



User Guide

CyberDOCS

Version 3.0.1

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Table of Contents

	About This Guide	ix
	Who Should Read This Guide	ix
	How This Guide Is Organized	ix
	Technical Data	x
	Browser Requirements	x
	Documentation Conventions	x
	Related Manuals	xi
	Training Classes	xi
	Technical Support	xi
Chapter 1	Introduction to CyberDOCS	
	Getting Started	2
	Logging Into CyberDOCS	2
	Internet Explorer Download Bug	3
	Install Smart CheckIn/CheckOut	4
	Overview of CyberDOCS	5
	DOCS Open Concepts	5
	How CyberDOCS Works	5
	CyberDOCS Functionality	7
	The CyberDOCS Display	8
	The CyberDOCS Toolbar	8
	The CyberDOCS Workspace	9
	The Quick Reference Page	10
	The <i>Quick Find!</i> Feature	10

The Search Page **11**
The Quick Search Page **12**
The Projects Page **12**
The New Document Page **12**
The Options Page **13**

Chapter 2 CyberDOCS Components

The Quick Reference Page **16**
 Accessing Checked Out Documents **17**
 Accessing Quick Searches **17**
 Accessing Projects **18**
 Accessing Recently Edited Documents **18**
The Search Page **19**
 Fields on the Search Page **19**
 Entering Information on the Search Page **22**
 Performing a Content Search **23**
 Performing a Profile Search **24**
The Quick Search Page **24**
 How to Add a New Quick Search **25**
 Edit Quick Search **25**
The Projects Page **26**
 Definition of Project **27**
 Project Contents **27**
 Edit Project Details **28**
 Project Management **29**
 Add an Existing Document to Project **29**
 Add an Existing Project as a Subproject **30**
 Add New Project **30**

	Delete an Existing Project	31
	Edit Project Name, Security, or Iconized State	31
	The Document Page	31
	The Libraries Page	34
	Definition of Library	35
	The Options Page	35
	Edit Personal Profile Defaults	38
	Additional Features	39
	Access Rights	39
	Assigning Rights	39
	Assigning Access Rights	39
	Access Templates and Rights	40
	FulView	41
	Installing FulView	42
	Using FulView	43
	Table Lookups	44
	SQL Wildcards Accepted in a Table Lookup Search	45
	Other Components	45
	Specifying Additional Login Information	45
	Java and HTML Forms	46
	The Search Results Page	46
Chapter 3	Working With Documents	
	Performing Document Operations	50
	Document Operations (for HTML Forms)	51
	Document Operations (for Java Forms)	51
	Document Status Descriptions	52
	Details, Profiles and Histories	52

The Document Details Page	52
Options on the Document Details Page	53
Document Versions Page	54
Document Profiles	55
The Document Profile Page	55
Edit Document Profile Page	57
Document History Page	59
Recently Edited Documents Page	60
Moving Documents	61
Document Check Out and Check In	61
Checking In a Document	62
Checking Out a Document	63
Checked Out Documents Page	65
Document Upload Page	66
Retrieving Documents	66
Retrieving Documents with HTML Forms	67
Retrieving Documents with Java Forms	67
Smart Check In/Check Out	68
Other Functions	69
Accessing a Document from a Project or Folder	69
Viewing Document Contents	69
Chapter 4	Using the Verity Search Engine
Introduction to the Verity Search Engine	72
Basic Rules for Content Searching	72
Content Searching Hints	72
Full-Text Searching Rules	73
Simple Syntax	73

Explicit Syntax	74
Date Range	74
Date Searching Syntax	75
Operators, Modifiers, and Precedence Expressions	76
Prefix and Infix Notation	76
Precedence Expressions	77
Commas in Expressions	77
Delimiters in Expressions	77
Double Quotes for Reserved Words	77
Parentheses in Expressions	78
Precedence Expressions	78
Delimiters in Expressions	79
Search Modifiers	79
The CASE Modifier	79
The MANY Modifier	80
The NOT Modifier	80
The ORDER Modifier	80
Search Operators	81
The ACCRUE Concept Operator	81
The AND Concept Operator	81
The NEAR Proximity Operator	82
The NEAR/n Proximity Operator	82
The OR Concept Operator	83
The PHRASE Proximity Operator	83
The STEM Evidence Operator	84
The WILDCARD Evidence Operator	84
WORD Evidence Operator	85

CONTENTS

Chapter 5 Glossary of Terms

Glossary **88**

Preface

About This Guide

This guide gives information for using CyberDOCS in a networked environment, either by intranet or internet.

Who Should Read This Guide

This document is intended for persons who will be adding documents or working with documents in a CyberDOCS system.

How This Guide Is Organized

This book has five chapters.

Chapter 1: Using CyberDOCS

This chapter provides a basic introduction to CyberDOCS and highlights some of the features.

Chapter 2: CyberDOCS Components

This chapter describes the individual CyberDOCS pages that you need to work with.

Chapter 3: Working With Documents

This chapter provides instructions on the specific document operations you need to perform.

Chapter 4: Using the Verity Search Engine

This chapter details the syntax for using the Verity full-text search engine to perform searches for documents in CyberDOCS.

Chapter 5: Glossary

This is a listing of several terms used in CyberDOCS.



Technical Data

Browser Requirements

CyberDOCS 3.0.1 requires a browser that is capable of handling:

- HTML frames
- HTML tables
- HTML cookies
- JavaScript
- Java applets

Microsoft Internet Explorer 4.0 (and later) and Netscape Navigator 4.08 (and later) meet these criteria.

N O T E CyberDOCS 3.0.1 no longer runs on Internet Explorer 3.02.

Documentation Conventions

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

Convention	Meaning
<i>Regular italic font</i>	Indicates a new term or variable in a command line. For example, replace <i>filename</i> with the name of a file.
<code>Courier Font</code>	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 <code>ORACLE_HOME/DBS</code> or <code>ORACLE_HOME/RDBMS73</code> .
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 document helpful.

- ◆ *CyberDOCS Administration Guide* - An online document providing details on using the CyberDOCS Manager utility.

Training Classes

PC DOCS/Fulcrum offers courses at authorized Training Centers worldwide. For more information or to register for classes, call the PC DOCS/Fulcrum Corporate Education Center at (617) 273-3800 ext. 224.

Technical Support

If you have questions about installing CyberDOCS, you can contact the PC DOCS/Fulcrum Technical Support Department at (850) 942-5000 from 8:00 A.M. to 8:00 P.M. EST.

Submit non-urgent issues to PC DOCS/Fulcrum Technical Support by fax, e-mail, or CompuServe:

Fax	(850) 942-8085
E-mail Address	support@pcdocs.com
CompuServe	go.pcdocs



1

Introduction to CyberDOCS

In This Chapter

This chapter provides an overview of CyberDOCS 3.0.1, including:

- Logging in.
- Installing the Smart Checkin/Checkout plug-in.
- Basic CyberDOCS functionality.
- Buttons available on CyberDOCS pages.
- The main user pages accessible to CyberDOCS users.

Getting Started

Logging Into CyberDOCS

To access DOCS Open libraries via a Web browser, you need a Uniform Resource Locator (URL). Your DOCS Open or CyberDOCS administrator should provide you with this URL.

When you enter the URL in your browser's address or location field, the CyberDOCS login page appears. The login page provides you with the fields to log in to CyberDOCS. To log in to CyberDOCS, specify the following:

Your user name. This can be either of the following:

- Your User ID in the DOCS Open library.
- A network user name if you have a LAN account that DOCSFusion can verify (for example: a Windows NT Domain user name).

Your password.

- If you specified your DOCS Open library User ID as your user name, use your mobile password.
- If you specified a LAN account as your user name, use your LAN account password.

Your network name. If this field does not appear, your CyberDOCS administrator has already set it for you.

- If you specified your DOCS Open library User ID as your user name, leave this blank.
- If you specified a Windows NT Domain LAN account as your user name, enter the name of the Windows NT Domain.
- If you specified a NetWare version 3 LAN account as your user name, enter the name of the NetWare server. If you specified a NetWare version 4 LAN account as your user name, enter the name of the NetWare tree.

Your login library. The DOCS Open library that contains the information needed for you to log in.

NOTE If only one library is available, you cannot change libraries.

Log into Primary Library Only. When this box is checked prior to login, only the library selected at the time of logging in will be set for searching. Additional search libraries previously defined in the User Profile will not be remembered by CyberDOCS.

As part of the login process, CyberDOCS attempts to contact all of the libraries defined in the User Profile in order to validate your identity (this allows much greater search speeds during the session). If CyberDOCS is unable to contact one of these libraries or one of the libraries does not validate your identity, your login session may time out and fail.

If this happens, selecting the “Log into Primary Library Only” checkbox may enable CyberDOCS to complete the login process successfully. For information on contacting additional libraries after logging in, refer to “The Libraries Page” on page 34.

NOTE If you are not sure what to enter for any of these, contact your DOCS Open, CyberDOCS, or network administrator. If the CyberDOCS administrator instructs you to use the Guest Login button, you do not have to enter a User Name, Password, or Network Name. Just choose the library and click the Guest Login button.

Once you have entered the login information and submitted the form, the server validates whether you can access the library. If you have access, CyberDOCS logs you in to the system, and sets up the browser display. If you do not have access, or enter your User Name or Password incorrectly, an error message appears. Try logging in again, or contact the CyberDOCS administrator to make sure that your account is correctly set up.

Internet Explorer Download Bug

The Document Download for Internet Explorer Browsers page allows you to save the document file to your local disk, even when the document is one recognized by the Microsoft Office suite. This is

necessary because Internet Explorer dynamically detects a Microsoft Office document by reading the byte stream and automatically invokes the appropriate application for the document. It does this regardless of the document disposition specified by CyberDOCS in the HTTP MIME type, and you are not given the option of choosing to save the file to disk rather than opening it.

By right-clicking the provided link and selecting **Save Target As...**, you bypass this feature.

Install Smart CheckIn/ CheckOut

This feature is a browser-based plug-in that provides additional “ease of use” functionality to the processes involved in moving documents and document copies back and forth between CyberDOCS and the DOCS Open Library.

To install this feature, go to the Options page and click the button labelled “Install Smart CheckIn/CheckOut”. CyberDOCS will automatically select the plug-in appropriate to the browser in use and install it.

Netscape Navigator. After the installation process is complete, you will see a dialog box confirming that the plug-in has been successfully installed.

Internet Explorer. There is currently no dialog box to confirm successful installation.

After Smart Check In/Check Out has been installed, the next document operation performed (such as “Get copy” or “Check out”) will launch a dialog box that asks you to select a drive or directory as the starting point for all future file transfers.

Overview of CyberDOCS

Organizations use DOCS Open to control and manage their information word processing documents, spreadsheets, forms, images, and e-mail messages - DOCS Open can manage practically any type of file. Until now, however, document management was restricted to those users in an organization who had access to knowledge repositories using the DOCS Open Desktop.

CyberDOCS 3.0.1 makes the DOCS Open enterprise document management capabilities available to remote users. By using either the Netscape Navigator or Microsoft Internet Explorer Web browsers, those who need access to the information stored in knowledge repositories can now access DOCS Open documents using CyberDOCS.

Variable security allows you to decide who can access your documents at the user, project, or even individual document level. Remote authors can create, check out, revise, and check in documents managed by DOCS Open. Editors and other collaborators can check out, review, edit, and approve the same documents. End users can review the documents online or download read-only copies for future reference.

DOCS Open Concepts

To use CyberDOCS effectively, you should understand some concepts central to DOCS Open and the document management process. This section provides some basic information that may be especially useful for those new to DOCS Open.

DOCS Open software helps organizations manage and control their documents. CyberDOCS extends those functions to others in an organization's intranet, and even to people on the Internet.

How CyberDOCS Works

CyberDOCS works with the DOCSFusion server to transform an HTTP server into a client or customer of DOCSFusion. At the core of CyberDOCS are Active Server Pages (ASP), which allow for customization and high performance. DOCSFusion makes a

Distributed Component Object Model (DCOM) interface available to CyberDOCS on the HTTP server. The components are:

Web Server	The HTTP server, such as Microsoft Internet Information Server (IIS).
ASP	The Active Server Pages component of IIS. This provides IIS with the ability to run applications such as CyberDOCS.
CyberDOCS	The CyberDOCS application, as a set of related ASP and HTML files.
CyberDOCS Applets	CyberDOCS makes use of Java applets to perform some of its functions: <ul style="list-style-type: none">- information lookup- document security setting

The information lookup and document security setting applets are used for both Netscape Navigator and Microsoft Internet Explorer.

DOCSFusion Client API	The client-side application programming interface provided by DOCSFusion.
DCOM	The communications channel between the DOCSFusion Client API and the DOCSFusion server.
DOCSFusion Server	The server running DOCSFusion which provides all of the underlying document management capabilities.
Databases and File Servers	The DOCS Open repositories, consisting of the SQL databases where the document profiles are stored, and the file servers where the document contents are stored.

CyberDOCS Functionality

CyberDOCS provides you with many different capabilities. For example:

You can...	Using this feature
Access your recently edited documents.	Quick Reference or Quick Search
Access your currently checked out documents.	Quick Reference or Quick Search
Access iconized quick searches that have been made available by other users.	Quick Reference or Quick Search
Access iconized projects that have been made available by other users.	Quick Reference or Quick Search
Search for documents.	Search
Use any quick searches that you have defined to search for documents. Note: To define a new quick search, you must use the DOCS Open desktop.	Quick Search
Access the contents of any projects that you have defined. Note: To create a new project, you must use the DOCS Open desktop.	Projects
Create a new document in the current DOCS Open library, from a file on your local system.	New Document
Change your current library and change the list of libraries that are searched.	Libraries
Change the appearance and behavior of CyberDOCS.	Options
View Help text for any page.	Help

The CyberDOCS Display

Once you have logged in to CyberDOCS, you are provided with a toolbar in the left frame of the browser, and a workspace in the right, which displays the Quick Reference page.

NOTE This describes the default CyberDOCS interface: CyberDOCS is fully customizable, and your browser display may be different. If you encounter difficulties because of a different interface, consult your CyberDOCS administrator

The CyberDOCS Toolbar

The CyberDOCS toolbar appears on the left side of the CyberDOCS window and lets you access DOCS Open features such as profile searching and project contents.

Icon

Page



Quick Reference

Access recently edited documents, documents that you have currently checked out, or iconized projects and quick searches.

DOCS Open: Corresponds to the DOCS Open desktop.



Search

Search for documents using the Verity search engine.

DOCS Open: Corresponds to Search/Search New Window and choosing Search Form.



Quick Search

Use, modify, or delete any defined Quick Search to which you have access or create a new Quick Search.

DOCS Open: Corresponds to Search/Quick Search.

**Projects**

Access, modify the profile of, or delete any projects to which you have access or create a new project.

DOCS Open: Corresponds to Projects/Open.

**New Document**

Create a new Document Profile and/or upload a document.

DOCS Open: Corresponds to Document Import or Document/New.

**Library**

Lists available CyberDOCS libraries and allows you to change your current library.

DOCS Open: Corresponds to Search/Libraries.

**Options**

Change the appearance and behavior of CyberDOCS.

DOCS Open: Corresponds to Options.

**Logout**

Closes all open CyberDOCS files and clears your personal security information from the local cache (prevents unauthorized access by next person using browser).

DOCS Open: Corresponds to File/Exit.

**Help**

Launches the WebHELP file for any page of CyberDOCS.

The CyberDOCS Workspace

The workspace appears on the right side of the browser and, by default, displays the Quick Reference page when you first log in to CyberDOCS.

The Quick Reference Page

The Quick Reference page is the primary user interface of the CyberDOCS system and the first screen displayed after a user has logged in.

The Quick Reference page is available by clicking Quick Search on the toolbar.

Your name and the current date are displayed under the title bar at the top left of the window. To the right of this is the new QuickFind! feature, which allows you to perform an instant document search by typing a document name or number and clicking the Go! button.

In the upper right-hand corner of the window, beneath the CyberDOCS logo, is the name of the library that you are currently accessing. This will either be your default library or a library chosen from the drop-down menu on the Login screen (where enabled by your CyberDOCS administrator). On a large network with multiple libraries, the CyberDOCS administrator may choose to enable a drop-down menu that allows you to switch between multiple libraries without first returning to the Login screen.

The Quick Reference page provides immediate access to these four CyberDOCS features:

- Recently Edited Documents
- Checked Out Documents
- Projects
- Quick Searches

For more information refer to “The Quick Reference Page” on page 16.

The *Quick Find!* Feature

The Quick Find feature allows users to perform an instant document search by entering a document name or number and then selecting the Go! button.

The Quick Find feature is available via the Quick Reference page on the toolbar.

To search by document name, enter either the exact document name or a part of the document name with an asterisk (*) used as a wildcard either before or after the search string (or both).

- The string “budget” will only return a hit if there is a document with the exact name of “budget”.
- The string “*budget” will return all document names that end in the word budget (for example: “1998 budget” and “Sales Budget”).
- The string “budget*” will return all document names that start with the word budget (for example: “Budget Projections” and “budget surplus”).
- The string “*budget*” will return all document names that include the word budget (for example: “1998 budget”, “Budget Projections”, “budget surplus”, and “Sales Budget”).

To search by document number, enter the exact document number.

- The string “260” will return document number 260, the string “261” will return document number 261, the string “262” will return document number 262, and so on.
- Even though documents 260, 261, and 262 are known to exist, the string “26*” will not return any documents because wildcards cannot be used to search by document number.

The Search Page

All documents stored in DOCS Open Libraries have Document Profiles that are created when a user creates a new document. Whether saved from the DOCS Open desktop or uploaded via CyberDOCS, a profile contains the document name, author, document type, and the unique identification number assigned by DOCS Open. The Search Page allows you to search for documents using information found in the Document Profile.

The CyberDOCS Search page is available by clicking the Search button on the toolbar.

For more information, refer to “The Search Page” on page 19.

The Quick Search Page

You no longer need to access the DOCS Open desktop to take full advantage of the Quick Search function because CyberDOCS 3.0 now allows you to create, modify, or delete Quick Searches and also has the ability to 'Save As Quick Search'.

The Quick Search page is available by clicking Quick Search on the toolbar.

For more information, refer to “The Quick Search Page” on page 24.

The Projects Page

The Projects page is available by clicking Projects on the toolbar.

CyberDOCS and DOCS Open Projects are groups of related documents. Projects provide a handy way to group related documents for easy retrieval. For example, a project could be all the documentation related to a specific product, including requirement specifications, design specifications, marketing literature, and technical notes.

The Projects page returns a list of projects that are available to you in the library you are currently accessing. Because a project is a static list of pointers to specific documents, there is no searching involved when you choose a document from a project list.

Click a project's name to view its contents. The contents can include both documents and subprojects.

For more information, refer to “The Projects Page” on page 26.

The New Document Page

The New Document page is available by clicking New Document on the toolbar.

With CyberDOCS, when you select New Document from the toolbar, you are actually creating a new Document Profile by using the New Document page.

To easily locate your documents, you must fill out a Profile Entry form for each document you want to be part of the system. Profiles provide the information necessary to search documents. The more detailed and accurate your profile, the easier it is to find the document.

The Options Page

The Options page is available by clicking Options on the toolbar.

The Options page allows you to customize how CyberDOCS looks and operates. For more information, refer to “The Options Page” on page 35.

C h a p t e r

2

CyberDOCS Components

In This Chapter

This chapter discusses the main user components of CyberDOCS 3.0.1, including the Quick Reference Page, Search Page, Quick Search Page, and the Projects Page.

The Quick Reference Page

The Quick Reference page is the primary user interface of CyberDOCS and the first screen displayed after you log in. The Quick Reference page is accessed by clicking Quick Reference on the toolbar.

Your user name and the current date are displayed under the title bar at the top left of the screen. To the right of this is the new QuickFind! feature, which allows you to perform an instant document search by typing a document name or number and then clicking the Go! button.

In the upper right-hand corner of the screen, beneath the CyberDOCS logo, is the name of the library that you are currently accessing. This will either be your default library or a library you chose from the drop-down menu on the Login screen (if this has been enabled by your CyberDOCS administrator). On a large network with multiple libraries, the CyberDOCS administrator may choose to enable a drop-down menu that allows you to switch between multiple libraries without first returning to the Login screen.

The Quick Reference page provides immediate access to:

- Recently Edited Documents
- Checked Out Documents
- Projects
- Quick Searches

The lists of Recently Edited Documents and Checked Out Documents are sorted by document name. The Quick Searches and Projects are sorted by description.

You do not have to go to these separate pages because all four have links directly to profiles, documents, projects, and searches (hereinafter called “items”).

The icon in the left-hand column is a link to the Document Profile screen for the item. The title in the right-hand column is a link that launches the appropriate application (Microsoft Word or Adobe

Acrobat, for example) for the item. For paper documents, the item title will appear as plain text and not a link.

Additionally, the category titles at the top of each list link directly to the appropriate iconized searches on the Quick Search page (for example, click the title “Projects” to run the Projects Quick Search and display the Results page without having to go to the Quick Search page).

Accessing Checked Out Documents

If you have any documents checked out, you will see the list of documents in the upper right corner of the screen under the title Checked Out Documents.

This list includes only documents that you have checked out. To see a complete list of all documents checked out of the current Library, use the <<Checked Out Documents>> search on the Quick Search page or click the category title of “Checked Out Documents” at the top of the document list on the Quick Reference page.

Any checked-out documents not returned by the due date (assigned when the document was first checked out) are marked as overdue, and the document titles in the right-hand column display as red text.

Click the icon in the left-hand column to go directly to the Document Profile page.

Click the document title in the right-hand column to launch the appropriate application (for example, Microsoft Word or Adobe Acrobat) for the item.

For paper documents, the item title will appear as plain text and is not a link.

NOTE Your CyberDOCS system administrator can set the number of documents that appear in this list and can customize how the information is shown.

Accessing Quick Searches

If you have used CyberDOCS to create an iconized Quick Search or have made any Quick Searches available on the DOCS Open desktop, you will see the list of Quick Searches in the lower right hand corner of the screen under the title Quick Searches.

Click the icon in the left-hand column to go directly to the Edit Quick Search page, where you can modify any parameters of the Quick Search.

Click the Quick Search title in the right-hand column to run the quick search feature. A Search Results page will appear, listing the documents that meet the search criteria.

N O T E Your CyberDOCS system administrator can set the number of documents that appear in this list and customize how the information is shown.

Accessing Projects

If you have used CyberDOCS to create an iconized Project in the library or have made any Projects available on the DOCS Open desktop, you will see the list of Projects in the lower left corner of the screen under the title Projects.

Clicking the icon in the left-hand column or the Project title in the right hand column will take you directly to the Projects page where you will see the list of the documents and sub-projects contained in that project.

N O T E Your CyberDOCS system administrator can set the number of documents that appear in this list and customize how the information is shown.

Accessing Recently Edited Documents

If you have created or edited documents in the library, you will see the list of these documents in the upper left corner of the screen under the title Recently Edited Documents. This list includes only the documents recently edited by you, not those edited by other users.

Click the Document Profile icon in the left-hand column to go directly to the Profile screen for the document.

Click the document title in the right-hand column to launch the appropriate application (Microsoft Word or Adobe Acrobat, for example).

For paper documents, the item title will appear as plain text and is not a link.

NOTE Your CyberDOCS system administrator can set the number of documents that appear in this list and customize how the information is shown.

The Search Page

All documents stored in DOCS Open Libraries have Document Profiles that are created when a user creates a new document. Whether saved from the DOCS Open desktop or uploaded via CyberDOCS, a profile contains the document name, author, document type, and the unique identification number assigned by DOCS Open. The Search page allows you to search for documents using information found in this profile.

The CyberDOCS Search page is accessed by clicking the Search button on the toolbar.

Your CyberDOCS administrator set up CyberDOCS to use either HTML forms or Java forms. HTML forms are simple and load quickly. Java forms are dynamically interpreted, which means they can use any of the forms that you customized in DOCS Open. For example, if there are multiple search forms available to you, you can select one from the drop-down list at the bottom of the Search page. Then, when you click Switch Forms, CyberDOCS displays the page with the new search form.

Fields on the Search Page

Information entered into these fields is not case sensitive.

Field	Description
Document Name	The actual name of the document. You can enter the full document name (up to 240 characters) or enter wildcard characters.

Doc. #	The unique DOCS Open Library document number assigned to a document when it is created in DOCS Open or uploaded by CyberDOCS. You cannot use wildcard characters in this field.
Author	The DOCS Open User ID for document author. Use this field to have CyberDOCS find documents created by a particular author. You can also use the Author table lookup button to find a particular value.
Document Type	Categorization for a document according to information it contains (for example: Template, Training Document, or Legal Brief). Enter a value in this field to have DOCS Open find documents of this type. You can also use the Document Type table lookup button to find a particular value.
Application	The ID of the application used to create this document. Enter a value in this field to have CyberDOCS find documents created with this application. You can also use the Application table lookup button to find a particular value.
Retention Type	The type of storage assigned to this document (for example: Archive, Delete, Keep, Optical, Template or Paper). When you search by storage type, a document's status is irrelevant. For example, if you were searching for a document whose Type is Archive, CyberDOCS would retrieve the document name even if it had already been archived.
Date Range	Range of dates within which CyberDOCS processed the document's storage type.
Created by	The User ID of the person who created this document. You can also use the Created by table lookup button to find a particular value.
Date Created	The date on which the document was created.


Last Edited by	The User ID of the last person who modified this document and the date they modified it. You can also use the Last Edited by table lookup button to find a particular value.
Edit Date	The date on which the document was last edited.
Search for	The text string for full-text searching. This string can contain wildcard characters. See “Full-Text Searching Rules” on page 73 for a description of how to perform a content search.
Search in	The location where CyberDOCS should look for search parameters. Possible values are Document contents, Profile fields, or Document contents and Profile fields.
Status	The status of the document. Use this field to have DOCS Open retrieve all documents with this status. Possible values are: Available Document Being Edited Profile Being Edited Checked out Not Available Being Indexed Archived Being Archived Deleted
Secured	The security rating of a document. If a document is secured, only those users granted access can work with it.
Clear All	This will clear all of the entries currently entered on the Search page.

Form (Java forms only)	If there are multiple search forms available to you, you can select one from the list displayed at the top of the Search page. Then, when you select Switch forms, CyberDOCS displays the page with the new search form. Note: You can change the default search page form on the Options page.
Sort By (HTML forms only)	Allows you to choose which field CyberDOCS will use to sort the returned records.
Order (HTML forms only)	The order in which CyberDOCS will return documents matching your search criteria. Possible values are Ascending and Descending.

Depending on the type of database you are using (for example: legal, financial, or government), and any customizations that may have been made to the DOCS Open database or to the CyberDOCS interface, some fields may not be displayed or may not be displayed exactly as described, or additional fields may appear.

Entering Information on the Search Page

When entering information on the Search Page, be aware of the following:

Use...	To...
Tab Key	Move from one field to the next (including table lookup buttons).
 (Table Lookup)	Launch a Table Lookup applet, which reads the possible values for a field from a database and displays a list of valid choices (especially useful if you are unsure of their spelling). These lists are set up by your CyberDOCS administrator.
Comma (,)	Enter multiple values in search fields. This allows CyberDOCS to retrieve documents meeting alternate criteria.

Asterisk (*)	<p>Represent one or more characters as a wildcard.</p> <p>Note: If you use the * wildcard for the first character of a Document Profile field, such as Document Name, you will get all profiles. For best results, you should also use other criteria to further narrow (and speed up) the search.</p>
Question Mark (?)	Represent a single wildcard character.

This section describes the Search page as it is shipped. Your CyberDOCS administrator may have customized the page differently.

Performing a Content Search

DOCS Open provides a comprehensive Content Searching capability. A Content Search lets you search the text of your documents or profiles for specific words, phrases, or words within proximity of each other.

Example: You could find all the documents in your organization containing the name “Clint Eastwood”. Documents that meet the criteria you specify are ranked by relevance.

CyberDOCS provides Content Searching as an option on the Profile Search page. You can use this feature by itself or in addition to entries made in the Profile Search fields. A search that combines both Profile Search and Content Search parameters will first find documents that meet your Profile Search criteria and then search those documents for the requested Content Search criteria. This type of search will yield very specific results but will take longer than a Profile Search performed with no entry in the Content Search fields.

NOTE The Content Search feature scans the entire contents of each document in the DOCS Open Library before it can return results on the Search Results page. Depending upon the number of documents in the DOCS Open Library and the size of those documents, running a Content Search without any information entered in the Profile Search fields can be a lengthy process.

Performing a Profile Search

A Profile Search lets you find documents matching any entries in any fields on the Document Profile. For example, if you know a document's author, the person who entered the document into the system, or the client for whom the document was produced, you can use a Profile Search. The Profile Search is a query-by-example (QBE) search and is as easy as typing in the information that you know about the document. CyberDOCS provides you with a page on which you can enter the information you know, and submit it to DOCSFusion. DOCSFusion then searches the selected Libraries for the documents that fit your search criteria.

To do a Profile Search, enter the information you know about the document and then click the Submit button in the lower right corner. CyberDOCS then returns a hyperlinked list of documents that meet all the criteria you provided - the more specific the information entered, the more refined and concise the returned list of documents.

Examples: Enter just an author name as your search parameter, and CyberDOCS retrieves all documents in the DOCS Open Library by that author.

Enter the author's name and a document type as your search parameters, and the list of possible returns will be restricted to those documents that meet both criteria.

NOTE If you do not enter search criteria, CyberDOCS returns a hyperlinked list of everything in the entire DOCS Open Library - this may take a long time and is not advisable. The fewer the details you provide, the larger the list of possible returns and the longer the overall process.

The Quick Search Page

A new feature in CyberDOCS is that you no longer need to access the DOCS Open desktop to take full advantage of the Quick Search function. CyberDOCS 3.0.1 now allows you to create, modify, or delete Quick Searches and also has the ability to 'Save As Quick Search'.

The Quick Search page is accessible by clicking the Quick Search button on the toolbar.

Select a Quick Search by clicking in the Quick Search Name column and then choosing one of the five buttons across the top of the Quick Search page:

Button	Function
Search	Runs Quick Search and then displays the Search Results page.
Security	Changes security settings for the Quick Search.
Modify	Displays the Quick Search Details page and allows the Search attributes and criteria to be edited.
Delete	Displays a confirmation dialog box asking the user to confirm or cancel the deletion of an existing Quick Search.
New Quick Search	Displays the Quick Search Details page which allows the user to name a new Quick Search and define the attributes and criteria before saving it.

How to Add a New Quick Search

1. Select the Quick Searches button on the toolbar
2. Click the New Quick Search button.
3. Type the name for your new search and then check the box beside Iconized on Desktop.
4. Type your Quick Search criteria in the form provided.
5. Click the Save as Quick Search button.
6. The main Quick Search Page will reload with the new Quick Search added to the list.

To test the search just created, select it from the list and click the Search button.

Edit Quick Search

The Edit Quick Search page is accessible from the Quick Search page by selecting a Quick Search from the list and clicking the Modify button. The functions available on this page are the same as those on the Add Quick Search page.

The Projects Page

CyberDOCS and DOCS Open Projects are groups of related documents. Projects provide a handy way to group related documents for easy retrieval. For example, a project could be all the documentation related to a specific product, including requirement specifications, design specifications, marketing literature, and technical notes. The Projects page is available by clicking Projects on the toolbar.

The Projects page returns a list of projects that are available to you in the current library. Because a project is a static list of pointers to specific documents, there is no searching involved when you choose a document from a project list.

Click a project name to view its contents. The contents can include both documents and subprojects. Once in the Project Contents page, you can:

- Click a document name. The document contents are displayed using the appropriate application. If the application cannot be determined, or if the browser does not support the application, a browser-specific question will be displayed, asking how the document content is to be handled.
- On HTML forms, click the page icon next to a document. The Document Details page appears with detailed information about the document. Click the document title to view the contents, click a document version number to view that version of the document, or click a button to perform some operation on the document.
- On Java forms, click the appropriate button at the top of the page to View the document, select a Version, or perform some operation.

Buttons for some operations may be dimmed depending on the type of document or its status. For example, you cannot view a paper document or delete a checked-out document.

- Click a subproject name. The contents of the subproject are displayed, listing any documents or subprojects that it contains.

- To execute a project or subproject, you can click the icon next to it or the link.

Definition of Project

Projects logically group other projects and related documents. A given document or subproject can be part of multiple projects. Think of Projects as “folders” in which documents and subprojects are grouped. CyberDOCS lets you access the contents of projects you have created or those that you have been given access to.

CyberDOCS and DOCS Open Projects are groups of related documents. Projects provide a handy way to group related documents for easy retrieval. For example, a project could be all the documentation related to a specific product, including requirement specifications, design specifications, marketing literature, and technical notes.

Project Contents

The Project Contents page displays the documents and subprojects within the Project. For each document listed, you can:

- Click the document name. The document contents are displayed using the appropriate application. If the application cannot be determined, or if the browser does not support the application, a browser-specific question will be displayed, asking how the document content is to be handled.
- On HTML forms, click the page icon next to a document. The Document Details page appears with detailed information about the document. You can then click the document title to view its contents, click a document version number to view that version of the document, or click a button to perform some operation on the document.
- On Java forms, click the appropriate button at the bottom of the page to View the document, select a Version, or perform some operation as defined below.

Buttons for some operations may be dimmed depending on the type of document or its status. For example, you cannot view a paper document or delete a checked out document.

The function of the Java applet buttons vary according to the context in which they are used:

Button	Context	Action
Contents	Subproject	Displays a page detailing subprojects and documents within that subproject
Profile	Subproject	Displays a page that allows the user to edit the attributes of the selected subproject
Profile	Document	Displays a page with a Java form that allows the user to edit Document Profiles
View	Document	Displays the document in the Browser (with the exception of paper documents)
Delete	Subproject	Displays a dialog box confirming user intent to Delete project folder and its contents
Add Subproject	Subprojects and Documents	Displays the Add Project page
Add Document	Subprojects and Documents	Displays a Search page allowing the user to find and retrieve a document to add

Edit Project Details

The Project Details page is available from the Projects page by selecting a project from the list and clicking the Project Properties button. From this page, you can:

- Change the project name.
- Modify security levels or set Trustees for the project being created by clicking the Edit Security button to launch the Security Java applet.

Project Management

- Iconize the project to the desktop and make it available under Projects on the Quick Reference page by clicking the Iconized on Desktop button.

One of the new features in CyberDOCS 3.0.1 is project management support. Through the Java forms screen you can:

- Create, rename, and delete Projects

This does not delete the actual documents listed in Project Contents. It only deletes the file associations that the subprojects and documents have in relation to the Project being deleted.

- Set security levels.
- Iconize an item on the DOCS Open desktop.
- Add and delete subprojects from the contents of the currently selected Project.
- Add and delete documents from the contents of the currently selected Project.

These features are available only when using the SearchResults applet for a Java forms installation. These features are not available from HTML search results pages or an HTML installation.

Add an Existing Document to Project

1. Click the Projects icon on the toolbar.
2. Select a project in the Java form and click the Contents button.
3. The Project Contents page appears. Click the Add Document button to launch the Search form.
4. Enter desired search criteria and then click the Submit button.
5. The Project Contents page reappears along with the table lookup applet, which contains the list of documents that met your search criteria.
6. Select a document from the list in the left pane of the screen and click the Add button to copy this document to the right pane of the table lookup applet. If you accidentally copy a file that you do

not want, select the document from the list in the right pane of the screen and click the Remove button.

7. Click OK and the Project Contents page will refresh with the document(s) added.

Add an Existing Project as a Subproject

1. Click the Projects icon on the toolbar.
2. Select a project in the Java form and click the Contents button.
3. The Project Contents page appears. Select the Add Sub-Project button to launch the table lookup applet.
4. Select a project from the list in the left pane of the screen and click the Add button to copy this project to the right pane of the table lookup applet. If you accidentally copy a file that you do not want, select the project from the list in the right pane of the screen and click the Remove button.
5. Click OK and the Project Contents page will refresh with the new project(s) added.

Add New Project

1. Click the Projects button on the toolbar.
2. Select a Project in the Java form. Click the Create Project button.
3. A dialog box containing a blank line for the Project name appears.
4. Enter the Project name.
5. To modify security levels or set Trustees for the project being created, click the Edit Security button to launch the Security Java applet.
6. To iconize the project to the desktop and make it available under Projects on the Quick Reference Page, click the Iconized on Desktop button.
7. Click the Submit button, CyberDOCS returns to the Projects Page.

Delete an Existing Project

1. Click the Projects button on the toolbar.
2. Select a Project in the Java form and click the Delete button.
3. A dialog box will ask you to confirm deleting the project. Click Yes to continue or No to cancel deletion.
4. CyberDOCS returns to the Projects page after you confirm or cancel this deletion.

This functionality is only available with Java forms, not HTML forms.

NOTE This does not delete the actual documents listed in Project Contents. It only deletes the file associations that the subprojects and documents have in relation to the Project being deleted.

Edit Project Name, Security, or Iconized State

1. Click the Projects button on the toolbar.
2. Select a project in the Java form and click the Project Properties button.
3. A dialog box containing the Project name appears.
4. Change the Project name and check the boxes beside Secure Project and Iconized on Desktop.
5. Click the Submit button, CyberDOCS returns to the Project Page and the new Project name will be displayed.

The Document Page

With CyberDOCS, when you select New Document from the toolbar, you are actually creating a new Document Profile by using the New Document page. The New Document page is accessed by clicking New Document on the toolbar.

To easily locate your documents, you must fill out a Profile Entry form for each document you want to be part of the system. Profiles provide the information necessary to search documents. The more detailed and accurate your profile, the easier it is to find the document.

If your administrator assigned access rights, those rights are combined with the rights you assign. Your CyberDOCS administrator can lock fields, such as those in the retention type box. In this case, the fields are read-only; you cannot edit them. Your CyberDOCS administrator may also have renamed or added fields. In this case, you need to find which field names at your site correspond to the default names.

Your CyberDOCS administrator set up CyberDOCS to use either HTML forms or Java forms. HTML forms are simple and load quickly. Java forms are dynamically interpreted, which means they can use any of the forms that you customized in DOCS Open. The following table lists the fields on the default New Document page shipped with CyberDOCS. Each field in the table is designated in one of the following ways:

- Required - DOCS Open requires these fields; you cannot submit a Document Profile without filling them in.
- May be required - Depending on how your DOCS Open administrator has set up your system, you may be required to fill in these fields.
- Optional - DOCS Open does not require any information in these fields.

Field	Description
Document Name (required)	The descriptive name for the document. This name can be up to 240 characters and can include spaces and any characters Windows uses (ANSI by default). Depending on your system setup, the value of Document Name may or may not need to be unique. If your system requires unique document names, the name you enter in this field must not be the same as any other name in this document library.
Author (required)	Author of the document. Selecting the table lookup button launches a Java applet that contains a searchable list of Authors (set by your system administrator).

Document Type (required)	Type of document. Selecting the table lookup button launches a Java applet that contains a searchable list of Document Types (set by your system administrator).
Description (optional)	Your description of the document. If you perform a QBE search, you can search for a document using words contained in this field.
Application (required)	Application used to create a document. Selecting the table lookup button launches a Java applet that contains a searchable list of applications (set by your system administrator).
Access Control (may be required)	To limit access to the document, click the Secure Document box. To designate document access, click the Edit button to view the Security dialog box on which you determine who has access to the document and what type of access they have. See also Assigning Access.
Type (may be required)	The destination of this document after Retention Days expire. Depending on what you enter as a Document Type, this field may be filled in for you. However, your CyberDOCS administrator may have set up the system so that you can change it. Possible values are Archive, Delete, Keep, Optical, Template, and Paper.

Retention Days (may be required)	The number of days the document remains on the system past Last Edit Date. This field is valid when the Type is Archive, Delete, or Optical. Depending on how your DOCS Open Administrator has set up your system, you may be able to change this value.
Enable Content Searching (may be required)	Indicates whether the full text of the document will be indexed. Depending on what you enter as a Document Type, this field may be checked for you. When checked, users can search the context of this document and its profile for words or phrases.

Depending on the type of database you are using (legal, financial, or government), additional fields may appear.

NOTE If an error occurs when uploading the document, CyberDOCS retains information entered on the New Document page so you can repeat the upload without completing the entire form again.

The Libraries Page

The Libraries page allows you to select the libraries in which CyberDOCS operates and is available only if you have access to additional libraries. The Libraries page is accessible by clicking the Libraries button on the toolbar.

Access to an additional Library requires three criteria to be met:

1. You can see the library.
2. You have an account on the remote library.
3. Your account on the remote library has not been disabled.

Use the Current Library drop-down list to select the library where new documents are created. If you are creating documents in a library other

than the one you selected on the Login page, you must select it from this list before using the New Document page.

Use the Search Libraries checkboxes to specify the libraries CyberDOCS is to search. The libraries listed here are the remote libraries attached to your login library. All of the libraries that are checked are searched when using the Search page.

Libraries shown in red were not polled as part of your current session login. Selecting one of these libraries and clicking Submit will result in one of two things:

- CyberDOCS will find this library, verify your identity and then the workspace display will return to the Quick Reference page.
- If CyberDOCS cannot find this library or the library does not validate your identity, an error message is returned to let you know that the login to the library failed.

The Search Libraries check boxes also specify the libraries that are displayed in the Quick Reference, Quick Searches, and Projects pages. These pages only display the entries from one library at a time. The additional libraries are listed at the bottom of the page. Click a library name to switch the display to that library. The Current Library selection determines the initial library to be displayed in these pages. If no libraries are selected, the Current Library is used.

Definition of Library

DOCS Open assigns every Document Profile to a Library. A Library is a collection of Profiles. On a large network, a DOCS Open administrator may set up multiple libraries. With CyberDOCS, you work with a default library, but you can access any number of libraries that are available to you, and can search for documents across any or all libraries.

The Options Page

The Options page allows you to customize how CyberDOCS looks and operates. Your CyberDOCS administrator set up CyberDOCS to use either HTML forms or dynamically interpreted forms (Java

forms). The Options page is available by clicking Options on the toolbar.

The following list describes the available options, but their arrangement on the options page depends on which form was selected:

- Default form setting for dynamically displayed forms

Search form - If there are multiple search forms available to you, you can select one from the displayed list to serve as your default (the form which is normally displayed for your profile). You can still change forms on the Search page: select Switch forms and CyberDOCS displays the page with the new search form.

- Search results, projects, and document history page settings

Maximum items
(Java forms only)

Indicates the maximum number of items that will be returned in the search results. The default value is 200; your CyberDOCS administrator can change this default value.

Maximum search
results per page
(HTML forms only)

Indicates the maximum number of documents returned from a search that will appear on each page of the search results. The default value is 10; your CyberDOCS administrator can change this default value.

Maximum result
pages (HTML forms
only)

Indicates the maximum number of pages that can be returned from a search. If more pages are returned than allowed by this value, you receive a message. The default value is 20; your CyberDOCS administrator can change this default value.

- Quick Reference, Quick Search, and Projects page settings

Columns - Indicates the number of columns to display on the Quick Reference, Quick Search, and Projects page. The default value is 2.

- Date and time format settings for both display and data entry

Date Format Indicates the format in which dates will appear on the browser. The default value is M/D/Y; your CyberDOCS administrator can change this default value.

Time Format Indicates the format in which time will appear on the browser. The default value is H:M; your CyberDOCS administrator can change this default value.

- Browser usage settings

Check this box if you want to show the CyberDOCS banner at the top of each page.

- Application activation settings for applications supporting in-place activation. These options affect only those applications that are recognized by the browser as allowing these features.

Run the application in the workspace frame When you activate an application to view a document's contents, the contents appear in the right side of the browser and the CyberDOCS toolbar remains on the left.

Run the application in the full browser window When you activate an application to view a document's contents, the contents appear in the entire browser window.

Run the application in a new browser window When you activate an application to view a document's contents, the contents appear in a new browser window.

- Login Options (This option is available only if enabled by the CyberDOCS administrator.)

Login without prompting - You will be logged in automatically, bypassing the Login page. You are required to log in manually at least once before this will take effect.

- Document Viewer settings
 - View the document with its native application.

This is the default setting. When a document is selected, CyberDOCS determines which application is required and launches it to display the document. The required application must be previously installed and correctly configured as explained in “Viewing Document Contents” on page 69.
 - View the document in the FulView viewer.

When a document is selected, CyberDOCS launches the FulView viewer and displays the document. FulView is a browser-specific Windows feature only and must be installed prior to use.
 - View the document as HTML

The DOCSFusion engine converts the document to HTML and then displays the result in the browser window.
- Install Smart Check In/Check Out

Click this button to install the browser-based plug-in for Smart Check In/Check Out. CyberDOCS will automatically select the plug-in appropriate to the browser in use and install Smart Check In/Check Out.

NOTE Settings made via the Options page are stored on your computer in a browser cookie, not on the server. If you log in to CyberDOCS from a different machine, you will not have the same settings as on the original machine.

Edit Personal Profile Defaults

The Edit Personal Profile Defaults page is accessible from the Options page and allows you to pre-define information on profile forms for use with various applications and document types.

Additional Features

Access Rights

There are additional features, specific to access rights to documents, which are discussed below.

Assigning Rights

By default, the user who enters a document has all rights to it. To assign access to other users and groups, follow these steps:

1. From the Available Trustees column, double click the users or groups folder to view a list of valid names.
2. Click the names you want to give access to and click Add.
3. The names you chose now appear in the Current Trustees column with full access.
4. Change the rights for any user or group in the Current Trustee column by clicking that user or group and choose one of the predefined Rights templates or select the desired individual rights.

To remove access rights of a particular user or group, follow these steps. (You are not allowed to remove your own rights to a document.)

1. Select the user or group you want to remove from the Current Trustees column.
2. Click Remove. DOCS Open revokes the rights of the user or group to the document.

To modify a Document Profile after it was created, find the document using the Quick Reference, Quick Searches, Projects, or Search pages, and click Profile. (On HTML forms, click the page icon next to a document. This brings you to the Document Details page for the document. You then click Edit Profile to view the Edit Profile page.)

Assigning Access Rights

The Access Control feature on the New Document page lets you restrict access to your documents. When you check Secure Document

and click Edit, the Security Access applet appears. You can then choose the Trustees for the document. You can assign each Trustee different access rights, ranging from read-only to full access rights.

Access Templates and Rights

DOCS Open provides five Rights Templates, which group certain rights. Assign a Rights Template to a user or group by using the list box next to the Rights Template field. You can use the templates as they are or modify them to suit your needs.

The DOCS Open Rights templates are as follows:

Rights Template	Description
View Profile	Allows designated users to view the profile of a selected document, but not to retrieve, view, edit, or copy the document or profile.
Read Only	Allows users to view the profile and document, but not to edit or delete the document or profile.
Normal Access	Allows designated users to view and edit the profile and to view, edit, retrieve, and copy the document.
Full Access	Allows designated users all rights.
Custom	Automatically selected by DOCS Open if you choose individual rights that do not coincide with any of the predefined Rights templates.

DOCS Open provides the following eight individual access rights, which you can assign to users or groups:

This Access Right...	Lets Users...
View Profile	View, but not edit the profile.
Edit Profile	View and edit the profile.

View Document	View, but not edit the document.
Retrieve Document	Retrieve the document and can also view the Profile. Users must save any edits to a new document.
Edit Document	Edit the document.
Copy	Retrieve a copy of the document and save it as a new document. Users cannot edit the original document or profile.
Delete	Delete the document.
Control Access	Control access to the document; that is, change the rights of any user or group you assign here.

FulView

This feature is an ActiveX control that provides additional ease-of-use to the processes involved in viewing documents. When installed, FulView allows the user to view any document type found in a DOCS Open Library, even if the associated application (for example: Microsoft Word or WordPerfect 6) is not installed on the user's hard drive.

To select this feature (after it has been installed), use the toolbar to go to the Options page to find three options under the heading Document Viewer Settings:

- View the document with its native application

This is the default setting. When a document is selected, CyberDOCS determines which application is required and launches it to display the document. The required application must be previously installed and correctly configured as explained in Viewing Document Contents.
- View the document with the FulView viewer

When a document is selected, CyberDOCS launches the FulView viewer and displays the document.
- View the document as HTML

The DOCSFusion engine converts the document to HTML code and then returns the end result to CyberDOCS for display in the browser.

This is an additional component that must be installed by your CyberDOCS administrator. If this component has not been installed, you may encounter an error the first time you attempt to view a document after choosing this option.

NOTE FulView is available a Windows feature only and is not Macintosh compatible.

Installing FulView

To install this feature, use the toolbar to go to the Options page.

Internet Explorer. To install FulView, follow these steps

1. Select the link “Download FulView Component” and save the file “fulview.exe” (4956K) to a temporary directory.
2. Exit the browser program and run the self-extracting file “fulview.exe” to automatically install the ActiveX control.

Netscape Navigator. Netscape Navigator does not directly support the ActiveX component of the FulView document viewer. An additional plug-in (“ScriptActive” by NCompass) is also required.

1. Select the link “Download FulView Component” and save the file “fulview.exe” (4956K) to a temporary directory.
2. Select the link “Download ScriptActive plug-in” and save the file “Sa2905g.exe” (3190K) to a temporary directory.
3. Exit the browser program and run the self-extracting file “fulview.exe” to automatically install the ActiveX control.
4. Run the self-extracting file “Sa2905g.exe” - it will determine which directory contains Netscape files and install the plug-in there.

After the installation process is complete, use the toolbar to go to the Options page, select the button “View the document with the FulView

viewer” under the heading Document Viewer Settings, and then click the Submit button. This action sets a cookie that allows the browser to retain the preferred document viewer setting when a user next starts a CyberDOCS session.

NOTE There are three links across the top of the FulView viewer page (HTML, FulView and Native) which allow the user to change the document viewer settings temporarily. Changes made here will be reflected on the Options page but expire after the current CyberDOCS session ends.

If a user were to go to the Options page, select the button “View the document with the FulView viewer”, and click the Submit button - this would modify the viewer preferences cookie. Then, while viewing a document with the FulView viewer, if a user clicked the Native link at the top of the viewer page and then went to the Options page - the button for “View the document with its native application” would have become selected (as a direct result of clicking the Native link on the FulView viewer page).

This is a temporary session change only and does not modify the session preferences cookie **unless** the Options page Submit button is clicked while the Document Viewer Settings show as changed.

Using FulView

FulView allows the user to view any document type found in a DOCS Open Library, even if the related application (for example: Microsoft Word or WordPerfect 6) is not present on the computer.

To select this feature (after installation), use the toolbar to go to the Options page and select the button “View the document with the FulView viewer” under the heading Document Viewer Settings.

When a document is selected, CyberDOCS launches the FulView viewer and displays the document. Across the top of the viewer page will be three links labeled HTML, FulView and Native, which allow the user to change the document viewer settings temporarily. Changes made here will be reflected on the Options page but expire after the current CyberDOCS session ends - using these buttons does not affect the viewer preferences cookie set on the Options page.

If the document being displayed is the result of a Full-Text or Contents search, two additional links will appear at the top right of the viewer screen: Previous Hit and Next Hit. These links allow the user to quickly find occurrences of the search parameter text in the current document.

Examples: A document viewed as the result of a Full-Text search for the word “lawyer” will have the word “lawyer” highlighted anywhere that it appears in the document. Selecting the Next Hit button will cause the document display to scroll down so that the next occurrence of the word “lawyer” is displayed on the top line of the viewer screen. Each word used as a search term is regarded as a separate “hit”. In a document found via Full-Text search for the phrase “executive summary”, selecting the Next Hit button will cause the document display to scroll down so that the next occurrence of the word “executive” is displayed on the top line of the viewer screen. A second click on the Next Hit button may appear to have no effect if the word “summary” is on the same line.

Table Lookups



Any field followed by an ellipsis button indicates the availability of a table lookup applet that reads the possible values for a field from a database and then displays a list of valid choices. This list is set up by your CyberDOCS administrator.

When the applet has loaded, click your choice from the list shown in the left window and then click the Add button to move this value to the right window of the applet. For a single search value, click OK to return to the search form with your choice from the applet now entered as the field value.

To select multiple field values for your search, continue choosing items from the left-hand pane and then adding them to the list in the right-hand pane until your list is complete. Click OK to return to the search form; your applet choices will now be shown in the field (with commas used as separators).

To remove an entry from the list on the right side of the table lookup applet, click the item in the list and then click the Delete button to

remove it from your list of values chosen for the search (this Delete key does not affect the original list shown in the left window).

A lookup table shows only 300 entries at a time; to view the next 300 entries, click Next. For a very long list of field values, such as a large office with thousands of employee names listed as potential authors, you can use the Filter function at the top left of the table lookup applet to refine and shorten the list presented.

NOTE By default, the values presented in the various columns in the left side of the table lookup applet are ordered alphabetically by the values in the first column. Clicking on any of the column headers allows you to reorder the field values - the first click sorts in ascending alphabetical order, and the second click sorts them in descending alphabetical order.

SQL Wildcards Accepted in a Table Lookup Search

Enter this wildcard...	To see...
M*	All values beginning with the letter M.
M?N	All values with M as the first letter and N as the third letter.
[M-Z]inger	All values beginning with any letter M through Z and ending in "inger". For example, Minger and Sons, Ringer Phones, and Singer Sewing Machines.
[MR]idge%	The records for Midge and Ridge.

Other Components

Specifying Additional Login Information

This page allows you to specify additional login information. This is required when you attempt to access a document residing on a file server that you are not allowed to access using your current login information.

Only the password for the specified file server is required. The user name and network name, specified on the initial login page, remain the same.

If you are not sure what to enter for the password, please contact your DOCS Open or network administrator.

N O T E This is an “on-demand” page and will only appear when you attempt to access a file server that you are not allowed to access using your current login information.

Java and HTML Forms

When CyberDOCS was installed, your system administrator selected either HTML or Java forms. This selection affects not only the appearance, but also what information is included on the Search, Create, and Profile forms.

HTML forms come with a default set of forms that apply to most users. You can also choose one of the pre customized forms: Legal, Government, or Financial.

Java forms are dynamically interpreted, which means they can use any of the forms that you customized in DOCS Open. For example, if there are multiple search forms available to you, you can select one from the list displayed at the bottom of the Search page. Then, when you select Switch forms, CyberDOCS displays the page with the new search form.

The Search Results Page

When you perform any type of search a Search Results page appears, listing all the documents that meet the criteria of that search. The displayed information includes:

- Date of the last edit
- Document Name
- Document Number
- Application
- Author
- Library where the document is stored

For each document listed in the Quick Search results, you can:

- Click the document name. The document contents are displayed using the appropriate application. If the application cannot be determined, or if the browser does not support the application, a browser-specific question will be displayed, asking how the document content is to be handled.
- On HTML forms, click the page icon next to a document. The Document Details page appears with detailed information about the document. You can then click the document title to view its contents, click a document version number to view that version of the document, or click a button to perform some operation on the document.
- On Java forms, click the appropriate button at the bottom of the page to View the document, select a Version, or perform some operation.

Buttons for some operations may be dimmed depending on the type of document or its status. For example, you cannot view a paper document or delete a checked-out document.

C h a p t e r

3

Working With Documents

In This Chapter

This chapter explains how to perform various document operations in CyberDOCS, including working with document profiles, checking documents in and out of CyberDOCS, and viewing document contents.

Performing Document Operations

You can perform specific operations on a document using the buttons at the top of the Document Details page. The available buttons depend on the current state of the document.

Button	Description
Get Copy	Gets a copy of the document and places it on your hard drive at a location you specify.
View History	Invokes the Document History page, from which you can view activity information about the document, such as when it was accessed and by whom.
Check In/Out	Depending on the status of the document, this invokes the Check In or the Check Out page, from which you can check a document in or out.
Edit Profile	Displays the Document Profile page in edit mode. This button is available only when a document is checked in.
Delete	Deletes this document from the library. This button only appears when a document is checked in.

Java forms do not have Document Details pages. The above operations are available from buttons on the Search Results, Recently Edited Documents, and Checked Out Documents pages. There are also View and Version buttons on these pages.

Document Operations (for HTML Forms)

Button	Description
Get Copy	Copies the document to your hard drive.
View History	Displays the activity information about the document.
Check In/Out	Invokes the Check In or Check Out page depending on the status of the document.
Edit Profile	Displays the Document Profile page for you to edit.
Delete	Deletes the document from the library.

Document Operations (for Java Forms)

Button	Description
View	Opens the document in the appropriate application.
Get Copy	Copies the document to your hard drive.
Profile	Displays the Document Profile page in edit mode.
Versions	Show what versions of this document are available.
View History	Displays the activity information about the document.

Button	Description
Check In/Out	Invokes the Check In or Check Out page depending on the status of the document.
Delete	Deletes the document from the library.

Document Status Descriptions

Search for this status...	To retrieve documents that are...
Available	Available for editing.
Document Being Edited	Currently checked out for editing.
Profile Being Edited	Currently having their profile modified.
Checked Out	Currently checked out by some user.
Not Available	Unavailable to be retrieved, according to the profile.
Being Indexed	Currently being indexed for full-text searching.
Archived	Archived, either to tape or optical disk.
Being Archived	Currently being archived, either to tape or optical disk.
Deleted	Deleted from the system.

Details, Profiles and Histories

The Document Details Page

From the Document Details page, you can view the Document Profile information or perform operations on the document.

- Get Copy—download a copy of the file to your local hard drive.

- **Versions**—display the Document Versions page, allowing you to select the version of a document to view or to edit the version properties for a document.
- **View History**—display the Document History page, allowing you to see who has accessed the document and when.
- **Check Out**—display the Check Out Document page, allowing you to check out or lock a document.
- **Delete**—allows you to delete the document (if you have deletion rights for this document).

Options on the Document Details Page

The following fields have table lookup buttons whose values have been defined in DOCS Open. Button options available on the Document Details page:

Buttons	Description
Get Copy	Gets a copy of the document and places on your hard drive at a location you specify.
View History	Invokes the Document History page, from which you view information about this document, such as when it was accessed and by whom.
Check In/Out	Depending on a document's status, invokes the Check In or Check Out page, where you can check the document in or out.
Edit Profile	Invokes the Edit Profile page, where you can edit the Document Profile. This button is available only when a document is checked in.
Delete	Deletes this document and its profile from the library. This button only appears when a document is checked in and you have access to it.

If you are using the legal database, two additional fields appear:

Field	Description
Client	The client name/ID associated with this document
Matter	The matter associated with this client.

If you are using the financial database, two additional fields appear:

Field	Description
Account	Account to which this document belongs.
Department	Department to which this document belongs.

If you are using the government database, two additional fields appear:

Field	Description
Division	Division to which this document belongs.
Organization	Organization to which this document belongs.

Document Versions Page

The Document Versions page is accessible from the Document Details page by clicking the Versions button. It allows you to review the detailed version history for a particular document as well as:

- View—Display a specific version of a document
- Edit Version Properties—Change table lookup values for the Author and Typist fields (includes a free-text entry box for including version specific comments).
- Delete—Allows you to delete a document (where you have such rights).

NOTE Buttons for some operations may be dimmed depending on the type of document

Document Profiles

Every document DOCS Open manages and maintains has a Document Profile associated with it. A Document Profile is like an entry in a library catalog and contains information such as Author, Document Name, and Description for every document. When you want to retrieve a document in a DOCS Open library, you can compose a search request that locates the profile you or another user created. Or you can search for words or phrases in the text of the document or its profile.

The Document Profile Page

The Document Profile page displays detailed information about the document. What you see on the Profile page depends on whether your CyberDOCS administrator set up the system to use HTML or dynamically interpreted forms (Java forms), which means they can use any of the forms that you customized in DOCS Open. For example, the legal form has a billable field to help you keep track of billable hours.

The following lists the fields on the page as it is shipped.

Field	Description
Document Name	Name of the document, as it is stored in DOCS Open. This field contains a hypertext link to the document contents. If the document is locked or checked out, Lock and Checkout icons appear next to the name.
Document Status	Indicates whether the document is checked in or out.
Expected Return Date	If a document is checked out, the date on which it will be returned to the DOCS Open library.
Document Description	Short description of the document.
Author	DOCS Open ID for the author who created this document.

Document Type	DOCS Open ID for the type of document: for example, MEMO, LETTER, or REPORT.
Retention Type	DOCS Open retention type. Can be Archive, Delete, Keep, Template, Optical, and Paper.
Created By	DOCS Open ID of the user who typed the document.
Retention Days	The number of days that this document will remain on the system past the last edit date for DOCS Open retention types Archive, Delete, or Optical.
Status	Current status of the document. Values for this field are Available, Document being Edited, Profile Being Edited, Checked Out, Not Available, Being Indexed, Archived, Being Archived, Deleted.
Application Type	DOCS Open ID for the application that the author used to create this document.
Application Name	Name of the application that the author used to create this document.
Created	Date on which the document was created.
Last Edit Date	Date the document was last edited.
Document Number	Number DOCS Open assigned to the document when it was created.
Version	Versions available for this document. Each version includes creation date, time, author, and any comments. (On Java forms, click the Versions button to see this information.)

If you are using the legal database definitions as shipped, two additional fields appear:

Client	The client name/ID associated with this document.
Matter	The matter associated with this client.

If you are using the financial database definitions as shipped, two additional fields appear:

Account Account to which this document belongs.

Department Department to which this document belongs.

If you are using the government database definitions as shipped, two additional fields appear:

Division Division to which this document belongs.

Organization Organization to which this document belongs.

Edit Document Profile Page

The Edit Profile page allows you to modify the values stored in the document profile. Once you have filled in or modified the profile values, click the Submit button on the toolbar to write the profile values into the library. What you see on this page depends on how your CyberDOCS administrator has set up the system. The following table lists the fields that appear on the page as it is shipped.

Field	Description
Document Name	Name of the document as it is stored in DOCS Open.
Document Number	Number DOCS Open assigned to the document when it was created.
Author	DOCS Open ID for the author who created this document.
Document Type	DOCS Open ID for the type of document: for example, MEMO, LETTER, or REPORT.
Application	DOCS Open ID for the application that the author used to create this document.

Enable access control	The check box indicates whether or not security is applied to the document. If applied, use the “edit security” button to modify the list of users and groups that can access the document.
Enable content searching	The check box indicates whether or not the document is indexed for full text searching. If not checked, any searches that specify strings in the document contents will not be able to find this document.
Retention Type	DOCS Open retention type. Can be Archive, Delete, Keep, Template, Optical, and Paper.
Days	The number of days that this document will remain on the system past the last edit date for DOCS Open storage types Archive, Delete, Keep, Optical, or Template.
Description	Short description of the document.

If you are using the legal database definitions as shipped, three additional fields appear:

Billable	Indicates whether or not the work on this document is billable.
Client	The client name/ID associated with this document.
Matter	The matter associated with this client.

If you are using the financial database definitions as shipped, two additional fields appear:

Account	Account to which this document belongs.
Department	Department to which this document belongs.

If you are using the government database definitions as shipped, two additional fields appear:

Division Division to which this document belongs.

Organization Organization to which this document belongs.

Many of the above fields have an associated lookup button, which is used to determine valid data for the field. When looking up information using any of the lookup buttons, the displayed information is determined only by the contents of the current library and not by all of the selected search libraries. There may be document types, for example, that exist in some of the search libraries, but not in the current library. These will not be displayed in the lookup list.

Document History Page

The Document History page displays who has accessed a document, and when. For the document whose history you want to view, click the View History button on the bottom of the Search Results, Recently Edited Documents, or Checked Out Documents page. (On HTML forms, click the page icon next to a document to display the Document Details page where you can click View History.)

Date The date the document was last accessed.

Time The time the document was last accessed.

Action The action that was performed on the document, such as viewing, editing the profile, creating, checking in, or checking out.

Version The version of the document that was accessed.

User The user who performed the action on the document.

If the number of entries in the document history exceeds the display setting selected on the Option page, a series of links will appear at the bottom of the page:

- Next—Advance to the next page of History listings
- Previous—Return to the previous page of History listings

- Numbers—Jump to a specific page of the History listings.

Recently Edited Documents Page

The Recently Edited Documents page is available as a search results display page by clicking the “Recently Edited Documents” title bar on the Quick Reference page

The Recently Edited Documents page displays the list of documents that you have edited recently and provides an easy way to retrieve those documents. The displayed information includes:

- Document Name
- Document Author
- Name of Library where Document is stored
- Document Number
- Application used to created Document
- Date of the last edit

For each document listed, you can:

- On HTML forms, click the page icon next to a document. The Document Details page appears with detailed information about the document. Click the document title to view its contents, click a document version number to view that version of the document, or click a button to perform some operation on the document.
- On Java forms, you can view the Document Profile or perform the following operations on the document:
 - View the document.
 - Get a copy of the document.
 - View the Document Profile page.
 - Select a specific version from the Document Versions page to view or edit the version properties for the document.
 - View the Document History page.

- Check out or lock the document from the Check Out Document page.
- Check in and return a document from the Check In Document page.
- Delete the document (if you have the deletion rights).

Buttons for some operations may be dimmed depending on the type of document or its status. For example, you cannot view a paper document or delete a checked-out document.

Moving Documents

Document Check Out and Check In

You can use CyberDOCS to check documents in and out of DOCS Open using the Check out option on the Document Profile or Document Details page. DOCSFusion and DOCS Open track all users' check-outs. You can check out any version of a document; however, only one user at a time can check out that version of the document.

Checking out and locking a document transfers a copy of the document to your workstation. However, the location of the file will not be retained when you check the document back in. Additionally, checking in the file does not remove it from your hard drive.

Before another user can work with a document you've checked out, you must check it in again. To check in a document, go to the Document Profile or Document Details page for the document and click Check In. CyberDOCS prompts you for whether you want to replace the version of the document you checked out or create a new version or sub-version. See *Checking In a Document* or *Checking Out a Document* for more information.

NOTE If you select the cancel button when you are checking out a document, you will only cancel the download of the document, not the check-out itself. The document will remain locked until you unlock it.

Checking In a Document

The Document Check-In page allows you to check in or unlock a document. Fill in the form and click one of the buttons at the top.

The buttons allow you to:

- Check in and unlock

This copies the contents of the document from your local system to the DOCS Open library, makes the new contents available to other users, and makes the document available for further editing.

- Unlock only

This makes the document available for editing, without changing the current contents. This is effectively an “undo Check out”.

The following fields are used only for the “check in and unlock” operation.

- Version buttons

These option buttons allow you to indicate how to check the document in.

Create a new version of the document.

Replace the currently checked-out version.

Create a new sub-version of the currently checked-out version.

The available version options depend on the version of the checked-out document. You cannot create a new sub-version if the latest version is currently checked out.

- Edit time

The amount of time spent working on the document. This is optional and is normally used only if one is doing cost tracking.

The following fields are used only for the “check in and unlock” operation, and only when a new version or sub-version is being created.

Author	Change the ID for the author of the new version or sub-version. This field has a table lookup button allowing you to obtain a list of possible ID values.
Entered by	Change the ID for the person who entered the new version or sub-version. This field has a table lookup button allowing you to obtain a list of possible ID values.
Comment	Enter a comment of up to 200 characters describing the changes made.

To complete checking in and unlocking a document:

1. Enter the path and file name, or click the Browse button to locate the document on your computer.
2. Click Submit and the document becomes unlocked.

NOTE If you cancel a Check in, you cancel the upload. The document will still be locked because it has not been uploaded.

Any changes to author/comments made on this page will affect only the current version being checked in. To change the author/comments for the original document, you must use the Document Details page.

Checking Out a Document

The Document Check-Out page allows you to check out or lock a document. Fill in the form and click one of the buttons at the top. The buttons allow you to:

- Check out and lock

This copies the contents of the document from the DOCS Open library to your local system, and locks the document so no other user can edit it.

- Lock only

This locks the document so no other user can edit it, without copying the contents to your local system.

Before clicking either button, you can fill in the fields on the form:

- Expected return date

Expected return date is always set to the next day, so if you check out a document on 6/22/98, the expected check-in date is set for 6/23/98. Optionally, you can specify when you expect to make the document available again.

- Comment

Optionally, you can specify the reason why the document is being checked out or locked.

- Version

Select the version to be checked out. This is only necessary when checking out a document. The lock will automatically be applied to all versions, whether checking out or just locking.

If you simply lock a document, other users cannot check it out, but they can still download the document.

Microsoft Internet Explorer. When you click Check Out and Lock, CyberDOCS informs you that the way Internet Explorer handles some document types (such as Microsoft Office documents) is to display their contents in the browser, rather than save them to disk. To ensure your document is saved properly, right-click the link and select Save Target As. If you just click the document link, the document appears in the browser and CyberDOCS will lock it, even if you do not save the file. You can select Save As, but results may be unpredictable.

Netscape Navigator. When you click Check Out and Lock, CyberDOCS prompts you for a location to save this file to disk. Indicate where you want to save the document.

Once you have saved the document to disk, check that the document has been locked.

Microsoft Internet Explorer. Click the Return to Document Details link to view the Document Details page

Netscape Navigator. You can click Quick Search on the toolbar, then click the Checked Out Documents link. You should see a check mark next to the document name, indicating that the document has been checked out.

NOTE If you cancel a check-out, you are canceling the file download, so you must go to the Check In page and unlock the document.

Checked Out Documents Page

The Checked Out Documents page displays the list of documents that you have currently checked out of the library. The displayed information includes:

- Document Name
- Related Author
- Library the document is stored in
- Document number
- Version that is checked out
- Related Application
- Expected check-in return date.

For each document listed, you can:

- On HTML forms
 - Click the document name. The document contents are displayed in the appropriate application. If the application cannot be determined, or if the browser does not support the application, a browser-specific question will be displayed, asking how the document content is to be handled.
 - Click the page icon next to a document. The Document Details page appears with detailed information about the document. You can then click the document title to view its

contents, click a document version number to view that version of the document, or click a button to perform some operation on the document.

- On Java forms:
 - Click the appropriate button at the bottom of the page to View the document, select a Version, or perform some operation.

Buttons for some operations may be dimmed depending on the type of document or its status. For example, you cannot view a paper document or delete a checked-out document.

Document Upload Page

The Document Upload page is used to specify the name of the file on your local system that is to be uploaded into the library, specifically when creating or checking in a document.

Either type in the device, folder, and name for the file on your local system, or use the Browse button to find the file. Once you have specified the file, click the Submit button on the toolbar to upload the file to the library.

Retrieving Documents

Netscape Navigator. To display a document, you can configure a viewer (helper application) by following instructions found in the Netscape Help files.

Microsoft Internet Explorer. To display a document, you can configure only helper applications that are Document Object Servers. For example, the applications that comprise the Microsoft Office suite meet this criterion. For other applications, you must save the document to disk before viewing it.

You can retrieve the current version of a document or select a specific version. Suppose you want to look at a version of a document that is checked out and locked. You can still retrieve the document, and even copy it to your disk. (You can't make changes, of course; for that you would need to check the document out.)

- If you are using HTML forms, make your selection from the Document Details page. For more information, refer to Retrieving Documents with HTML Forms.

- If you are using Java forms, you make your selection from the buttons on the Search Results, Recently Edited Documents, and Checked Out Documents pages. (Java forms do not have Document Details pages.) For more information, refer to Retrieving Documents with Java Forms.

Retrieving Documents with HTML Forms

To retrieve a document, use the following steps:

1. On the Quick Reference or Quick Searches page, click the Recently checked out documents link.
2. From the Checked out documents page, click the document icon to view details for the document or click the document name link to view the document.
3. On the Document Details page that appears, click the document title at the top of the page or the hypertext link under the Version column to view the document. To get a copy of the document, click Get Copy.

With Netscape Navigator, if you have not configured a viewer to display the document, you can configure a viewer or save the file to disk.

Retrieving Documents with Java Forms

To retrieve a document, use the following steps:

1. On the Quick Reference or Quick Searches page, click the Recently checked out documents link.
2. Select the name of the document you want to retrieve.
3. Double-click the document name or click the View button on the bottom of the page. To get a copy of the document, click Get Copy.

With Netscape Navigator, if you have not configured a viewer to display the document, you can configure a viewer or save the file to disk.

Smart Check In/ Check Out

This feature is a browser-based plug-in that provides additional “ease of use” functionality to the processes involved in moving documents and document copies back and forth between CyberDOCS and the DOCS Open Library.

- Default File Location

The user can choose to select a default drive/directory as the starting point for all of file transfers while still retaining the ability to change drive/directory locations on a file-by-file basis.

- Original File Names

When downloading a file (for example: “Check Out” or “Get Copy”) with CyberDOCS, the user currently has the option of renaming the file before it is saved to their local drive/directory. Unfortunately, when it came time to return the file to the DOCS Open Library (for example: “Check In”) the user had to remember the original file name and location for files that had been renamed as part of the download process.

With the Smart Check In/Check Out plug-in installed, CyberDOCS “remembers” the original path and file name associated with the file and automatically checks the file back in to its' original library location.

- Remove Local Document

In situations where documents are being shared among a work group or are being co-authored by more than one person, it is essential that a new and up-to-date copy of the file be downloaded every time it is to be modified. This key element of effective document management requires the ability to consistently ensure that documents that have been uploaded to a Library are removed from the local hard drive.

When a new document is uploaded or an existing document is checked back in to the DOCS Open Library, the Smart Check In/Check Out plug-in adds a dialogue box (with a default value of Yes), which allows the user to choose to have CyberDOCS delete the local document copy after it has been successfully uploaded. This removal forces a user to download a current copy next time

they want to work with a document and ensures that a potentially out-of-date document is not accidentally worked with in the future.

Other Functions

Accessing a Document from a Project or Folder

You can access a project and retrieve a document from it. If a project icon appears on the Quick Reference page, you can click it to view the project's contents.

Example. To view a project called Cyber-Project, click its name on the Quick Reference page or click Project on the toolbar and select Cyber-Project.

The Project page appears, listing all documents and subprojects in that project. As with other CyberDOCS listings, you can click the document icon to view details or click the document hyperlink to view the document itself. If any subprojects are listed, you can click their names to view their contents.

Viewing Document Contents

To display a document, you must configure your browser to use the correct application for the document type.

Netscape Navigator. You can configure a viewer (helper application). If you have not configured a viewer to display the document, a dialog box appears asking whether you want to configure a viewer, or save the file to disk.

Microsoft Internet Explorer. You can configure only helper applications that are Document Object Servers. For example, the applications that comprise the Microsoft Office suite meet this criterion. For other applications, you must save the document to disk before viewing it.

If you want to look at a version of a document that is checked out and locked, you can still retrieve the document, and even copy it to your hard drive. (You can't make changes, of course, since you would need to check the document out.) To do this, follow these steps:

1. Find the document using the Search, Quick Reference, Quick Searches, or Projects pages.
2. Click view to open the document. (For HTML forms, click the document icon to view details for the document.)
3. If you clicked the document icon, the Document Details page appears. Click the document title at the top of the page or the version number under the Version column to view the document.
4. While viewing the document you can use the application to save it to your local hard drive.

You can get information from a document without having to check it out by using the Get Copy option or you can select the View button, which will also allow you to view the document. If you want to get a copy of the latest version of a document without viewing it, follow these steps:

1. Find the document using the Search, Quick Reference, Quick Searches, or Projects pages.
2. Click Get Copy. (For HTML forms, click the document icon to view details for the document and then click Get Copy.)

C h a p t e r

4

Using the Verity Search Engine

In This Chapter

This chapter discusses how to use the Verity Search Engine's basic and advanced syntax to find documents in CyberDOCS.

Introduction to the Verity Search Engine

Basic Rules for Content Searching

Use a query (an expression you want DOCS Open to interpret and process) to retrieve specific information. CyberDOCS uses the Verity full-text search engine, which permits two kinds of searching syntax: Simple and Explicit.

Content Searching Hints

Because of the volume of documents that a Content Search must handle, some searches are faster than others. To determine the best search method for your particular task, consider these factors:

If you are performing a search for a word that contains a period at the end, such as Mr. or U.S.A., Verity will assume that the final period is the end of a sentence, and will not index it. Enter the words without the final period to locate them.

Examples. To search for Mr. use Mr
To search for U.S.A. use U.S.A

Special characters, such as those used as wildcards and precedence expressions, are not indexed, so you cannot search for them. In such a case, you could simply enter your search without the characters. For a phone number, enter the number without using parentheses or dashes.

Example. To search for the number (781) 273-3800, enter 781
273 3800

Do not search for broad topics. If the list of returned documents is too long for you to find a specific document, you should narrow your search. Include more operators or select Profile fields (Author, Entered by) for a more specific search. A search for a specific document containing the term Alimony is faster if you include other terms to narrow the search.

Example. Alimony and Caldwell and December
returns a more focused list than one of these search operators alone.

Phrase and proximity searches are more useful in a case where a normal “AND” search might deliver a very large list.

Full-Text Searching Rules

This section contains basic rules for content searching. If you are not familiar with Verity's search syntax, see *Basic Rules for Content Searching*.

To perform a Content Search, follow these steps:

1. In the Search For field, enter the text you want DOCS Open to find. (DOCS Open uses the Verity search engine.)
2. In the In: field, indicate whether you want DOCS Open to search the contents of Documents only, the Profile fields only, or the Document contents and Profile fields. If you decide to search Profile fields, the search engine will search textual fields such as Document Name or Description on the profiles in the specified library or libraries.
3. Enter any additional search criteria on the Search page, if desired.
4. Click Submit to submit the form and invoke the search.

If you are not familiar with Verity's search syntax, see *Basic Rules for Content Searching*

Use a query (an expression you want DOCS Open to interpret and process) to retrieve specific information. CyberDOCS uses the Verity full-text search engine, which permits two kinds of searching syntax: Simple and Explicit.

Simple Syntax

When you use simple syntax, the Verity engine interprets the words you enter as if they were preceded by the MANY or STEM operator. The MANY modifier counts the number of occurrences of words or phrases in a document and lists the documents in order of importance (or relevance) to your search criteria. The most relevant documents are at the top of the list.

The more often a word appears in a document, the higher the document's score. Because the MANY modifier considers density relative to document text, a longer document containing more occurrences of a word may score lower than a shorter document containing fewer occurrences.

The STEM operator searches for documents that include one or more variations of the search word you specify.

Example. To search for documents containing the word *assert* and any variations, enter the word *assert* (without quotation marks). CyberDOCS retrieves documents containing such words as *assertion*, *asserts*, *asserting*, and *asserted*.

In a search using simple syntax, the Verity engine relevance ranks retrieval results according to word frequency as it searches for the word you specify, as well as words that have the same stem.

Explicit Syntax

For explicit syntax, enclose individual words in double quotation marks. The Verity engine interprets these words literally.

Example. If you enter the expression “assert”, the Verity engine does not retrieve documents containing “asserts”, “assertion”, “asserting”, or “asserted”. Thus, you can perform a search without retrieving stemmed variations.

Documents retrieved for a literal word search are not relevance-ranked. Verity assigns all these documents a score of 1.00, indicating that the word was found in the documents.

You can add the MANY modifier to search for literal words and get relevance-ranked results.

Example. To relevance-rank documents containing the word *asserts* without searching for stemmed variations, you would enter the expression <MANY> “asserts”.

Date Range

Date Range must include the date when the document’s storage type is scheduled for processing.

Because this date depends on how many Retention Days were set in the Document Profile and when the last edit was, the Date Range criterion is ideally suited for multiple document searches.

Example. To find documents archived during the first quarter of 1998, select “Archive” in the Type field and enter “01-01-98 TO 03-31-98” in the Date Range.

NOTE The clock for the number of retention days restarts every time a new edit is saved.

Date Searching Syntax

The CyberDOCS administrator sets the date format order (DMY, MDY, or YMD). However, you can change this order on the Date format field on the Options page.

Assuming your site uses the format MDY, you can enter any of the following for the date February 25, 1998:

2-25-98
2-25-1998
2/25/98
2/25/1998

CyberDOCS offers enhanced date searching capabilities. The following examples illustrate enhanced date searching and use these conventions:

- date represents the date you specify.
- %today represents today's date.
- n represents any integer.
- MINUS allows you to subtract a number of days from the specified date.
- TO allows for a range of dates.

Examples. To locate documents created between two sets of dates, enter:

10/21/1998 TO 12/27/1998

To locate documents created in the last 30 days, enter:

%today MINUS 30

Operators, Modifiers, and Precedence Expressions

Operators are expressions that further refine your search. There are three types of operators:

- Evidence
- Proximity
- Concept

Modifiers further specify the behavior of operators. For example, you can use the CASE modifier with an operator to specify that the case of a word be considered as a search element as well as the word itself. There are four modifiers:

- CASE
- MANY
- NOT
- ORDER

Precedence expressions are rules for determining the order in which an expression is evaluated. For example, information inside parentheses has a higher precedence than information outside them. There are four precedence expressions:

- Parentheses ()
- Commas (,)
- Angle Brackets (<>)
- Double Quotation Marks (" ")

Prefix and Infix Notation

You can use prefix or infix notation to define expressions that use any operator besides the evidence operators (STEM, WILDCARD, or WORD). Prefix notation is a format that specifies that the operator comes before the words used with that operator.

Example. The expression AND (a,b) indicates that Verity will look for documents that contain *a* and *b*.

When you use prefix notation, precedence is explicit within the expression.

Example. The expression OR (a, AND (b,c)) means that Verity first looks for documents that contain *b* and *c*, then for documents that contain *a*.

Infix notation is a format that specifies that the operator is specified between each element of the expression.

Example. The expression a AND b OR c, indicates that Verity will look for documents containing a or b or c.

When you use infix notation, precedence is implicit.

Example. The AND operator takes precedence over the OR operator.

Precedence Expressions

Commas in Expressions

If an expression includes two or more words within parentheses, you must use a comma to separate each element enclosed in the parentheses.

Example. OR (a, AND (b,c)).

Delimiters in Expressions

Verity uses angle brackets (<>) and double quotation marks (" ") to indicate precedence in expressions.

Left and right angle brackets are reserved for designating operators and modifiers; however, you do not have to use them. You can enter expressions with or without angle brackets.

Double Quotes for Reserved Words

To search for a word that is reserved as an operator or modifier (AND, OR, NOT), enclose the word in double quotation marks.

Example. To search for the phrase: black and white TV
Enter the expression: black "and" white TV

By enclosing AND in double quotations, you are telling Verity that it should process the word as a search term, not as an operator.

Parentheses in Expressions

Parentheses indicate the order in which Verity should carry out directions in the expression. Verity first reads information enclosed in the parentheses, then any information outside. There must be at least one space between operators and words used in the expression. For example, the expression (a OR b) AND c means that Verity first looks for documents containing a and c, or b and c.

If you use nested parentheses, Verity first interprets the innermost level.

Example. The expression:

(a AND (b OR c)) OR d

tells Verity to look for documents containing *b* or *c*, as well as *a*, or documents containing *d*.

Precedence Expressions

Verity uses certain rules for determining the order in which an expression is evaluated. When Verity encounters a query, it applies precedence rules to the operators used in the query. Though Verity reads a query from left to right, it processes some operators before others, thus affecting the interpretation of the expression.

Example. An AND operator takes precedence over an OR operator.

Thus, Verity interprets the expression: a AND b OR c as “Look for documents that contain *a* and *b*, or documents that contain *c*”.

Precedence Expression	Description
Parentheses ()	Indicate the order the directions are to be carried out. Information within parentheses is read first, information outside parentheses is read next.

Commas (,)	Separate each element in an expression enclosed within parentheses. The expression must include two or more words.
Angle Brackets (<>)	Designate operators and modifiers only.
Double Quotation Marks (" ")	Enclose words that are reserved as operators ("and," "or," and "not").

Delimiters in Expressions

Verity uses angle brackets (<>) and double quotation marks (" ") to indicate precedence in expressions. Left and right angle brackets are reserved for designating operators and modifiers; however, you do not have to use them. You can enter expressions with or without angle brackets.

Search Modifiers

The CASE Modifier

Modifiers further specify the behavior of operators. For example, you can use the CASE modifier with an operator to specify that the case of a word be considered as a search element as well as the word itself.

Use the CASE modifier to perform a case-sensitive search with the WORD or WILDCARD operators. By default, Verity retrieves documents containing any occurrences of a particular word or phrase, regardless of case. When you use the CASE modifier, Verity retrieves all documents with the word or phrase as you specify it: in all uppercase letters, in mixed case, or in all lowercase.

Example. To find documents containing the phrase Document Management, enter the expression:

```
<CASE><WORD> Document Management
```

Verity retrieves only those documents containing Document Management, and not those containing document management, or DOCUMENT MANAGEMENT. The CASE modifier only works if the files have been set up for CASE.

The MANY Modifier

Modifiers further specify the behavior of operators. For example, you can use the CASE modifier with an operator to specify that the case of a word be considered as a search element as well as the word itself.

Use the MANY modifier to count the density of words, stems, or phrases in a document and obtain a relevance-ranked score for retrieved documents. The more occurrences of a word, stem, or phrase in proportion to document text, the higher that document's score. Because MANY considers word density in relation to document text, a longer document with more occurrences of a word may score lower than a shorter document with fewer occurrences. You cannot use MANY with the AND, OR, or ACCRUE operators.

The NOT Modifier

Modifiers further specify the behavior of operators. For example, you can use the CASE modifier with an operator to specify that the case of a word be considered as a search element as well as the word itself.

Use the NOT modifier to search for documents in which information is not included.

Example. To find documents that contain the words “cat” and “mouse” but not the word “dog”, enter the expression:
cat, mouse <AND><NOT> dog

You can use the NOT modifier only with the AND and OR operators.

The ORDER Modifier

Modifiers further specify the behavior of operators. For example, you can use the CASE modifier with an operator to specify that the case of a word be considered as a search element as well as the word itself.

Use the ORDER modifier to express the explicit order in which search elements must occur in a specified phrase.

Example. To search for a phrase containing the word “President” followed by the word “Washington”, enter the following expression:

Simple Syntax: President <ORDER><PHRASE>Washington

Explicit Syntax: <ORDER><PHRASE>(President, Washington)

You can use this modifier with the NEAR/n operator

Search Operators

The ACCRUE Concept Operator

Concept operators combine the meaning of search elements so you can search for concepts.

Use the ACCRUE operator to retrieve documents that include at least one of the search elements you specify. You can use two or more words or phrases as your search elements. Verity scores retrieved documents - the more search elements found in a document, the better the document's score.

Simple Syntax. To search for documents most relevant to the words “computers” and “laptops”, enter the following expression:

computers<ACCRUE>laptops

Explicit Syntax. To search for documents most relevant to the words “computers” and “laptops”, enter the following expression:

<ACCRUE>(computers, laptops)

The AND Concept Operator

Concept operators combine the meaning of search elements so you can search for concepts.

Use the AND operator to retrieve documents that contain all the search elements you specify. Verity relevance-ranks documents retrieved with AND.

Example. To search for documents containing the words “pharmaceutical companies” and the word “stock”, enter the expression:

pharmaceutical companies AND stock

Verity retrieves only those documents containing all search terms and ranks them according to their score.

The NEAR Proximity Operator

Proximity operators indicate the relative location of specific words in the document. For Verity to retrieve a document, the words you specify must be in the same order in the document. When you nest proximity operators, use the operators with the broadest scope first.

Use the NEAR operator to search for documents that contain specified terms within close proximity to each other. Verity calculates document scores based on the proportion of instances found versus the size of the region containing the words. For example, if your query includes two words and those words are right next to each other in a document (thus composing a region two words long), the document score is 1.0. The document with the smallest region containing all search terms always receives the highest score. Verity does not retrieve documents scoring less than .75, since that score indicates that the search words are too far apart to be meaningful within the context of the document.

Unlike other proximity operators, the NEAR operator also calculates relative proximity and assigns scores based on its calculations.

To search for relevance-ranked documents that contain the words “war” and “peace” within close proximity, you can enter the following expressions:

Simple Syntax: war <NEAR> peace

Explicit Syntax: <NEAR> (war, peace)

Verity relevance-ranks documents retrieved with the NEAR operator.

The NEAR/n Proximity Operator

Proximity operators indicate the relative location of specific words in the document. For Verity to retrieve a document, the words you specify must be in the same order in the document. When you nest proximity operators, use the operators with the broadest scope first.

Use the NEAR/n operator to search for documents within **n** words of a second search term, where **n** is a variable between 1 and 1,024. If **n** is 1,000 or higher, enter the value of **n** without a comma. The Verity engine assigns document scores based on the relative distance between search terms, when the terms are separated by **n** words or fewer. Verity does not retrieve documents with terms separated by more than **n**

words. For example, if you use the expression NEAR/5 to find two terms within five words of each other, a document that has two terms within two terms of each other scores higher than a document that has two terms within five words of each other. Near/1 searches for terms that are next to each other.

You can use the NEAR/n operator with the ORDER modifier to perform ordered searches. An ordered search finds documents containing a search term within **n** terms of a second term when the order of the terms matches the order in the query.

The OR Concept Operator

Concept operators combine the meaning of search elements so you can search for concepts.

Use the OR operator to retrieve documents that have at least one of your search terms.

Example. To search for documents containing the word “computer” or “security”, enter the expression:
computer OR security

Verity relevance-ranks documents retrieved with the OR operator.

The PHRASE Proximity Operator

Proximity operators indicate the relative location of specific words in the document. For Verity to retrieve a document, the words you specify must be in the same order in the document. When you nest proximity operators, use the operators with the broadest scope first.

Use the PHRASE operator to search for documents that include a grouping of two or more words in a specific order. By default, Verity considers two or more words separated by a space to be a phrase.

Examples. To search for relevance-ranked documents containing the phrase “mission oak”, enter the expression:

Simple Syntax: mission oak -or- mission <PHRASE>
oak

Explicit Syntax: <PHRASE> (mission oak).

Verity does not relevance-rank the retrieved documents unless you use the MANY modifier.

Example. <MANY><PHRASE>(mission oak)

The STEM Evidence Operator

Evidence operators expand a search word into a list of related words to search for. When you use an evidence operator, Verity retrieves documents containing one or more occurrences of the words in the expanded word list.

Use the STEM operator to search for documents that include one or more variations of a specified word.

Example. To search for documents containing a variation of the word “generate”, enter the expression:

<STEM>generate

Verity finds all documents that contain stemmed variations of the word generate, including generation and generator. Verity does not relevance-rank the retrieved documents unless you use the MANY modifier.

Example. <MANY><STEM> generate.

The WILDCARD Evidence Operator

Evidence operators expand a search word into a list of related words to search for. When you use an evidence operator, Verity retrieves documents containing one or more occurrences of the words in the expanded word list.

Use the WILDCARD operator to define a character search string with variables that Verity uses to locate related word matches in documents.

Example. To search for documents containing words such as pharmaceutical, pharmacology, and pharmacodynamics, enter the expression:

<WILDCARD> pharmac*

Use either of these valid Wildcard characters to represent variable portions of your WILDCARD search string.

Character	Function	Example	Considerations
?	Specifies one of any alphanumeric character	?an locates ran, pan, can, and ban	Not special within [] or { }. For example: [?an] locates ?an while bank{?} locates bank?
*	Specifies 0 or more of any alphanumeric character	corp* locates corporate, corporation, corporal, and corpulent. You should not use * to specify the first character of a wildcard string.	Not special within [] or { }. For example: [corp*] locates corp* while bank{*} locates bank*?

WORD Evidence Operator

Evidence operators expand a search word into a list of related words to search for. When you use an evidence operator, Verity retrieves documents containing one or more occurrences of the words in the expanded word list.

Use the WORD operator to search for documents that include one or more instances of a specified word.

Example. To search for documents containing the word “compensation”, enter the expression:

```
<WORD>compensation
```

Verity does not relevance-rank the retrieved documents unless you use the MANY modifier.

Example. <MANY><WORD>compensation

N O T E Most administrators set up the system so that MANY and STEM are automatically applied to every content search.

C h a p t e r

5

Glossary of Terms

In This Chapter

This chapter provides definitions for several terms used in CyberDOCS 3.0.1.

Glossary

Access Rights

Rights such as Edit, Read and View that can be assigned to trustees for each document. To display a list of access rights given to a particular use or group, click the Access button on the Profile dialog box.

Attachment

Each document can have any number of attachments, which are essentially response documents or related documents - for example, notes on a project or automatic redline results.

Boolean Operators

Terms (operators) such as “AND”, “OR”, and “NOT” that can be used to expand or restrict a search. Named for George Boole, English mathematician and developer of the logic system that symbolically represents relationships between entities.

The Boolean search...

Would yield results of...

water AND fire

Documents which contain references to both water and fire

water OR fire

Documents which contain references to either water and fire

water NOT fire

Documents which contain references to water but not references to fire

Check In / Check Out

A feature that keeps track of documents users have copied from the system or locked on the system, noting when the documents will be returned.

Contents Searching / Full-Text Searching

The process of searching the actual contents of a series of documents in order to locate specific documents.

This function is also referred to as “Full-Text Searching”.

DOCS Open

Document Organization and Control System is an enterprise document management system that provides a secure infrastructure to store, locate, retrieve, and manage information across a network.

Document History

The file created by a feature that logs every activity performed in a document.

Document Profile

The system “library card” created by entering information on a profile form (dialog box) about each document stored in DOCS Open or CyberDOCS. This profile contains the information that can be used to search for documents.

Every document DOCS Open manages and maintains has a Document Profile associated with it that contains information such as Author, Document Name and Description. When you want to retrieve a document in a DOCS Open Library, you can compose a search request that locates the profile you or another user created.

Folders

Groups of related documents, Projects logically group other projects and related documents. A given document or subproject can be part of multiple projects.

Think of Projects as “folders” in which documents and subprojects are grouped. CyberDOCS lets you access the contents of Projects you have created or those that you have been given access to.

CyberDOCS and DOCS Open Projects are groups of related documents. Projects provide a handy way to group related documents for easy retrieval. For example, a project could be all the documentation related to a specific product, including requirement specifications, design specifications, marketing literature, and technical notes.

Full-Text Searching / Contents Searching

The process of searching the actual contents of a series of documents in order to locate specific documents.

This function is also referred to as “Contents Searching”.

HTML

Hypertext Markup Language is a language for indicating hypertext links and other features of a document through “markup”. The resulting document can be distributed through Web browsers over the Internet.

HTTP

Hypertext Transfer Protocol is a protocol for transferring hypertext documents and other resources.

Hit List

The name given to a list of documents shown on the search results page.

Library

DOCS Open assigns every Document Profile to a Library - a storage location for Document Profile information, including all tables related to the profile. On a large network, a DOCS Open administrator may set up multiple libraries.

With CyberDOCS, you work with a default library, but you can access any number of libraries that are available to you and can search for documents across any or all libraries.

Phrase and Proximity

Two types of complex full-text searches. They allow the user to search for phrase and words within a certain proximity of one another.

Profile Search

Allows the user to find documents by matching any fields filled out on a profile form stored in DOCS Open.

Protocol

A set of rules that determines the behavior of functional units in achieving communication.

Search Results

A list of documents and information about these documents, that meet the search criteria defined by the user.

Trustees

Trustees are users who have access to your document. You can assign each trustee different access rights ranging from view-only to full modification rights.

Version

Related documents attached to the same document profile. They allow DOCS Open/CyberDOCS user to keep track of the edit history of a document.

Index

A

access control **39**
 access rights **39**
 definition **88**
 template **40**
 accessing checked out documents **17**
 accessing documents from project **69**
 accessing projects **18**
 accessing Quick Searches **17**
 accessing recently edited documents **7, 18**
 ACCRUE concept operator **81**
 ActiveX **41**
 add projects and subprojects **29**
 AND concept operator **81**
 AND expression **76**
 angle bracket precedence expression **76**
 angle brackets **77**
 assigning rights **39**
 attachment
 definition **88**

B

basic concepts of DOCS Open **5**
 basic rules for content searching **72**
 Boolean operators
 definition **88**
 browser
 CyberDOCS 3.0 requirements **x**
 plug-in **4**

buttons
 table lookup **22**
 toolbar **8**

C

CASE modifier **76**
 CASE search modifier **79**
 Check In/Check Out
 definition **88**
 Check Out **61**
 checked out documents
 accessing **17**
 checking in **62**
 listing **65**
 checking in a document **62**
 comma precedence expression **76**
 commas in expressions **77**
 concept operators
 ACCRUE **81**
 AND **81**
 OR **83**
 content searching
 basic rules **72**
 full-text **73**
 hints **72**
 contents of project **12**
 contents searching
 definition **88**
 create icons **29**
 current library **7**

CyberDOCS

- access control feature **39**
- access rights **39**
- access templates **40**
- accessing projects **18**
- accessing Quick Searches **17**
- add existing document to project **29**
- adding new Quick Searches **25**
- applets **5**
- assigning rights **39**
- definition of project **27**
- entering information on the Search page **22**
- fields on the Search page **19**
- FulView viewer **41**
- HTML forms **46**
- installing Smart CheckIn/CheckOut plug-in **4**
- Java forms **46**
- Libraries page **34**
- library definition **35**
- logging in **2**
- login library **3**
- network name **2**
- New Document page **12**
- Options page **13**
- password **2**
- primary library **3**
- project contents **26**
- Project Contents page **27**
- Projects page **12**
- Quick Find feature **11**
- Quick Reference page **8, 10**
- Quick Search page **24**

- quick searches **10**
- recently edited documents **18**
- rights **39, 40**
- Search page **12, 19**
- Search Results page **46**
- subprojects **26**
- table lookup **22, 44**
- toolbar **8**
- Trustees **39**
- user name **2**
- workspace **9**

D

- date **36**
- date format **36**
- date format order **75**
- date range in searches **74**
- date searching syntax **75**
- DCOM **5**
- delete projects and subprojects **29**
- delimiters in expressions **77**
- displays **55**
- DOCS Open
 - basic concepts **5**
 - definition **89**
 - Document Profile **24**
 - Education Center **xi**
 - libraries **3**
 - Profile Search **24**
 - rights **40**
- DOCS Open libraries
 - Smart CheckIn/CheckOut **4**
- DOCSFusion Client API **5**

DOCSFusion Server **5**

document

- accessing **69**
- checking in **62**
- checking out **61**
- operations **50**
- retrieving **66, 67**
 - Java forms **67**
- status descriptions **52**

Document Check-In page **62**

Document Check-Out page **63**

Document Details page **50, 52, 61**

- fields/options **53**

document download

- Internet Explorer **3**

Document History

- definition **89**

Document History page **59**

Document Import **8**

Document Object Servers **66**

Document Profile **24, 52, 55**

- creating **31**
- definition **89**

Document Profile page **55, 61**

Document Upload page **66**

document viewer settings **41, 42**

documents

- accessing checked out **17**
- add to project **29**
- search for documents containing **73**

double quote precedence expression **76**

double quotes **74, 77**

- reserved words **77**

download FulView component **42**

download ScriptActive plug-in **42**

E

Edit Document Profile page **57**

Edit Profile page **57**

enhanced date searching **75**

evidence operators **76**

- STEM **84**
- WILDCARD **76, 84**
- WORD **76, 85**

explicit syntax

- use of double quotes **74**

Expressions

- precedence **76**

expressions

- AND **76**
- delimiters **77**
- use of commas **77**

F

fields

- Search page **19**

Folders

- definition **89**

format

- date **36**
- time **36**

full-text **43**

full-text searching

- definition **88**

full-text searching rules **73**

FulView **41**

installing **42**
using **43**

H

hit list

definition **90**

HTML

definition **90**

HTML forms **46**

document operations **51**

HTTP

definition **90**

I

infix notation **76**

install Smart Check In/Check Out **4**

Internet Explorer

document download **3**

installing FulView **42**

known problem **3**

J

Java applets **5**

Java forms **46, 67**

Document operations **51**

L

Libraries page **34**

library

definition **35, 90**

DOCS Open **3**

primary **3**

logging in **2**

login

library **3**

specifying additional information **45**

M

MANY modifier **73, 76**

MANY search modifier **80**

Microsoft Internet Explorer **3**

Document Object Servers **69**

Retrieving Documents **66**

viewing document contents **69**

modifiers

CASE **76**

MANY **76**

NOT **76**

ORDER **76**

N

NEAR proximity operator **82**

NEAR/n proximity operator **82**

Netscape Navigator

installing FulView **42**

Retrieving Documents **66**

viewing document contents **69**

network name **2**

New Document page **12, 31**

new Quick Search **25**

NOT modifier **76**

NOT search modifier **80**

O

operators **76**

Options page **13**

accessing **36**
 OR concept operator **83**
 order
 Parentheses indicate **78**
 ORDER modifier **76**
 ORDER search modifier **80**

P

parentheses
 use of commas within **77**
 parentheses precedence expression **76**
 password **2**
 phrase
 definition **90**
 PHRASE proximity operator **83**
 plug-in for web browser **4**
 precedence expressions **76, 78**
 prefix notation **76**
 primary library **3**
 Profile **55**
 Profile Search **24**
 definition **90**
 project
 add as subproject **30**
 definition **27**
 Project Contents **8**
 project contents **12, 26**
 Project Contents page **27**
 project management **29**
 Projects
 definition **89**
 projects

accessing **18**
 Quick Search **16**
 Projects page
 accessing a document **69**
 accessing projects **18**
 project contents **26**
 project management **29**
 subprojects **26**
 protocol
 definition **90**
 proximity
 definition **90**
 proximity operators
 NEAR **82**
 NEAR/n **82**
 PHRASE **83**

Q

QBE **24**
 Query-by-Example **24**
 Quick Find **11**
 Quick Reference page **8, 10**
 accessing **16**
 accessing a document **69**
 accessing checked out documents **17**
 Quick Search **10**
 adding new **25**
 Quick Search page **24**
 accessing **12**
 accessing checked out documents **17**
 Quick Searches
 accessing **17**

R

recently edited documents **7, 18**

Recently Edited Documents page **60**

reserved words

use of double quotes **77**

retrieve document **52**

retrieving

documents

HTML Forms **67**

documents, with Java forms **67**

retrieving documents **66**

HTML forms **67**

rights **39**

assigning **39**

DOCS Open **40**

DOCS Open revokes **39**

templates **40**

S

ScriptActive **42**

search

libraries **34**

search modifiers

CASE **79**

MANY **80**

NOT **80**

ORDER **80**

Search page **12**

entering information **22**

fields **19**

Profile Search **24**

searching CyberDOCS libraries **19**

search results

definition **91**

Search Results page **46**

search syntax

MANY modifier **73**

STEM operator **73**

searching

date range **74**

use of double quotes **74**

searching for documents **7, 8**

security **39**

setting security levels **29**

Smart Check In/Check Out **68**

Smart CheckIn **4**

Smart CheckOut **4**

specifying additional login information **45**

STEM **76**

STEM evidence operator **76, 84**

STEM operator **73**

subproject

add existing project **30**

adding or deleting **29**

detailing **27**

subprojects

list within project **26**

T

table lookup **22, 44**

SQL wildcards **45**

technical support

PC DOCS fax number **xi**

PC DOCS internet e-mail address **xi**

time **36**

time format **36**

toolbar **8**

Trustees **39**

definition **91**

U

Uniform Resource Locator (URL) **2**

user name **2**

V

Verity

angle brackets **77**

basic rules for content searching **72**

commas in expressions **77**

content searching hints **72**

delimiters in expressions **77**

documents containing **73**

double quotes **77**

full-text content searching **73**

full-text searching rules **73**

infix notation **76**

parentheses indicate order **78**

precedence expressions **78**

prefix notation **76**

use of commas within parentheses **77**

use of double quotes for reserved
words **77**

version

definition **91**

View Document **69**

viewers

FulView **41**

W

WILDCARD evidence operator **76, 84**

WORD evidence operator **76, 85**