

## EXCLUDING DOCUMENTS FROM VERSIONING

### Selecting Criteria for Exclusion

A group of options, called Exclude Documents, allows you to exclude certain categories of documents from versioning. While you continue versioning whatever you need, these options can prevent unnecessary versioning—thus saving disk space and preventing clutter.

As with all options concerning versioning except Menu commands, Exclude Documents options are set individually for each application. In other words, you select an application that is set to be versioned and exclude categories of documents from that versioning.

Documents can be excluded from versioning on the basis of four criteria: folder, name, size, and color/label. You can use any one of these criteria, or any combination of them, to limit the documents that will be versioned. A single criterion is sufficient to exclude a specific document from versioning; only documents that have not been excluded by any criterion will be versioned.

To access the criteria for excluding documents, select an application from the Main Screen. Click on App Settings..., and when the new dialog box appears, click on Exclude Documents.... The Exclude Documents dialog box will be displayed.

The remainder of this topic discusses in turn each criterion for exclusion available from this dialog box.

### Excluding by Folder

You can exclude documents in any existing folder from versioning, whether that folder is on your hard disk, a separate disk drive, a floppy disk, or a network server.

To exclude a folder from versioning, click on Folder... in the Exclude Documents dialog box. The Exclude by Folder dialog box will appear.

### Excluding vs. Versioning

Note that you have a choice between excluding or versioning documents in specific folders. If you are going to version the majority of your folders and exclude a small number, it will probably be easier to select folders to be excluded, by means of the first button. But if you are going to version a small number of folders and exclude the majority, it will probably be easier to select folders to be versioned, by means of the second button. There is no real limit to the number of folders you can exclude, but performance may decrease if large numbers are excluded. Try to keep the list reasonable.

After selecting the button indicating whether folders you will select are to be excluded or versioned, click on Add Folder... . The Add Folder dialog box appears, allowing you to view the folders on your various disks and select folders for exclusion. When you see a folder you want to exclude, simply select it and hit the Add Folder button. When you are done adding folders for exclusion, hit the Done button.

### Excluding by Name

Another way to exclude documents from versioning is to use their names. To do this, you specify a combination of letters/characters in the names of the documents. Then you tell Versionary to version—or to exclude from versioning—all documents within a selected application that begin with, contain, or end with those characters, or conversely, all documents that don't begin with, don't contain, or don't end with those characters.

To exclude documents based on their names, click on Name... in the Exclude Documents dialog box. The Exclude by Name dialog box will appear.

Click on one or more of the three checkboxes to indicate whether the characters you specify are to be considered at the start, within, or at the end of document names. Then click on the radio buttons to specify whether versioning should or should not occur based on the presence of the characters. Finally, specify the characters themselves in the text boxes.

### Excluding by Size

You may be concerned that versions of your largest documents will consume too much disk space, or that versions of your smallest documents will cause too much clutter. If either of these possibilities is of concern, you can exclude from versioning all documents in a selected application that are larger or smaller than a specific number of kilobytes.

To exclude documents of a certain size from versioning, click on Size... in the Exclude Documents dialog box. The Exclude by Size dialog box will appear.

Note that the default lower limit is zero and the default upper limit is infinity, the effect of each being not to exclude any documents on that end of the scale. You can leave either of these non-excluding limits (zero or infinity) as is while setting a limit on the opposite end of the scale, if you want.

Decide on the lower and/or upper limits, in kilobytes, that you want to set and type that number in the applicable box.

### Excluding by Color/Label

If your Finder has a color or label menu, (ie, if you have a color monitor displaying 16 or more colors or if you are running Apple System 7), you can exclude documents from versioning based on their color (or label) in the Finder. This is a two-step process, involving coordination between the way documents are colored/labeled and the way they are excluded. (In deciding how to coordinate the coloring of documents and the Exclude by Color/Label option, you may want to take into consideration how you color your versions as well as your regular documents. For more information, see Coloring Your Versions under the Help topic, Version Preferences.)

To exclude documents from versioning based on their color, click on Color/Label... in the Exclude Documents dialog box. The Exclude by Color/Label dialog box will appear.

You will be presented with the eight colors or labels in your Finder's color or label menu. Click on the check boxes next to those colors or labels you want versioned. For instance, if you only want green and blue documents versioned, click on the checkboxes next to the green and blue, but leave all other checkboxes unchecked.