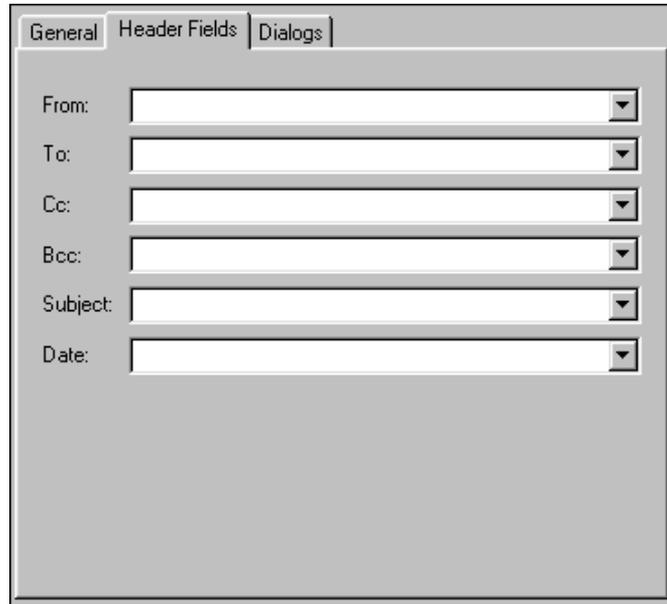
Select a SQL Column name from the drop down list attached to each header field name. For example, if you want to use the ABSTRACT field as a source for the Subject field, select the ABSTRACT column from the drop down list.

E-mail Integration - Dialog Options

The Dialogs tab allows you to configure Save Options, Attachment options and Insert Options for email integration.

Figure 4.20

E-mail Integration Configuration - Dialogs tab

1. Save message body check box indicates whether or not the Save main message field of the Save to PowerDOCS dialog is checked by default.

2. Save attachments check box indicates whether or not the Save attachments field of the Save to PowerDOCS dialog is checked by default.

3. Delete e-mail after save check box indicates whether or not the Delete original document after save field of the Save to PowerDOCS dialog is checked by default.

4. The Attachment name drop down list can have one of the following values:

— **Custom.** Indicates that the user must specify the name of each attachment separately when profiling it.

— **Subject.** Indicates that the name of all attachments will be defaulted to the message subject.

— **File name.** Indicates that the name of all attachments will be defaulted to their file names.

5. The Send drop down list indicates the default value shown in the Insert Type column of the Insert from PowerDOCS window. The choices are:

— Copy

— Copy and check-out

— Reference

General Options

The General Options section allows you to enable logging and set the location of the log file. It is recommended that you do not enable logging full-time, as it is usually only used to track system information for the purposes of troubleshooting problems. The log file created with this option records activity on the DE Core. An example of this log is shown on the next page.

Figure 4.21

Log File

```
DE Core Log file. Compiled at Jan 26 2000,
13:28:29

Running on Windows NT 4.0. Build N 1381.
CSDVersion: Service Pack 5

Time PrId ThrId    Mask Description

09:11:48.10 312 136 00000100 Event
<SHELL_INSTANCE_STARTING> <0x44> was created
successfully

09:11:48.10 312 136 00000100 Creating main window
with HWND = 0x200ea

09:11:55.81 312 136 00000100 Event
<SHELL_INSTANCE_STARTING> <0x44> was closed
successfully

09:12:46.87 312 136 00000100 Browser Core 0x302F30
- created

09:12:46.87 312 136 00000180 Loading plugins

09:12:46.87 312 136 00000180 Plugin key: Fusion
```

Figure 4.22

General Options Screen
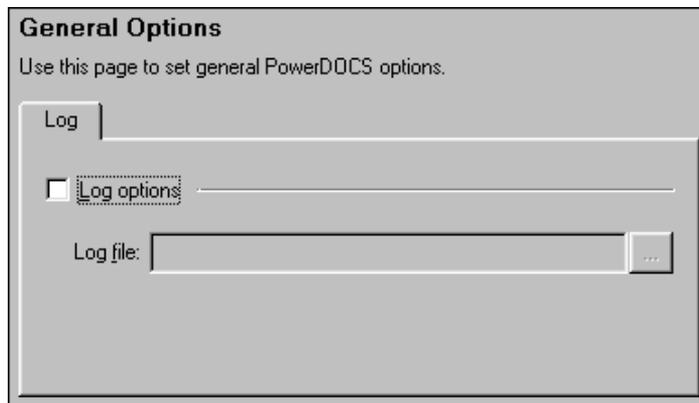
Click the Log Options checkbox to enable. Enter the full path for the log file or use the lookup button to browse for the file location. It is recommended that the filename you give this file be unique so that it can be distinguished from other log files created by PowerDOCS.

Add-ons Configuration

An Add-on is a PowerDOCS user interface extension. Using this section you can enable or disable add-on products or change their load order.

For more information on the Profile and Viewer Add-ons, refer to "Viewing a Document or Profile Using PowerDOCS Add-Ons" in the *PowerDOCS User's Guide.*

Figure 4.23

Add-ons Configuration Screen

Add-ons Configuration

Add-on is a PowerDOCS user interface extension. Use this page to manage add-ons that will be represented on the PowerDOCS window.

Click an add-on's name to rename it. Select the add-ons you want to make visible. Clear the add-ons you want to hide. Click an arrow button to change add-ons order on the screen.

Add-ons:

☑ Profile
☐ Logger
☑ Viewer

Profile

Location: D:\PROGRA~1\PCDOCS\POWERD~1\ProfView.ocx
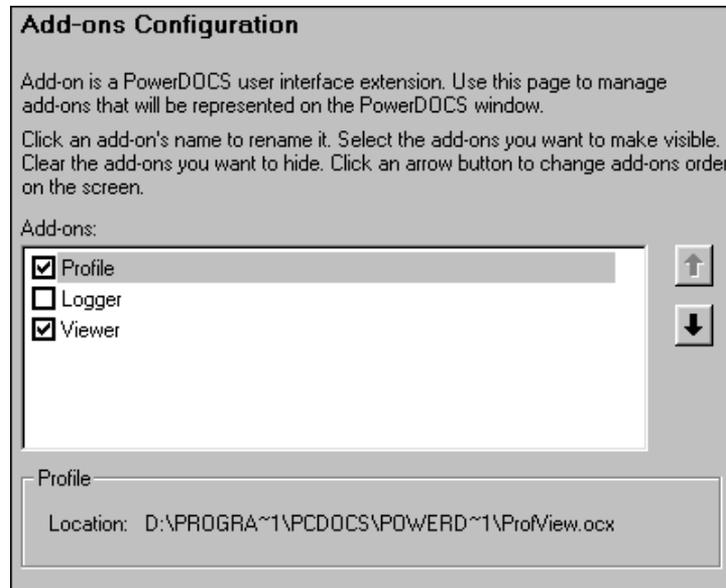
1. Click the checkbox to enable or disable an Add-on application.

2. Select the Add-on whose load order you want to modify.

3. Click the up or down arrow to the right of the window to change the Add-on position in the PowerDOCS window.

N O T E   The Logger Add-on should only be activated at the request of Hummingbird Techinical Support.

Custom Tabs Configuration

Use the Custom Tabs section to manage custom tabs that appear in the PowerDOCS Desktop.

Figure 4.24

Custom Tabs Configuration Screen

Custom Tabs Configuration

Use this page to manage custom tabs that will be presented on the PowerDOCS window.

Click tab's name to rename it. Select the tabs you want to make visible. Clear the tabs you want to hide.

Tabs:

Location:

To rename a custom tab, click on the tab name and enter a new name.

To enable a custom tab, click the checkbox next to the tab name. To disable a custom tab, click the checkbox to clear it.

N O T E   You must use the PowerDOCS Application Program Interface (API) Toolkit to create or modify custom tabs.

PowerDOCS Desktop Configuration

General Desktop options such as Refresh rate and automatic selection of the first item in a Search Results list can be set in this section.

Figure 4.25

Desktop Configuration Screen

The Refresh Time is the number of minutes between instances when the PowerDOCS pane is refreshed. You can use the spinners to increase or decrease the Refresh time in increments of one. You can click in the field and enter a number.

To enable the Autoselect feature, click the checkbox next to the label. When enabled, the Autoselect feature will automatically highlight the first document in a Search Results list.

Exporting the Registry File

After you have set the PowerDOCS Configuration options that you wanted to modify, you can distribute this master registry file to desktop users.

1. Return to the Implementation Tool Welcome Screen.

Figure 4.26

PowerDOCS Implementation Tool Welcome Screen

Welcome to PowerDOCS Implementation Tool!

This utility will help you to manage all aspects of the PowerDOCS product.

When finished, you can create a single registry file that will store information about all your settings right from this page. Or you can manage components individually and create a registry file that will contain only settings of a page you like.

Note that if you want PowerDOCS to work with your custom modules (such as plug-ins or add-ons) you need to actually install that code onto client's computers. You will also need to distribute a registry file with appropriate data to them.

Click here to save all current PowerDOCS settings to a registry file.   [Export...]

2. Click Export.

3. Select a file location for the registry file and name the file. Click Save.

N O T E   You can save the registry file to the PowerDOCS Install directory and the file will be imported to the registry as part of the PowerDOCS installation process.

If you do not want to include the registry file in the PowerDOCS Install directory or if you are providing a new registry file to your users, users should perform the following steps.

1. Close PowerDOCS.

2. On the Windows taskbar, select Start>Run.

3. Enter **regedit** in the field and click OK. The Windows Registry Editor will appear.

4. Select Registry>Import Registry File.

5. Select the master Registry file that was exported from the Implementation Tool. Click Open.

6. A confirmation message will appear, verifying that the file was imported successfully. Click OK.

7. Close the Registry Editor.

5

Uninstalling DOCSFusion and PowerDOCS Components

In This Chapter

This chapter describes how to remove DOCSFusion and PowerDOCS components from your system. All components can be removed in the same manner.

The Uninstall Procedure

As an example of uninstalling components, the following procedure describes how to uninstall the DOCSFusion Client API.

N o t e If you are uninstalling DOCSFusion, we recommend that you shut down the DOCSFusion Windows NT service before uninstalling. You can do this using the DOCSFusion ServerManager program or the Services program in the Windows NT Control Panel.

1. From the Start menu, select Settings>Control Panel. The Control Panel appears.

Figure 5.1

Windows 98 Control Panel

2. Double-click the Add/Remove Programs icon. The Add/
    Remove Programs Properties dialog box appears.

Figure 5.2

*Add/Remove Programs
Properties dialog box*
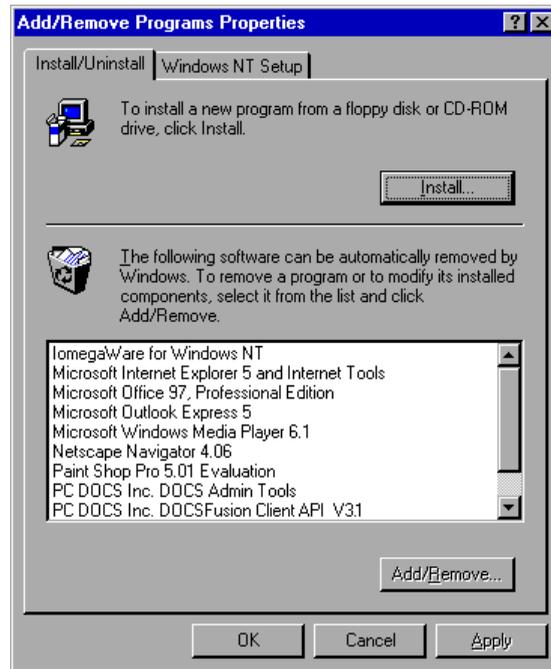
3. Select PC DOCS Inc. DOCSFusion Client API V3.5.1 and click
    Add/Remove. For some Fusion family products, the Confirm
    File Deletion dialog box appears.

Figure 5.3

*Confirm File Deletion
dialog box*
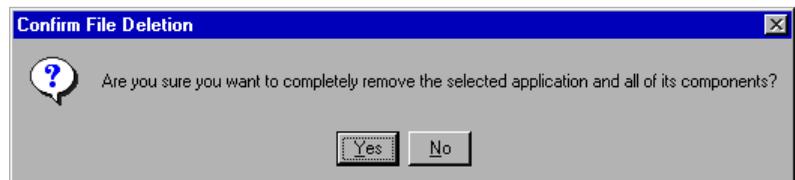
4. Click Yes. The Remove Programs From Your Computer dialog box appears.
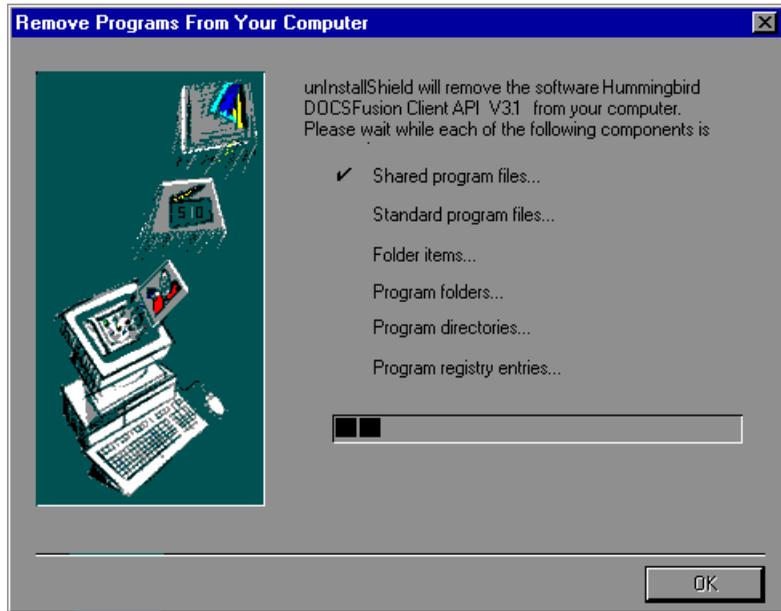
5. A number of installed files may be marked as shared. For each of them the Remove Shared File? dialog box appears.

Figure 5.5

Remove Shared File? dialog box
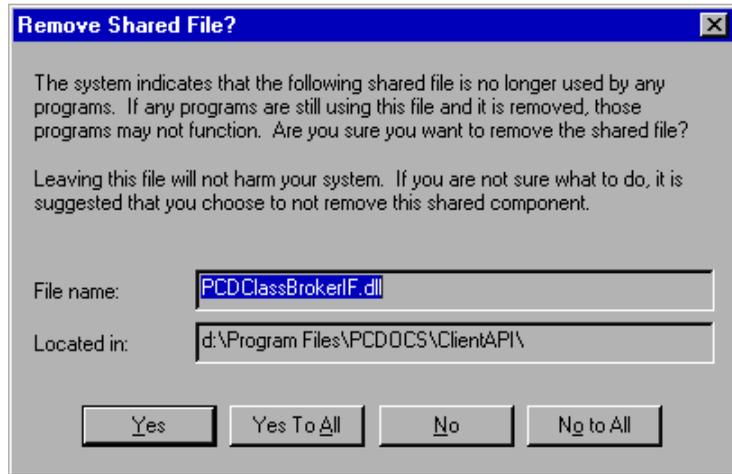
In most cases, it is safe to remove the shared file, but you will not cause any problem if you choose not to remove it. Use the Yes To All or No To All buttons to prevent the dialog box from appearing multiple times.

6. When the uninstall is finished, the following dialog box appears.

In most cases, the elements referred to in the Remove Programs From Your Computer dialog box are shortcuts you may have created or moved after performing the original installation. It will cause no problem to leave them in place.

You will be asked to reboot your machine to complete the uninstall process. It is strongly recommended that you follow these instructions.

N O T E Prior to uninstalling PowerDOCS, it will be necessary to remove the PowerDOCSFooter macros that may have been installed on the computer. See "Unintegrating the Microsoft Word Macros" on page 123.

A

Configuring Application Integration for PowerDOCS

In This Chapter

This chapter explains the steps necessary to configure and use applications with PowerDOCS. These steps assume that you already have a DOCS Open library set up. If you do not, see Chapter 8, "Library Maintenance," of the *DOCSFusion Setup and Administration Guide.*

Steps Necessary to Set Up Application Integration with PowerDOCS

1. Determine whether the applications you want to set up with PowerDOCS are integrated using Interceptor, Passive Integration or ODMA (Open Document Management API). See "Integration Methods" on page 87, to determine how your applications are integrated.

2. Use Application Maintenance to add launch methods for applications that will use new DDE (Dynamic Data Exchange) settings with PowerDOCS. See "Applications Using DDE Settings" on page 90, for which applications need new launch methods for use with PowerDOCS.

3. If you want to integrate applications that use ODMA, see "Integrating Applications with ODMA" on page 120.

4. If you want to integrate applications that use Interceptor, see "Integrating Applications with Interceptor" on page 124.

5. After you have turned on the applications in Interceptor that you want your users to have access to, see "Exporting the Interceptor Settings" on page 133, for sharing those settings with your users.

I M P O R T A N T   It is strongly recommended that you not use Application Integration with PowerDOCS and DOCS Open on the same workstation.

Integration Methods

There are several ways to integrate applications with PowerDOCS:

- Interceptor—an integration method that monitors when Open and Save dialog boxes are called. Applications monitored through Interceptor should be set to Full Integration , see Chapter 8, "Library Maintenance," of the *DOCSFusion Setup and Administration Guide.*

- ODMA—a Document Management integration method built into applications by their vendors. Applications integrated through ODMA in DOCS Open 3.8 are also integrated using ODMA in PowerDOCS. Applications set to Full Integration in DOCS Open 3.8 Application Maintenance use Interceptor with PowerDOCS.

- Directory Monitoring—a method that tracks documents created in non-integrated applications and prompts you to profile them on returning to PowerDOCS. To set up an application to use Directory Monitoring, see Chapter 8, "Library Maintenance," of the *DOCSFusion Setup and Administration Guide.*

- Passive Integration—a new integration method that allows you to profile Microsoft Word, Microsoft Excel, Microsoft Project 98, and Adobe Acrobat 4.0 documents in PowerDOCS or bypass PowerDOCS and save in the native application. For more information on Passive Integration, see Chapter 8 of the *PowerDOCS User's Guide.*

Tables A.1 through A.3 list the applications that use Interceptor, Passive Integration, and ODMA.

Table A.1   Tested Applications- Interceptor

Integrated Using Interceptor
Adobe Acrobat Exchange 3.0.x
AutoCad R14
Microsoft Excel 97
Microsoft Excel 2000
Corel Presentations 9.0
Corel Quattro Pro 9.0

Table A.2   Tested Applications - Passive Integration

Integrated Using Passive Integration
Microsoft Word
Microsoft Excel
Microsoft Project 98
Adobe Acrobat 4.x

Table A.3   Tested Applications - ODMA

Integrated Using ODMA
Corel Presentations 8.0
Corel Quattro Pro 8.0
Corel WordPerfect 9.0
Corel WordPerfect 8.0
Microsoft PowerPoint 2000
Microsoft PowerPoint 97
Microsoft Word 2000
Microsoft Word 97

Applications Using DDE Settings

To set up certain applications with PowerDOCS, you must create an additional set of launch methods to enter new Dynamic Data Exchange (DDE) settings used with PowerDOCS. For example, if you have a launch method for Excel already set up in Application Maintenance for use with DOCS Open, you need to create a new launch method for use with PowerDOCS that is identical to the original launch method except for the new DDE settings. You may want to change the description field to "Excel - PowerDOCS," to differentiate between the two launch methods.

N O T E   Before integrating applications with PowerDOCS, verify that the application settings listed in Library Maintenance match those shown in the section entitled "DDE Settings for Specific Applications."

Corel Suite applications that are being integrated on Windows 2000 systems are configured slightly different. Refer to "Integrating Corel Suite Applications on Windows 2000 Systems."

The applications that require new DDE settings are:

- Adobe Acrobat Exchange 3.0.x

- Microsoft Excel

- Microsoft Word

- Microsoft PowerPoint

- Corel WordPerfect 8.0 and 9.0

- Corel Presentations 8.0 and 9.0

- Corel Quattro Pro 8.0 and 9.0

- Acrobat 4.0x

- Acrobat Reader 4.0x

To create the additional launch methods:

1. From the Windows Start Menu, select Programs>DOCSFusion Services>DOCS Admin Tools>Library Maintenance.

2. Double-click the Applications icon.

3. From the Application Maintenance Select dialog box, highlight the application that needs an additional PowerDOCS launch method and click OK.

4. Click Launch Methods from the Application Maintenance dialog box.

5. Select a launch method and click Copy.

6. In order to differentiate between the DOCS Open launch method and the PowerDOCS launch method, edit the Launch Method Description to refer to PowerDOCS. For example, edit the Excel 8.0 Launch Method Description as "Excel 8.0 - (PowerDOCS)."

7. Click DDE Settings.

8. Specify the new DDE settings, listed in Table A.4 through Table A.29, in the Application DDE Settings dialog box.

I M P O R T A N T   You must refresh the DOCSFusion cache when changes have been made in Library Maintenance. To do this, go to the DOCSFusion server and access the DOCSFusion Server Manager. Select the Caches tab and click Refresh All. The next time you launch PowerDOCS, your changes will take effect.

For more instructions on setting up applications in Application Maintenance, see Chapter 8, "Library Maintenance," in the *DOCSFusion Setup and Administration Guide.*

DDE Settings for Specific Applications

Table A.4   Acrobat Exchange 3.0.x Launch Method Settings

Integration Type	Full Integration
Command Line Parameters	%FULLPATH

Acrobat Exchange 3.0.x DDE Settings - Open

Application Name	ACROVIEW
Topic Name	CONTROL
Command 1	[FileOpen("%1")]
Command 2	[FileOpen("%1")]

Acrobat Exchange 3.0.x DDE Settings - Print

Application Name	AIM
Topic Name	AcroExch.Document
Command 1	Print
Command 2	Print

Table A.5   Acrobat Exchange 4.0x Launch Method Settings

Integration Type	ODMA Compliant
Command Line Parameters	%FULLPATH

Acrobat Exchange 4.0x DDE Settings - Open

Application Name	ACROVIEW
Topic Name	CONTROL
Command 1	[FileOpen("%1")]
Command 2	[FileOpen("%1")]

Acrobat Exchange 4.0x DDE Settings - Print

Application Name	AcrobatPowerDOCSPlugin
Topic Name	AcroExch.Document
Command 1	[FilePrintSilentEx("%1")]
Command 2	[FilePrintSilentEx("%1")][AppQuit]

Table A.6   Acrobat Reader 4.0x Launch Method Settings

Integration Type	ODMA Compliant
Command Line Parameters	%FULLPATH

Acrobat Reader 4.0x DDE Settings - Open

Application Name	ACROVIEW
Topic Name	CONTROL
Command 1	[FileOpen("%1")]
Command 2	[FileOpen("%1")]

Acrobat Reader 4.0x DDE Settings - Print

Application Name	AcrobatPowerDOCSPlugin
Topic Name	AcroExch.Document
Command 1	[FilePrintSilentEx("%1")]
Command 2	[FilePrintSilentEx("%1")][AppQuit]

Table A.7   Microsoft Excel 97 and Excel 2000 Launch Method Settings

Integration Type	Full Integration
Command Line Parameters	

Microsoft Excel 97 and Excel 2000 DDE Settings - Open

Application Name	EXCEL
Topic Name	SYSTEM
Command 1	[open("%1")]
Command 2	[open("%1")]

Microsoft Excel 97 and Excel 2000 DDE Settings - Print

Application Name	EXCEL
Topic Name	SYSTEM
Command 1	[open("%1")][print?()][close()]
Command 2	[open("%1")][print?()][quit()]

N O T E   To execute a Print command from the Recently Edited documents list without a pause at the printer setup dialog box, remove the ? from the command syntax.

Table A.8   Microsoft Word 97 and Word 2000 Launch Method Settings

Integration Type	ODMA Compliant
Command Line Parameters	/ND

Microsoft Word 97 and Word 2000 DDE Settings - Open

Application Name	WINWORD
Topic Name	SYSTEM
Command 1	[REM _DDE_Direct][FileOpen("%1")]
Command 2	[REM _DDE_Direct][FileOpen("%1")]

Microsoft Word 97 and Word 2000 DDE Settings - Print

Application Name	WINWORD
Topic Name	SYSTEM
Command 1	[FileOpen("%1")][FilePrint 0][DocClose 2]
Command 2	[FileOpen("%1")][FilePrint 0][FileExit 2]

Table A.9   Microsoft PowerPoint Launch Method Settings

Integration Type	ODMA Compliant
Command Line Parameters	%FULLPATH

Microsoft PowerPoint DDE Settings - Print

Application Name	AIM
Topic Name	PowerPoint.Show.8
Command 1	Print
Command 2	Print

Table A.10 Microsoft Project 98 Launch Method Settings (Passive Integration Only)

Integration Type	Full Integration
Command Line Parameters	

Microsoft Project 98 DDE Settings - Open

Application Name	WINPROJ
Topic Name	SYSTEM
Command 1	[FileOpen("%1")]
Command 2	[FileOpen("%1")]

Microsoft Project 98 DDE Settings - Print

Application Name	WINPROJ
Topic Name	SYSTEM
Command 1	FileOpen "%1":FilePrint 1, 32767
Command 2	FilePrint 1,32767:FileExit 0

Table A.11 Corel WordPerfect 8.0 Launch Method Settings

Integration Type	ODMA Compliant
Command Line Parameters	

Corel WordPerfect 8.0 DDE Settings - Open

Application Name	WPWin8_Macros
Topic Name	COMMANDS
Command 1	FileOpen("%1")WPActivate
Command 2	FileOpen("%1")WPActivate

Corel WordPerfect 8.0 DDE Settings - Print

Application Name	WPWin8_Macros
Topic Name	COMMANDS
Command 1	FileOpen("%1")PrintFullDoc()CloseNoSave(1)
Command 2	FileOpen("%1")PrintFullDoc()CloseNoSave(1)ExitWordPerfect()

Table A.12 Corel WordPerfect 9.0 Launch Method Settings

Integration Type	ODMA Compliant
Command Line Parameters	/ddeex/smin:

Corel WordPerfect 9.0 DDE Settings - Open

Application Name	WPWin9_Macros
Topic Name	COMMANDS
Command 1	Display(1) FileOpen("%1") WPActivate
Command 2	Display(1) FileOpen("%1") WPActivate

Corel WordPerfect 9.0 DDE Settings - Print

Application Name	WPWin9_Macros
Topic Name	COMMANDS
Command 1	FileOpen("%1")PrintFullDoc()CloseNoSave(1)
Command 2	FileOpen("%1")PrintFullDoc()CloseNoSave(1)ExitWordPerfect()

Table A.13 Corel Presentations 8.0 Launch Method Settings

Integration Type	ODMA Compliant
Command Line Parameters	

Corel Presentations 8.0 DDE Settings - Open

Application Name	PRESENTATIONS
Topic Name	COMMAND
Command 1	ShellFileOpen("%1") PRActivate()
Command 2	ShellFileOpen("%1")

Corel Presentations 8.0 DDE Settings - Print

Application Name	PRESENTATIONS
Topic Name	COMMAND
Command 1	ShellPrintTo("%1")
Command 2	ShellPrintTo("%1") FileExit()

Corel Presentations 9.0

To integrate Corel Presentations 9.0, you must complete the following steps.

1. Disable ODMA for Presentations by adding the following Keys to the Windows Registry:

   `[HKEY_CLASSES_ROOT\PRESENTATIONS]`

   `[HKEY_CLASSES_ROOT\PRESENTATIONS\ODMA32]`

2. Turn off enhanced file dialogs option for Corel Presentations 9. From the Presentations Menu select Tools > Settings >

Environment. From the Options Tab, uncheck the Use enhanced file dialogs.

N O T E Two launch method settings are needed, one for Opening a document and one for Printing a document.

Table A.14 Corel Presentations 9.0 Open Launch Method Settings

Integration Type	Full Integration
Command Line Parameters	/ddeex
Application Name	PRESENTATIONS
Topic Name	COMMAND
Command 1	ShellFileOpen("%1") PRActivate()
Command 2	ShellFileOpen("%1")

Corel Presentations 9.0 DDE Settings - Open

Application Name	PRESENTATIONS
Topic Name	COMMAND
Command 1	ShellFileOpen("%1") PRActivate()
Command 2	ShellFileOpen("%1")

Corel Presentations 9.0 DDE Settings - Print

Application Name	PRESENTATIONS
Topic Name	COMMAND
Command 1	ShellPrintTo("%1")
Command 2	ShellPrintTo("%1") FileExit()

Table A.15 Corel Presentations 9.0 Print Launch Method Settings

Integration Type	Full Integration
Command Line Parameters	/ddeex /pt

Corel Presentations 9.0 DDE Settings - Open

Application Name	PRESENTATIONS
Topic Name	COMMAND
Command 1	ShellFileOpen("%1") PRActivate()
Command 2	ShellFileOpen("%1")

Corel Presentations 9.0 DDE Settings - Print

Application Name	PRESENTATIONS
Topic Name	COMMAND
Command 1	ShellPrintTo("%1")
Command 2	ShellPrintTo("%1") FileExit()

Corel Quattro Pro 9.0

To integrate Corel Quattro Pro 9.0, you must complete the following steps.

1. Disable ODMA for Presentations by adding the following Keys to the Windows Registry:

    `[HKEY_CLASSES_ROOT\QPW]`

    `[HKEY_CLASSES_ROOT\QPW\ODMA32]`

2. Turn off enhanced file dialogs option for Corel Quattro Pro 9.0. From the Quattro Pro Menu select Tools > Settings > Environment. From the File Options tab, uncheck the Use enhanced file dialogs.

N o t e   Two launch method settings are needed, one for Opening a document and one for Printing a document.

Table A.16 Corel Quattro Pro 9.0 OPEN Launch Method Settings

Integration Type	Full Integration
Command Line Parameters	

Corel Quattro Pro 9.0 DDE Settings (Open) - **None**

Corel Quattro Pro 9.0 DDE Settings - Print

Application Name	QPW
Topic Name	SYSTEM
Command 1	[print("%1")]
Command 2	[print("%1")]

Table A.17 Corel Quattro Pro 9.0 PRINT Launch Method Settings

Integration Type	Full Integration
Command Line Parameters	/dde

Corel Quatto Pro 9.0 PRINT DDE Settings (Open) - None
Corel Quatto Pro 9.0 PRINT DDE Settings - Print

Application Name	QPW
Topic Name	SYSTEM
Command 1	[print("%1")]
Command 2	[print("%1")]

Integrating Corel Suite Applications on Windows 2000 Systems

On Windows 2000 systems you must disable ODMA and modify the application launch methods in order to integrate Corel WordPerfect 8.0 \ 9.0, Quattro Pro 8.0 \ 9.0, or Presentations 8.0 \ 9.0 through Interceptor. All these applications require separate launch methods for opening and printing documents.

1. Disable ODMA for each application by adding the following Keys to the Windows Registry.

    WordPerfect:

    `[HKEY_CLASSES_ROOT\WORDPERFECT]`

    `[HKEY_CLASSES_ROOT\WORDPERFECT\ODMA32]`

    Quattro Pro:

    `[HKEY_CLASSES_ROOT\QPW]`

    `[HKEY_CLASSES_ROOT\QPW\ODMA32]`

    Presentations:

    `[HKEY_CLASSES_ROOT\PRESENTATIONS]`

    `[HKEY_CLASSES_ROOT\PRESENTATIONS\ODMA32]`

    To make this task easier, three Registry files have been provided. The files are found in the Tools>PowerDOCS directory on the Fusion Family CD. As the administrator, you can make a master registry file and provide it to your users. Please refer to Exporting the Registry File in Chapter 4 of the PowerDOCS Installation Guide.

2. Within each application, turn off the Use Enhanced file dialogs option:

    In WordPerfect select Tools > Settings > Files. Uncheck the Use enhanced file dialogs selection from the Document tab.

    In Quattro Pro, select Tools > Settings. From the File Options tab, uncheck the Use enhanced file dialogs selection.

In Presentations, select Tools > Settings > Environment. From the Options tab, uncheck the Use enhanced file dialogs selection.

3. Go to Library Maintenance and set the application launch methods for each application to use Full Integration.

4. Edit the launch methods for each application to match the application settings shown below.

5. Enable the launch method in Interceptor. Refer to "Steps Necessary to Set Up Application Integration with PowerDOCS" on page 86.

Table A.18 WordPerfect 8.0 Open Launch Method settings

Description	WordPerfect 8 - Open (PowerDOCS)
Command Line Parameters	/ddeex
OS Environment	Windows/Windows NT
Integration Type	Full Integration

WordPerfect 8.0 DDE Settings - Open

Application Name	WPWin8_Macros
Topic Name	COMMANDS
Command 1	Display(1) FileOpen("%1") WPActivate
Command 2	Display(1) FileOpen("%1") WPActivate

WordPerfect 8.0 DDE Settings - Print

Application Name	WPWin8_Macros
Topic Name	COMMANDS
Command 1	FileOpen("%1") PrintFullDoc() CloseNoSave(1)
Command 2	FileOpen("%1") PrintFullDoc() CloseNoSave(1) ExitWordPerfect()

Table A.19 WordPerfect 8.0 Print Launch Method settings

Description	WordPerfect 8 - Print (PowerDOCS)
Command Line Parameters	/ddeex/smin:
OS Environment	Windows/Windows NT
Integration Type	Full Integration

WordPerfect 8.0 DDE Settings - Open

Application Name	WPWin8_Macros
Topic Name	COMMANDS
Command 1	Display(1) FileOpen("%1") WPActivate
Command 2	Display(1) FileOpen("%1") WPActivate

WordPerfect 8.0 DDE Settings - Print

Application Name	WPWin8_Macros
Topic Name	COMMANDS
Command 1	FileOpen("%1") PrintFullDoc() CloseNoSave(1)
Command 2	FileOpen("%1") PrintFullDoc() CloseNoSave(1) ExitWordPerfect()

Table A.20 WordPerfect 9.0 Open Launch Method settings

Description	WordPerfect 9 - Open (PowerDOCS)
Command Line Parameters	/ddeex
OS Environment	Windows/Windows NT
Integration Type	Full Integration

WordPerfect 9.0 DDE Settings - Open

Application Name	WPWin9_Macros
Topic Name	COMMANDS
Command 1	Display(1) FileOpen("%1") WPActivate
Command 2	Display(1) FileOpen("%1") WPActivate

WordPerfect 9.0 DDE Settings - Print

Application Name	WPWin9_Macros
Topic Name	COMMANDS
Command 1	FileOpen("%1") PrintFullDoc() CloseNoSave(1)
Command 2	FileOpen("%1") PrintFullDoc() CloseNoSave(1)

Table A.21 WordPerfect 9.0 Print Launch Method settings

Description	WordPerfect 9 - Print (PowerDOCS)
Command Line Parameters	/ddeex/smin:
OS Environment	Windows/Windows NT
Integration Type	Full Integration

WordPerfect 9.0 DDE Settings - Open

Application Name	WPWin9_Macros
Topic Name	COMMANDS
Command 1	Display(1) FileOpen("%1") WPActivate
Command 2	Display(1) FileOpen("%1") WPActivate

WordPerfect 9.0 DDE Settings - Print

Application Name	WPWin9_Macros
Topic Name	COMMANDS
Command 1	FileOpen("%1") PrintFullDoc() CloseNoSave(1)
Command 2	FileOpen("%1") PrintFullDoc() CloseNoSave(1)

Table A.22 Presentations 8.0 Open Launch Method settings

Description	Presentations 8 - Open (PowerDOCS)
Command Line Parameters	/ddeex
OS Environment	Windows/Windows NT
Integration Type	Full Integration

Presentations 8.0 DDE Settings - Open

Application Name	PRESENTATIONS
Topic Name	COMMAND
Command 1	ShellFileOpen("%1") PRActivate()
Command 2	ShellFileOpen("%1")

Presentations 8.0 DDE Settings - Print

Application Name	WPWin9_Macros
Topic Name	COMMANDS
Command 1	ShellPrintTo("%1")
Command 2	ShellPrintTo("%1") FileExit()

Table A.23 Presentations 8.0 Print Launch Method settings

Description	Presentations 8 - Print (PowerDOCS)
Command Line Parameters	/ddeex/pt
OS Environment	Windows/Windows NT
Integration Type	Full Integration

Presentations 8.0 DDE Settings - Open

Application Name	PRESENTATIONS
Topic Name	COMMAND
Command 1	ShellFileOpen("%1") PRActivate()
Command 2	ShellFileOpen("%1")

Presentations 8.0 DDE Settings - Print

Application Name	WPWin9_Macros
Topic Name	COMMANDS
Command 1	ShellPrintTo("%1")
Command 2	ShellPrintTo("%1") FileExit()

Table A.24 Presentations 9.0 Open Launch Method settings

Description	Presentations 9 - Open (PowerDOCS)
Command Line Parameters	/ddeex
OS Environment	Windows/Windows NT
Integration Type	Full Integration

Presentations 9.0 DDE Settings - Open

Application Name	PRESENTATIONS
Topic Name	COMMAND
Command 1	ShellFileOpen("%1") PRActivate()
Command 2	ShellFileOpen("%1")

Presentations 9.0 DDE Settings - Print

Application Name	WPWin9_Macros
Topic Name	COMMANDS
Command 1	ShellPrintTo("%1")
Command 2	ShellPrintTo("%1") FileExit()

Table A.25 Presentations 9.0 Print Launch Method settings

Description	Presentations 9 - Print (PowerDOCS)
Command Line Parameters	/ddeex/pt
OS Environment	Windows/Windows NT
Integration Type	Full Integration

Presentations 9.0 DDE Settings - Open

Application Name	PRESENTATIONS
Topic Name	COMMAND
Command 1	ShellFileOpen("%1") PRActivate()
Command 2	ShellFileOpen("%1")

Presentations 9.0 DDE Settings - Print

Application Name	WPWin9_Macros
Topic Name	COMMANDS
Command 1	ShellPrintTo("%1")
Command 2	ShellPrintTo("%1") FileExit()

Table A.26 Quattro Pro 8.0 Open Launch Method settings

Description	Quattro Pro 8 - Open (PowerDOCS)
Command Line Parameters	/ddeex
OS Environment	Windows/Windows NT
Integration Type	Full Integration

Quattro Pro 8.0 DDE Settings - Open

Application Name	QPW
Topic Name	SYSTEM
Command 1	{FileOpen "%1"}
Command 2	{FileOpen "%1"}

Quattro Pro 8.0 DDE Settings - Print

Application Name	QPW
Topic Name	SYSTEM
Command 1	[print("%1")]
Command 2	[print("%1")]

Table A.27 Quattro Pro 8.0 Print Launch Method settings

Description	**Quattro Pro** 8 - Print (PowerDOCS)
Command Line Parameters	/ddeex
OS Environment	Windows/Windows NT
Integration Type	Full Integration

Quattro Pro 8.0 DDE Settings - Open

Application Name	QPW
Topic Name	SYSTEM
Command 1	{FileOpen "%1"}
Command 2	{FileOpen "%1"}

Quattro Pro 8.0 DDE Settings - Print

Application Name	QPW
Topic Name	SYSTEM
Command 1	[print("%1")]
Command 2	[print("%1")]

Table A.28 Quattro Pro 9.0 Open Launch Method settings

Description	Quattro Pro 9 - Open (PowerDOCS)
Command Line Parameters	%FULLPATH
OS Environment	Windows/Windows NT
Integration Type	Full Integration

Quattro Pro 9.0 DDE Settings - Open

Application Name	QPW
Topic Name	SYSTEM
Command 1	[open("%1")]
Command 2	[open("%1")]

Quattro Pro 9.0 DDE Settings - Print

Application Name	QPW
Topic Name	SYSTEM
Command 1	[print("%1")]
Command 2	[print("%1")]

Table A.29 Quattro Pro 9.0 Print Launch Method settings

Description	Quattro Pro 9 - Print (PowerDOCS)
Command Line Parameters	/dde
OS Environment	Windows/Windows NT
Integration Type	Full Integration

Quattro Pro 9.0 DDE Settings - Open

Application Name	QPW
Topic Name	SYSTEM
Command 1	[open("%1")]
Command 2	[open("%1")]

Quattro Pro 9.0 DDE Settings - Print

Application Name	QPW
Topic Name	SYSTEM
Command 1	[print("%1")]
Command 2	[print("%1")]

Integrating Applications with ODMA

ODMA is a document management integration method built into applications by their vendors.

Several menu items in Microsoft Word are integrated using macros. Two typical examples are: (1) Insert>PowerDOCS Footer, and (2) Tools>PowerDOCS Mail Merge. For information on using these integrated menu options, see Chapter 8, "Using Applications with PowerDOCS," in the *PowerDOCS User's Guide*.

Installing the Microsoft Word Macro

1. If you have previously integrated with Word and have customized your DOCS Open macros, you need to rename the file NORMAL.DOT under a different file name. You will then have a backup copy of your customized macros, which can be used by a qualified integrator to recustomize the new macros.

N O T E When installing the Microsoft Word Macros in Word 2000, macro security must be set to medium and you must be using Word version 9.0.32.31.

2. Start Word. Select File>Open. Since Word is integrated using ODMA, the Search Results dialog box is displayed. If you are not logged in to the DOCSFusion server, the login screen is displayed.

N O T E Do not start the macro by double-clicking the file in My Computer or Windows Explorer.

3. If you are installing from full integration, click Cancel to display a native Open dialog box. PowerDOCS displays a message box, asking you if you want MS Word to open a document. Click Yes to display the native Open dialog box. Proceed to step 5.

4. If you are using Passive Integration, you do not need to click Cancel. With Passive Integration installed, you only need to select File>Open to display a native dialog.

N O T E If Native Save and Open are disabled, a native dialog box will not appear. For additional information refer to "Restricting Users from Using Interceptor and Native Dialog Boxes" on page 136.

5. From the native Word Open dialog box, locate the integration template `POWERDOCSFOOTER.DOT`. The integration template is located in the PowerDOCS folder (by default, `\Program Files\Pcdocs\PowerDOCS`). Remember to change the Files of type field to Document Templates (`*.DOT`).

6. If you have Word set up to warn you when a document contains macros, the following dialog box is presented.

   Click Enable Macros.

Figure A.30

Word Macro Warning dialog box

7. A Word document appears. Click the Install Macros button at the bottom of the page. If the Install Macros button is not visible,

select Tools>Options>View from the menu bar and clear the Field Codes check box.

Figure A.31

PowerDOCS Automated Macro Installation Document

PowerDOCS 3.5.1
Automated Macro Installation
For
Microsoft Word

This document allows you to install or remove the macros necessary to use Microsoft Word footer and mail merge functionality with PowerDOCS 3.5.1|

Warning:

Have your PowerDOCS macros been customized? If so, you need to close this template (PowerDOCSFooter.dot), exit Word, and rename the file Normal.dot under a different file name. You will then have a backup copy of your customized macros, which can be used by a qualified integrator to re-customize the new macros. If you have any questions, please feel free to call our support hot line at (850) 942-5000 for assistance.

Double-click on one of the options below:

| Install Macros | | Remove Macros |

A PowerDOCS information dialog box, like the one in Figure A.32, appears. Click OK.

Figure A.32

The PowerDOCS information dialog box

PowerDOCS   ☒

ⓘ   Macros installed. You may now close this document.

OK
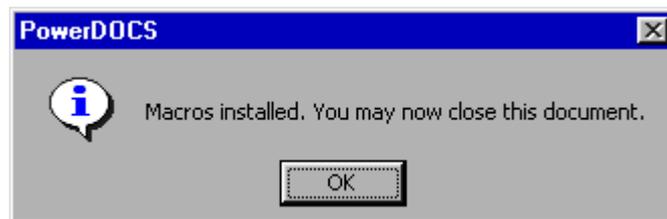
8. Choose File>Close. Do not save changes to the POWERDOCSFOOTER.DOT integration template. You should, however, save changes to the global template NORMAL.DOT, if you are prompted to do so.

   This process adds global macros containing PowerDOCS function calls to Word's Normal template.

9. Close Word.

Unintegrating the Microsoft Word Macros

Prior to uninstalling PowerDOCS you must unintegrate the Microsoft Word Macros.

1. Start Word. Select File>Open. Since Word is integrated using ODMA, the Search Results dialog box is displayed. If you are not logged in to the DOCSFusion server, the login screen is displayed.

2. If you are using full integration, click Cancel to display a native Open dialog box. PowerDOCS will ask you if you want MS Word to open a document. Select Yes to display the native Open dialog box. Proceed to step 4.

N O T E　If Native Save and Open have been disabled, the native dialog box will not appear.

3. If you are using Passive Integration, you do not need to click Cancel. With Passive Integration installed, you only need to select File>Open to display a native dialog.

4. Locate the integration template POWERDOCSFOOTER.DOT. The integration template is located in the PowerDOCS folder (by default, \Program Files\Pcdocs\PowerDOCS).

5. If you have Word set up to warn you when a document contains macros, the following dialog box is presented.

Figure A.33

Word Warning dialog box
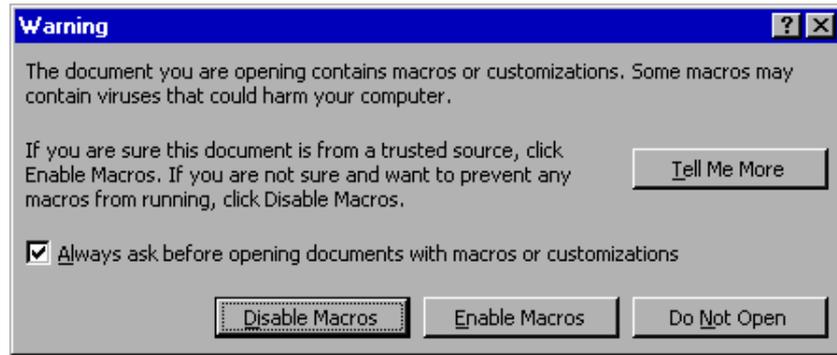
Click Enable Macros.

6. Click the Remove Macros button at the bottom of the page.

7. Select File>Close.

8. Exit Word, saving the changes to the NORMAL.DOT template. The integrated menu options have been removed from your system.

Integrating Applications with Interceptor

Interceptor is installed with PowerDOCS. There are two modes that make up the Interceptor system:

Configuring Applications with the Interceptor Learning Tool

The Interceptor Learning Tool (ILTWizard.exe) is used to set up applications installed on the user's workstation for use with PowerDOCS. The Interceptor Learning Tool is installed in the PowerDOCS directory when you install PowerDOCS.

Configuring and Using Integration with Interceptor

Interceptor is the module that monitors when Open and SaveAs dialog boxes are called for specific applications integrated with PowerDOCS. It is represented by the task bar icon that is displayed when the user starts PowerDOCS.

The Interceptor Module

You can use PowerDOCS Interceptor to:

- Enable or disable applications monitored by Interceptor.

- Edit Launch Method settings.

- Export the settings to a registry file that can be run on users' workstations to easily duplicate settings.

- Configure new applications.

Each of these tasks is described in the sections below. To configure a new application for integration with Interceptor, you can use the Interceptor Learning Tool (`ILTWizard.exe`) or configure a new application directly from Interceptor. For instructions, refer to "Configuring New Applications for Interceptor" on page 142.

Launching the PowerDOCS Interceptor

1. Locate the Interceptor executable, `INTERCEPTOR.EXE`, in your PowerDOCS folder (by default, `\Program Files\Pcdocs\PowerDOCS`) and double-click it.

N o t e   If you are logged into PowerDOCS, the Interceptor will already be running. If you are not logged in, the login dialog box appears.

2. Once you are logged in to the DOCSFusion server or to PowerDOCS, the Interceptor program icon is displayed along the bottom right corner of your task bar.

Figure A.34

The Interceptor icon

3. Double-click the Interceptor icon in the task bar. The PowerDOCS Interceptor dialog box appears. It contains a list of launch methods that are set up in Application Maintenance. The launch methods for the library you are logged in to are displayed by default. You can switch to a remote library by clicking the down arrow of the Library combo box.

Figure A.35

PowerDOCS Interceptor
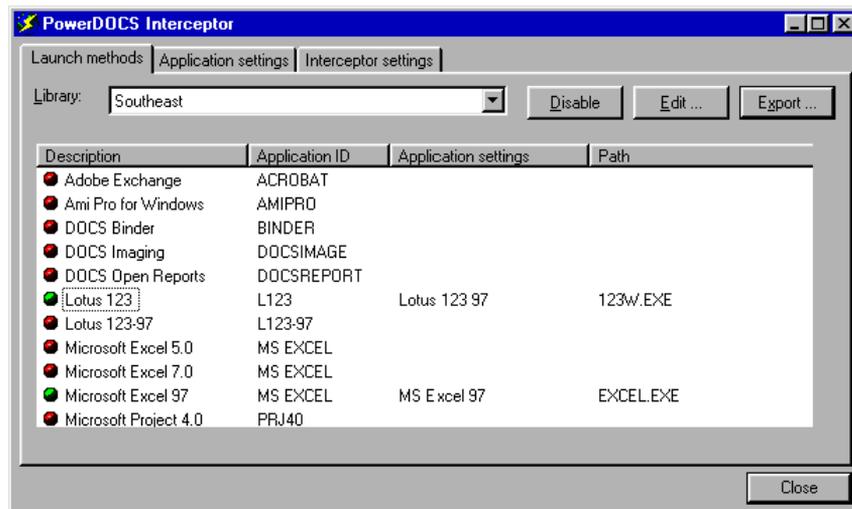
Enabling Applications Within Interceptor

If you want to enable integration for an application within Interceptor, complete the following steps.

1. Launch the PowerDOCS Interceptor, as described in "Launching the PowerDOCS Interceptor" on page 125.

Figure A.36

PowerDOCS Interceptor Launch Methods tab
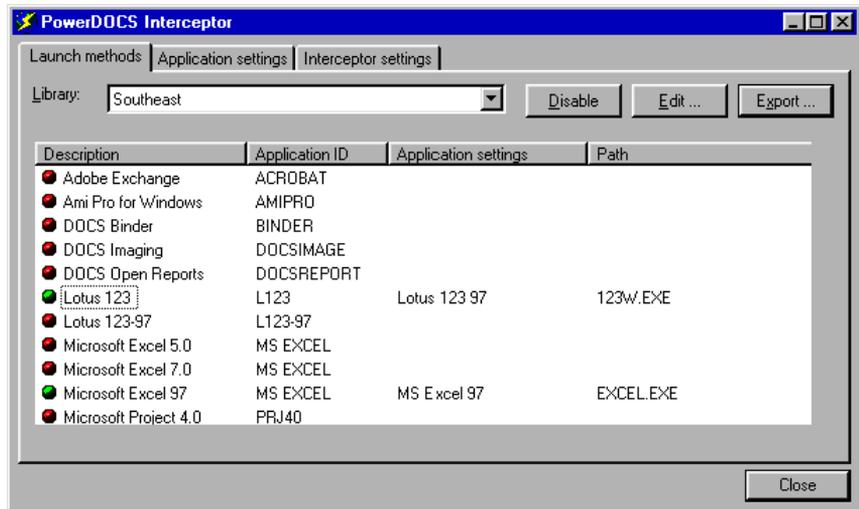
2. From the Launch Methods tab of the PowerDOCS Interceptor window, shown in Figure A.36, highlight the launch method for the application that you want to integrate and click Enable.

I M P O R T A N T   If you created launch methods for the new DDE settings used with PowerDOCS, remember to select the launch method that applies to PowerDOCS, not DOCS Open.

The following dialog box is displayed.

Figure A.37

Launch Method Settings dialog box
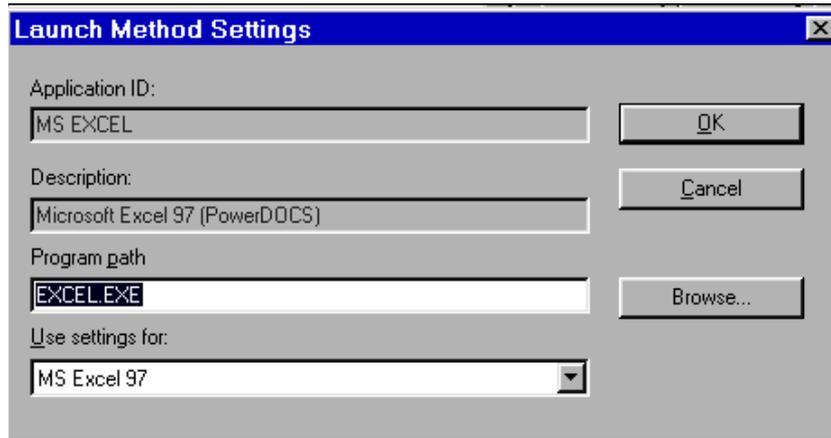
- The Application ID and Description fields are filled in by default.

- Click the Browse button to ensure that your program path is correct. The Open dialog box appears. If you do not have the full path to the application in your system path, select the Full Path radio button. If this information is in your system path, you can accept the default of Only File Name.

Figure A.38

Click the Browse button to produce the Open dialog box
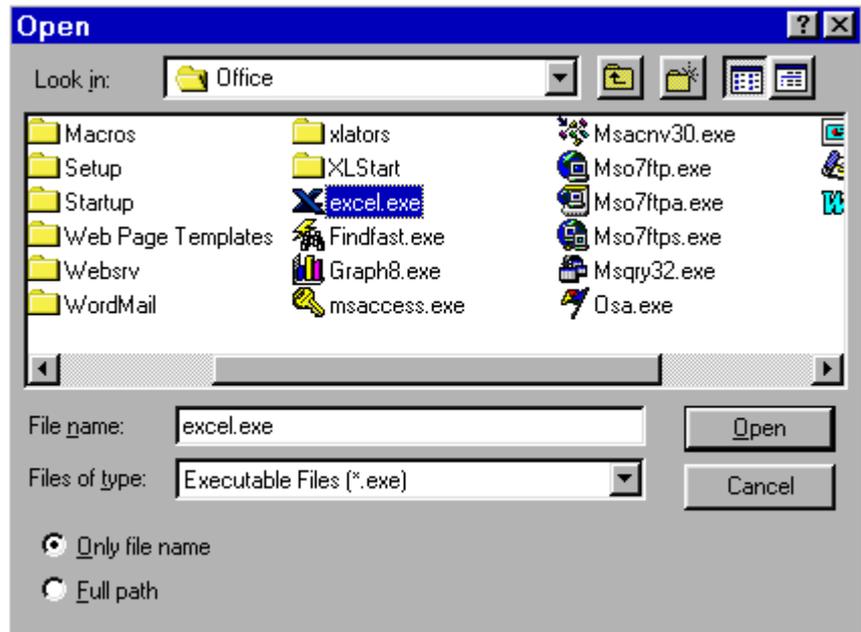
- Click the down arrow of the Use settings for drop-down list and select the correct application from the list.

3. Click OK to enable Interceptor to monitor the application's launch method. A green dot is then displayed next to the application, indicating that the application is now set to be monitored by Interceptor.

   If the Program Path on the users' individual workstations is different from the Location defined in Application Maintenance, you need to point Interceptor to the application's executable. For more information, see "Editing the Launch Method Settings" on page 130.

Once you have enabled each application that you want integrated, you can create a registry file that can be run on users' workstations to duplicate the integration information that you have created on your workstation. See "Exporting the Interceptor Settings" on page 133.

4. Click Close to exit Interceptor.

N O T E   There are some applications that require specific Launch Method or Registry settings. Please refer to "Corel Presentations 9.0" on page 101 and "Corel Quattro Pro 9.0" on page 104.

Disabling Integration with Interceptor

If you want to disable integration for an application that you have integrated with Interceptor, complete the following steps.

1. Launch the PowerDOCS Interceptor as described in "Launching the PowerDOCS Interceptor" on page 125.

2. Select the application that you want to disable from the Launch Methods tab of the PowerDOCS Interceptor dialog box.

3. Click Disable. The green dot to the left of the application description will change to a red dot indicating that the application launch method will no longer be monitored by Interceptor.

N O T E   A yellow dot to the left of an application description means a setting (launch method) exists in the registry but is missing or incorrect in the database.

Editing the Launch Method Settings

The Interceptor allows you to edit the path to an application that Interceptor will monitor. When you edit the launch method settings from Interceptor, your edits do not apply to Application Maintenance in Library Maintenance. You are only editing the path that Interceptor will monitor. This allows more flexibility in the location of your users' integrated applications.

For example, suppose you selected Adobe Acrobat Exchange 3.0.x to be monitored by Interceptor and the Location defined in the Application Launch Methods is:

`C:\Acrobat3\Exchange\AcroEx32.EXE.`

If you have DOCS Open users who have Acrobat Exchange installed on their D:\ drive, you would have multiple launch methods set up. In Interceptor, you only need to enable one of those launch methods. Specify only the file name of the executable in the Program Path field and select the Only File Name option on the Open dialog, shown in Figure A.38. This allows Interceptor to monitor the application independent from where it is launched, as long as the executable is in the user's search path.

To edit the launch method that Interceptor will monitor:

1. From the Interceptor dialog box, select the launch method that you want to edit and click Edit from the Launch Methods tab. The Launch Method Settings dialog box is displayed.

2. Fill out the fields as described below:

    Program Path: Specify the path to the application that you want Interceptor to monitor. The path can be a whole or partial path or simply the executable file name. If you have a company whose individual workstations have different configurations, use the executable file name. Click Browse to ensure that your program path is correct. The Open dialog box appears, shown in Figure A.38. If you do not have the full path to the application in your system path, select the Full Path radio button. If this information is in your system path, you can accept the default of Only File Name.

N O T E   Click the Full Path button to save the information you enter in the Program Path field.

    Use Settings for: Select the appropriate launch method from this drop-down box.

Interceptor Settings

The Interceptor Settings tab of the PowerDOCS Interceptor dialog box contains three general settings that affect how Interceptor behaves when errors occur.

Figure A.39

Interceptor Settings tab of the Power-DOCS Interceptor
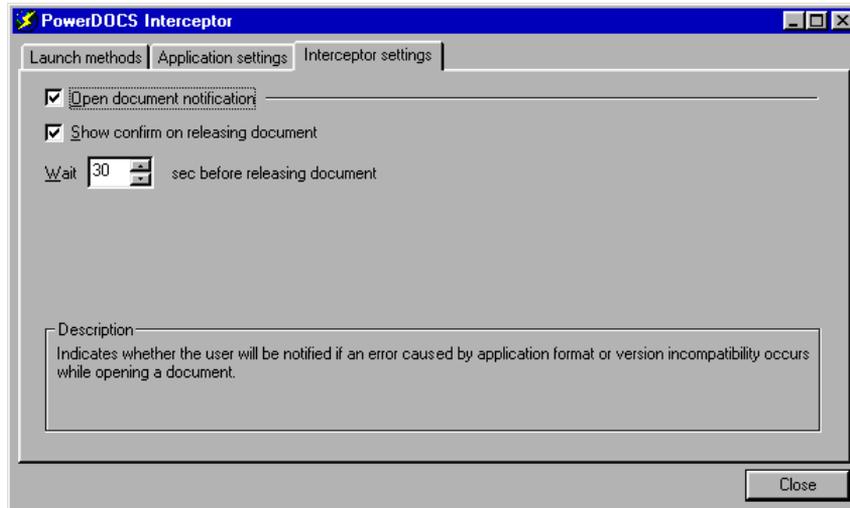
Open Document Notification: If this option is checked, users will be notified when an application format or a version incompatibility causes an error while opening a document. If this option is checked, and a conflict occurs, PowerDOCS will lock the document and release it only if you have selected Show Confirm on Releasing Document.

Show Confirm on Releasing Document: If you checked Open Document Notification, you must also check this option. If this option is checked, users will be prompted to release the document after the designated time if an error occurs while opening it.

Wait n seconds before releasing document: The default value is 30 seconds. If you accept the default, PowerDOCS will try to open the document for 30 seconds before prompting you to release it. You can override the default value.

After making these changes, you can export your settings to a registry file for your users. For more information, refer to "Exporting the Interceptor Settings" on page 133.

Exporting the Interceptor Settings

The Export option in the PowerDOCS Interceptor enables you to create a registry file that you can distribute to users to duplicate the application integration settings you created using Interceptor.

Only the applications that you enabled in Interceptor before creating the registry file will be turned on and actively integrated in the user's Interceptor.

1. Launch the PowerDOCS Interceptor as described in "Launching the PowerDOCS Interceptor" on page 125.

2. From the Launch Methods tab of the PowerDOCS Interceptor dialog box, select Export.

3. The Export Settings dialog box appears.

4. The default setting on this dialog box is All Settings. We recommend that you leave this checked and click Export. The Save As dialog box is displayed. If you select All Settings, PowerDOCS assigns a default file name for the registry file of `InterceptorSettings.reg`.

Figure A.40

Save As dialog box
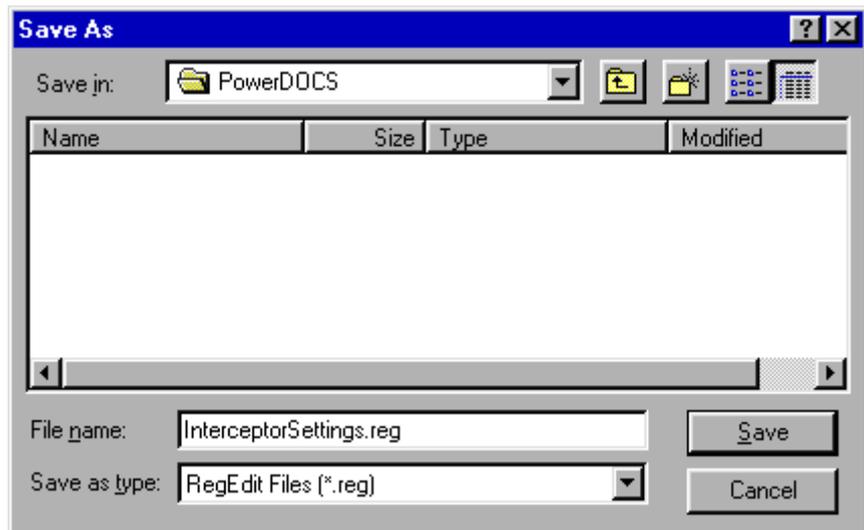
• **Export Settings:**

All Settings: This option exports application settings and launch method settings for all applications and all libraries. This is the most common setting when exporting a registry file. Selecting this option creates a registry file named InterceptorSettings.reg, by default.

Only Application Settings: This option exports the settings that relate to application properties and creates a registry file named `InterceptorAppDB.reg`, by default.

All Launch Method Settings: This option exports only the launch method settings for your applications and creates a registry file named `LaunchMethodSettings.reg`, by default.

Launch Method Settings for the Selected Library: This option exports only the *enabled* launch methods for the currently selected library and creates a registry file named *LibraryName*`.reg`, by default, where your library name is inserted.

5. Select a location for the registry file and click Save.

N o t e Place the registry file in the PowerDOCS Install Kit directory (by default, `\Install\PowerDOCS`), it will run automatically when your users install PowerDOCS on their machines.

If you do not place the registry file(s) in the PowerDOCS folder, place it in a location that is accessible to all users.

Instruct your users to double-click the registry file(s). The following dialog box appears, confirming that the Interceptor settings were installed on their workstation.

Figure A.41

Registry Editor confirmation message

Registry Editor

Information in C:\WINDOWS\DESKTOP\InterceptorSettings.reg has been successfully entered into the registry.

OK

N O T E   If the your users install PowerDOCS in a directory location that is different from the computer from which you export the Interceptor registry file, they may receive messages stating that there are no valid launch methods for their applications. To resolve this issue you should export and apply the Interceptor files in two parts:

Application Settings Only

All Launch Method Settings

Restricting Users from Using Interceptor and Native Dialog Boxes

By design, PowerDOCS is set up to allow users to open and save files both within the document management system and outside the document management system.

If you, as the PowerDOCS Administrator, do not wish to allow the users and/or certain groups in your organization to save documents outside of PowerDOCS, you should follow the instructions listed below. As the PowerDOCS Administrator, you should set up all applications via the Interceptor beforehand and export a registry file that can be accessed by the user. See "Exporting the Interceptor Settings" on page 133.

1. Copy the `DisableNativeDialogs.reg` file from the Fusion Family CD-ROM to the `..\install\PowerDOCS directory`. This file will be automatically merged into any workstation that runs the PowerDOCS Admin Kit installation program.

    This file will enable the option located in the PowerDOCS Options > Defaults > General tab called "Disable native dialogs". By enabling this option, all native dialogs allowing you to open or save to the local file system will be disabled. If you plan to implement this feature after your users have already installed

PowerDOCS, you will need to instruct your users to import the registry file.

Figure A.42

PowerDOCS Defaults Dialog Box
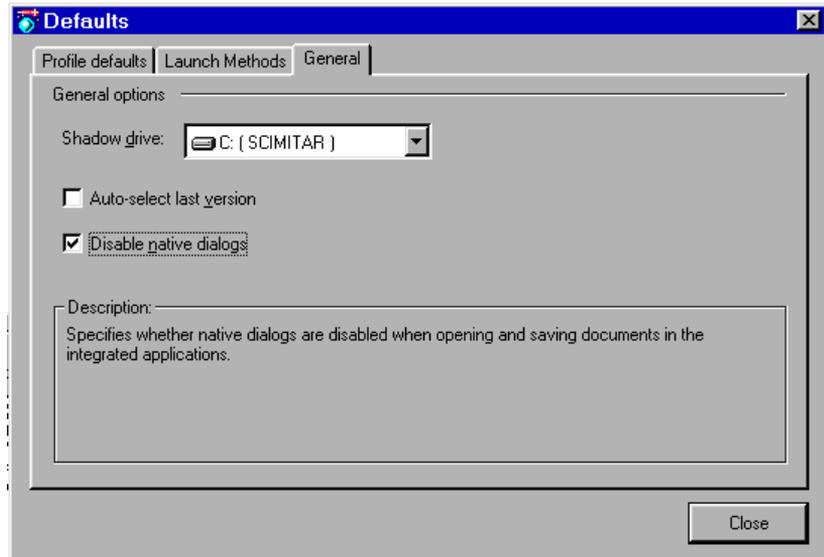
3. In Library Maintenance>System Parameters and/or Groups Maintenance, access the Features dialog box and set the Disable Native Open/Save option to Yes.

Figure A.43

Groups Maintenance>Features dialog box
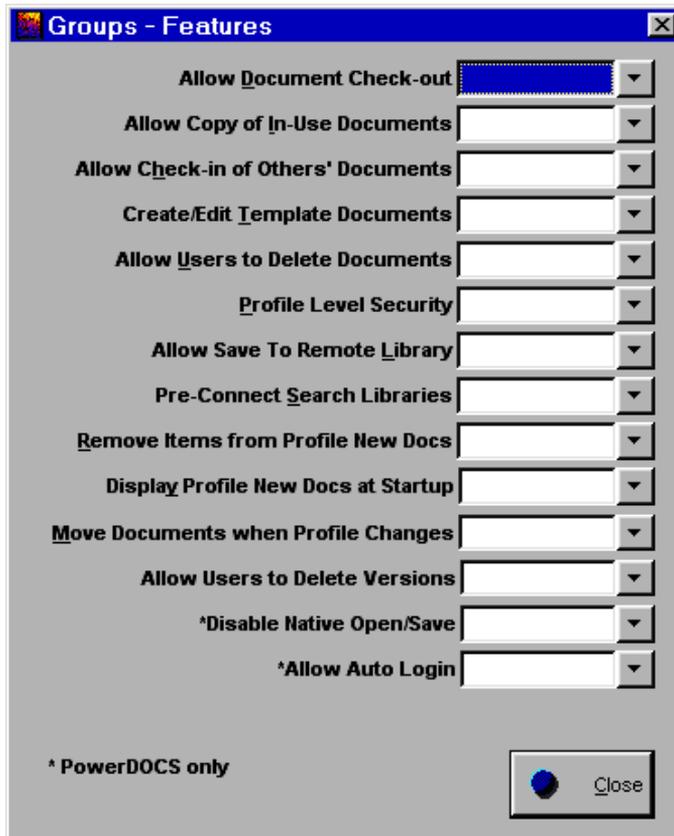
Figure A.44

Library Maintenance>System Parameters>Features dialog box
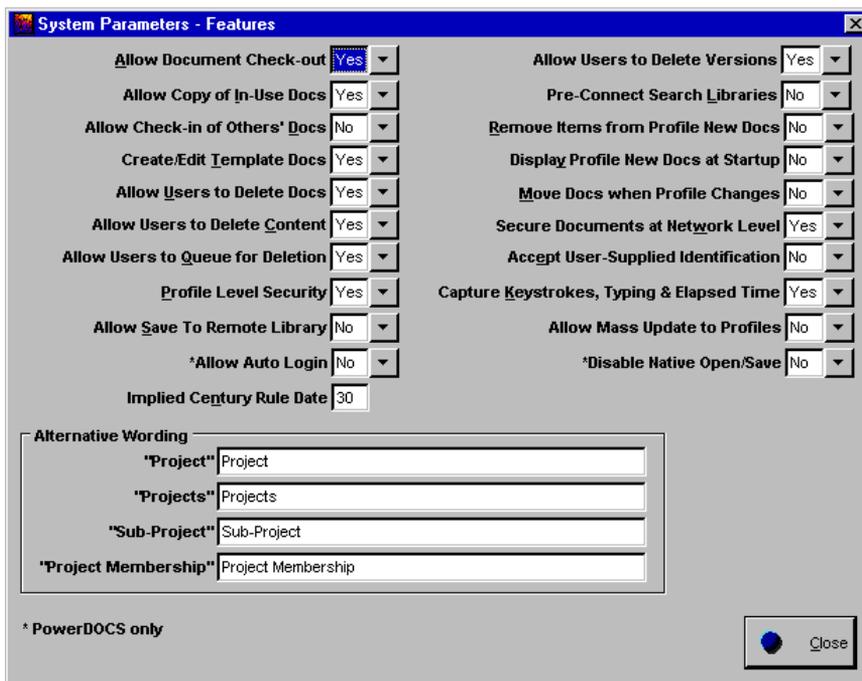
Enabling this option will result in the following:

• The Disable Native Save checkbox located in the PowerDOCS Options dialog box will be unavailable for modification.

• The Settings option in Interceptor will be unavailable.

2. As the final step, you will need to refresh the cache at the DOCSFusion Server Manager. In DOCSFusion Server Manager, on the Caches tab, click Refresh All to update the library information in DOCSFusion.

NOTE Disabling Native Save and Open and access to Interceptor work hand in hand. You can't disable one without disabling the other.

3. If you wish to revert to allowing your users to save outside of
    PowerDOCS, instruct your users to run the
    `EnableNativeDialogs.reg` file. You must also return to
    Library Maintenance and/or Groups Maintenance and reset the
    Disable Native Save option to No.

PowerDOCS Auto-Login

When run on a Windows 95 or 98 platform, users can save their
PowerDOCS password to allow quick login to the system. As an
administrator, you can disable this feature on a global or group level.

Figure A.45

*PowerDOCS Login dialog
box - Windows 95 and 98*

When using PowerDOCS on a Windows NT system, the ability to save
the PowerDOCS password is not immediately available. As an
administrator you can provide registry files that will allow NT users to
save their PowerDOCS password.

N O T E   Before providing these features to your users, consider the
security issues that may result from allowing unrestricted access to
PowerDOCS.

Disabling the Auto-Login Feature-Windows 95 and 98

In Library Maintenance>System Parameters and/or Groups Maintenance, access the Features dialog box and set the Allow Auto Login to No. Refer to Figure A.44.

Enabling and Disabling Auto-Login - Windows NT

By design, the ability to save passwords for PowerDOCS is not available for Windows NT users. If your Windows NT users would like access to this feature, you can modify the Windows registry to allow auto-login by installing the registry files provided for this purpose. The files are found on the Fusion Family CD in the Tools directory.

The portion of the registry that is modified is:
`HKEY_CURRENT_USER\Software\PC DOCS Inc.\PowerDOCS\Core\Plugins\Fusion\`

The two files provided to turn this feature on and off are:

`NT_Auto_Login_OFF.reg`

`NT_Auto_Login_ON.reg`

Configuring New Applications for Interceptor

The PowerDOCS Interceptor allows you to integrate new applications that do not already exist in Interceptor's list of launch methods.

You can integrate new applications in one of two ways:

- Select the Application settings tab of Interceptor.

- Use the Interceptor Learning Tool Wizard (`ILTWizard.exe`), located in your PowerDOCS directory.

Integrating New Applications from the PowerDOCS Interceptor

You can integrate a new application directly from the PowerDOCS Interceptor. Once you have completed the following steps, the application you configured will be monitored by Interceptor. You can disable integration with applications at any time.

Creating Launch Methods for Interceptor Applications

Before you can add and integrate a new application, you must create a launch method for that application in Library Maintenance. You can access Library Maintenance via DOCS Open or by using the DOCS Admin Tools.

To create a launch method for a new application:

1. From Library Maintenance, double-click the Applications icon.

2. From the Application Maintenance Select dialog box, click the New button.

3. Complete the Application Maintenance dialog box as described below:

   Application ID: Enter an ID that is appropriate and logical. You will later use this ID when adding a new application to Interceptor.

   Description: Enter the Application name in this field.

   Filing Scheme: Select the appropriate filing scheme from the drop-down list (typically, Enhanced).

File Types: Click the table lookup (ellipsis) button for this field and click Add to enter file extensions that are accepted by this application.

4. Click OK then click the Options button. From Application Options, make sure that Shows on Desktop is checked.

5. Click Close from Application Options then click the Launch Methods button.

6. From the Application Launch Methods Select window, click the New button.

7. The Application Launch Methods dialog box appears. Complete this dialog box as described below:

Description: Specify the Application name in this field.

Location: Specify the drive letter and directory for this application. Use the table lookup (ellipsis) button to browse for the correct directory.

Default Directory: Specify the same drive letter and directory that you entered in the Location field.

Integration: Select Full Integration from this drop-down list. In order for Interceptor to monitor new applications, you must select Full Integration.

8. Click OK then click Close to return to the Application Launch Methods Select dialog box. Your new launch method appears in the Description window of this dialog box.

9. Continue to click Close until you return to the original Application Maintenance Select dialog box. Your new launch method appears in the Application ID column.

10. Click Close and then File>Exit to close Library Maintenance.

You are now ready to add this application to Interceptor and should proceed with the steps in the following section. For more information about Library Maintenance, refer to Chapter 8,

"Library Maintenance," of the *DOCSFusion Setup and Administration Guide.*

Adding New Applications to Interceptor

To configure a new application in the Interceptor:

1. Launch the Interceptor, using the instructions in "Launching the PowerDOCS Interceptor" on page 125. The PowerDOCS Interceptor window appears, displaying all applications that are currently configured to work with Interceptor. The application you are configuring will not appear in the list until you complete the subsequent steps and restart Interceptor.

2. Click the Application Settings tab. This window will be empty if you have never configured a new application in Interceptor. If you have previously integrated new applications, this list appears in the active window. Click Add to add a new application.

3. With the Common Properties tab selected, complete the following fields:

    Application ID: Specify the Application ID you chose when creating this application's launch method. If these Application IDs do not match, PowerDOCS may have trouble reconciling the application with its launch method.

    Description: Specify the application name in this field.

    Keyword: Specify the Application ID you chose when creating this application's launch method. PowerDOCS attempts to match the value(s) in the Keyword field to words in the Launch Methods.

4. Click the Window Properties tab. This tab has two Autodetect check boxes that are selected by default. We highly recommend leaving these boxes checked. If you uncheck them, you will have to enter all application settings manually. If you leave them checked, Interceptor attempts to automatically detect all settings.

5. Click the Application Dialogs tab to display the Dialogs window. This window will be empty until you add commands to be integrated with Interceptor.

6. Click Add to display the Dialog window. Fill out the fields as described below.

> **Dialog Type:** Select the dialog type that most closely matches the nature of the dialog box you are integrating.

> | | |
> |---|---|
> | **Open** | Select this type if you want the Search Results dialog box presented and the selected document opened. |
> | **Save As** | Select this type if you want the Document Profile form displayed so the user can profile and save the open document. When this type is selected, the original document is replaced by the new one. |
> | **Import** | Select this type if you want the Search Results dialog box presented and the selected document opened into the current document. Some applications may not support Import and Export. |
> | **Export** | Select this type if you want the Document Profile form displayed so the user can profile and save the exported document. Some applications may not support Import and Export. When this type is selected, the original document remains open. This is useful for MS Outlook and for graphics programs where you want to perform a "Save Copy As." |

> **Dialog Caption:** Type the caption title of the dialog box.

Not full caption: Select this check box if you want to use the same settings for several dialog boxes with equal functionality and similar headings. In the Dialog Caption field, type the common part of the headings and select Not full caption.

Autodetect: This check box is selected by default, and it is strongly recommended that you leave it selected.

7. Click OK to save your settings. The dialog box you configured appears in the Dialogs window. You can repeat step 6 to configure other commands in this application.

8. When you have finished integrating commands, click OK and close the Application Settings dialog box.

9. Your new application should appear in the Application Settings list now.

10. Select the Launch Methods tab and click Enable to allow Interceptor to begin monitoring this application.

11. The Launch Methods Settings dialog box appears. Select the correct application in the Use Settings for field.

NOTE For further instruction on enabling applications in Interceptor, refer to "Enabling Applications Within Interceptor" on page 127.

Integrating New Applications Using the Interceptor Learning Tool

The Interceptor Learning Tool is a separate component of the PowerDOCS Interceptor that is installed in the PowerDOCS directory. This executable file, `ILTWizard.exe`, is located in `C:\Program Files\Pcdocs\PowerDOCS\`, where C: represents your local hard drive.

This tool is designed to help you configure Interceptor to accept other applications not currently listed in the Application Settings tab of Interceptor.

Integrating an Application

The Interceptor Learning Tool is configured similar to other application wizards. The tool is designed to guide you through the entire process of configuring the desired application. In the following instructions, the Interceptor Learning Tool will be referred to as the ILT Wizard.

The example below shows how to integrate Paint Shop Pro version 5.01.

N O T E Prior to setting up applications using the ILT Wizard, a Launch Method must be created in DOCS>Library Maintenance>Applications. The Launch Method must use Full Integration. For information on setting up Launch Methods, refer to "Creating Launch Methods for Interceptor Applications" on page 142.

1. Using My Computer, locate the PowerDOCS directory. Double-click `ILTWizard.exe`. The Welcome window appears.

2. From the Welcome window, click Next. The Application Parameters dialog box appears.

Figure A.46

Application Parameters dialog box
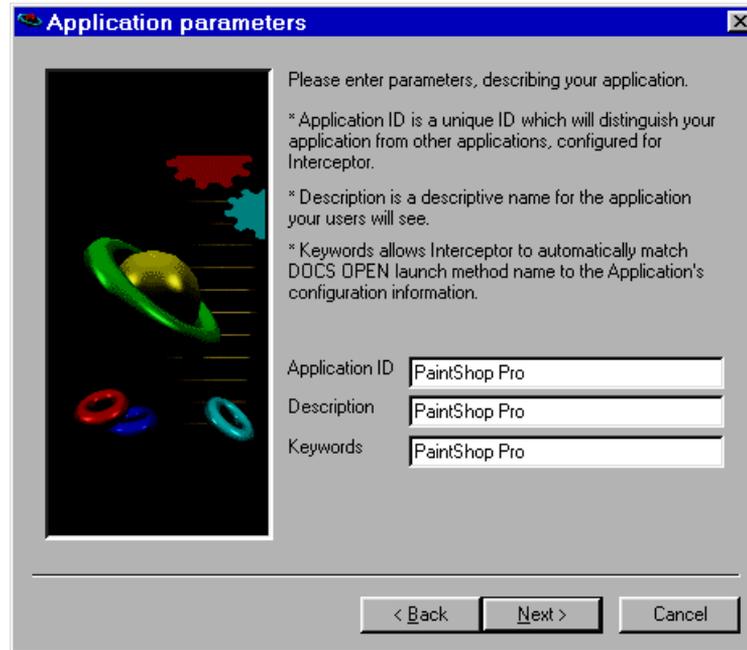
3. Following the on-screen instructions, complete the Application ID, Name, and Keywords fields.

> **Application ID:** Type the Application ID you chose when creating this application's launch method. If these Application IDs do not match, PowerDOCS may have trouble reconciling the application with its launch method.

> **Description:** Type the application name in this field.

> **Keyword:** Specify the Application ID you chose when creating this application's launch method. PowerDOCS will attempt to match the value(s) in the Keyword field to words in the Launch Methods. Click Next.

4. The Select an Application dialog box appears. The application you are integrating must be currently open on your desktop. Our example uses Paint Shop Pro. You should open the application of your choice now.

Figure A.47

Select an Application dialog box
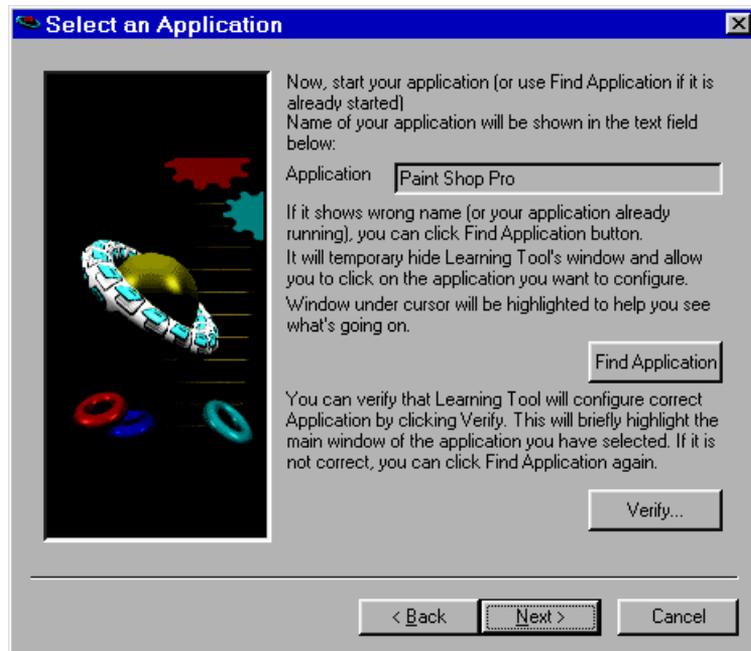
If the application name does not appear in the Application field, you can use the Find Application feature to locate the application. The Paint Shop Pro window should be maximized in the background. Click Find Application. The ILT Wizard will minimize and a specialized cursor will appear. Click the Paint Shop Pro window.

N O T E You may receive a message, asking you to open one document in the MDI application before continuing. If you receive this message, press Alt+Tab and select your application. Then click File>New or File>Open and open a file into your application. Then press Alt+Tab to select the ILTWizard and click Find Application again.

The Select an Application dialog box will reappear. Paint Shop Pro should be listed in the Application field.

5. Verify that the correct application is selected by clicking Verify. The ILT Wizard window will minimize and your application window will be flashing. You will be asked if this is the correct application. Click Yes if the correct application is flashing.

6. From the Select an Application dialog box, click Next.

7. The Dialog Configuration screen will appear. You must specify the application commands that you want to configure for Interceptor. File>Open and File>Save As are common commands to integrate with PowerDOCS and will be used in this example. File>Import and File>Export are also available. Press Alt + Tab to select Paint Shop Pro and click File>Open.

8. Press Alt + Tab again and select the Interceptor Learning Tool Wizard. "Open" should appear in the text field of the Dialog Configuration window. If it does not appear, click Find Dialog. The ILT Wizard will minimize, and a special cursor will appear. Click the Open dialog box. The ILT Wizard will reappear, and Open should be displaying in the text field.

9. You must confirm that the correct dialog box was selected by clicking Verify. You will be asked if the correct dialog box is flashing. Click Yes if this is correct. Click Next to continue. The Known dialog detected window appears in the upper-right corner of your screen.

Figure A.48

Known Dialog Detected dialog box
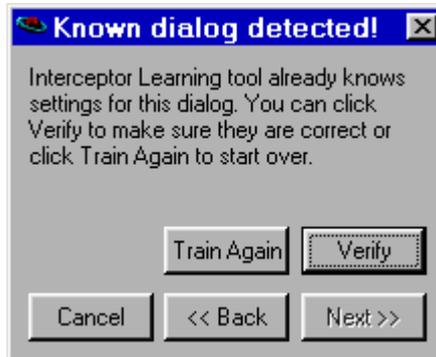
It will indicate if the dialog window you have configured is recognized by the Interceptor Learning Tool.

10. Click Verify to confirm that the correct command will be intercepted. The ILT Wizard will highlight the appropriate fields of the dialog box you configured. You will be asked if these fields are correct. If you agree, click Yes. Click Next to continue and proceed to step 12. If the fields are not correct, click No and proceed to step 11.

11. If the dialog box is not known to the Interceptor Learning Tool, click Train Again. The Configure Dialog window will appear. You will be instructed to click in the File Name field of the dialog box you are attempting to configure.

    The next step is to click OK. Some applications do not have an OK button. In this case, the Open button represents the OK command.

    The last step is to click Cancel to return to the Dialog Configuration window. Click Verify from the Configure Dialog

window. You will be asked if this is correct. Click Yes if you agree. Now click Next to continue.

12. The Dialog Options screen appears. Make sure that the command you just configured is displaying in the Dialog Type field. In this case, the Open command should appear. If the caption of the dialog box is not fixed, for example, it may show a file name in addition to the dialog box title, click the Partial Caption check box.

    If you do not want to set up additional dialog windows, click the second check box. If you will be configuring additional dialog boxes, leave this check box unmarked and click Next.

Figure A.49

Dialog Options
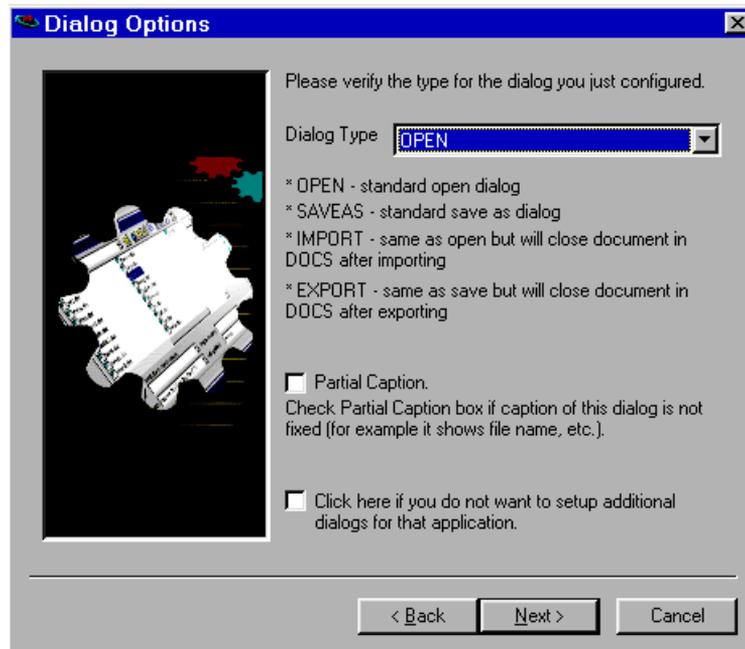
13. If you have finished integrating dialogs for this application, check the second check box and click Next.

14. An ILT Wizard message box will ask you if you want to view the application parameters that you just configured. Click Yes to view these. Otherwise, click No.

Figure A.50

Editing Parameters
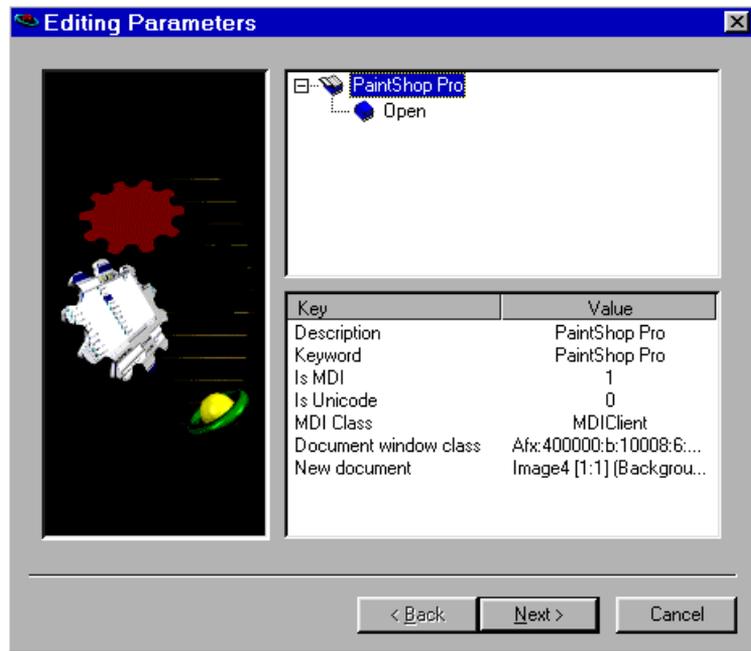
15. To edit any of the parameters, double-click the desired key. Edit the shown value and click OK. Click Next to continue.

W A R N I N G We strongly recommend that you not change the parameters that you configured through the ILTWizard.

16. The final ILT Wizard dialog box appears, confirming that your application is configured. If you want to configure another application, click the check box at the bottom of this dialog box

and then click Next. If you do not want to configure another application, click Finish to close the ILT Wizard.

NOTE   To use the new integrated application, you must do the following:

1. Enable the integration. Refer to "Enabling Applications Within Interceptor" on page 127. Close and restart PowerDOCS Interceptor before using this integrated application.

2. Create a PowerDOCS launch method for this application. Refer to "Creating Launch Methods for Interceptor Applications" on page 142.

You can export these settings for your users. Refer to "Exporting the Interceptor Settings" on page 133 for more information.

B

PowerDOCS E-Mail Integration

In This Appendix

This document describes how to configure PowerDOCS E-mail
Integration on your system.

Mail Client Requirements

The e-mail clients supported for PowerDOCS integration are:

• Microsoft Outlook

• GroupWise

• Lotus Notes

Outlook 98, Outlook 2000, Lotus Notes and GroupWise have been tested with PowerDOCS 3.1.

Microsoft® Management Console (MMC), version 1.1, must be installed on your computer in order to configure PowerDOCS E-mail Integration for Microsoft Outlook. See "Installing the Microsoft Management Console" on page 45. In addition, you should be a DOCS Open Supervisors Group member.

E-mail Integration Options

PowerDOCS E-mail Integration for Microsoft Outlook provides the following integration types:

• **None** – No integration

• **Normal** – Mail messages and attachments are stored in PowerDOCS as simple, separate documents.

• **Enhanced** – The most complete integration, PowerDOCS E-mail Integration for Microsoft Outlook allows you to search for documents saved from the mail. This integration method supports the storing of message parameters (for example: `MAIL_ID`, `ATTACH_NUM`, `MSG_ITEM`, `DELIVER_REC`, `PARENTMAIL_ID`, and `THREAD_NUM`) and requires modification in your database.

PowerDOCS E-mail Integration for Lotus Notes and GroupWise is of the Normal type. Additional information about Outlook, Lotus Notes and GroupWise integration can be found in Chapter 9 of the *PowerDOCS User's Guide.*

Configuring Enhanced Integration for Microsoft Outlook

Configuring PowerDOCS and MMC to support Enhanced Integration for Microsoft Outlook is a multi-step process. The options can be configured using the Implementation Tool. See "E-mail Integration Configuration" on page 66.

Modifying the PROFILE Table

New SQL columns must be added to the PROFILE table and Profile form (dialog box). You can add these columns manually, as shown below or use the TBLCOMP.EXE utility.

N O T E You can hide these new columns on the profile if you do not want your users to see them.

Adding SQL Columns Using TBLCOMP.EXE

1. Access the Tools\PowerDOCS directory on the Fusion Family CD. Copy the EmailIntegration.tbl file into the ...\PCDOCS\DOCSAdminTools directory.

2. From the Windows task bar click Start>Run.

In the Open field, type
**...\PCDOCS\DOCSAdminTools\TBLCOMP.EXE /
tEmailIntegration.tbl**

3. Click OK.

TBLCOMP.EXE will then initialize the DOCS database, adding six columns to the PROFILE table. The columns and their properties are as follows:

Column Name	Type	Length	Object Type
MAIL_ID	String	80	Edit
PARENTMAIL_ID	String	60	Edit
THREAD_NUM	Integer	-	Edit
ATTACH_NUM	String	20	Edit

Column Name	Type	Length	Object Type
MSG_ITEM	Integer	-	CheckBox
DELIVER_REC	Integer	-	CheckBox

Next add the columns to the Profile Form. See "Modifying the Profile Form" on page 160.

Adding SQL Columns Using DOCS Designer

1. Run DOCS Designer. For users with permission, there are three methods of access: from the DOCS Open Desktop, from the DOCS Open Admin program group, or by running the `Paint32` executable file in the DOCS Open program directory. Log in to Designer.

2. Select Edit>Edit Data Dictionary or click the Database button on the toolbar. The Select Field to Edit dialog box appears.

Figure B.1

Select Field to Edit dialog box
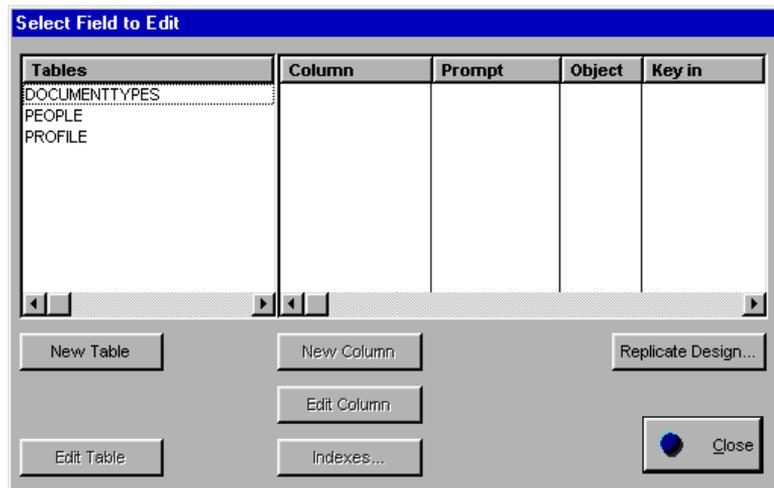
3. Highlight the PROFILE table from the Tables column and click New Column. The Edit Column Description dialog box appears. Specify the following information for the columns below. After entering information in the Column Name, Type, Length, and Object Type fields, click OK to add that column to the column list. Then click New Column and enter the settings for the next column.

Column Name	Type	Length	Object Type
MAIL_ID	String	80	Edit
PARENTMAIL_ID	String	60	Edit
THREAD_NUM	Integer	-	Edit
ATTACH_NUM	String	20	Edit
MSG_ITEM	Integer	-	CheckBox
DELIVER_REC	Integer	-	CheckBox

4. After all columns have been added, click Close to close the Select Field to Edit dialog box.

Next add the columns to the Profile Form. See "Modifying the Profile Form" on page 160.

N O T E   You can hide these new columns on the profile if you do not want your users to see them.

Modifying the Profile Form

1. Select File>Open Profile Form or click the Profiles button located on the toolbar. The Available Forms dialog box appears.

Figure B.2

Available Forms dialog box
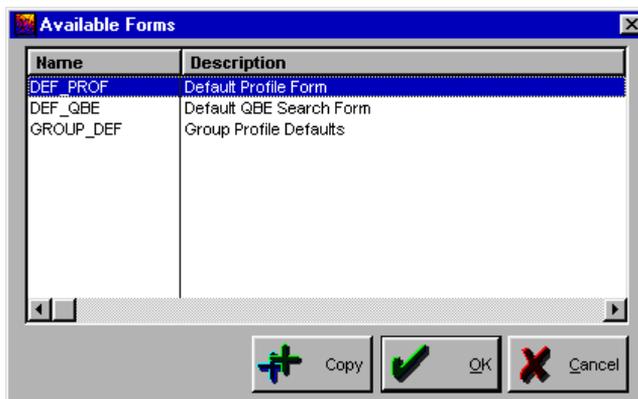
2. Select your Profile Form from the Available Forms dialog box and click OK. The Designer window will open.

3. From the SQL Columns window, select each of the newly added columns and drag and drop them into the Profile Form design, placing the fields where you want them on the form.

N o t e You should add all columns such as MAIL_ID, PARENTMAIL_ID, and so forth, to your Profile Form(s) and GROUP_DEF forms.

If you do not want your users to see these fields, you can adjust the height of the Document Profile form to hide the fields.

Figure B.3

*Document Profile
dialog box with new
columns added*

4. After all the new columns have been added and placed on the form where you want them, select File>Close. When asked if you want to save your changes, select Yes.

5. Close DOCS Designer.

NOTE After the columns have been added and saved, it is necessary to refresh caches on the DOCSFusion Server Manager program. Refer to "Managing the Internal Caches," in Chapter 7 of the *DOCSFusion Setup and Administration Guide* for more information on refreshing server caches.

Add the Exchange or Outlook E-mail Client to the Library

In order to properly support MSG format, you must add the e-mail client to the Application Library. Perform the following steps.

1. Start DOCS Open Library Maintenance. For users with permission, there are three methods of access: from the DOCS Open Desktop (choose menu item Options>System Utilities>Library Maintenance), from the DOCS Open Admin

program group, or by running the `Docsadm.exe` executable file located in the DOCS Open program directory. Log in to DOCS.

2. Double-click the Applications icon. The Application Maintenance Select dialog box appears, displaying all available launch methods.

3. Click New. The Application Maintenance dialog box appears.

Figure B.4

Application Maintenance dialog box
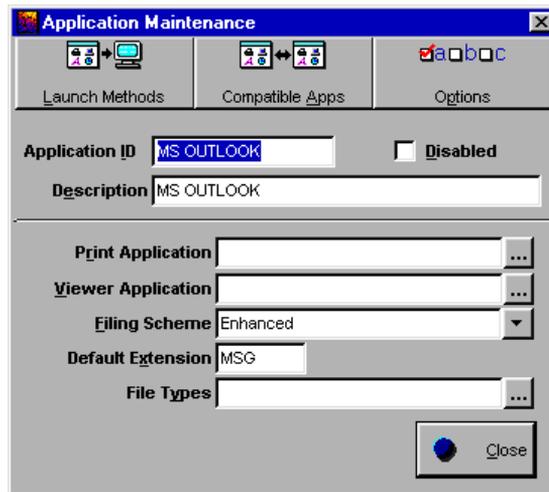
4. Complete the following fields as described below:

  Application ID: Enter an ID that is appropriate and logical. For example, enter MS OUTLOOK in this field.

  Description: Enter an Application description in this field.

  Filing Scheme: Select Enhanced from the drop-down list.

  Default Extension Field: Type MSG in this field.

5. Click OK to enable the buttons located at the top of this dialog box.

6. Click the Options button to display the Application Options dialog box. Uncheck Shows on Desktop and click OK; then click Close to return to the Application Maintenance dialog box.

Figure B.5

Applications Options dialog box

7. Click Launch Methods. The Application Launch Methods Select dialog box appears.

8. Click New. The Application Launch Methods dialog box appears. Enter the following values in the correct fields:

Field	Value
Description	MS OUTLOOK or MS EXCHANGE
Location	`<FULL PATH>\OUTLOOK.EXE` (or `EXCHNG32.EXE`), where *FULL PATH* is the path from which you run MS Outlook or Exchange
Command Line Parameters	/f %FULLPATH
OS Environment	Windows/Windows NT
Integration	Full Integration

Figure B.6

Application Launch Methods dialog box for Outlook 98
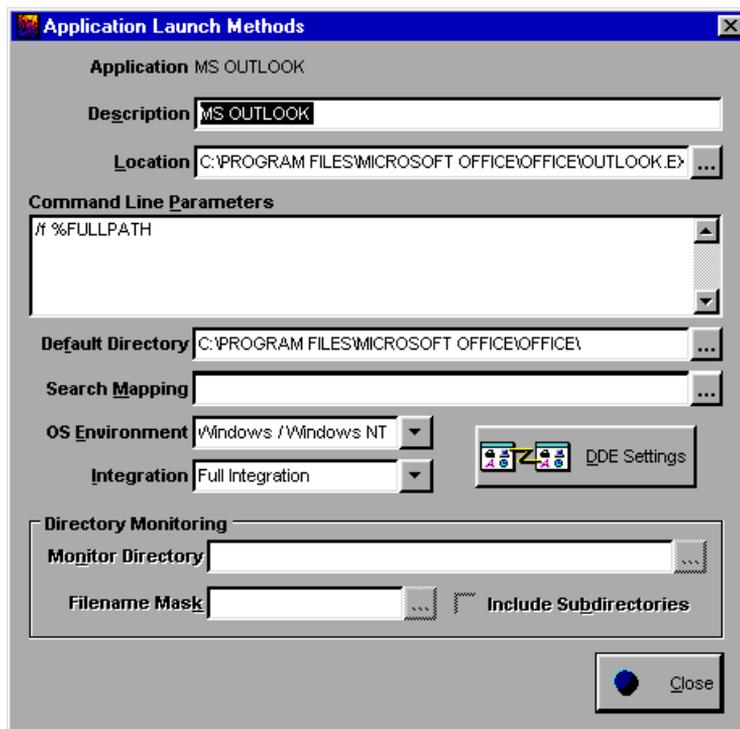
9. Click Close to return to the Application Launch Methods Select window. The launch method you just created for Outlook should now appear in this window. Continue to click Close until you have exited Library Maintenance.

Now you can start PowerDOCS so that it recognizes the new application. The application will not show on the PowerDOCS Desktop, because you unchecked that option in Figure B.5.

Customizing Outlook E-mail Integration Settings

PowerDOCS e-mail integration settings for Microsoft Outlook are modified through the PowerDOCS Implementation tool. Refer to "E-mail Integration" on page 66.

Microsoft Outlook Client

The Outlook Client for PowerDOCS allows PowerDOCS users to access their document libraries while using Microsoft Outlook. When this option was selected during PowerDOCS client installation, you need to install the PowerDOCS service to enable the client. This must be done on every desktop installation.

1. Launch Microsoft Outlook. If necessary, log in to PowerDOCS.

2. Select Tools, Services. The Services dialog box will appear.

Figure B.7

Services Dialog
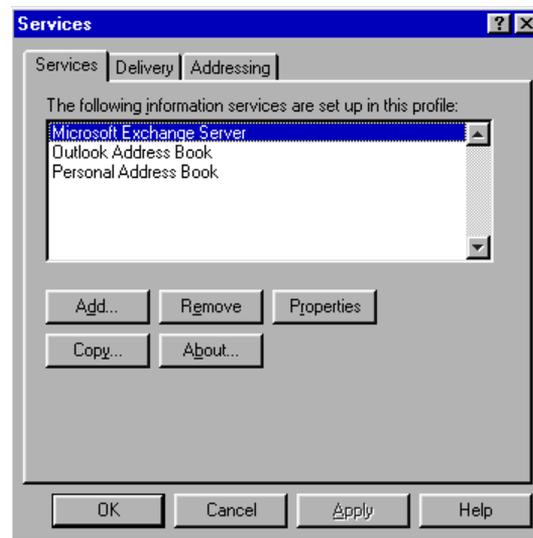
If PowerDOCS is not listed as a service, click Add.

3. The Add Service to Profile dialog will display. Select PowerDOCS and click OK.

Figure B.8

Add Service to Dialog

4. Close Outlook and reopen the application. The user will be prompted to log in to PowerDOCS. Logging in to PowerDOCS is necessary if the user wants to use the PowerDOCS Client during this Outlook session.

    Additional information about the Outlook Client is found in Chapter 9 of the *PowerDOCS User's Guide.*

5. Click OK to close the Services dialog. The PowerDOCS folder will appear in the Folder List, shown in Figure B.9.

Figure B.9

Microsoft Outlook Folder List view
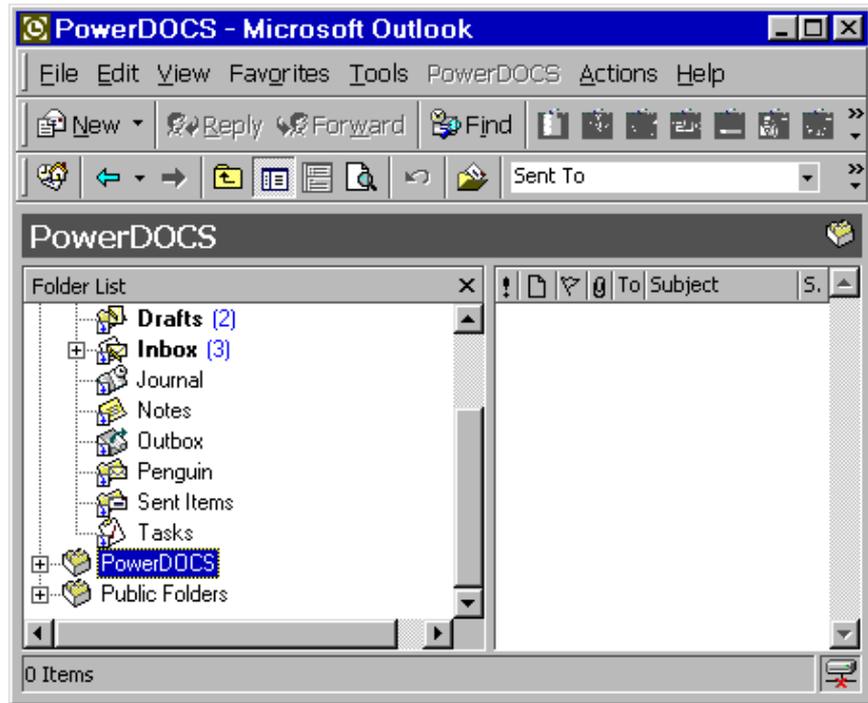
N O T E   If the Folder List view is not visible, select View>Folder List

For information on using the Microsoft Email Client, refer to Chapter 8 of the *PowerDOCS User's Guide.*

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DOCSFusion Security Regeneration Tool

In This Appendix

This appendix describes the function and use of the DOCSFusion
Security Regeneration tool.

Security Regeneration

When an organization must recover documents from backup (as opposed to their DOCSFusion archive), file-level trustees are often lost. The Security Regeneration utility provides a method for reapplying the trustees. The utility can also be used when a user leaves your organization and you want to give a new user rights to his or her documents.

The Security Regeneration utility checks the network-operating-system (NOS)-level security of documents to verify that security at the NOS level is the same as the access rights assigned on the document profile. It does this by selecting each profile from the database and reapplying security at the NOS level for each version of that profile's document. To avoid checking every document, the utility processes only documents selected from the Search Results dialog box. Simply perform a profile search on any documents for which you need security regenerated, and run the utility.

The Security Regeneration utility is run from the PowerDOCS Desktop. The PowerDOCS user must be a member of DOCS_Supervisors in order for Security Regeneration to appear on the menu.

To run the Security Regeneration utility:

1. Perform a profile search to obtain a list of the documents for which you want to reapply file-level security.

2. Select the documents you wish to apply security to. Use Shift-Click to select consecutive documents, Ctrl-Click to select adjacent documents.

3. With the search results displayed in the Quick Retrieve dialog box, choose Options>Security Regeneration.

4. Enter a time for the utility to begin processing, or leave the field "Time to start processing" blank to start processing as soon as you click OK. Because the utility generates heavy document-server

activity, we recommend that you run it when demands on the document server are low. Click OK.

Confirm Security Regeneration ⊠

(?) This operation can affect system performance of other users. Are you sure you want to reapply file-level security to all currently selected documents?

[Yes]   [No]

---
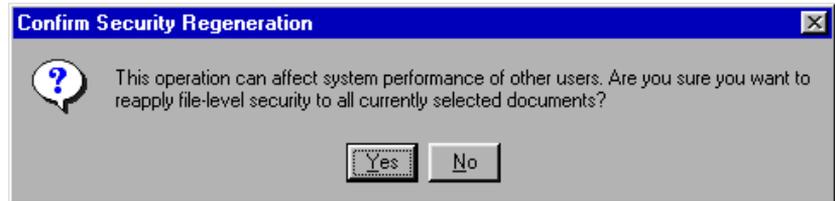
5. When the utility is finished, click OK.

N O T E   If you are prompted to log in to other libraries or document servers, do so as an administrator or supervisor who will have access to all files and directories being processed.

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