

User's Guide

 **NOVELL**®

For WINDOWS

USING ENVOY

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SoftSolutions®

DOCUMENT MANAGEMENT SOFTWARE V 4.1

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Introduction

SoftSolutions® 4.1 for Windows is the innovative Document Management Software (DMS) from Novell, Inc. The greatest asset of any organization is information. SoftSolutions allows locating and utilizing your information assets without knowing specific document names, applications, or document locations. SoftSolutions streamlines workflow by eliminating time wasted in recreating and searching for documents that can be lost in a maze of network drives and directories.

Each department, workgroup and individual in an organization has unique document management needs. SoftSolutions' open architecture design accommodates those needs while maintaining enterprise-wide DMS standardization. SoftSolutions can simultaneously access information from a variety of Windows, DOS or Unix applications so workgroups are not confined to platform limitations. Furthermore, SoftSolutions can manage dispersed information located on LANs, Unix systems, remote offices, laptops, notebooks, and home computers. All this can be done without compromising an organization's ability to collaborate and share information. The increased capability of workgroups and individuals to share collective knowledge will dramatically improve the quality of your products and services.

About This Manual

The *User's Guide* contains fourteen sections, two appendices and an index:

1. Introduction
2. Getting Acquainted
3. Document Desktop
4. Document Profile
5. Integration with Applications
6. Integration with SoftSolutions Retrieve/Launch
7. Janitor
8. Mark, Launch & EZLaunch
9. Object Linking and Embedding (OLE) 2.0
10. Personalizing SoftSolutions' Look
 - ▶ Colors
 - ▶ Customize Results List
 - ▶ Fonts
 - ▶ General Options
 - ▶ Screen Definition
 - ▶ SpeedButtons
11. Portable Mode

12. Remote Document Server (RDS)
13. Searching
14. Version Control

Appendices:

- A. Keys & Options
- B. Terms Glossary

The *Introduction* contains the following:

- An explanation of SoftSolutions Document Management System
- A brief explanation of the contents of the *User's Guide*
- Documentation conventions used throughout this guide

Getting Acquainted briefly introduces you to:

- Using SoftSolutions in Windows
- Becoming familiar with the SoftSolutions Window
- Becoming familiar with the fundamental operations of logging in, canceling operations, using HELP in SoftSolutions, and exiting SoftSolutions

The remainder of the sections in the *User's Guide* contain the bulk of the documentation. These sections contain information on performing the everyday operations in the various users' windows and dialog boxes.

Document Desktop and *Document Profile* document the alternative methods of user interface with SoftSolutions.

Personalizing SoftSolutions' Look explains how to use the following windows and dialog boxes to customize various aspects of SoftSolutions:

- Colors
- Customize Results List
- Fonts
- General Options
- Screen Definition
- SpeedButtons

Appendices include:

- *Keys & Options* which describes the SoftSolutions cursor movement and function keys.
- *Terms Glossary* which provides an alphabetical listing of words and phrases as they pertain to SoftSolutions.

Documentation Conventions

A few documentation conventions are used to improve readability and enhance understanding.

bolded text	Field names (<i>e.g.</i> , Name field, Copy out document field, Document Security field, Document Number field).
ALL CAPS	Window and dialog box names (<i>e.g.</i> , DOCUMENT PROFILE window, CHECK OUT dialog box); filenames and keyboard entries (<i>e.g.</i> , WORD %P%F).
{Key Name}	Key references are enclosed within <i>Lenticular Brackets</i> , usually as they appear on an IBM® PC keyboard. For example, the “a” key is represented as {A}, the “escape” key is represented as {Esc}, and the “plus” key as {+}.
bold and <u>underline</u>	SoftSolutions <i>options</i> selected from the menu bar in Windows. The bolded and underlined letter represents the mnemonic letter used to choose an option using the keyboard. When using mnemonic letters to perform a step, the step is always preceded by also pressing the {Alt} key. (<i>e.g.</i> , {Alt}{X} chooses the Search Full- <u>Text</u> option).
“monospaced text”	SoftSolutions error and confirmation messages (usually within quotes), and example texts.
<i>[Italicized in Brackets]</i>	“Place holders,” which are words that identify information to be supplied by the user (<i>e.g.</i> , C:[<i>Filename</i>]).

Getting Acquainted

Getting Acquainted introduces you to:

- Using SoftSolutions in Windows
- Becoming familiar with the SoftSolutions window
- Becoming familiar with the fundamental operations of logging in, canceling operations, using HELP in SoftSolutions, and exiting SoftSolutions

Using SoftSolutions in Windows

Since SoftSolutions 4.1 for Windows operates in the Windows environment, it uses the standard Windows rules for choosing icons, menus, and menu items. The following information should help you to become familiar with using SoftSolutions in Windows.

Using the Mouse

Unless otherwise noted, mouse instructions refer to the left button. If the mouse has been remapped or a left-hand mouse is being used, use the right button.

When using the mouse, steps may involve performing the basic skills of *pointing*, *clicking*, and *dragging*.

Point	Move the mouse to place the pointer (arrow) over an item.
Click	Move the mouse to place the pointer (arrow) over an item and then quickly press and release the mouse button.
Double-click	Move the mouse to place the pointer (arrow) over an item and then quickly press and release the mouse button twice.
Drag	Hold down the mouse button as the pointer is moved.

Choosing Commands

To choose a command from a menu, you can use the mouse or use mnemonic letters. Mnemonic letters are included with steps to allow quick keyboard access. These letters are **bolded** and underlined throughout the manual. For example, “F” for **File**. When using mnemonic letters to perform a step, the step is always preceded by pressing the [Alt] key.

For example, if the step states “Choose **E**xit from the **F**ile menu to exit SoftSolutions,” use the mouse or keyboard as described below to perform the step.

Mouse


1. Point to the **F**ile menu, then click the left mouse button.
2. Point to the **E**xit command, then click the left mouse button. SoftSolutions is exited.

Keyboard

1. Press the {Alt} key to activate the menu bar. Then press “F” to open the **F**ile menu.
2. Press “X” to choose the **E**xit command. SoftSolutions is exited.

Shortcuts

Keyboard Shortcuts

In the documentation, the keyboard icon  is used to indicate a keyboard function (shortcut) for performing an operation. These shortcuts include function keys and accelerators. For example, rather than choosing **E**xit from the **F**ile menu to exit SoftSolutions, {Alt}{F4} can be used. Rather than choosing **S**earch from the **S**earch menu to search for a Profile in the DOCUMENT PROFILE window, {Ctrl}{S} can be used.

To perform this command:

Press these accelerators:

SoftSolutions


Access version records	{Ctrl}{I}
Add a record	{Ctrl}{A}
Mark a document	{Ctrl}{M}
Open a document	{Ctrl}{O}
Preview a document	{Ctrl}{V}
Search for a record	{Ctrl}{S}
View a personal worklist	{Ctrl}{W}
View the search results	{Ctrl}{U}

Clipboard

Copy to Clipboard	{Ctrl}{Ins}
Cut to Clipboard	{Shift}{Del}
Paste from Clipboard	{Shift}{Ins}

<i>To perform this command:</i>	<i>Use these function keys:</i>
Exit SoftSolutions	{Alt}{F4}
Access SoftSolutions-based HELP	{F3}
Access Windows-based HELP	{F1}
Return to the DOCUMENT PROFILE	{F7} or {Esc}

Mouse Shortcuts

The mouse icon  is used to indicate a mouse function (shortcut) for performing an operation. These shortcuts include SpeedButtons. For example, rather than choosing **A**dd from the **F**ile menu to add a Profile in the DOCUMENT PROFILE window, the “Add” SpeedButton may be chosen.

<i>To perform this command:</i>	<i>Choose this SpeedButton:</i>
Add a Profile	Add
Change Datasets	Change Dataset
Open a document	Open
Preview a document	Preview
Search for a document (<i>using Profile data only</i>)	Search
Search for a document (<i>w/Profile or full-text data</i>)	Search Full-Text
View a personal worklist	Worklist

Becoming Familiar with the SoftSolutions Window _____

On the following page is an illustration of the SoftSolutions DOCUMENT PROFILE window. The key components of the window have been identified. Following is a brief description of each component.

drop-down menu	Menu of SoftSolutions options, chosen from the menu bar.
field	A location in the window where information is entered and displayed. Fields are indicated by a field “name.”
field name	Each field is associated with a name. This name may indicate the type of information stored in the field.
look-up button	Displays a SoftSolutions LOOK-UP table containing a valid code listing. Look-up buttons are available for any field that requires a code entry.

maximize button	Enlarges the SoftSolutions window to fill the monitor.
menu bar	Contains a list of SoftSolutions drop-down menus.
minimize button	Reduces the SoftSolutions window to an icon.
scroll bars	Windows scroll bars are displayed to the right or the bottom of the window when an entire SoftSolutions window cannot be displayed on the monitor. The scroll bars are used to view different portions of the SoftSolutions window. With the mouse, the display may be scrolled by clicking the scroll bar or the scroll arrow, or by dragging the scroll box.
SpeedButton bar	With the help of the mouse, provides quick access from the DOCUMENT PROFILE window to frequently used SoftSolutions commands.
status bar	Displays the current mode (<i>e.g.</i> , “Adding,” “Select Option,” “Changing”). When performing a search in the DOCUMENT PROFILE window, the status bar also contains the Search Scope.
control-menu box	Contains a list of system options such as Maximize, Minimize, Open, Close, and Restore.
title bar	Displays “SoftSolutions” and the name of the current window or dialog box. In the DOCUMENT PROFILE window, the current Dataset ID is displayed.

SoftSolutions for Windows Pointer Shapes

The Windows pointer will assume one of the following shapes:



Shape of the mouse pointer when in the selection mode.

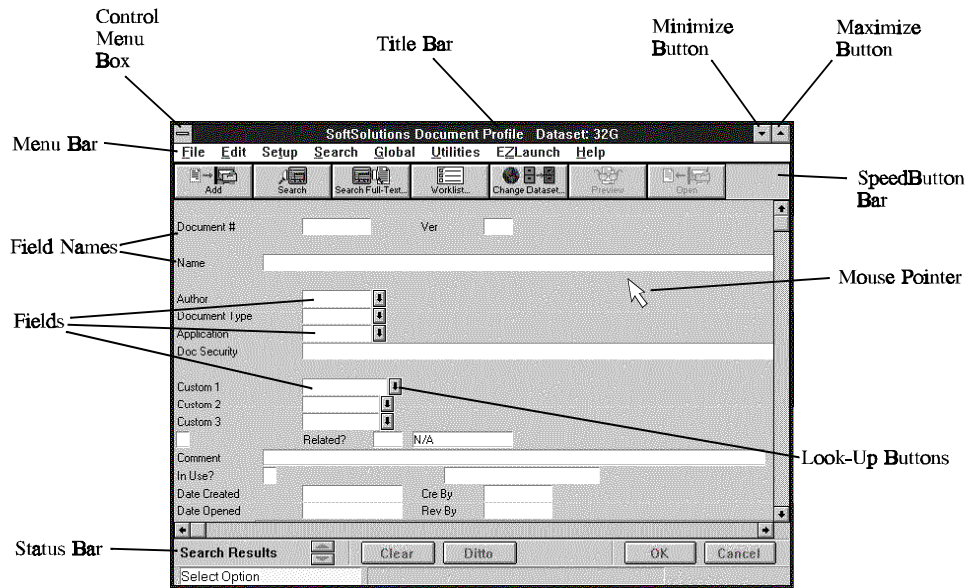


Shape of the mouse pointer when waiting for SoftSolutions to perform a function.



Shape of the mouse pointer when placed in a data entry field.

SoftSolutions Document Profile Window



Fundamental Operations

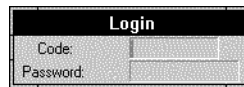
The following fundamental SoftSolutions operations are discussed in this section:

- Logging In *p. 10*
- Login Switches *p. 11*
- Changing the Password *p. 18*
- Canceling Operations In SoftSolutions *p. 19*
- Using HELP *p. 19, 21*
- Exiting SoftSolutions *p. 22*

Logging In

SoftSolutions can be started by double-clicking on the SoftSolutions icon or by choosing **R**un from the **F**ile menu, typing “[*Programs Directory*]\SOFTSOLW” where [*Programs Directory*] is the full path to the SoftSolutions programs directory, and pressing (Enter) or choosing OK. Optional login switches are also available. (See “Login Switches” on page 11 for additional information.)

When starting SoftSolutions, the LOGIN window is displayed. Contained in the LOGIN window is the Organization Name to which the copy is registered and the Serial Number. This information is recorded at the time SoftSolutions 4.1 is initially installed.



Access: Log into SoftSolutions

In the LOGIN window, perform the following:

1. Enter the user code assigned to you by the system administrator in the **Code** field and press (Tab).
2. Enter the password assigned to you by the system administrator in the **Password** field and press (Enter).
 - The password can be up to 10 characters.
 - The password can be changed. (See “Changing the Password” on page 18 for additional information.)
 - To maintain security, the password is *not* displayed.
 - An error indicating that NETWARE.DLL cannot be found is displayed if the /NOVMAP is used in an OAM command line and the *Windows* setup does not have “NetWare” specified as the network.

NOTE

If a dataset suddenly cannot be accessed and the error “Could not send data to server” (or something to that effect) is reported, check the SEM screen on the server. If the message “No space left on device” is displayed, first check the amount of free disk space on the volume which holds the data directory. If there is a reasonable amount of free space, do an “NDIR *.*” command in the data directory. Most likely, one or more of the data files has an owner of “N/A.” This means that the user who previously held ownership of the file has been removed from the *NetWare* Bindery. *NetWare* prevents SoftSolutions from writing to a file which does not have a valid owner. Similar problems may occur in datasets without a SEM, but the error will be different. The error may be “PS.KDT - Write on end error.”

Login Switches

To speed up entry into SoftSolutions, “switches” may be included on the command line set up for the SoftSolutions for Windows icon. These switches are optional and can be used as needed. The switches are:

/DATA=	/ID=	/JANITOR	/POR
/DOCNUM=	/IMPORT	/NETPASS=	/USER=
/EXIT	/INDEX	/PASS=	/VERIFY

In the following login example, switches are used. Any one or more of these switches can be used in any order to log into SoftSolutions.

```
G:\SS41\SOFTSOLW/ID=RVM/USER=RVM/PASS=NEW/DATA=G:\SS41\DATA\SOFTSOL
```

/DATA=

SoftSolutions stores its “data” files in a directory known as the data directory. When logging in to SoftSolutions, the location of this data directory is indicated in one of two ways:

- 1) use the /DATA= switch, which is followed by the dataset network location of the SoftSolutions data files; or
- 2) place the dataset network location in the “DATAPATH” ASCII text file located in the SoftSolutions programs directory.

The typical format for DATAPATH is:

```
[Data Directory]:[Dataset ID]
```

An example of a DATAPATH for SoftSolutions 4.1 is “G:\SS41\DATA:NY1,” where the [Dataset ID] is “NY1.” This Dataset ID is defined in the CONTROL FILE window. When first installing SoftSolutions, the default Dataset ID is “SOFTSOL.” The [Data Directory] is “G:\SS41\DATA.” This is the directory in which the data files are located. Drive mapping is *not* performed on this path.

If a SoftSolutions SEM is used, the format for DATAPATH is:

[Server]:[Object]:[Dataset ID]:[Name Service]

Based on the [Name Service], the [Server] and [Object] must contain specific information. [Dataset ID] is replaced with the Dataset ID defined in the CONTROL FILE window. The default is “SOFTSOL” when first installing SoftSolutions. The [Dataset ID] and [Name Service] components may be in upper or lowercase.

The following table is provided to explain the [Object] and [Server] components of the DATAPATH based on the [Name Service].

Name Service		
NWB (<i>NetWare Bindery</i>)	Required	The socket number to be used on the server. If no socket number is defined, the SoftSolutions designated socket number is used. The default should be used unless more than one Dataset resides on a single server. In such instances, <i>one</i> of the Datasets should use the default socket number. The remainder of the Datasets on the same server must be assigned a unique socket number.
IN (<i>Internet</i>)	Defaults to the machine on which the client software is running.	<i>Internet</i> service name or socket number for server. The default is “SS.”
FIL (<i>File Services</i>)	Not required	None

Some examples:

FS1:NY1:NWB — NWB name for a dataset called “NY1” on server “FS1.”
Notice that the default *[Object]* (socket number) is used.

FS2:32765:NY2:NWB — NWB name for a dataset called “NY2” on server “FS2”
accessed via socket 32765.

SPIKE:2094:KPS:IN — IN name for a dataset called “KPS” on the server
“SPIKE” accessed via the *[Object]* (socket number) 2094.

/DOCNUM=

This switch allows a particular document's Profile to be immediately displayed upon *first* accessing the SoftSolutions DOCUMENT PROFILE window. The /DOCNUM= switch is followed by a Document Number. If a user does not have rights to the Profile, or if the Document Number is invalid, the Profile does *not* display.

/EXIT

The /EXIT switch is used to exit SoftSolutions at a specified time or after a specified period of idle time. This switch can be used with the /ID=, /USER=, /PASS=, /IMPORT, /INDEX, /JANITOR, and /DATA= switches. When used with the /IMPORT and /JANITOR switches, the respective utility is exited upon completion of the operation. When used with the /INDEX switch, the SoftSolutions Indexer is exited when all of the indexing requests have been processed.

The /EXIT switch can also be used to exit the Indexer at a specified time. This is done by using the switch /EXIT=*HH:MM* replacing *HH:MM* with a specific time in 24-hour format. For example, SOFTSOLW/INDEX/EXIT=23:30 will exit the Indexer soon after 11:30PM. At 11:30PM, the Indexer will either complete the request on which it is currently working or complete the 2-minute waiting period before exiting. Additionally, the /EXIT=*HH:MM* switch can be used without the /IMPORT, /INDEX, or /JANITOR switch to exit the user from any normal SoftSolutions window at a specified time if no operation is being performed at that time.

Lastly, the /EXIT switch can be used to exit users from SoftSolutions if no operation is performed for a specified number of minutes. This is done using the switch /EXIT=*mm* replacing *mm* with the number of minutes. For example, SOFTSOLW/EXIT=10 will exit the user from SoftSolutions if the cursor sits idle for 10 minutes without choosing an option.

/ID=

The /ID= switch is followed by a Workstation ID (up to eight characters), which is used by the WORKSTATION window to determine the location of temporary files, the location to which echoed files are saved, and the maximum size of the directory used for echoing. This switch can be placed in an icon's command line. If the /ID= switch is *not* used, SoftSolutions uses a generic configuration associated with the default ID of "(MSWIN)."

For easier management, file attributes should be checked before selecting a Workstation ID naming methodology. Examples:

```
/ID=[Network Address]
```

- The DOS network address is eight characters or less.

```
/ID=[Initials]
```

```
/ID=[Unique Workstation Numbers]
```

/IMPORT

The /IMPORT switch is used for accessing the IMPORT PROFILED DOCUMENTS utility directly rather than by accessing it from within SoftSolutions' Utilities menu. This switch can be used with the /ID=, /USER=, /PASS=, /EXIT, and /DATA= switches. When using the /IMPORT switch without the /EXIT switch, the DOCUMENT PROFILE window automatically returns when the operation is completed. When used with the /EXIT switch, SoftSolutions is automatically exited. The /IMPORT switch may be followed by a directory specification (*e.g.*, /IMPORT=F:\DOCS), indicating the location of the documents to be imported. If no directory is defined, the user is prompted for a directory.

If a user who does not have access to the IMPORT PROFILED DOCUMENTS window attempts to use the /IMPORT switch, error 676 is displayed and the DOCUMENT PROFILE window is displayed.

/INDEX

This switch is designed to run SoftSolutions' Indexer utility directly rather than by accessing it from within SoftSolutions' Utilities menu. This is useful when a workstation is dedicated to performing only indexing. This utility can be protected using screen security to prevent unauthorized use.

This switch can be used with the /ID=, /USER=, /EXIT, /PASS=, and /DATA= switches. When using the /INDEX switch, SoftSolutions is exited immediately upon exiting the Indexer.

This switch should be reserved for use only by the system administrator.

If a user who does not have access to the Indexer utility attempts to use the /INDEX switch, the error "User does not have access to this program." is displayed.

/JANITOR

The /JANITOR switch is used for entering the JANITOR directly rather than by accessing it from within SoftSolutions' Utilities menu. This switch can be used with the /ID=, /USER=, /PASS=, /EXIT, and /DATA= switches. When using the /JANITOR switch without the /EXIT switch, the DOCUMENT PROFILE window automatically returns when the JANITOR is completed. When used with the /EXIT switch, SoftSolutions is exited.

This switch can be used to force users to run the JANITOR utility on the Echo Location defined in the WORKSTATION window.

If a user who does not have access to the JANITOR utility attempts to use the /JANITOR switch, the error "User does not have access to this program." is displayed.

/NETPASS=

The /NETPASS= switch is followed by a password of up to 16 characters, which is used by SoftSolutions for access to other file servers. When a document to be accessed from within SoftSolutions is located on a server to which a user is not currently attached, SoftSolutions tries to automatically establish a temporary file server attachment. This is done using the user code used to log into the current server and the password following the /NETPASS= switch. If the /NETPASS= switch is not used or the user/password combination is *not* valid, the [FILE SERVER] LOGIN box is displayed and prompts the user for a valid user/password combination.

If files are spread across several file servers, the /NETPASS= login switch should be used for Indexers because keyboard interaction with the [FILE SERVER] LOGIN box is not possible when an Indexer is running.

NOTE

If a given user has the same user/password combination on each file server to which access is needed, the [FILE SERVER] LOGIN box need not display. The attachment/detachment with file servers during document accessing is transparent to the user.

CAUTION

If the /NETPASS= switch and its accompanying password are placed in the icon's command line, security of the password can be compromised.

/PASS=

The /PASS= switch is generally used in an icon's command line with the /USER= switch to save the step of entering the password at the keyboard during login. The /PASS= switch is followed by a password of up to 10 characters initially defined in SoftSolutions by the system administrator.

If the password following the switch is invalid, the SoftSolutions LOGIN window prompts for *both* the user code and password.

If the /PASS= switch is used, the /USER= switch must also be used. However, the /PASS= switch does *not* need to be used if the /USER= switch is used (then only entry of the password is required in the LOGIN window).

The password can be changed when logging in to SoftSolutions. To change the password, the /PASS= switch cannot be used.

CAUTION

If the /PASS= switch and its accompanying password are placed in an icon's command line, security of the password can be compromised.

/POR

The /POR switch indicates that SoftSolutions is being used in Portable Mode. This switch can be used with the /DATA=, /DOCNUM=, /EXIT, and /USER= switches. The /DATA= switch is followed by the path to the directory in which the documents and their corresponding *[Document Number].PRO* files are located. If no documents exist, the /DATA= switch is followed by the path to which documents created are to be placed while in Portable Mode.

/USER=

The /USER= switch is generally used in an icon's command line to save the step of entering the user ID code at the keyboard during login. The switch is followed by a user code of up to eight characters defined in SoftSolutions by the system administrator.

Using the `/USER=` switch, you can specify that the user code should be obtained from the network. Currently, this is only available for *Novell NetWare* (DOS and Windows only), and *Unix*. To obtain the code from the *NetWare Bindery*, the switch is `/USER=%NWB`. To obtain the code from a *Unix* operating system, the switch is `/USER=%OS`. When using the `/USER=` switch in one of these two manners, a password is not required for accessing SoftSolutions.

NOTE

When using `/USER=%NWB` in a DOS batch file, the format must be `/USER=%NWB`. “NWB” must be preceded by two percent signs (`%%`), rather than a single percent sign (`%`).

- When `/USER=%NWB` is used to log into SoftSolutions and the *Novell* user code is more than eight characters, the error “Invalid User/Password” is displayed.

If the `/USER=` switch is *not* used, if the code following the switch is invalid, or the code cannot be obtained from the *NetWare Bindery* or the *Unix* operating system, the SoftSolutions LOGIN window prompts for both the user code and password.

/VERIFY

The `/VERIFY` switch is used to access the VERIFICATION utility. This switch can be used with the `/USER=`, `/PASS=`, and `/DATA=` switches. When using the `/VERIFY` switch, SoftSolutions is exited immediately upon exiting the VERIFICATION utility.

This switch should be reserved for use only by the system administrator.

If a user who does not have access to the VERIFICATION utility attempts to use the /VERIFY switch, the error “User does not have access to this program.” is displayed.

The following table indicates all of the valid switch combinations:

	D a t a	D o c u m e n t	E x i t	E x i t = H H M M	E x i t = M M	I D	I m p o r t	I n d e x	J a n i t o r	N e t p a s s	P a s s	P o r	S n o w	U s e r	V e r i f y
Data	-	Y	Y	Y	Y	Y	Y	Y	Y	Y	Y	n	Y	Y	Y
Docnum	Y	-	Y	Y	Y	Y	Y	n	Y	Y	Y	Y	Y	Y	Y
Exit	Y	Y	-	n	n	Y	Y	Y	Y	Y	Y	n	Y	Y	n
Exit=HHM	Y	Y	n	-	n	Y	Y	Y	Y	Y	Y	Y	Y	Y	n
Exit=MM	Y	Y	n	n	-	Y	Y	Y	Y	Y	Y	Y	Y	Y	n
ID	Y	Y	Y	Y	Y	-	Y	Y	Y	Y	Y	n	Y	Y	Y
Import	Y	Y	Y	Y	Y	Y	-	n	n	Y	Y	n	Y	Y	n
Index	Y	n	Y	Y	Y	Y	n	-	n	Y	Y	n	Y	Y	n
Janitor	Y	Y	Y	Y	Y	Y	n	n	-	Y	Y	n	Y	Y	n
Netpass	Y	Y	Y	Y	Y	Y	Y	Y	Y	-	Y	n	Y	Y	n
Pass	Y	Y	Y	Y	Y	Y	Y	Y	Y	Y	-	n	Y	Y	Y
Por	n	Y	n	Y	Y	n	n	n	n	n	n	-	Y	Y	n
Snow	Y	Y	Y	Y	Y	Y	Y	Y	Y	Y	Y	Y	-	Y	Y
User	Y	Y	Y	Y	Y	Y	Y	Y	Y	Y	Y	Y	Y	-	Y
Verify	Y	n	n	n	n	Y	n	n	n	n	Y	n	Y	Y	-

Changing the Password

Each password may initially be the same as the user code. This is done in the USERS window. Perform the following steps in the SoftSolutions LOGIN window to change the password:

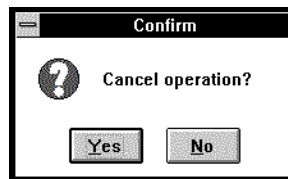
1. Enter a valid user code in the **Code** field and press (Tab).
2. Type the password in the **Password** field and immediately choose Chg Passwd.

The password cannot be changed when using the /PASS= switch.

- The password can be up to 10 characters.
 - To maintain security, the password is *not* displayed.
 - The CHANGE PASSWORD dialog box is displayed.
3. Enter the new password and press {Enter}.
 - SoftSolutions prompts for reentry of the new password. This ensures the password is correctly entered.
 4. Re-enter the new password and press {Enter}. **One** of the following occurs:
 - a. If the password entered the second time does not match the first entry of the new password, error 509 is displayed and the password is *not* changed. Choose OK and SoftSolutions is accessed using the old password.
 - b. If both new entries match, SoftSolutions indicates the password is being updated for the next login. SoftSolutions is then accessed.
 - The password is not available for viewing in SoftSolutions. If the password is forgotten, the system administrator must assign a new password.

Canceling Operations In SoftSolutions

Pressing the {Esc} key or choosing Cancel cancels any operation in SoftSolutions. Depending on the SoftSolutions settings, a CONFIRM message box may display when pressing {Esc} or choosing Cancel. Choose **N**o to cancel the exit and remain in the window in the selected mode. Choose **Y**es to confirm cancellation of the operation. Any information entered in the window is *not* saved.

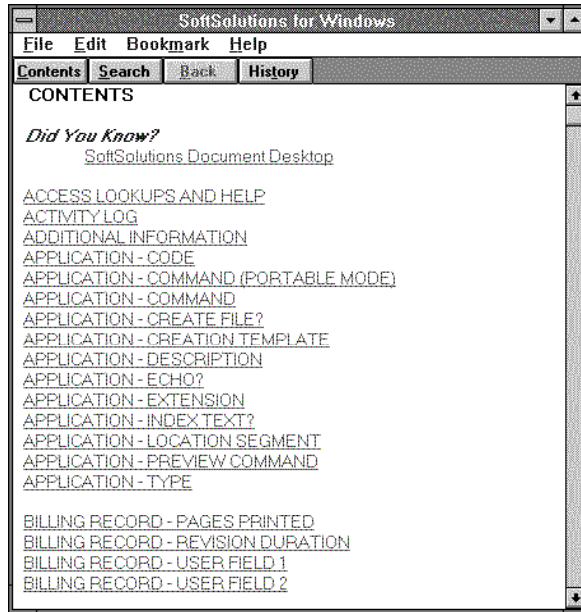



Using HELP

While in SoftSolutions, HELP is available for SoftSolutions in both the SoftSolutions and Windows formats. Access HELP anytime, especially when first using SoftSolutions.

Invoking HELP

Windows-based HELP. Windows-based HELP is accessed by choosing the appropriate option from the **H**elp menu, by choosing **H**elp, or by pressing (F1). Windows-based HELP provides an index, hypertext links, and keyword searching.



SoftSolutions-based HELP. When in a menu, (F3) is used to access SoftSolutions-based HELP. When the cursor resides in a field, SoftSolutions-based HELP is accessed by clicking on the LOOK-UP button  located to the right of the field in which the cursor resides or by pressing (F3).[†] Different levels of HELP are available in SoftSolutions. The level of HELP initially accessed depends on the location of the cursor when HELP is invoked.

When in a field requiring a valid code entry, a LOOK-UP table is initially accessed. A LOOK-UP table contains a list of the valid codes. By default, this list is sorted alphabetically by code. To sort the list alphabetically by description, click the Description radio button to its ON state or press (Tab). The list is immediately resorted. Several options are available for viewing the contents and selecting an entry. The cursor movement keys and the various scroll bars can be used for moving through the list. To select an entry, highlight the desired code and press (Enter) or double-click on the record.

[†] SoftSolutions-based HELP is not available in SoftSolutions dialog boxes.

CDRR	Correspondence	FullTxt	Ver: 1	Bill	Arc	15 days	▲	
DELETE	Delete	Profile	Ver: 99	NoBill	Del	0 days	▲	
FORM	Form	Profile	Ver: 1	NoBill	Arc	9999 days	▲	
LETTER	Letter	FullTxt	Ver: 5	NoBill	Arc	90 days	▼	
LIST	List	FullTxt	Ver: 5	NoBill	Arc	90 days	▼	
MEMO	Memorandum	FullTxt	Ver: 1	NoBill	Arc	10 days	▼	
SAMPLE	Sample Data	FullTxt	Ver: 10	NoBill	Del	20 days	▼	
Sort by:		<input checked="" type="radio"/> Code	<input type="radio"/> Description					

When in a menu or in a field not requiring a valid entry, a window containing general information on a menu, option, window, or field is initially accessed. HELP may consist of several pages. {Page Up} and {Page Down} can be used to scroll through the text.

Lastly, a general HELP window providing instructions on using the keys and options is available. This level of HELP is accessed by pressing the HELP key ({F3}) while displaying the general information HELP on the menu, window, option, or field.

Each level of HELP is accessed through successively pressing the HELP key ({F3}). For example, while in a field requiring a code entry, press the HELP key for a LOOK-UP table on the code, press the HELP key again to display the context-sensitive HELP for the field, and press the HELP key yet again to provide the general help on the keys and options.

Exiting HELP

SoftSolutions-based HELP is exited by pressing {Esc} or by double-clicking on the control-menu box. Windows-based HELP is exited by choosing **Exit** from the **File** menu, by double-clicking on the control-menu box, or by pressing {Alt}{F4}.

Using the Browse Button

In fields requiring a path or a path and filename, the **B**rowse button can be used to locate the desired directory or file. When choosing **B**rowse, the BROWSE dialog box is displayed. Provide the following information to locate the desired file.

File Name

Enter the name of the desired file in the File Name field or select the file from the list box. If only a portion of the filename is known, enter the template in the File Name field to view a listing of the files matching the template in the specified directory. For example, if it is an executable file, enter "*.exe" in this field. This field is available only if the field is requesting a path *and* filename.

Directories (or Path)

Enter the directory in which the file is located or to which the file is to be placed or select the directory from the list box. If the directory you want is not displayed in the list box, the incorrect drive may be specified. When in a field which is requesting a path only, the field name is Path.

List Files of Type

Enter the type of files to be displayed in the File Name list box or select the type from the drop-down box. For example, choosing Text Files will list all files with a .TXT filename extension in the specified directory. This field is available only if the field is requesting a path *and* filename.

Drives

Enter the drive in which the file is located or to which the file is to be placed or select the drive from the drop-down box. When selecting a drive, the directories on the drive are displayed in the Directories list box.

Once the desired path or file has been located and selected, choose OK to place the entry in the appropriate field.

Exiting SoftSolutions

SoftSolutions is exited by choosing Exit from the File menu in the DOCUMENT PROFILE window, or by pressing {Alt}{F4} or double-clicking on the control-menu box while in any SoftSolutions window. Depending on the SoftSolutions settings, SoftSolutions may be exited immediately or the CONFIRM message box may be displayed. Choose No to cancel the exit and remain in SoftSolutions. Choose Yes to confirm the exit. SoftSolutions is exited.



Document Desktop

SoftSolutions Document Desktop is a Windows application designed to take advantage of the graphical environment of *Microsoft Windows*. Document Desktop is a graphical user interface to SoftSolutions with iconic representation of Documents, Folders, Applications, Services, and SoftSolutions search criteria (EZSearch). With this new graphical view of Document Management Systems, users are allowed to personalize their organization of the documents and services used. Users can interact directly with the documents and the applications associated with document creation and analysis.

Using icons and drag-and-drop technology, SoftSolutions Document Desktop will become the standard for user interface in the graphical environment of Windows.

SoftSolutions Document Desktop Objects _____

Five types of objects are available for Document Desktop (listed alphabetically):

- Application
- Document
- EZSearch
- Folder
- Service

Each type of object has several “properties” associated with it. These properties describe the object and what it can do, and are listed below for each type.

Each object has an icon and description associated with it, since the objects are represented in Document Desktop by icons. The other properties indicate its functionality.

Application

Applications, such as those contained in the SoftSolutions for Windows APPLICATIONS window (*e.g., WordPerfect, Microsoft Word, Excel*), as well as any applications which can be run at the command line under Windows, can be placed on the desktop. By doing so, Document Desktop can almost entirely replace the Program Manager as the controlling operation from the user standpoint.

Each application will have a set of properties that must be established by the user. These properties include:

1. Icon
2. Description
3. Execute command
4. Maximum number of documents to accept at one time
5. Working directory
6. Run minimized
7. Accept documents of which type
8. If a Launch: SoftSolutions dataset, SoftSolutions Launch command

Document

A Document icon has a direct relationship with a Profile in the SoftSolutions database. Each Document object represents a profiled document. No documents may exist in Document Desktop without being profiled in SoftSolutions. Documents may be on the desktop as individual entities or inside Folders. A single, profiled document may be represented many times on the desktop. Multiple versions of a document cannot be placed on the desktop. All documents on the desktop represent the most current version of the document.

The properties of a Document include:

1. Icon
2. Description
3. Document number
4. Dataset

EZSearch

An EZSearch object represents a saved search criteria. The criteria from all of the SoftSolutions searching methods can be stored. When opened, this object re-executes the associated search and the search results are displayed in the SEARCH RESULTS window.

The properties of an EZSearch include:

1. Icon
2. Description
3. Search criteria
4. Search scope

Folder

A Folder is a storage item that may contain any combination of Desktop objects—Documents, EZSearches, Services, Applications, Shared Icon Lists and other Folders. When creating a new Folder, it is initially empty and sized in proportion to its parent. Its properties are inherited from the parent but may be modified.

The properties of a Folder include:

1. Icon
2. Description
3. Background color (when open)
4. Icon spacing
5. Shared icon list

Service

Services are any options available in Document Desktop. These Services can be used to locate, view, create, and manipulate SoftSolutions documents and Profiles. Services are also available for determining the contents and appearance of Document Desktop. Some of the Services require the user to access a SoftSolutions window while other Services will use the SoftSolutions OAMs and DLLs to perform their functions in the background. Icons for Services related to SoftSolutions options will match those icons used in SoftSolutions for Windows. SoftSolutions document security will be enforced in Document Desktop.

The properties of a Service include:

1. Icon
2. Description
3. Maximum number of documents to accept at one time

Using SoftSolutions Document Desktop _____

Since Document Desktop operates in the Windows environment, it uses the standard Windows rules for choosing icons, menus, and menu items. The following information should help in becoming familiar with using Document Desktop.

Using the Mouse

Unless otherwise noted, mouse instructions refer to the left button. If the mouse has been re-mapped or a left hand mouse is being used, use the right button.

When using the mouse, steps may involve performing the basic skills of *pointing*, *clicking*, and *dragging*.

<i>Windows Function</i>	<i>Operation Performed</i>
Click	Move the mouse to place the pointer (↔) over an item, then press and release the mouse button. NOTE: This selects a <i>single</i> icon—holding down the {Shift} key while clicking selects <i>multiple</i> icons.
Double-click	Move the mouse to place the pointer (↔) over an item, then quickly press and release the mouse button twice
Drag-and-drop	Move the mouse to place the pointer (↔) over an item, press and hold the mouse button down as the pointer is moved to the desired location, then release the mouse button. NOTE: This <i>moves</i> the object—holding the {Ctrl} key down while performing drag-and-drop <i>copies</i> the object.
Marquee-select	Move the mouse pointer (↔) over any <i>unused</i> area, press and hold the mouse button down as the pointer is moved to select the desired objects with the dotted-line box (an entire object does not need be within the box to be selected), and release the mouse button.
Point	Move the mouse to place the pointer (↔) over an item.

Choosing Commands

To choose a command from a menu, use the mouse or use the mnemonic letters. Mnemonic letters are included with steps to allow quick keyboard access. These letters are **bolded** and underlined throughout the manual. For example, “F” for **File**. When using mnemonic characters in the main menu, the step is always preceded by pressing the {Alt} key. In submenus, simply press the mnemonic letter.

For example, if the step states “Choose **Exit** from the **File** menu to exit,” use the mouse or keyboard as described below to perform the operation.

Mouse

1. Point to the **File** menu, then click the left mouse button.
2. Point to the **Exit** command, then click the left mouse button. The program is exited.

Keyboard

1. Press the {Alt} key to activate the menu bar. The press “F” to open the **F**ile menu.
2. Press “X” to choose the **E**xit command. The program is exited.

Accelerators

In the documentation, the keyboard icon is used to indicate a keyboard function (shortcut) for performing an operation. These shortcuts include function keys and accelerators. For example, rather than choosing **E**xit from the **F**ile menu to exit, {Alt}{F4} can be used. Following is a list of the menu options and their accelerators:

<i>File Option</i>	<i>Accelerator Keys</i>
Document Preview	{Ctrl}{V}
File Exit	{Alt}{F4}
File New Document Last Search Results	{Ctrl}{U}
File New Document Profile Search	{Ctrl}{S}
File New Document Worklist	{Ctrl}{W}
File Open	{Enter} or {Ctrl}{R}
File Print	{Ctrl}{P}
File Properties	{Alt}{Enter}
File Remove	{Delete}
Locate Last Search Results	{Ctrl}{U}
Locate Profile Search	{Ctrl}{S}
Locate Worklist	{Ctrl}{W}
Options Menu Off	{Alt}{F10}
Profile Add	{Ctrl}{A}

Keyboard Selection of Icons and Folders

Certain keyboard combinations can speed selection of icons or Folders in Document Desktop.

<i>Keys</i>	<i>Result</i>
{Ctrl}{Tab}	Selects the next Folder.
{Shift}{Ctrl}{Tab}	Selects the previous Folder.
{←} or {→}	Deselects the current icon and selects the next icon.
{Shift}{←} or {Shift}{→}	Leaves the current icon selected and also selects the next icon.

Using HELP

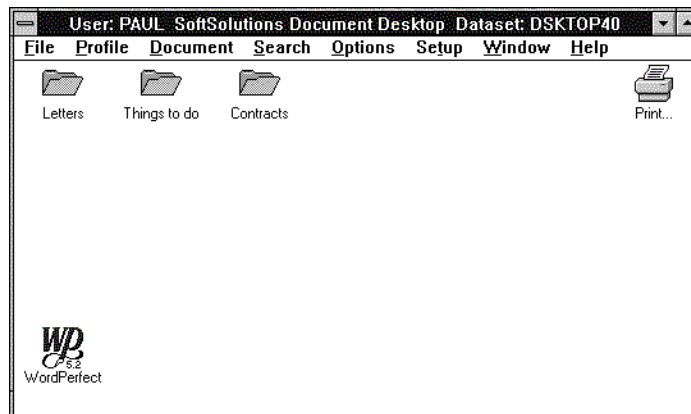
While in Document Desktop, Help is available for Document Desktop in the Windows format. Access Help anytime, especially when first using Document Desktop. Help is accessed by choosing the appropriate **H**elp menu option or by clicking on the **H**elp button in many of the dialog boxes. Available in the Help is an index, hypertext links, and keyword searching. Help is exited by choosing **E**xit from the **F**ile menu.

Fundamental Operations

The fundamental operations in Document Desktop are starting, exiting (including exiting SoftSolutions), and working with multiple documents.

Starting Document Desktop

Document Desktop can be started by double-clicking on the SoftSolutions Document Desktop icon. Following is a sample Document Desktop group window:



The Document Desktop program files must be installed by the system administrator for it to be available to end users. Then, the *first time* users accesses Document Desktop, **F**ile **R**un must be used on their PCs so that the Document Desktop group and icon can be created as part of an automatic “New User” routine. The Document Desktop icon will thereafter be available for easy access. The system administrator must use the following information to develop the instructions to be given to each user who will be using Document Desktop.

The command line syntax used to access Document Desktop (the /DESKDATA= switch is automatically included in the DESKDATA.INI file as part of the “deskdata=” line, and only needs to be included if changed from the default):

```
[Document Desktop Programs Directory]\SSDSKTOP.EXE  
/DESKDATA=[Document Desktop Data Directory]
```

For example, the *full* command line might be:

```
F:\DESKTOP\SSDSKTOP.EXE /DESKDATA=F:\DESKTOP\DATA
```

The SoftSolutions /ID= and /DATA= switches may also be used, but only in the DESKDATA.INI file as part of the “sscommand=” line. The /ID= switch is followed by the Workstation ID code used to determine which SoftSolutions Workstation ID record is to be used. The /DATA= switch is followed by the location and Dataset ID of the SoftSolutions dataset being used. (*For additional information on the /ID= and /DATA= switches, see the Getting Acquainted section of the SoftSolutions User's Guide.*)

When logging into SoftSolutions, Document Desktop will look for a subdirectory in the Document Desktop data directory matching the code entered in the **User** field of the SoftSolutions LOGIN window.

Each user must have a subdirectory in the Document Desktop data directory for storing the Desktop settings. When logging into SoftSolutions Document Desktop, SoftSolutions will check for the existence of a subdirectory matching the User code used to log into SoftSolutions. If it exists, Document Desktop is accessed. If this subdirectory is *not* located, a message box is displayed asking if you are a *new* user. If Yes is chosen, this subdirectory is automatically created, the default settings are used, and the user is automatically given Read and Write access to the user subdirectory. If No is chosen, Document Desktop is not accessed.

“Using default settings” may be displayed when accessing Document Desktop if the file, DESKTOP.SET, is not found in the user's subdirectory. This file is automatically created when first accessing Document Desktop. Ensure you have sufficient rights to your user's subdirectory to create and write to this file.