



WINCTOOLS FOR OPEN TEXT EDOCS™

Installation and Operations Manual

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Introduction

Welcome to WincTools!

WincTools is a suite of utilities designed for Open Text eDOCS (formerly Hummingbird DM, and hereinafter referred to as simply 'DM') administrators. Combining a number of features and functions into a single program console, WincTools enables an organization to centralize the administration of a DM enterprise and thereby reduce the effort necessary to maintain one or more DM libraries.

The WincTools features and functions can be divided into key areas based on scope, described in more detail later in this document. Following is a sampling of WincTools features:

ENTERPRISE FUNCTIONS

These are functions that operate across libraries, including:

- Dictionary Differences
- Parameter Differences
- Primary Library Differences
- Library Contents Matrix
- Recent User Report
- Document Count by User
- Recent User Report
- Database Space (MS SQL)
- Transaction Log Space (MS SQL)
- Compare Collation Sequences (MS SQL)

LIBRARY FUNCTIONS

These are functions that operate on a single library, including:

- Recent Users
- Library Settings
- Dictionary Report
- Document Count by User
- Purge Activity Log
- Move User
- Copy Documents to Another Library
- Export Documents
- Import Documents
- Import Folder Structure from ASCII List
- Secure Documents or Folders and Contents
- In-Use Document Report

- Missing and Zero-Byte Files Report
- Missing Profiles Report
- Document Listing by Criteria
- Document Component Listing
- Activity Log Analysis Report
- Transferred Document List
- Workspace Contents Report
- Folder Contents Report
- Component Check
- Missing Profile Metadata Report
- Compare Groups to DOCSPARMS
- Check Launch Methods
- Check for Duplicate PeopleGroup SIDs
- Check and Reset NextKeys
- Folder Cleanup
- Folder Purge
- Verify Folder Information
- Library Contents Matrix
- Run SQL
- List Triggers, Indexes, Statistics (MSSQL)
- SQL Server Configuration (MS SQL)
- Database Space (MS SQL)
- Transaction Log Space (MS SQL)
- Compare DB to Dictionary (MS SQL)
- Update Statistics (MS SQL)
- Truncate Spaces in Candidate Keys (MS SQL)

TABLE FUNCTIONS

These are functions that operate on a table, including:

- List Contents
- Query Contents
- Row Count
- Compare Structure to Another Library
- Dictionary
- Forms
- Cross-references
- Missing Links
- Secure Projects / Folders and all Components

TABLE FUNCTIONS (Con't)

The following additional functions are for validation tables only:

- Set WincSync Exclusions
- Copy Table to Another Library
- Compare Table Contents to Another Library (with or without applying missing rows)
- Search & Replace
- Cleanup Unreferenced Rows

LIST FUNCTIONS

These are functions that operate on one or more rows in a validation table, including:

- Copy Row to Another Library
- Sync Row to All Libraries
- Edit Row
- Delete Row
- Transfer Documents to Another Value
- Secure Project or Quick Search
- Copy Project or Quick Search to Another Library
- List People or Group Trustees (WincWall)

SCHEDULE FUNCTIONS

These are functions that are scheduled, including:

- Database Import
- Table Synchronization
- External Applications
- Activity Log Purge
- Run SQL Statement
- Fix / Purge Folders
- Missing Files/Profiles Reports

WINCSYNC FUNCTIONS

- Synchronize with WincSync
- List WincSync Exclusions
- Summarize Pending Rows
- Check Pending Rows

WINCARCHIVE FUNCTIONS

- Copy Documents with WincArchive
- Add Documents to Archive Queue

WINCWALL FUNCTIONS

- Secure with WincWall
- List WincWall Trustees
- List Pending Documents
- Conflicts Report

DMSSYNC FUNCTIONS

- Synchronize with DMSSync
- List DMSSync Exclusions

WincTools is written using DM 32-bit API calls to perform all functions. This means that WincTools functions regardless of database and Network Operating System (NOS) platforms, and can even support libraries that are running on different database systems.

The readme.txt file that accompanies the installation package contains information on the latest features, functions and bug fixes in WincTools. It is suggested that you review this document before attempting to install, run or upgrade an existing copy of WincTools.

A Few Words on Copying and Synchronizing Data

WincTools provides a number of different methods for copying and synchronizing data between libraries. These methods include:

- Copying all the validation data in one library to a single destination library (*);
- Synchronizing the contents of one table to all other libraries (*);
- Copying the contents of one table to a single destination library (*);
- Comparing the contents of a table in one library to the contents of that table in another library, then applying the differences to the other library;
- Selecting one or more rows from a list of the rows in a table, and copying them to either one single library or synchronizing them to all other libraries;
- Using WincSync to schedule the synchronization of a table from one library to one or more other libraries (*);
- Using WincSync's triggers to capture changes or additions to validation data in one library and subsequently apply that information to the other libraries.

The following important information provides a summary of some specific aspects of these methods. Further information is contained in subsequent sections of this or the WincSync manual as appropriate.

- The WincSync method can be used in conjunction with any of the methods identified with an asterisk (*) above. If WincTools has been configured to use the WincSync method, WincTools will automatically use the WincSync functions when running a scheduled synchronization operation.
- When using the WincSync method, changes to a candidate key will automatically be applied to the matching row in the other libraries. If you do not use the WincSync method, a change in the candidate key of a row will result in a new row being inserted into the other libraries.
- When running a scheduled synchronization, you can instruct WincTools to apply rows based upon their relative ages. The age of a row is determined by comparing the SYSTEM_ID of the row with the SYSTEM_ID of the rows in the ACTIVITYLOG table in order to ascertain the approximate date that this row was created. For instance, if you instruct WincTools to apply rows in the APPS table that are two days old, WincTools will determine the SYSTEM_ID of rows in the ACTIVITYLOG table that are two days old, and then select the rows in the APPS table that have a higher SYSTEM_ID.
- You can exclude any non-key column in any table from being synchronized. For example, you can exclude the TARGET_DOCSRVR column in the PEOPLE table, in which case the contents of this column will not be applied to the other libraries.
- When a table is synchronized or a row is copied to another library, all foreign references to that row are applied before the row is copied. For example, the MATTER table has foreign references to both the CLIENT and DOCSERVERS tables. Therefore, when synchronizing a MATTER row, WincTools will first check to make sure that the specified CLIENT and DOCSERVER are found in the other library before posting the MATTER row. Among other things, this means that you never need to manually copy the CLIENT table first in order to synchronize or copy the MATTER table! This feature has been tested to four levels (e.g., a CLIENT table linked to MATTER, which is linked to OFFICE, which is linked to DEPARTMENT – each of which also link to DOCSERVERS).

System Requirements

WincTools has been tested and operates using the following minimum configurations:

WORKSTATION:

- 32-Bit Operating System (Windows XP or Windows Vista workstations, Windows 2000 or Windows 2003 server). **Do not run Winc products on a Windows Document or SQL Database (Library) Server.**
- Pentium (1 Ghz or faster recommended)
- 1GB or more RAM (2GB or more recommended)
- The DM Extensions client must be installed on the workstation prior to installing WincTools or any add-on modules
- The workstation must be in the same domain as the DM server.
- The workstation must have the appropriate network client for each type of document server to be accessed
- For the Move User, Transfer Documents, Missing Document Files and Missing Document Profiles functions, the network share of each document server must be mapped.
- An email client must be installed on the workstation in order to use WincMonitor. If a MAPI-compatible client is not installed, WincMonitor will use SMTP.
- If the Log Everything option is selected, disable virus scanning software on the computer that is running WincTools or any add-on modules.

DM SERVER:

- Open Text eDOCS 5.1.0.5 SR6MR4, eDOCS 5.2.1 hot Fix 1 or later is recommended
- When the DM Server is running on a Windows 2003 server, Windows 2003 SP1 (or later) must be installed
- During initial installation of the tables and triggers used by WincTools and its add-on modules, the DM server **must** connect to the database as DOCSADM.
- The DM Server should be configured with the following minimum values: In the Results tab, set the Maximum Size (KB) value to at least 100,000, and set the Maximum Total Size (KB) value to at least 2,000,000

SYSTEM / USER / GROUP PARAMETERS

- The SQL Passthru function must be enabled in System Parameters for each library.
- The account running WincTools should be a member of the Docs Supervisors group, as this is the only group to which the DM application permits true universal access to all information.
- The primary group of the account running WincTools should not have Shadowing enabled.

Notice to Evaluation Users

You are allowed to use WincTools for evaluation purposes for a period of 60 days from the program date, 30 days from the date of installation, or for 15 executions, whichever comes first. Each execution will run for a maximum of one hour. Unless you register the application, WincTools will cease to function after the expiration of the evaluation period.

A maximum of 10 rows can be copied from one library to another per session.

WincTools Installation

Initial Workstation Installation

To install WincTools, follow these instructions:

1. Insert the WincTools CD into the appropriate drive of the computer.
2. Double-click **Setup.exe**, located in the root directory of the CD. The following screen will be displayed:



Note: In some cases, the files being copied already exist and are in use. The setup program will need to reboot in order to these files; if this is the case, you will be informed by the setup application and asked to reboot. After rebooting, follow the steps above once again to return to this point in the installation.

3. The following screen will be displayed; click **OK** to continue.



4. You are now ready to install WincTools. You may change the installation directory if desired, or simply click on the computer icon to begin installation.



5. Follow any on-screen prompts to complete the installation. A program group will be created automatically, and a shortcut to the application will be added to your programs folder.
6. Before using WincTools, you should configure the application by choosing **Setup Program** and **WincTools Groups** from the **Setup** menu in WincTools. Additional information concerning these options can be found later in this document.

Upgrading an Existing WincTools Installation

Wertheim Global Solutions periodically releases updated versions of WincTools and its associated add-on modules. All updates are released in ZIP (compressed) format, requiring the use of a decompression program such as WinZip® to decompress the file(s).

In most instances, product updates do not require a re-installation of the product. Installation of the update, then, simply requires that the new executable (e.g., WincTools.exe) be extracted to the WincTools installation directory, overwriting the older version.

Updates are made available in three ways:

1. Via download from the Wertheim Global Solutions website. Visit www.WertheimGlobal.com and click on **Support**. *
2. On the WincTools CD, in the Updates directory.

* You must have a licensed copy of WincTools in order to use this function.

Both the full installation and the update files alone are available for download from the Wertheim Global Solutions support site.

To upgrade WincTools:

1. Exit WincTools
2. Open the update ZIP file using a decompression application such as WinZip.
3. Extract all of the files included in the update ZIP file to your WincTools installation directory. For a default installation, this will be C:\Program Files\Winc

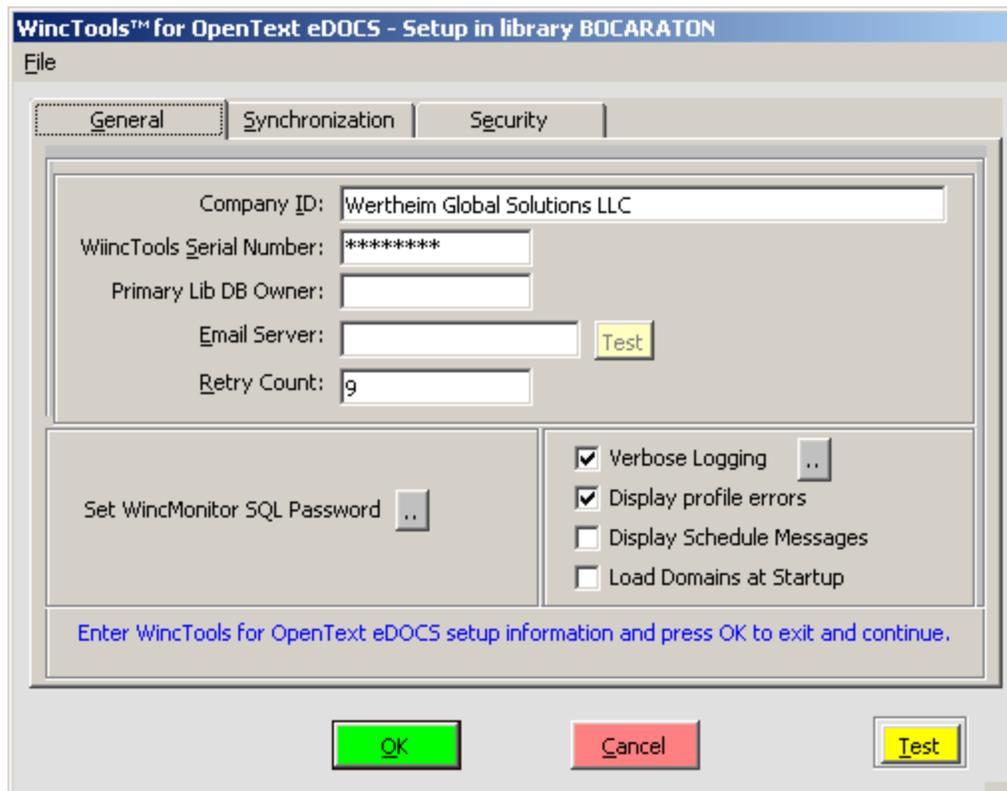
The WincTools upgrade is then complete.

Setup and Configuration of WincTools



Before you can use WincTools, you will need to enter your serial number and configure the application options.

1. Launch WincTools, and then choose **Setup WincTools Program Options** from the **Setup** menu. The following screen will be displayed:



2. Complete each field in the setup screen as follows:

General

- **Company ID / Serial Number:** If this is an evaluation copy of the software, leave the Company ID and Serial Number fields blank. For a licensed copy of WincTools, enter your Company ID and Serial Number exactly as they were provided to you. Note that the Company ID field is case-sensitive.
- **Primary Lib DB Owner** For Oracle users, if your primary library's database owner is not DOCSADM, enter the correct database owner ID.
- **Email Server:** If you are going to use the Component Check function, and wish to receive email notifications when a missing document file is identified, you must set

your email server name here. In order for a user to receive this notification, the user's email address must be present in the EMAIL_ADDRESS column in the People table.

Once you have set the Email Server, and assuming your email address does exist in the People table, you can press the **Test** button to send an email to yourself.

- **Retry Count:** Enter the maximum number of attempts WincTools should make to synchronize rows (using WincSync), archive documents (using WincArchive), and/or secure documents (using WincWall). Specify zero if for no maximum.
 - **Verbose Logging:** Select (check) this option in order to log everything that WincTools does; if this option is unchecked, only errors will be logged. Click the Set Log File Location elipse button to specify the location of your log file. WincTools will generate a new log file each day at midnight.
 - **Display Profile Errors:** Select (check) this option in order to have WincTools stop whenever it encounters a profile API error. This is typically only necessary if there is a problem with the DM Extensions API and the API does not provide a recordable error report.
 - **Display Schedule Messages:** Check this option to have WincTools warn you of any pending scheduled tasks when exiting WincTools. Note that scheduled tasks will not execute when WincTools is not running.
 - **Load Domains at Startup:** Checking this option pre-populates the Enterprise and Library Network menus at startup. Having this option checked will result in a slightly longer launch time when initializing WincTools; if the option is unchecked, WincTools will only load network information when one of the Network menus is highlighted.
 - **Test:** This button allows you to stress-test the current workstation's connection to the DM server. This function can also be accessed from the Setup menu directly.
3. The options in the Synchronization tab are discussed in the WincSync section of this manual.
 4. The **Security** tab is used to configure the WincTools features that you want to make available to the support group (by default, WincDBUser). See the Security Configuration section of this manual for further information.
 5. Press the OK button to save your options to the local registry or the Cancel button to discard them. You will be returned to the main WincTools screen.
 6. To save the current settings as a registry file for easy configuration on another workstation, select the **Save Settings** option from the **File** menu within the Setup Program dialog. The file *registry.txt* will be saved to the WincTools installation directory.
 7. To restore previously saved settings, or to configure a new WincTools installation using a previously saved *registry.txt*, select the **Restore Settings** option from the **File** menu within the Setup Program dialog.

Create WincTools Security Groups

WincTools provides two levels of application access. To enable this feature, it is necessary to create two groups in each library to be administered. These groups may be created manually using Library Maintenance, but WincTools can also create these groups for you. To create these groups automatically, choose **Create WincTools Security Groups** from the **Setup** menu. (WincTools will prompt you to confirm this choice and notify you of a successful completion.)

The groups necessary, whether created manually or by WincTools, are WINCDBADMIN and WINCDBUSER. Members of WINCDBADMIN can perform any WincTools function on the library; while members of WINCDBUSER can only perform list functions on the library. Users that are not members of either group cannot perform any WincTools functions on the library, with one exception: members of the DOCS_SUPERVISORS group are automatically considered members of the WINCDBADMIN group.

Note that another group called WINCWALLADMIN may be required in your library if you are using WincWall to secure documents. The automatic group creation described above does not also create the WINCWALLADMIN group; for further information about this group, please refer to the WincWall documentation.

Create WincTools Tables

WincTools stores information about scheduled tasks in custom tables including one called WINC_SETTINGS. This table was introduced with the three-tier version of WincTools, and is now used by many of the WincTools add-on modules as well. If this table has never been created in your libraries, you will need to create it and the other WincTools tables in order to properly run all of WincTools' functions. To create these tables, select **Create WincTools Tables** from the **Library** menu.

In order for WincTools to create tables, the WincTools user **MUST** connect to a DM Server that logs into the database as DOCSADM. In many installations, the database login is set to another user, DOCSUSER, that does not have sufficient rights to create tables. If this is the case in your environment, you will have to temporarily change the database login, create the tables, and then reset the database login back. To do this, you will need to know the DOCSADM and the DOCSUSER passwords, and have access to Library Maintenance and the DM Server:

1. Launch Library Maintenance, and go to File – Set DBMS User Login.
 - a. You will be prompted for the DOCSADM user and Password (change the default value for User from SA to DOCSADM). Make sure you have this.
 - b. After successfully entering the DOCSADM Password, change the login to DOCSADM with the DOCSADM password.
 - c. Close Library Maintenance
2. Go to the DM Server, and Stop it, then Start it up again. At this point, the DM Server will be logging into the database as DOCSADM.
3. Start WincTools.
 - a. Verify that you are logged into the database as DOCSADM by looking at the right side of the status bar at the bottom, which will show the SQL login.
 - b. Go to the bottom of the library menu, and select Create WincTools tables.
 - c. After that is completed, optionally, go to the library menu, Microsoft SQL, and run Create Group Trigger to retain UNIV_ACCESS
 - d. Exit WincTools.

4. Launch Library Maintenance, go to File – Set DBMS User Login.
 - a. You will be prompted for the DOCSADM user and Password (change the default value for User from SA to DOCSADM).
 - b. After successfully entering the DOCSADM Password, change the login to DOCSUSER with the DOCSUSER password.
 - c. Close Library Maintenance
5. Go to the DM Server, and Stop it, then Start it up again. At this point, the DM Server will be back to logging into the database as DOCSUSER.

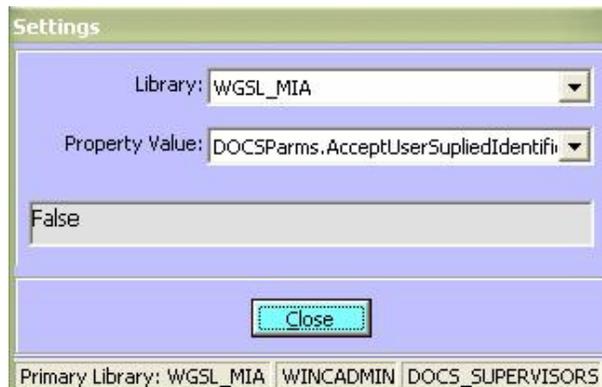
NOTE: If this menu option is grayed-out, the WINCTOOLS tables already exists on the selected library.

DCOM Configure

This option will launch the DCOM Configuration. For certain Windows Operating Systems (such as Windows 2003 Server with Service Pack 1), DCOM security settings must be edited in order to properly run eDOCS. Consult the Open Text Support website for further details on how to set/change these settings.

Display Current DM Settings:

This option allows you to display all DM property values as they are set on the computer running WincTools. A form similar to the following will be displayed:

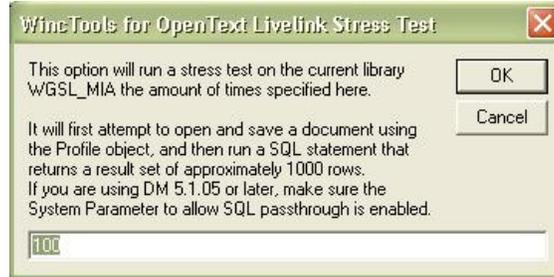


To display a property, you should select the library from the Library drop-down list, and then select the specific property from the Property Value dropdown list. The resulting value will then be displayed in the box.

Press the **Close** button to close the form.

Test Connection to DM Server:

This option will ‘stress test’ the connection from the computer running WincTools to the DM server to which it is attached. It should be used to determine whether large jobs can successfully complete on that computer. A form similar to the following will be displayed:



To run the stress test, you should enter in the number of times the test should run, and press the OK button to continue, or the Cancel button to cancel.

If the test is successful, a screen similar to the following will be displayed:



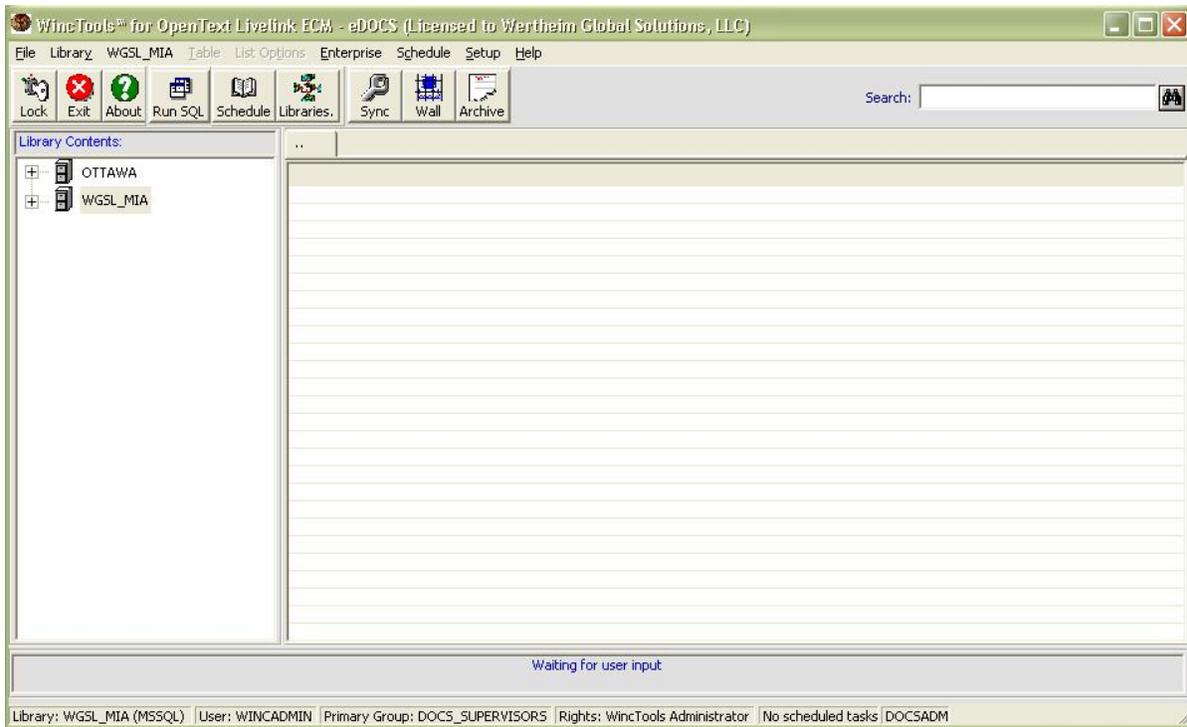
Otherwise an error will display.

A Note on Quick Retrieve Forms

Many WincTools functions display an eDOCS Quick Retrieve form to allow you to select specific documents. Please note, however, that the Quick Retrieve form may take an unexpectedly long time to display, depending on your eDOCS client software version. This is unfortunately unavoidable, as the delay is a function of the API calls provided by OpenText to access their software.

The WincTools Console

When WincTools is launched, the screen below is displayed. Note that if DM Extensions is not already running, the appropriate application will be started when WincTools is launched.



All WincTools functions are executed from this screen, called the WincTools **console**.

Main menu selections may be accessed by clicking on the selection or by pressing the Alt key in conjunction with the corresponding underlined letter. For instance, to select the Enterprise menu option, press <Alt-E>. Submenu selections (when displayed) may then be accessed by pressing the corresponding underlined letter.

The size of the **library tree** (the left side of the WincTools console) and the **results list** (the right side of the WincTools console) can be adjusted by clicking on the grey bar between the two objects and dragging the mouse to the left or the right.

The **F4** key will toggle the library tree list between alphabetical order and inverse alphabetical order.

Note for Add-on Modules

Note that multiple copies of the WincTools add-on modules (DMSSync, WincArchive, WincSync or WincWall) cannot execute simultaneously on a single computer. Attempting to run more than one of the add-on modules on the same computer at the same time can cause unpredictable results, particularly when different libraries are being accessed concurrently by the different modules. WincTools, and each of the runtime versions of the add-on modules, checks to make sure this is not occurring and displays an error if a conflict is identified. In order to be able to bypass (ignore) this error, you can start WincTools or any of the runtime versions using the /NOCHECK command line parameter. This option is particularly useful if you are running multiple WincTools modules in different sessions using Citrix.

The Library Tree

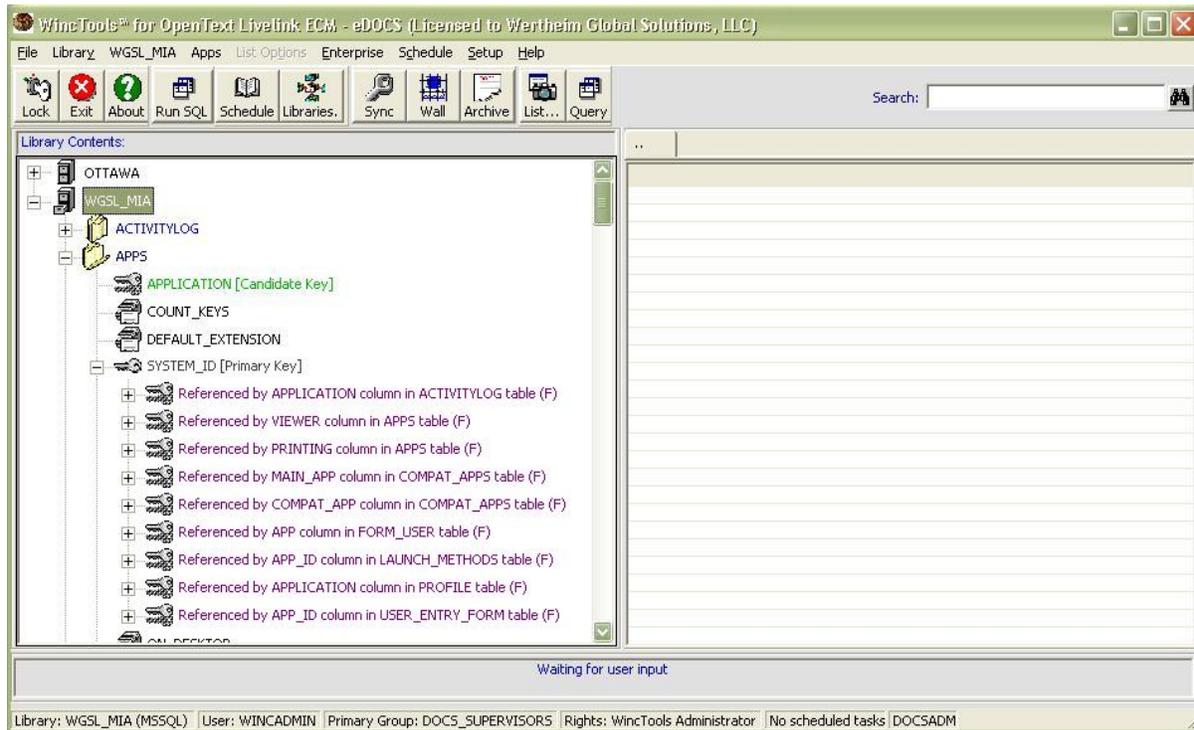
The left side of the WincTools console contains the library tree, which lists all connected libraries. Connected libraries are those which are: defined as remote libraries to the user's primary library, available to the DM server (if appropriate), *and* selected in the WincTools **Enterprise – Select Libraries** configuration option (described further on page 28).

NOTE: The first time that WincTools connects to a library, it checks SQL databases to see if the option QUOTED_IDENTIFIER is turned ON. Because OpenText eDOCS uses the reserved SQL keyword NEXT as the name of a column in the FOLDER_ITEM table, this setting **must** be turned on in order to manipulate folders in WincTools. If WincTools identifies that this option is turned OFF for the selected library's database, an error message will inform you that manipulating folders through WincTools will result in SQL errors until this setting has been changed. The message will also provide the exact text of the SQL query which needs to be executed. This query must be run by the SA (or equivalent) account.

In some cases, this SQL query will **not** update the Quoted Identifiers setting even though it executes successfully. This setting can also be changed manually via SQL Enterprise Manager's Database Properties page, on the Options tab.

- Clicking on the plus sign [+] to the left of a library opens up a list of all of that library's tables (the list of available tables is generated based on both the contents of the DOCSTABLE table and the WincTools List Validation Tables Only setup option).
- Clicking on the plus sign [+] to the left of a table opens up a list of all of that table's columns.
- Clicking on the plus sign [+] to the left of a column that is a key opens up a list of all of that column's references.

The following example demonstrates the results of expanding a library, then the APPS table, and then the SYSTEM_ID column within the APPS table:

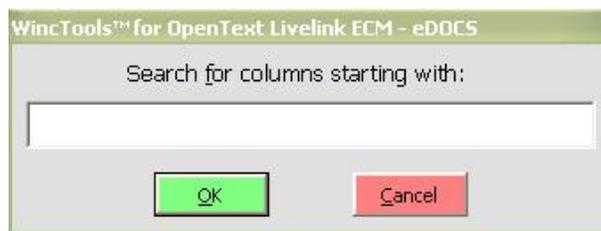


All functions are performed on a library, a table, or a column by first highlighting the selected item and then either right-clicking on the item or selecting the menu which corresponds to the selection. For instance, to display the menu of options for the WGSL_MIA library, you would highlight WGSL_MIA and then right-click on it to display the context menu, or you could click on the menu option corresponding to the library name (in this case, WGSL_MIA) from the main WincTools menu bar.

Menu items change as the selection changes. Different options will be displayed based on whether the item selected is a library, a table, a validation table, or a column.

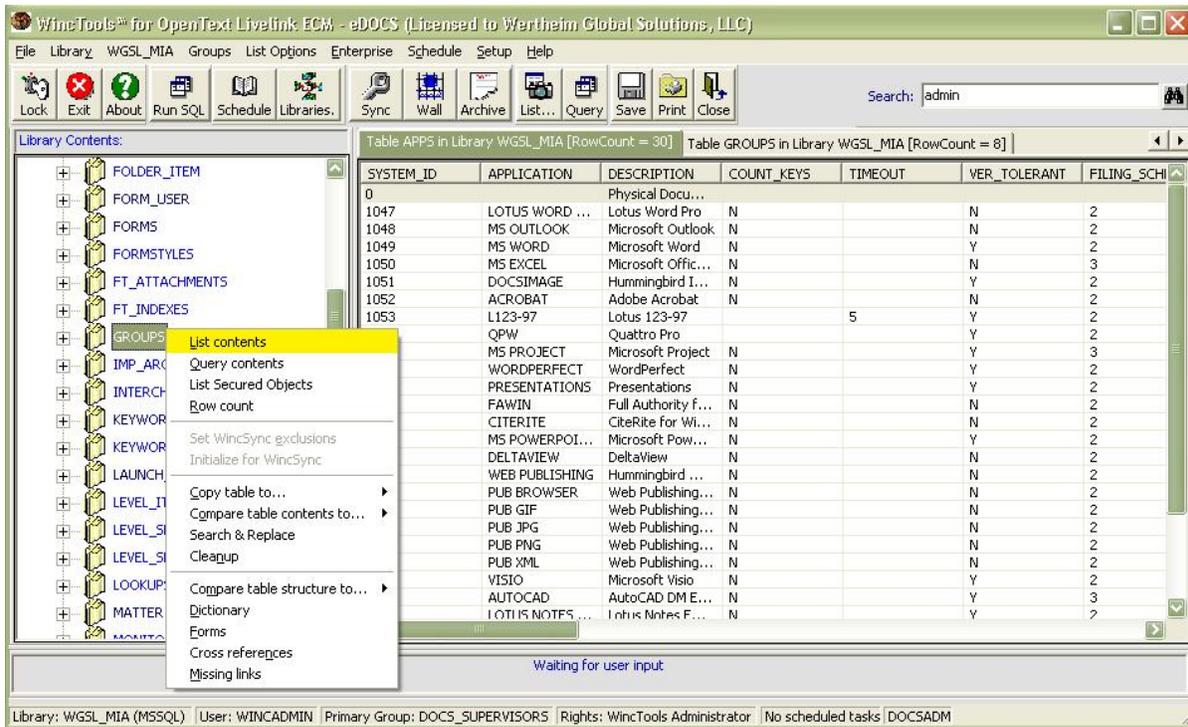
In any function that lists libraries, the sort order can be toggled by pressing the F4 key.

To search for Columns within the library tree, press Ctrl-F, type the search criteria, and hit Enter key. To search for the next occurrence of that text, press Ctrl-N.



The Results List

When you make a menu selection that generates a results list, the results are displayed in a results list that appears on the right-hand side of the WincTools console. For example, you may list the contents of a table by selecting it in the library tree, and then either dragging that table to the list results pane, or by selecting the table's menu option to List Contents:



Each set of results will appear on a separate tab at the top of the results list; to review a previous result set, use the arrows at the top-right corner of the results list to navigate between the results tabs.

NOTE: Pressing the Escape key while WincTools is displaying any list (including report results) will terminate the process and display rows already retrieved. There may be a pause before processing completes, however, as WincTools retrieves rows in batches of 50 and must complete the current batch before termination.

The operations available to be performed on the results list varies dynamically based on the type of results that are displayed. To perform an action on a value in a results set, right-click on the row(s) and choose an operation or highlight the row(s) for processing and select the appropriate operation from the List Options menu. To select multiple rows, <Shift>-click on the range of contiguous rows to be selected. Use Ctrl-click to select non-contiguous rows.

All results lists can be sorted on any column by clicking on the column heading. Clicking once on the column heading will sort the column in ascending order, clicking again will sort in descending order. The order of the displayed columns can be changed by dragging and dropping the columns into the desired order.

The FOLDER Table Results List

For most tables, the WincTools results pane displays the table contents exactly as they appear in the database. For the FOLDER table, however, WincTools displays two additional columns: the Folder name (retrieved from the PROFILE table) and the User ID of the Folder's creator (retrieved from the PEOPLE table via the PROFILE'S Author reference).

The Lookup Form

When performing a lookup against any validation table, WincTools will present a custom lookup form, shown below. This form allows you to specify the maximum number of rows returned; the default value is configured in the WincTools Setup option Lookup Rows, as explained **Error!**

Bookmark not defined..

Lookup PEOPLE in library WGS_L_MIA

Filter: USER_ID By: Search

USER_ID	FULL_NAME
CAMERONM	Mike Cameron
DMADMIN	DM Administrator
DMUSER	DM User
GLAVINET	Tom Glavine
INTERNAL	Internal User
JETERD	Derek Jeter
MUSSINAM	Mike Mussina
PIAZZAM	Mike Piazza
RIVERAM	Mariano Rivera
WINCADMIN	Winc Administrator

Status

Total: 10 Max Rows: 100 Selected: 0

OK Cancel

The WincTools Functions

The Enterprise Menu



Enterprise functions are those which operate across all libraries. Generally, these functions generate reports which may provide a general view of the health of your overall system.

Dictionary Differences

The Dictionary Differences function compares the database structure of all libraries in the enterprise, based on the eDOCS DM data dictionaries. The resulting report will display the non-standard tables and / or columns, the library or libraries where they exist, and the library or libraries where they do not exist.

Table	Column	Found in	Not found in
GROUPS	AUTO_UNSUBSCRIBE	WGSL_MIA	OTTAWA
GROUPS	UNSUBSCRIBE_DAYS	WGSL_MIA	OTTAWA
NEEDS_ARCHIVING		WGSL_MIA	OTTAWA
NEEDS_FOLDERING		WGSL_MIA	OTTAWA
PEOPLE	AUTO_UNSUBSCRIBE	WGSL_MIA	OTTAWA
PEOPLE	UNSUBSCRIBE_DAYS	WGSL_MIA	OTTAWA
WINC_AUTOBUILDER		WGSL_MIA	OTTAWA
WINC_CMPG		WGSL_MIA	OTTAWA
WINC_DMSSYNC_FLTRS		WGSL_MIA	OTTAWA
WINC_DMSSYNC_MAPS		WGSL_MIA	OTTAWA
WINC_DMSSYNC_SID		WGSL_MIA	OTTAWA
WINC_SUBSCRIPTION		WGSL_MIA	OTTAWA

Parameter Differences

The Parameter Differences report displays a matrix of all system parameters which have different values in different libraries. Only those parameters which differ between libraries will be displayed in the report, and for each library the value of the differing parameters will be displayed.

Parameter	OTTAWA	WGSL_MIA
CAPTURE_KEYSTROKES	Y	N
DELETE_VERSIONS	Y	N
DISPLAY_VER_LIST	Y	N
LAST_UPDATE	2008-08-20 00:00:00	2008-10-15 10:54:39
NEW_VERSIONS	Y	N
SAVE_TO_REM_LIB	Y	N

Primary Library Differences

The Primary Library Differences report displays a matrix of users where their Primary Library is set different in each library.

Library Contents Matrix

The Library Contents Matrix reports the total row count of all tables in every library, and identifies those tables whose row counts differ.

When you select Library Contents Matrix from the Enterprise menu, you will be presented with the following dialog box:



If you want to display the row count for all tables in the DM, click **Yes**. To display row counts for validation tables only (e.g., client, apps, documenttypes, etc.), click **No**. The results list will then display all relevant tables and their row counts by library and which ones are different.

Table Name	OTTAWA	WGSL_MIA	Different
ACTIVITYLOG	8	161	Y
APPS	30	30	
ARCHIVES	0	0	
CHECKOUT	0	0	
CLIENT	1	4	Y
COMPAT_APPS	1	1	
COMPONENTS	2	33	Y
COST_REC	0	0	
COST_REC_FORMAT	0	0	
DBIMPORT_SETINFO	0	0	
DBIMPORTIGNORE	0	0	
DBIMPORTSETS	0	0	
DELEGATES	0	0	
DEPL_PACKAGES	0	0	
DOC_IMPORT	0	1	Y
DOC_IMPORT_DETAIL	0	14	Y
DOC_VER_DETAIL	0	0	
DOCS_INTERCHANGE	0	0	
DOCS_UNIQUE_KEYS	3	5	Y
DOCSCOLUMN	1212	1262	Y
DOCSERVERS	1	1	
DOCSPARMS	1	1	
DOCSTABLE	119	127	Y
DOCUMENTTYPES	3	5	Y

Document Count by User

The Document Count by User function displays a count of all documents across all libraries where each user is an author or typist.

Before the report begins to run, you will be warned that the procedure requires connections to all libraries, and may take a long time to run. You may choose to cancel or to proceed. If you choose to proceed, you be asked to set options for the report:



You can specify a starting date and an ending date for the report, as well as choose whether that date should reference the documents last edit date or the last access date.

When the report has completed, your result set will include the user's ID, the user's primary group, a count of documents that user authored, and a count of documents for which that user was the typist. The result set will look similar to the following example:

USER	PRIMARY GROUP	AUTHOR COUNT	TYPIST COUNT
CAMERONM	DOCS_USERS	1	0
DMADMIN	DOCS_SUPERVISORS	24	24
DMUSER	DOCS_USERS	6	0
WINCADMIN	DOCS_SUPERVISORS	4	11

Recent User Report

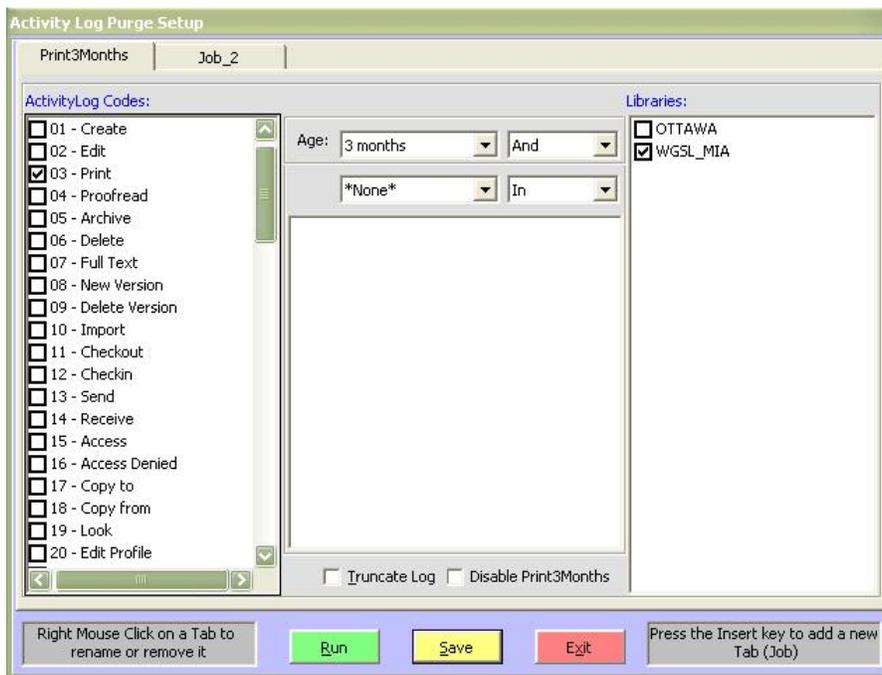
The Recent User Report (known in previous versions of WincTools as the User License Count) generates a list of all users who either have, or have NOT, logged into any library within a specified recent number of days (e.g., the last 30 days). When selecting this menu item, you will be asked how many days of login activity to display, and then be warned that the report requires connections to every library and may take a while to complete. The user's ID, the last library to which they connected, their last login date, their primary group, and their location will be displayed and the results report will be automatically saved as **LicenseCount.txt** to the TEMP directory.

Purge Activity Log

The Purge Activity Log feature allows you to define one or more purge jobs that can be executed within this form or scheduled to run at another date and time.

Note: It is strongly recommended that you turn off transaction logging before using this procedure if you plan to purge a large number of records from your activity log.

The Activity Log Purge Setup allows you to define purge jobs. A separate tab is created for each purge job; right-click the tab to rename or delete the job, or press the **Insert** key to create a new job.



For each job, enter your criteria from the following selections:

Purge Criteria

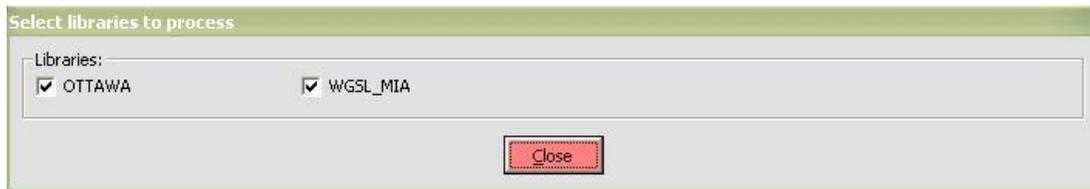
- **ActivityLog codes:** Place a checkmark next to the activity codes you wish to purge.
- **Age:** Narrow the date range of records eligible for purging.
- **And / Or:** Select **And** to purge those items which meet both the date and field criteria; select **Or** to purge all items which meet *either* criteria.
- ***None*:** If you wish to further qualify the items to be purged to a specific author, typist, author's primary group, typist's primary group, or application, select the qualifier from the drop-down list. A subsequent list of valid selections will appear below; place a check next to those items you wish to apply.
- **In / Not In:** Applies to the field chooser described immediately above; if **In** is selected, checked items will be purged; if **Not In** is selected, all un-checked items will be purged.
- **Libraries:** Check the libraries whose activity logs are to be purged.
- **Truncate Log:** Check this option to have WincTools automatically turn off transaction logging for the duration of this purge job.
- **Disable [Job Name]:** Disables the current job.

When you have completed defining purge jobs, press the **Save** button to save the job(s), or press the **Exit** button to exit without saving or running any of the defined jobs. If you want to save your jobs without running them, you **must** set them to be disabled, and then press the **Go** button.

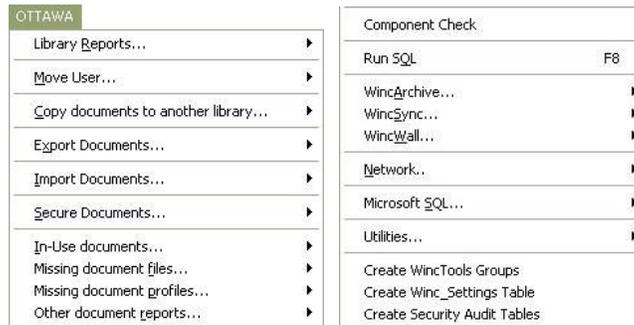
Select Libraries

All enterprise functions are enabled or disabled for each library based on its setting in the Select Libraries dialog. Enterprise functions which are affected include synchronization, Run SQL, and all functions in the Enterprise menu. The library selection remains in effect until changed, even if you exit and re-start WincTools.

Note that when you re-start WincTools after de-selecting a library, the deselected library will not appear in the library tree.



Library Functions



Library functions are those which operate on a single library. These functions are accessed by first selecting a library in the library tree, and then either right-clicking or choosing the **[Library Name]** menu.

NOTE: When performing any lookups, WincTools will only display the first 1500 rows in the lookup form. To find the desired values, simply filter the search results; a blank filter will subsequently return all rows.

Library Reports



Recent Users

Similar to the Enterprise function Recent User Report, this report tells you all users who have logged into a specific library in the last specified number of days. The library-specific report is displayed in the WincTools results window, and is not automatically saved.

Library Settings

The Library Settings option displays those settings for the library which are defined in the REMOTE_LIBRARIES table.

Column Name	Column Value
BRIDGED	N
DATABASE_ENGINE	3
DATABASE_NAME	WGSL_MIA
DEFAULT_SEARCH	Y
DISABLED	N
LAST_UPDATE	2008-10-13 13:08:44
LIB_LOGIN_SCHEME	C
LIB_LOGIN_UNAME	DOCSADM
LIBRARY_DESC	Current Library
LIBRARY_GROUP	
LIBRARY_NAME	WGSL_MIA
OPERATING_SYSTEM	5
ORACLE_MIXED_CASE	0
OWNER	
PRESHADOW	N
SERVER_LOCATION	WGSL-SQLDM
SHADOW_DOCS	N
SQL_PASSWORD	7bb15e5f246a5131
SYSTEM_ID	0

Dictionary Report

The Dictionary Report function displays the definition of all tables and columns in the library, as defined in the DOCSTABLE and DOCSCOLUMN tables.

Data Dictionary Report for library WGS_L_MIA [Count:1262]

TABLE_NAME	COLNAME	OBJECTTYPE	PROMPT	TBL_DESCRIPTION	USER_MODIFIABLE	VALIDATION_TABLE	IMPORT_IP
PEOPLE	USER_ID	MEDIUMEDIT	User ID	PEOPLE	Y	Y	Y
PEOPLE	USER_LOCATION	MEDIUMEDIT	User Location	PEOPLE	Y	Y	Y
PEOPLE	USER_PASSWORD	EDIT	Password	PEOPLE	Y	Y	Y
PEOPLEGROUPS	GROUPS_SYSTEM_ID		Groups System ID	PEOPLEGROUPS	N	N	N
PEOPLEGROUPS	LAST_UPDATE	EDIT	Last Update Timestamp	PEOPLEGROUPS	N	N	N
PEOPLEGROUPS	PEOPLE_SYSTEM_ID		People System ID	PEOPLEGROUPS	N	N	N
PROFILE	ABSTRACT	MULTIEDIT	Abstract	PROFILE	Y	N	N
PROFILE	APPLICATION		Application	PROFILE	Y	N	N
PROFILE	ARCHIVE_DATE		Archive/Delete Date	PROFILE	Y	N	N
PROFILE	ARCHIVE_ID		Archive ID	PROFILE	Y	N	N
PROFILE	ATTACH_NUM	EDIT	Attachment Number	PROFILE	Y	N	N
PROFILE	AUTHOR		Author	PROFILE	Y	N	N

PeopleGroups Report

The PeopleGroups Report displays the list of PeopleGroups memberships.

PeopleGroups Memberships (Total: 24)

GROUP_ID	USER_ID
DOCS_SUPERVISORS	DMADMIN
DOCS_SUPERVISORS	DMUSER
DOCS_SUPERVISORS	INTERNAL
DOCS_SUPERVISORS	WINCADMIN
DOCS_USERS	CAMERONM
DOCS_USERS	DMADMIN
DOCS_USERS	DMUSER
DOCS_USERS	GLAVINET
DOCS_USERS	JETERD

Network Aliases Report

The Network Aliases Report displays the list of all user and group network aliases

Network_Aliases (Total: 14)

P/G	PERSONORGROUP	NETWORK_ID	NETWORK_TYPE
P	CAMERONM	WGS_L_VM\CAMERONM	8
P	DMADMIN	WGS_L_VM\DMADMIN	8
P	DMUSER	WGS_L_VM\DMUSER	8
G	DOCS_SUPERVISORS	WGS_L_VM\DOCS_SUPERVISORS	8
G	DOCS_USERS	WGS_L_VM\DOCS_USERS	8
P	GLAVINET	WGS_L_VM\GLAVINET	8
P	JETERD	WGS_L_VM\JETERD	8
P	MUSSINAM	WGS_L_VM\MUSSINAM	8
G	NEWTST	WGS_L_VM\NEWTST	8
G	NYMETS	WGS_L_VM\NYMETSTEAM	8

Library Contents Matrix

The Library Contents Matrix reports the total row count of all tables in the library. The options and results are the same as the Enterprise – Library Contents Matrix.

Move User

The Move User function will take all selected information related to a user and move that information to another library. This function is particularly useful when you consolidate libraries as well as when a user transfers from one office to another.

When you select the Move User function, a form similar to the following will display:

Select the options for moving user(s)

<input checked="" type="checkbox"/> Retain Document Number	<input type="checkbox"/> Include In-Use & Checked-Out Documents	<input type="checkbox"/> Process documents where user is Author
<input checked="" type="checkbox"/> Process Projects & Folders	<input type="checkbox"/> Append Library Name to DocName	<input type="checkbox"/> Process documents where user is Typist
<input checked="" type="checkbox"/> Process Activitylog	<input type="checkbox"/> Append Original DocNumber to Abstract	<input type="checkbox"/> Process documents where user's Primary Group members are Authors
<input type="checkbox"/> Use Group Default Profile Form	<input type="checkbox"/> Disable User in Source Library	<input type="checkbox"/> Process documents where user's Primary Group members are Typists
<input type="checkbox"/> Remove DOCS from Needs_Foldering	Increment Doc # <input type="text"/>	

OK Cancel

Options:

- **Retain Document Number:** if a document's number is still available in the source library, WinTools will use it for the copied or transferred document. Note that if this option is used when a document with a high document number is transferred into a smaller library with lower document numbers, all subsequent new documents created in that target library will have document numbers higher than the transferred document.
- **Process Project & Folders:** check this option to copy a document's Projects or Folders to the target library.
- **Process Activity Log:** check this option to copy ActivityLog entries to the target library.
- **Use Group Default Profile Form:** check this option to use the user's Primary Group default profile form instead of the original profile form.
- **Remove DOCS from NEEDS_FOLDERING:** if you have DMFolders, check this option to have documents not added to the queue.
- **Include In-Use & Checked-Out Documents:** check this option to force the copy of in-use and checked-out documents.
- **Append Library Name to DocName:** check this option to append the target library's name to the target document's name.
- **Append Original DocNumber to abstract:** check this option to append the original document's number to the Description (ABSTRACT) field in the target document.
- **Disable User in Source Library:** check this option to disable the user in the source library.
- **Increment Doc#:** if the option to Retain Document Number is not checked, enter the number to increment the next document number in the target library.
- **Process documents Where User is Author:** copy all documents where the user is the Author.
- **Process documents Where User is Typist:** copy all documents where the user is the Typist.
- **Process documents Where User's Primary Group Members are Authors:** copy all documents where the Author is a member of the user's Primary Group.
- **Process documents Where User's Primary Group Members are Typist:** copy all documents where the Typist is a member of the user's Primary Group.

Copy Documents to Another Library



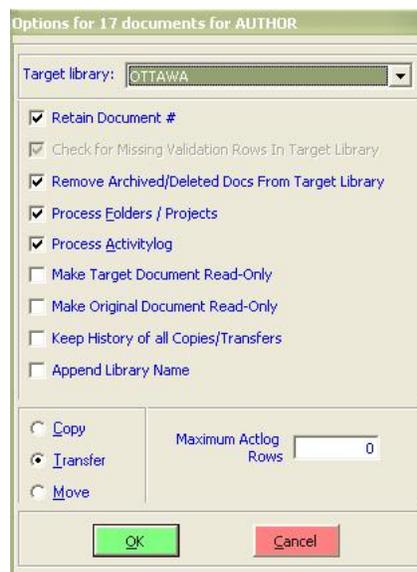
This function copies or transfers all selected documents to another library. Documents can be selected based on Author, Typist, Primary Group, Folder/Project or by the results of a DM document search (by query).

Based on which document criteria you selected, you will be presented with a lookup form to select one or more users, groups, or folders/projects. Selecting By Query will present you with an eDOCS Search form.

NOTES:

- For performance reasons, it is suggested that you disable WincTools logging while running the Copy or Transfer Documents procedure
- If a document has already been copied or transferred to the target library, or if you are transferring a document back into its source library, WincTools will ***overwrite*** the copy in the target library with the copy in the source.
- When copying or transferring documents, only documents in the current library are processed, even if documents from other libraries are selected from the hitlist.

After selecting the documents to be processed, you will be presented with the following set of options:



Document Copy Options

- **Target Library:** Select the library to receive the documents.
- **Retain Document#:** If a document's number is still available in the source library, WincTools will use it for the copied or transferred document. Note that if this option is used when a document with a high document number is transferred into a smaller library

with lower document numbers, all subsequent new documents created in that target library will have document numbers higher than the transferred document.

- **Check for Missing Validation Rows in Target Library:** Select this option if you want WincTools to check that a document's metadata (validation data) exists in the target library before attempting to process the document. Note that this option will increase the performance time for the function.
- **Remove Archived/Deleted Docs From Target Library:** Select this option if you want documents that are archived or deleted in the source library to be removed from the target, rather than copying the document to the target.
- **Process Folders / Projects:** This option will re-create all projects or folders (and their trustees) of which the selected documents are members. It may or may not re-create the entire folder structure, depending upon the complexity of the structure (for instance, it will not re-create other subfolders that may exist in the folder that are at the same level as a subfolder in which a document resides).
- **Process Activity Log:** Select this option to copy history information along with the document to the target library.
- **Make Target Document Read-Only:** This option makes the target document read-only.
- **Make Original Document Read-Only:** This option makes the source document read-only.
- **Keep History of all Copies / Transfers:** Keep all ActivityLog entries including all WincArchive transfers and copies.
- **Append Library Name:** With this option checked, WincTools will modify the document name in the target library to include the name of the source library.
- **Document Archiving process:**
 - **Copy Documents:** Copy Documents will always retain the documents in the source library and make a duplicate of that document in the target. Note that if the same document is copied multiple times to the same target library, subsequent copies of that document will replace the original copy on the target.
 - **Transfer Documents:** This option will copy the document to the target library, and upon successful completion, mark the original (in the source library) as Transferred. Note that if you transfer a document that was previously copied to the same target library, the transfer will replace the original copy on the target.
 - **Move Documents:** This option will copy the document to the target library, and upon successful completion, remove the original from the source library. Note that if you move a document that was previously copied to the same target library, the move will replace the original copy on the target.
- **Maximum Actlog Rows:** You may specify the maximum number of History rows to copy to the target library. If left at 0, all History records will be copied when Process ActivityLog is checked.

Export Documents



This function copies all selected documents to a directory called \EXPORT in a location that you specify. The exported file name becomes the document's profile name, number, version, and subversion.

Documents can be selected for export based on Author, Typist, Document Type, Application, Client/Matter (ASCII file), Matter, or by the results of a DM document search (by query). Note that client/matter and matter are only available for legal installations with the corresponding client and matter tables.

To export documents, right-click on the appropriate library name and choose Export Documents... Based on which document criteria you then select, you will be presented with a lookup form to choose one or more users, groups, applications, or matters. Selecting **By Query** will present you with an eDOCS DM Search form. Note that when selecting the By Query option, the search form may appear minimized; simply click on the taskbar icon that corresponds to the search form, and continue as normal.

If you selected the **By Matter** export option, you will be asked whether you would like all documents pertaining to a specific client, or only those belonging to a specific matter.

If you selected the **By Input File (Client / Matter)** option, you will be asked to locate a text file containing the list of clients and matters to be exported. The comma-delimited text file must have the client value as the first column and the matter value as the second column.

Once you have established the criteria for documents to be exported, you will see the following options:



- **Save documents with short names:** This option will name the exported files with their document number, version, and subversion (e.g., *123_v1A.doc*). Otherwise, documents will be exported with the document name, number, version, and subversion (e.g., *Memo to Jones_#123_v1A.doc*).
- **Separate documents into Author / Document Type Directories:** Checking this option will subdivide the exported documents into directories based on their author and document

type. This option is highly recommended for documents which may be imported into any document management system at a later date.

- **Separate documents into Client / Matter Directories:** Checking this option will subdivide the exported documents into directories based on their client and matter. This option is highly recommended for documents which may be imported into any document management system at a later date.
- **Export last version only:** Checking this option will export only the most recently edited version (which may or may not be the highest version number of the document).

Choose a location for the exported documents. An EXPORT directory will be created at this location, and will contain all exported files as well as an export log.

NOTE: The WincTools export log contains all information necessary to re-import the documents into another eDOCS library, including author, typist, client and matter, application, and default security. Please see the Import Documents instructions below for further information.

Import Documents



There are two methods you can use for importing documents into your DM library:

- *Import Documents From Local Drive:* This option allows you to import either an individual file or an entire subdirectory on a local or network drive into DM, and (optionally) replace the local file with a DRF file of the same name.
- *Import from Export Log:* If you have a WincTools export log, WincTools can use it to import documents into another eDOCS library. Select Import Documents from the menu of the library that will receive the documents, and select the WincTools export log that corresponds to the documents you want to import. All documents referenced in the WincTools export log will be imported as long as their locations have not changed since the export was created.

NOTE: All validation data referenced in the WincTools Export log must be created in the destination library before initiating the WincTools document import. If the document was secured in the original library at the time of export, the document will be secured to the author and the typist only in the destination library. The ABSTRACT column is included in the export log and to use it, the column name in the import PROFILE form must be called ABSTRACT.

Secure Documents



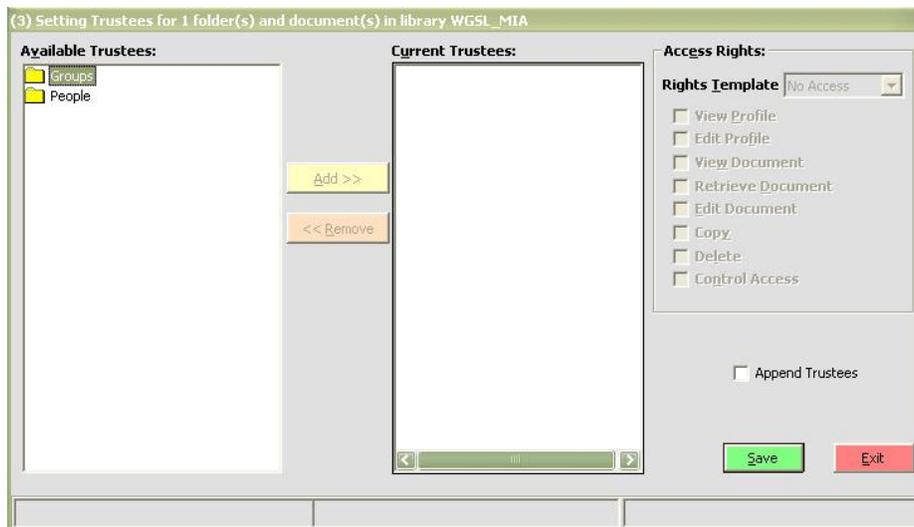
To re-set security on a group of documents, right-click on the appropriate library and select **Secure Documents**. Options for securing documents are Author, Typist, Document Type, Primary

Group, Application and Query. If Query is selected, the recently edited document list will appear; you may select from these documents or click the Change Criteria button to modify the search.

If selecting other than the Query option, you must choose a date range for the report, and can select whether the date referenced is the last edit date or the last access date.



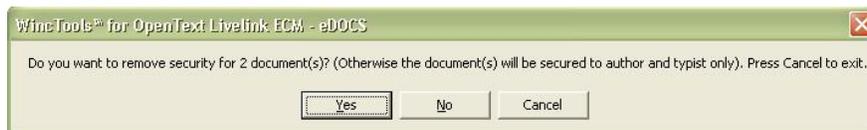
If you select a folder to secure, the folder's contents (including subfolders) will be secured as well. After selecting the document(s) or folder(s) to be secured, the following screen will show:



Take note of the **Append Trustees** option; select this option if you do not want to over-write existing document security. If this option is un-checked, the trustees you designate will be added to the documents selected and *all other trustees will be removed*.

NOTE: Although the WinTools security dialogs do not display deny rights for each level of security, the enhanced ACL features of DM5 will be used if the library parameter has been enabled. Setting a Rights Template of No Access in WinTools will result in a Deny All setting for environments using Enhanced ACL.

If you click the Save button without designating any trustees, you will have the option to remove all security from the documents, or secure the documents to their author and typists only.



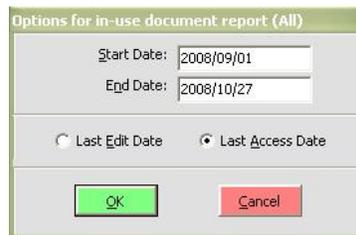
Click **Yes** to remove security from all selected documents; click **No** to secure all files to their respective authors and typists only.

In-use Documents...

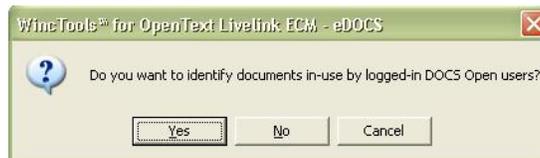


The In-Use Documents function generates a list of all documents currently marked as being in use, the account by which the file was locked, and a Y or N designating whether or not that account is currently logged in (DOCS Open clients only).

To run the In-Use Documents report, right-click on the appropriate library and select In-Use Documents. You may run the report for all documents, or narrow the report by Author, Typist or by a eDOCS DM Query. You will then be asked to select a date range of documents to examine and to designate whether the date referenced is the last edit or the last access date.



Note: A final option will provide the choice whether or not to identify documents in-use by currently logged-in users. This selection will only apply to users connected via DOCS Open clients.



The report may take a while to generate, depending on the size of your library and the speed of the connection to your document servers. When the report is complete, you can then select any or all of the documents and choose from the right-click menu to **Display Profile** or **Release Document(s)** to unlock the selected files.

Documents that are in use in library WGL_MIA [Total = 3]

DocNumber	DocName	Last Edited By	LAST_ACCESS_DATE	LAST_ACCESS_TIME	DocType	Status	Logged In?
44	Crosswind for Opentext eDOCS	WINCADMIN	2008		LETTER	Checked Out	?
47	WinArchive for DOCS Open	WINCADMIN	2008		LETTER	Checked Out	?
50	WinWall for DOCS Open	WINCADMIN	2008		LETTER	Checked Out	?

Right-click context menu options: Release Document(s), Display Profile, Select all, Deselect all, Save window, Print window, Close window.

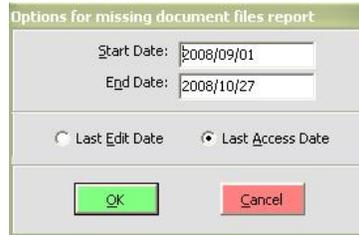
Missing Document Files



The Missing Document Files report displays a list of all profiles and versions where the corresponding file on the file server either does not exist or is zero bytes. This report can be generated for all users, for a specific Author, Typist, or Document Server, or by a custom Query.

To report on missing document files, right-click on the appropriate library and select the Missing Document Files menu item. If by Author, by Typist, or by Document Server is selected, you will be presented with a lookup to select the report criteria. The by Query option will open the Recently Edited Documents window, where you may click Change Criteria to search for specific documents to examine.

Click OK to continue. You must next choose a date range for the report, and can select whether the date referenced is the last edit date or the last access date:



Click OK and the report will begin to run. With large document sets, this report may take some time to complete. Zero-byte files will be reported in brackets, while missing files will appear in the result set without brackets.

Missing Document files in library WGS_L_MIA [Total = 2]

DocNumber	DocName	Version	Subversion	Author	Typist	App	Creation Date	File
0000050	[WinWall for DOCS Open]	01	!	DMUSER	WINCADMIN	MS WORD	2005-07-14	\\WGS_L-SQLDM\DOCS\HUMMINGBIRD\DM S
0000057	TestInFolder with other	01	!			ROBAT	2008-10-22	\\WGS_L-SQLDM\DOCS\HUMMINGBIRD\DM S

Right-clicking on any row or rows in the report will provide the following options:

- **Mark Profile Unavailable:** This option changes the status of the document(s) to unavailable.
- **Mark Version Unavailable:** This option changes the status of the version(s) to unavailable.
- **Delete Profile:** This option deletes the profile record, including all corresponding references (components, versions, etc.).
- **Delete Version:** This option deletes only the version record corresponding to the missing file.

Missing Document Profiles



The Missing Document Profiles function examines document servers for files which have no associated profiles. This report can be run for all document servers or for a single specified document server.

To run the Missing Document Profiles report, right-click on the appropriate library and select Missing Document Profiles from the pop-up menu. Select All to search all document servers for un-profiled documents, or By DocServer to search a single document server. Then you will be

asked to enter the number of days back from the current's date that you wish to search for files, and where to start the search of files from the Document Server.



Files without profiles found in library WGSL_MIA [Total = 13 out of 58]

File Path	Application	Server	File Date
\\wgs1-sqldm\docs\hummingbird\dm server\program\wgs1_mia\dmuser\1#011.doc	MS WORD	\\WGSL-SQLDM\DOCS	10/21/2008 4:21:19 PM
\\wgs1-sqldm\docs\hummingbird\dm server\program\wgs1_mia\dm	WORD	\\WGSL-SQLDM\DOCS	10/21/2008 4:20:52 PM
\\wgs1-sqldm\docs\hummingbird\dm server\program\wgs1_mia\dm	WORD	\\WGSL-SQLDM\DOCS	10/27/2008 4:54:06 PM
\\wgs1-sqldm\docs\hummingbird\dm server\program\wgs1_mia\dm	WORD	\\WGSL-SQLDM\DOCS	10/21/2008 4:20:36 PM
\\wgs1-sqldm\docs\hummingbird\dm server\program\wgs1_mia\dm	WORD	\\WGSL-SQLDM\DOCS	10/21/2008 4:20:46 PM
\\wgs1-sqldm\docs\hummingbird\dm server\program\wgs1_mia\dm	WORD	\\WGSL-SQLDM\DOCS	10/21/2008 4:20:59 PM
\\wgs1-sqldm\docs\hummingbird\dm server\program\wgs1_mia\dm	WORD	\\WGSL-SQLDM\DOCS	10/21/2008 4:21:04 PM
\\wgs1-sqldm\docs\hummingbird\dm server\program\wgs1_mia\dm	WORD	\\WGSL-SQLDM\DOCS	10/21/2008 4:21:11 PM
\\wgs1-sqldm\docs\hummingbird\dm server\program\wgs1_mia\dm	WORD	\\WGSL-SQLDM\DOCS	10/27/2008 4:54:11 PM
\\wgs1-sqldm\docs\hummingbird\dm server\program\wgs1_mia\dm	WORD	\\WGSL-SQLDM\DOCS	10/27/2008 4:54:17 PM
\\wgs1-sqldm\docs\hummingbird\dm server\program\wgs1_mia\dm	WORD	\\WGSL-SQLDM\DOCS	10/27/2008 4:54:20 PM
\\wgs1-sqldm\docs\hummingbird\dm server\program\wgs1_mia\dm	WORD	\\WGSL-SQLDM\DOCS	10/27/2008 4:54:22 PM
\\wgs1-sqldm\docs\hummingbird\dm server\program\wgs1_mia\dm	WORD	\\WGSL-SQLDM\DOCS	10/27/2008 4:54:24 PM

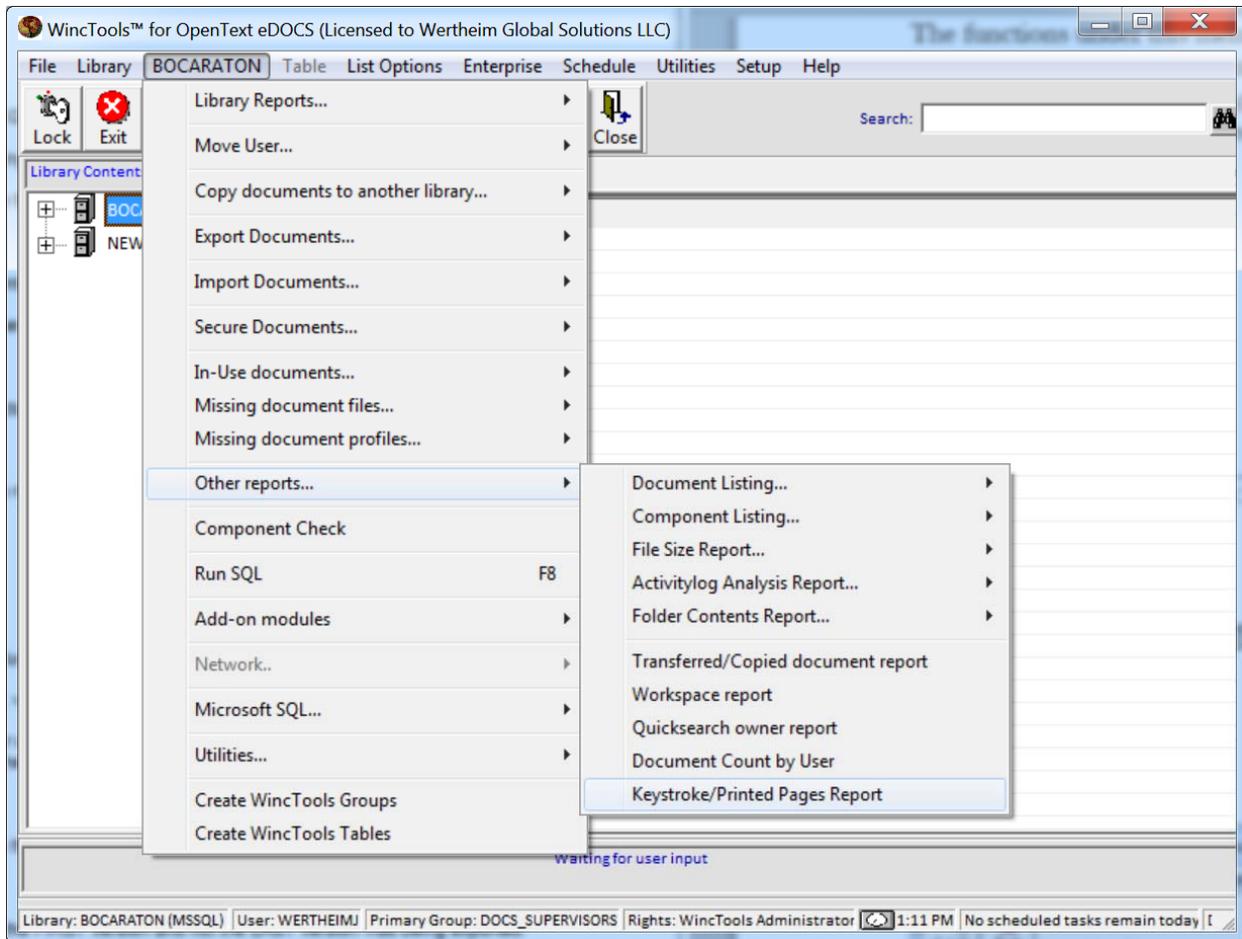
Context menu options: Delete file(s), Rename file(s), Import file(s), Move file(s), Select all, Deselect all, Save window, Print window, Close window.

For standard document servers, the options below will be available by right-clicking on selected report rows. These options will not be available if the document server is read-only or is using eDOCS's DSA service.

- **Delete file(s):** deletes the file from the server.
- **Rename file(s):** renames the file, you must specify the full name including extension.
- **Import file(s):** imports the file as a new document into eDOCS.
- **Move file(s):** move the file to another location.

Other Document Reports

The functions under this menu option generate reports based on a document's history. You can view document or component information by Author, Typist, Document Type, Application, or by Query; as well as query the ActivityLog to gather information about user activities in the library. All of these functions are accessed by right-clicking on the appropriate library and selecting Other Document Reports.



- **Document Listing:** allows you to list all documents for a specific Author, Typist, Document Type, Application, or specific Query. This report can be further narrowed by date range based on either the last edit or the last access date.
- **Component Listing:** allows you to list all components for a specific Author, Typist, Document Type, Application, or specific Query. This report can be further narrowed by date range based on either the last edit or the last access date; you will also have the option to display either the full document path or just the file name.
- **File Size Report:** allows you to list the file sizes of all components of documents, for a specific Author, Typist, Group, Application, Age, Document Server, or documents of at least a certain size.
- **Activity Log Analysis Report:** displays an analysis of activity log transactions for the specified date range, optionally broken down by transaction date. This report can be generated for all activity log values within the date range, or for a specific Author, Typist, Application, or Primary Group.
- **Folder Contents Report:** displays a list of all items in folders, by Author, Typist or Group.
- **Transferred/Copied Document Report:** displays for a specified date range a list of all documents that have been transferred from other libraries (using either WincTools or Storage Manager), including the original document number. Unless the file's current document server is read-only or running the eDOCS DSA service, right-clicking a row or rows in the report will allow you to change the document number and filename of each

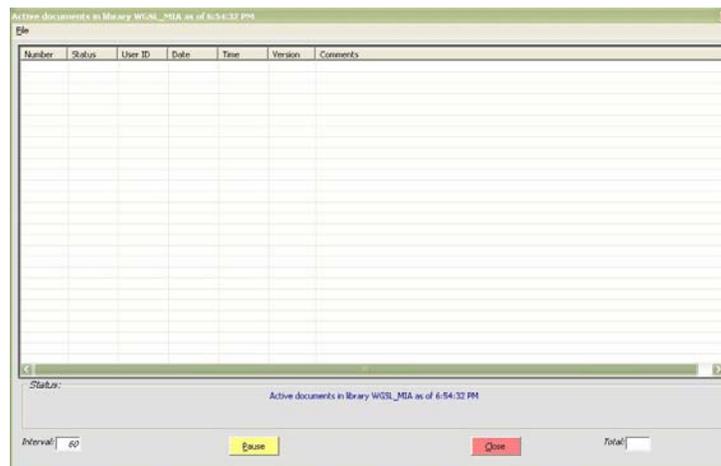
component to match the document number and file name from the source library. Note that this will only occur if the original name(s) and number(s) are available in the current library. You will be prompted to confirm this selection before WincTools will proceed with updating the document numbers.

- **Workspace Report:** produces a report of all workspaces for all users in the library, and the item(s) associated with the workspace(s).
- **QuickSearch Owner Report:** displays every quicksearch and who is the Owner of each.
- **Document Count by User:** lists all users who have authored or typed documents, along with a count of documents authored and typed. The user's primary group will also be displayed.
- **Keystroke/Printed Pages Report:** produces a report of keystrokes and pages/printed as they exist in the activitylog.

Component Check

The Component Check function examines all in-use documents (within a specified date range) for missing document files, and verifies that the document files exist when an in-use document is closed. Note that this function may take a long time to load, and other WincTools functions cannot be used while this function is running.

To launch the Component Check function right-click the appropriate library and choose **Component Check** from the library's menu. The following screen will be displayed:



You may adjust the default refresh interval of 60 seconds typing a new number of seconds in the Interval textbox.

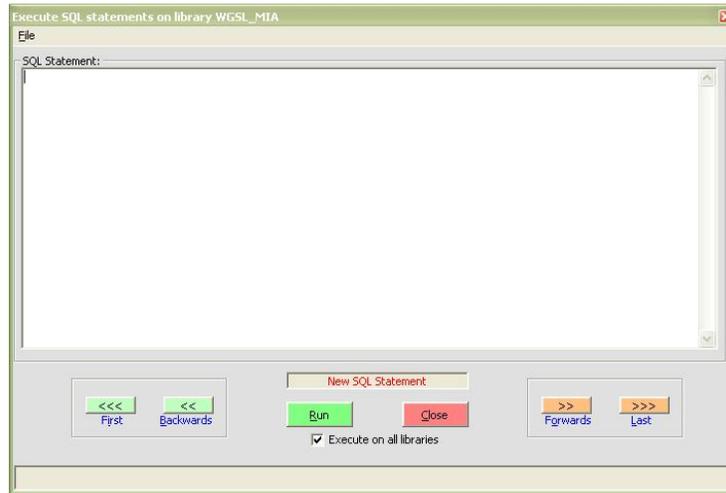
To print the report, press **Ctrl-P**. To save the report, press **Ctrl-S**.

Run SQL

WincTools includes an interactive SQL query tool that includes a history of all SQL statements which have been executed during the current WincTools session. The SQL query tool may be accessed from any library's menu, or by pressing **F8** within WincTools.

To maintain the referential integrity of your eDOCS database, only members of the WINCDBADMIN group (discussed in greater detail on page 15) are permitted to run INSERT, DELETE, or UPDATE statements. Any statement which will modify the contents of the library will ask the user to confirm their decision before executing the SQL statement.

The WincTools SQL query tool is displayed below:



The last SQL statement run by WincTools will be displayed; other SQL statements can be accessed (as well as modified and re-run, if desired) by navigating backwards and forwards through the history of statements. For a new query, press **F7**. Any statement can also be executed on all currently connected libraries by selecting the **Execute on all Libraries** checkbox.

The history of SQL statements is only maintained for the current WincTools session. Any SQL statement can be saved for re-use during a later WincTools session, however. Within the SQL query window, navigate to the statement you wish to save and select **Save SQL Statement** (or press **Ctrl-S**). You can then provide a name for the statement; the query and its name will be saved to the registry of the workstation on which WincTools is installed.

Note that a query must have been executed once in order to be saved.

To retrieve a saved SQL statement, you must be on the same WincTools workstation which saved the query. Launch the SQL query tool, and select **Open Saved SQL Statement** from the File menu. A list of saved statement names will be displayed for selection.

From the WincTools SQL query window, you may also export or import SQL queries using the corresponding menu items from the File menu. If you import a DOCS SQL Log file, WincTools will parse the log file's SQL statements and allow you to browse them. To turn on logging for OpenText DOCS Open clients, the following entries must appear in your WIN.INI file:

```
[DOCS Open Logging]
LogToFile=1
LogFileName=logfilepath.log
```

WincArchive, WincSync, WincWall

If you have purchased any of the WincTools add-on modules, many of their functions may be accessed from within WincTools. Please refer to the documentation for each product for further information.

Network



While the Enterprise Network function will display the contents of network containers, the library-level Network menu provides the ability to compare these network containers to your DM users and groups, examine and correlate group memberships, and apply this information to your DM library. Note that all of the network functions may take a long time to complete, depending on the size and performance of the enterprise network environment. This menu option will be unavailable if the WincTools option Load Networks at Startup is turned off.

- **Users and Groups:** Selecting a network object from the Users and Groups menu will display the users and groups from the selected library and compare them to the users and groups in the selected network container. Users and groups that exist in the library but not on the network will be noted.

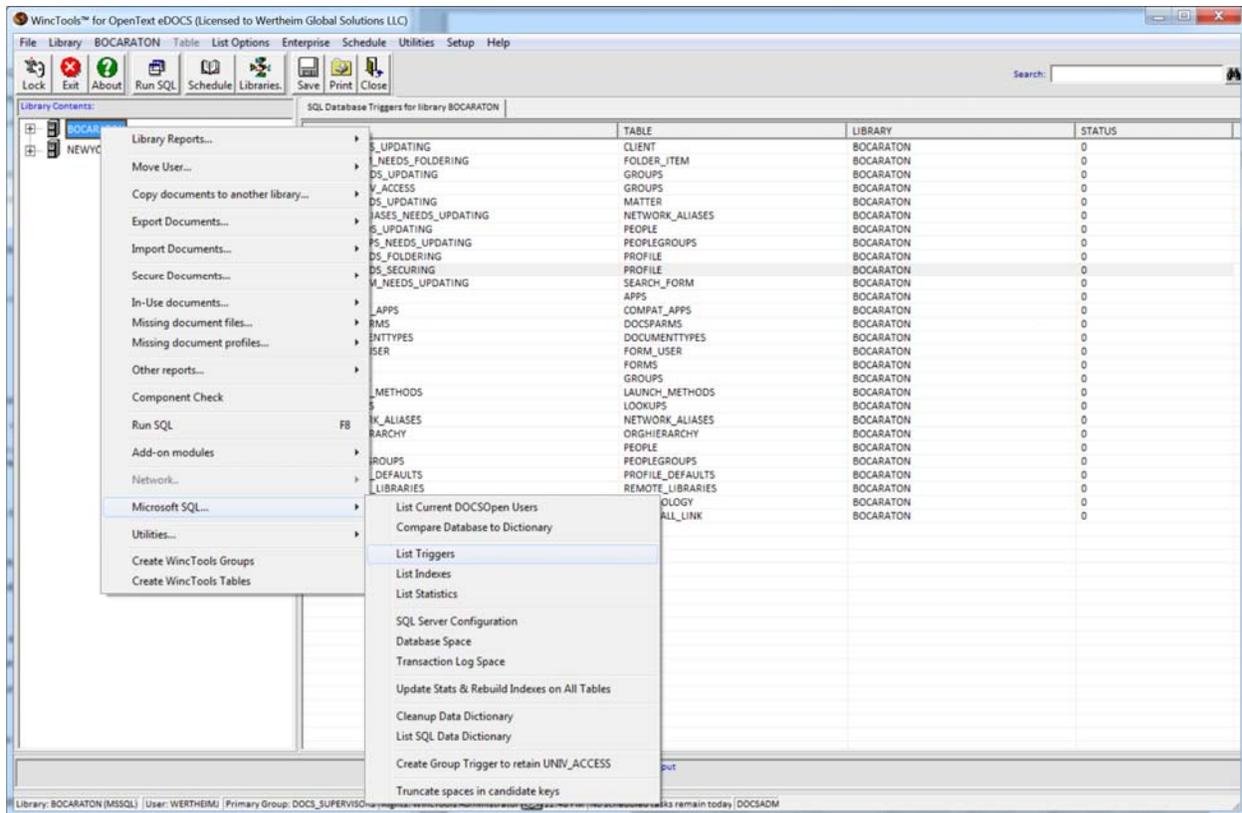
P or G	Network Name	DM Name	Alias	Notes
User	Administrator			Not found in library WGSL_MIA
User	arod			Not found in library WGSL_MIA
User	CameronM	CAMERONM	WGSL-VM\CAMERONM	
User	DMADMIN	DMADMIN	WGSL-VM\DMADMIN	
User	DMUSER	DMUSER	WGSL-VM\DMUSER	
Group	DnsUpdateProxy			Not found in library WGSL_MIA
Group	DOCS_SUPERVISORS	DOCS_SUPERVISORS	WGSL-VM\DOCS_SUPERVISORS	
Group	DOCS_USERS	DOCS_USERS	WGSL-VM\DOCS_USERS	
Group	Domain Admins			Not found in library WGSL_MIA
Group	Domain Computers			Not found in library WGSL_MIA
Group	Domain Controllers			Not found in library WGSL_MIA
Group	Domain Guests			Not found in library WGSL_MIA
Group	Domain Users			Not found in library WGSL_MIA
Group	Enterprise Admins			Not found in library WGSL_MIA

- **Group Memberships:** Selecting a network object from the Group Memberships menu will display the group membership assignments from the selected library and compare them to the group memberships in the selected network container. Group memberships that exist in the library but not on the network will be noted.

Group	User	Notes
DOCS_SUPERVISORS	DMADMIN	
DOCS_SUPERVISORS	DMUSER	Not found on network WGSL-VM
DOCS_SUPERVISORS	INTERNAL	Not found on network WGSL-VM
DOCS_SUPERVISORS	WINCADMIN	
DOCS_USERS	CAMERONM	Not found on network WGSL-VM
DOCS_USERS	DMADMIN	
DOCS_USERS	DMUSER	
DOCS_USERS	GLAVINET	Not found on network WGSL-VM
DOCS_USERS	JETERD	Not found on network WGSL-VM
DOCS_USERS	MUSSINAM	Not found on network WGSL-VM
DOCS_USERS	PIAZZAM	Not found on network WGSL-VM
DOCS_USERS	RIVERAM	Not found on network WGSL-VM
DOCS_USERS	WINCADMIN	

Microsoft SQL

The Microsoft SQL sub-menu contains items which generate reports to identify the health of your SQL databases. This option is not appropriate for environments running on Oracle database servers.



List Current DOCSEn Users

This function displays a list of all users currently connected to all libraries, and refreshes automatically every 60 seconds. Please note that this function will only be able to report those users running DOCS Open clients, as all DM Extensions clients connect to the database using the DM Server service account.

Compare Database to Dictionary

This function compares the tables in the database to the tables defined in the eDOCS Data Dictionary, and then compares the columns each table in the eDOCS Data Dictionary with the columns in each of the database tables. NOTE that tables and columns that are in the database but not in the dictionary should not cause problems with your system; but tables and columns in the dictionary that are not in the database may cause your system to fail.

List Triggers

This function lists all the triggers in the database. Triggers can be enabled and/or disabled from the results. Status of zero means the trigger is enabled, status of one (1) means the trigger is disabled. NOTE that it is recommended that you disable all triggers in the database prior to running Library Generator to update a library, and re-enable them after completed.

List Indexes

This function displays a list of all of the indexes on all tables in the database.

List Statistics

This function displays a list of all of the statistics on all tables in the database.

SQL Server Configuration

This function displays a list of all of the configuration settings in the database.

List Indexes

This function displays a list of all of the indexes on all tables in the database.

Database Space

When you run the Database Space report, you have the option to see summary information for the database, or detailed information for each user table. Note that the detailed table report can take quite a long time to execute.



Summary result set:

Database Space Information for all libraries						
Database	Library	Rows	Space Allocated	Space Used	Space Available	% Used
WGSL_MIA	WGSL_MIA	16,196	1,742,848	860,160	882,688	49%
OTTAWA	OTTAWA	1,764	430,080	108,544	321,536	25%

Detailed result set:

Database Space Information for all libraries							
Database	Library	Table	Rows	Space Allocated	Space Used	Space Available	% Used
WGSL_MIA	WGSL_MIA	ACTIVITYLOG	259	30,720	14,336	16,384	47%
OTTAWA	OTTAWA	ACTIVITYLOG	8	16,384	2,048	14,336	13%
WGSL_MIA	WGSL_MIA	APPS	30	8,192	2,048	6,144	25%
OTTAWA	OTTAWA	APPS	30	8,192	2,048	6,144	25%
WGSL_MIA	WGSL_MIA	ARCHIVES	0	0	0	0	
OTTAWA	OTTAWA	ARCHIVES	0	0	0	0	
WGSL_MIA	WGSL_MIA	CHECKOUT	0	12,288	2,048	10,240	17%
OTTAWA	OTTAWA	CHECKOUT	0	12,288	2,048	10,240	17%

Transaction Log Space

The Transaction Log Space report displays the library name, database name, log size (in MB), log space used, and status for each transaction log.

Update Statistics and Rebuild Indexes

This function updates the Statistics and Rebuilds all of the indexes on all of the tables in the database.

Cleanup Data Dictionary

This function will remove table and column entries from the data dictionary that do not exist in the database.

List SQL Data Dictionary

This function lists the data dictionary – tables and columns – in SQL.

Create Group Trigger to retain UNIV_ACCESS

This function will help with security issues where administrators might not have full access to all documents in the library. That can occur when you use Library Maintenance to edit an administrator group, where the value for the UNIV_ACCESS column is changed from 255 to zero (0). Installing this trigger in the database will prevent that change from occurring. NOTE that you must be connected to the database as the database owner (ie, DOCSADM) in order to create the trigger.

Truncate Spaces in Candidate Keys

This function will remove leading and trailing spaces from all keys in all tables that have candidate keys.

Compare Collation Sequences

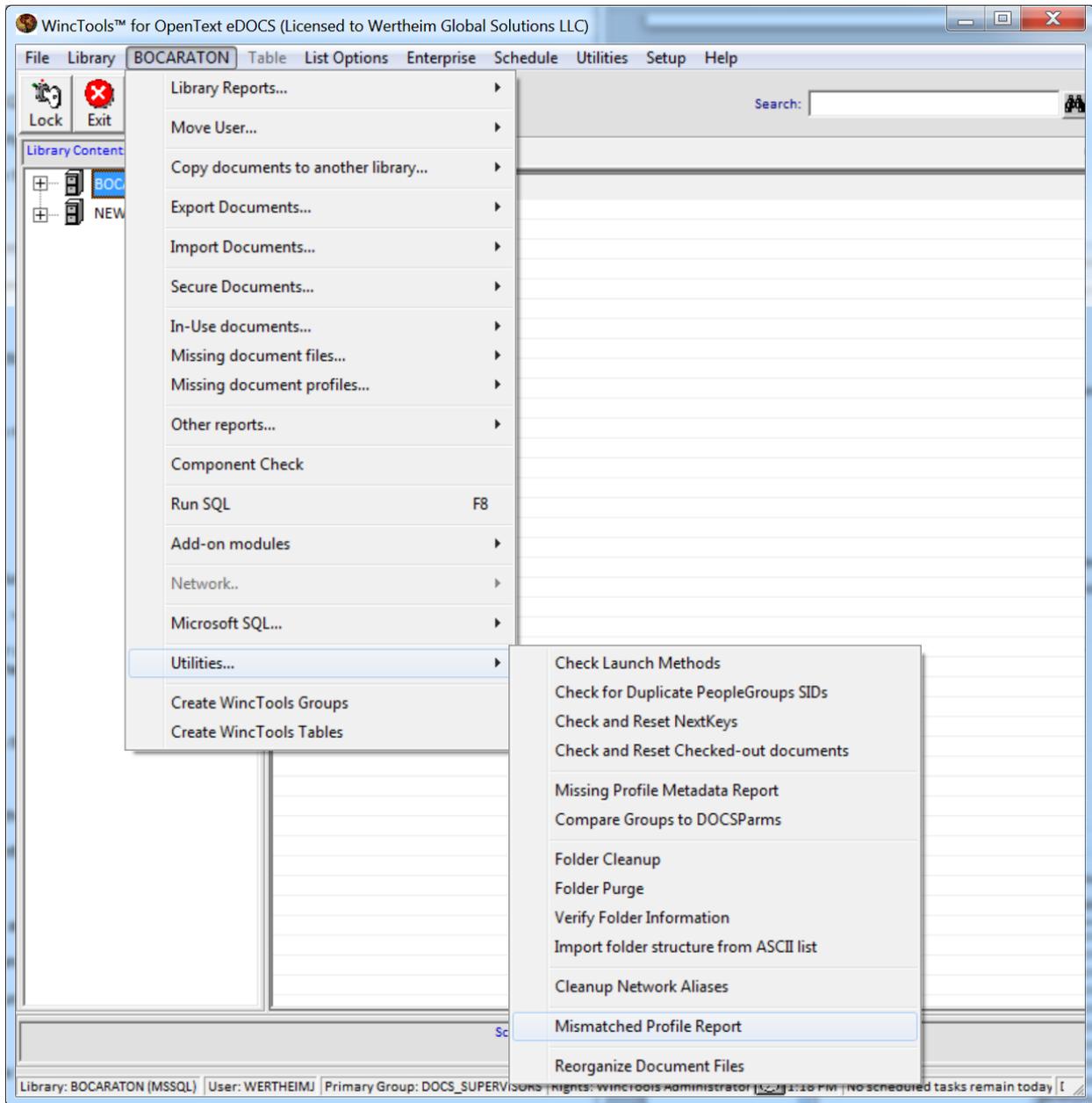
This function displays a list of the Collation Sequences (sort order) for the database associated with each library.

Library	Database	Sequence
WGSL_MIA	WGSL_MIA	SQL_Latin1_General_CP1_CI_AS
OTTAWA	OTTAWA	SQL_Latin1_General_CP1_CI_AS

Cleanup Data Dictionary

This function will remove table and column entries from the data dictionary that do not exist in the database.

Utilities:



Check Launch Methods

The Check Launch Methods function checks the path for each application launch method against the current workstation and displays a list of all launch methods which are not valid. After selecting Check Launch Methods from a library's menu, WincTools will warn you that the procedure may take a while to complete. Click Yes to continue with the function or No to cancel.

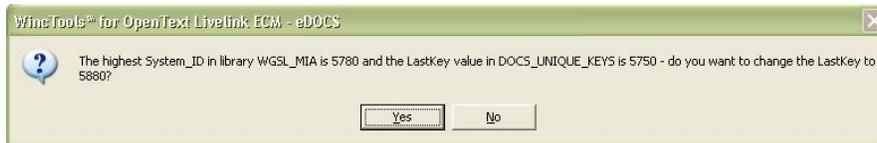
If any invalid launch methods are identified, you may select one or more of the results and remove them from the library by right-clicking on the selected rows and selecting Remove Launch Method. You will be prompted to confirm this action before WincTools proceeds to delete the specified launch methods.

Check for Duplicate People/Group SIDs

This function will check the People and Group tables to ensure that no system IDs have been used multiple times. If any duplicate values are found, all conflicting values will be displayed.

Check and Reset NextKeys

This function displays the highest system_id used by each table in the library, determines whether the next system_id to be assigned is lower than the highest assigned system_id, and if so, allows the user to reset the next system_id to a higher number. If a change is necessary, a message like the following will be displayed:



Click Yes to assign the new value, or No to cancel. If no change is necessary, a notification will also be displayed:

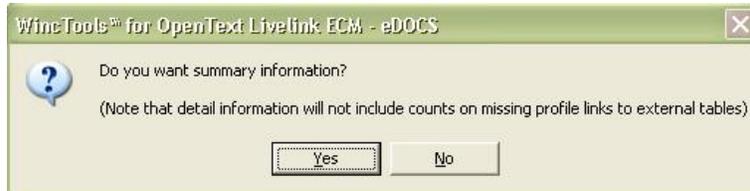


Check and Reset Checked-out Documents

This function identifies whether checked-out documents have the necessary entry in the CHECKOUT table, and allows you to release any documents that do not have that entry in the table

Missing Profile Metadata

The Missing Profile Metadata function analyzes the profile, versions, and components tables and identifies the differences between the tables for missing information. When you run this report, the following option will appear:



If you choose Yes to display only summary information, the report will display a count of items in the following five categories:

- Profiles without versions.
- Versions without components.
- Components without versions.
- Versions without profiles.
- Components without profiles.
- Missing profile links to external tables (such as author, documenttype, etc.).
- Profiles without security.

Selecting No will display all incidences of missing information. If there are no missing rows in the database, WincTools will display a notification.

Compare Groups to DOCSParms

This function will display differences between the system parameters and the associated setting for a group. Note that it does not show the 'Default' setting for a group parameter.

Folder Cleanup

The folder cleanup function will remove duplicate and unreferenced folder information from the library.

Folder Purge

The folder purge function will remove empty folders that have had no activity for a user-selected number of days.

Verify Folder Information

This function will analyze the tables related to folders (ROOT_OBJECT, FOLDER, FOLDER_ITEM, PROFILE, REMOTE_LIBRARIES and SECURITY) and report on items that have any missing or invalid information.

Import Folder Structure from ASCII list.

This function allows you to pre-create a folder structure based upon information contained in an ASCII list file.

Cleanup Network Aliases

This function will go through all the identified networks (NDS, ADS and NT Domains) and remove any network aliases in the selected library that do not match with an id on the network. It will also identify the non-disabled document server network type(s) and inform you of those that do not match with a valid network.

Mismatched Profile Report

This function will identify all documents that have a mismatched version or component entry.

Reorganize Document Files

This function can be used to change document file locations into a new template. For instance, if your documents are currently stored in AUTHOR\DOCTYPE directories, you can use this function to change the location to CLIENT\MATTER directories. In order to use this function, you need to ensure that no production users are accessing the system, and all document files are released (not open in an application). Then, you should go into Library Maintenance, change the document path template. After doing that, run this function in WincTools. NOTE that you should backup your document server before continuing; also note that this procedure may take a very long time, depending upon how many document files need to be moved.

Create WincTools Groups

The WincTools administration groups, discussed in detail on page 15, can be created selectively for individual libraries by using this command in place of the global Create WincTools Security Groups function from the Setup menu.

Create WINC_SETTINGS Table

If the WINC_SETTINGS table does not already exist, a menu option will be available to create it. This table is required for all scheduling and activity log purge functions. If the table already exists, this menu item will not appear.

Create Security Audit Tables

To keep track of changes to group memberships (WINC_AUDIT_PG), document and folder security (WINC_AUDIT_SEC), and WincWall walls (WINC_AUDIT_WALLS). This can help generate audit reports related to these items

Table Functions (Basic)



Table functions are those which operate on a single table. These functions are accessed by expanding a library in the library tree, selecting one of its tables and then either right-clicking or choosing the **[Table Name]** menu. This section will also cover the result set functions available for all tables; for information about functions available on validation tables, please refer to the Table Functions (Validation) section on page 54.

List Contents

This function lists all contents of the selected table.

Query Contents

WincTools includes a simple QBE form that allows you to easily select rows in any eDOCS table based on almost any criteria, including fields hidden through standard eDOCS administration tools. The WincTools QBE also provides access to validation data lookup forms for all foreign table

references. WincTools builds this QBE form dynamically, based on the contents and structure of the table.

Note: for tables with many columns, such as the Profile and Groups tables, the QBE form will be very large. At lower screen resolutions, use of the WincTools QBE form may not be practical.

A sample WincTools QBE form is displayed below:

Criteria may be entered for any columns in the table; the following qualifiers are available for each column:

- Equal To
- Not Equal To
- Greater Than
- Less Than
- Greater Than or Equal To
- Less Than or Equal To
- Like
- In List
- Not In List
- Between
- Is Null
- Is Not Null

Notes regarding the WincTools QBE form:

- It is not necessary to enter delimiting characters (such as commas or semicolons) to separate multiple values.
- Columns that display a lookup button (ellipses) allow you to select values from a lookup form. To display the lookup form, click the ellipses button or enter the field and press F2.
- Use the And / Or selection at the end of each field to define the appropriate criteria for multiple columns.
- To display a column on the results list, leave that column checked; otherwise, uncheck the column and its data will be hidden on the results list.
- Criteria from the previous query against the table are stored and re-populated when the QBE form is re-displayed. To clear all old criteria, click the **Clear** button.

To display the result set, click OK. The syntax of the query can be displayed and modified if desired in the WincTools SQL query tool, discussed in further detail on page 41.

Row Count

The Row Count function displays the total number of rows for the selected table.



Compare Table Structure To...

This function compares the structure of the selected table to the same table in another library. WincTools first compares the current table to the remote library's table, and then reverses the process, ensuring that all differences are noted. The results list will display by library any column defined in one table but not in the other.

Dictionary

The Dictionary function displays, in a separate window, the eDOCS data dictionary definition for the selected table. A sample dictionary for the APPS table is shown below:

Dictionary for Table APPS in Library WGS_L_MIA	
Column Name	Column Value
API_SECURITY	0
IMPORT_INT0	N
SYSTEM_ID	364
TABLE_NAME	APPS
TBL_DESCRIPTION	APPS
USER_MODIFIABLE	N
VALIDATION_TABLE	N
VERSION	

Forms

The Forms function lists all forms defined for the selected table.

Forms for Table APPS in Library WGS_L_MIA		
Form Name	Form Title	Form Type
_APPS	Table Lookup for _APPS	LOOKUPS
_APPS_PAPER	Table Lookup for the APPS table that includes <PAPER>	LOOKUPS
_APPS_VALID_PROFILE	Table Lookup for _APPS which are valid on profiles	LOOKUPS

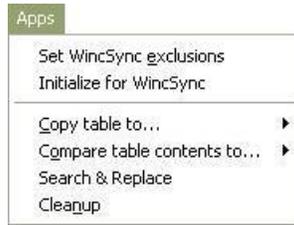
Cross-References

The Cross-References function lists all rows from other tables in the library that reference the rows in the selected table.

Missing Links

The Missing Links function lists all rows in the selected table that reference non-existent values in other tables.

Table Functions (Validation)



Note: Cross-library functions cannot be performed against the LAUNCH_METHODS table unless the following SQL statement has been run on each library:

```
UPDATE DOCSADM.DOCSCOLUMN SET CMSKEY = 'C'  
WHERE COLNAME = 'DESCRIPTION' AND TBNAME =  
'LAUNCH_METHODS'
```

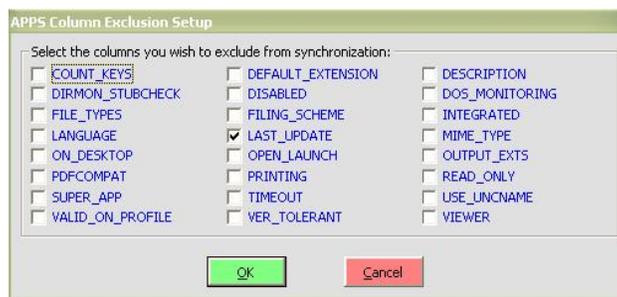
Set WincSync Exclusions

The Set WincSync Exclusions function, only available to licensed WincSync users, allows you to specify rows that will not be synchronized when copying data between libraries. Although the WincSync manual covers this topic in greater detail, a brief overview will be provided here.

Any column in any table that is not a key to that table may be excluded for synchronization. For example, different matters may be billable only in specific offices; in this case, the Billable column in the MATTER table could be excluded from synchronization.

Note: You **must** set Sync Exclusions for any columns that do not exist in all libraries. If these columns are not excluded, WincTools will generate SQL errors when attempting to synchronize that data.

After selecting the Set Sync Exclusions menu item, a list of all columns for that table will be displayed. Place a checkmark next to any column that should be excluded from synchronization. The list of all excluded columns is saved in a table called WINCSYNC_EXCLUSIONS.



Initialize for WincSync

Licensed WincSync users can choose to initialize a table for WincSync. This will populate the NEEDS_UPDATING table with all rows from the selected table for synchronization to all target libraries.

Copy Table To...

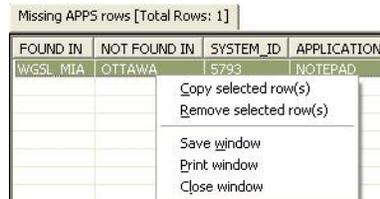
This function copies all rows in the selected table to the same table in one specified remote library. WincTools will prompt for confirmation before initiating this function.

Note: If you have installed the WincSync add-on module, you can also choose to apply only those rows in the Needs_Updating table. For more information, please refer to the WincSync manual.

Compare Table Contents To...

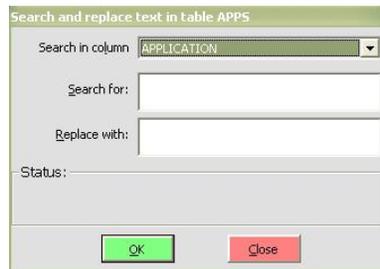
The table comparison function compares the contents of the selected table to the same table in another library. WincTools first checks that all rows in the current table are present in the remote table, and then reverses the process. The result set will display by library a list of rows not found in both tables; the following actions may be performed on any row or rows within the result set:

- Copy Selected Rows: adds the missing row(s) to the other library.
- Remove Selected Rows: attempts to delete the rows from the library where they exist. The rows cannot be deleted, however, if there are any references to them elsewhere in the database.



Search & Replace

The Search & Replace function allows you to replace one string of text with another string in a validation table's text column. This function works on the PROFILE table as well as all validation tables.



Select the column name in which to search from the drop-down list; all text columns will be displayed. Fill in your criteria for the Search For and Replace With values, and click OK. WincTools will then count the number of instances where the search text will be replaced, and ask for confirmation:



Click Yes to continue, or No to cancel the search and replace function.

Cleanup

The Cleanup function displays a list of rows in the selected table that are not referenced by any other row in the library. For example, running the Cleanup function against the APPS table will identify any applications that have no associated launch methods or document profiles.

You can right-click on any row(s) in the Cleanup result set and select **Remove row(s)** to permanently delete the unused row(s) from your database. WincTools will prompt for confirmation before processing the deletion.

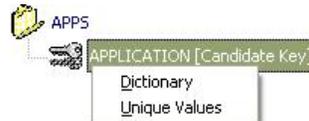
Table Functions (FOLDER table)

In addition to the options available on all system tables, the FOLDER table has one additional option. The **Sort and Fix** option will sort the contents of Folders alphabetically and verify the integrity of the Folder's components listing (stored in the FOLDER_ITEM table).

This WincTools function was designed to fix Folder references to deleted documents. When attempting to display a DM Folder that contains a reference to a deleted document, the Folder may appear empty. This issue is created when a document is deleted but a reference to the document remains in a DM5 folder. Documents deleted using WincTools do not create this issue, as WincTools removes all appropriate folder references when deleting a document.

NOTE: Because Open Text uses the reserved SQL keyword NEXT as the name of a column in the FOLDER_ITEM table, WincTools may generate errors when attempting to manipulate Folders. To resolve this issue, the SQL database option QUOTED_IDENTIFIER must be turned ON. For more information, please see the further details provided on page 19.

Column Functions



Two right-click options are available on each column; columns are displayed by expanding a table in the left-hand WincTools pane.

Dictionary

This function will display all database design information about the selected column, such as allow nulls, column length, and creator.

Unique Values

The Unique Values function has two uses. When it is selected, you will be prompted “Do you want a count of documents for *the selected column in the selected table?*” Answering **Yes** will give you a list of all unique values and a count of documents from the profile table linked to that value. Answering **No** will give you a list all unique values and the number of times each appear in the selected table.

For example, select Unique Values on the USER_LOCATION column in the PEOPLE table. If you answer **No** to “Do you want a count of documents,” you will have a list of all unique locations and the number of users in each. If you select **Yes**, you will have a count of documents created by users at each location.

Schedule Functions



The Schedule menu provides access to the WincTools Scheduler, from which you can schedule several maintenance jobs or launch an external application. Note that the scheduler will only function while WincTools is running on a workstation; if WincTools is closed, no scheduled tasks will be initiated.

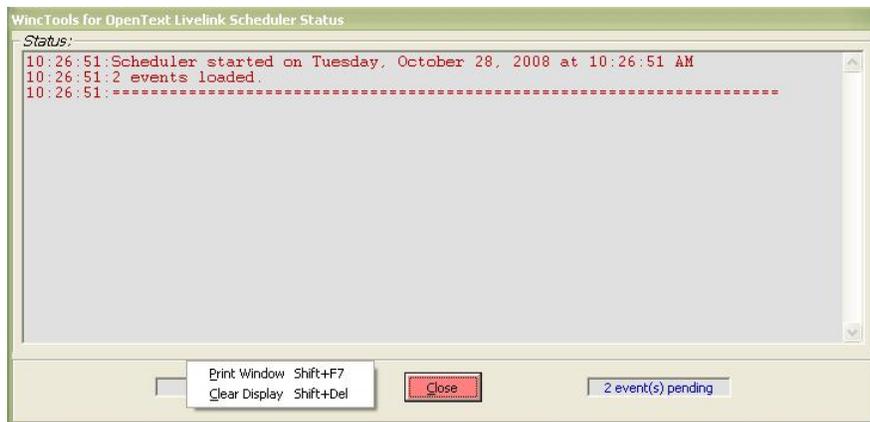
Manage

The Manage menu item will list all scheduled tasks in the WincTools results pane. For any event listed, the following options are available:

- **Edit Task:** edit the selected task.
- **Delete Task:** delete the selected task.
- **Run Task Now:** initiate the schedule task. The task will also run at its regularly scheduled time.
- **Pause/Release Task:** pauses the selected task so that it does not execute when scheduled, or releases a paused task so that it will execute at the scheduled time. The menu text will toggle to reflect the current state of the selected task (paused or released).

Status

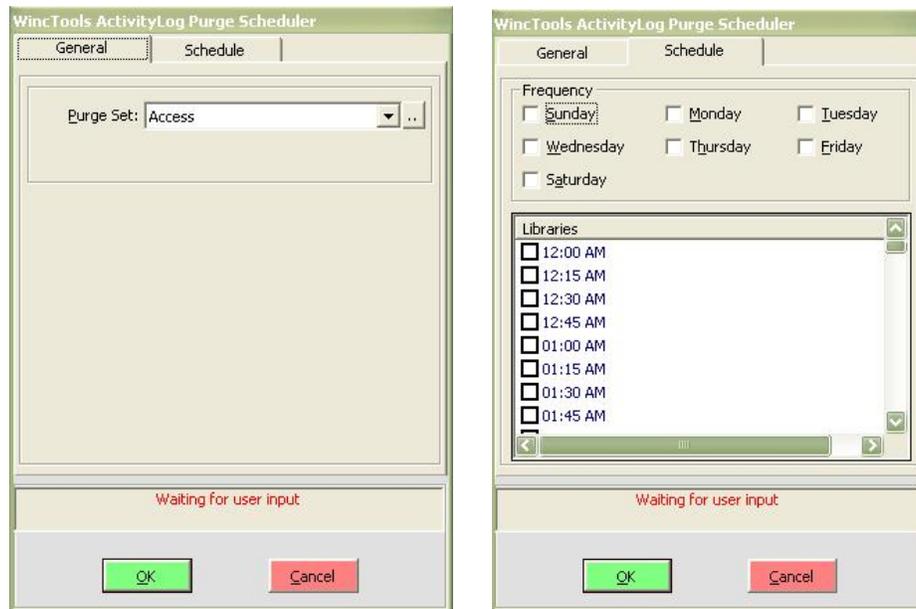
The Status menu item opens a new window displaying the status of the WincTools Scheduler:



The current time and number of pending events are displayed; from this screen you may also Print the window (Shift+F7) or Clear the display (Shift+Del) of the scheduler status information from the pop-up menu by right-clicking anywhere in the button of the window.

Activity Log Purge

The Activity Log Purge menu item allows you to schedule a previously defined ActivityLog purge job. A drop-down list of purge jobs will be available:

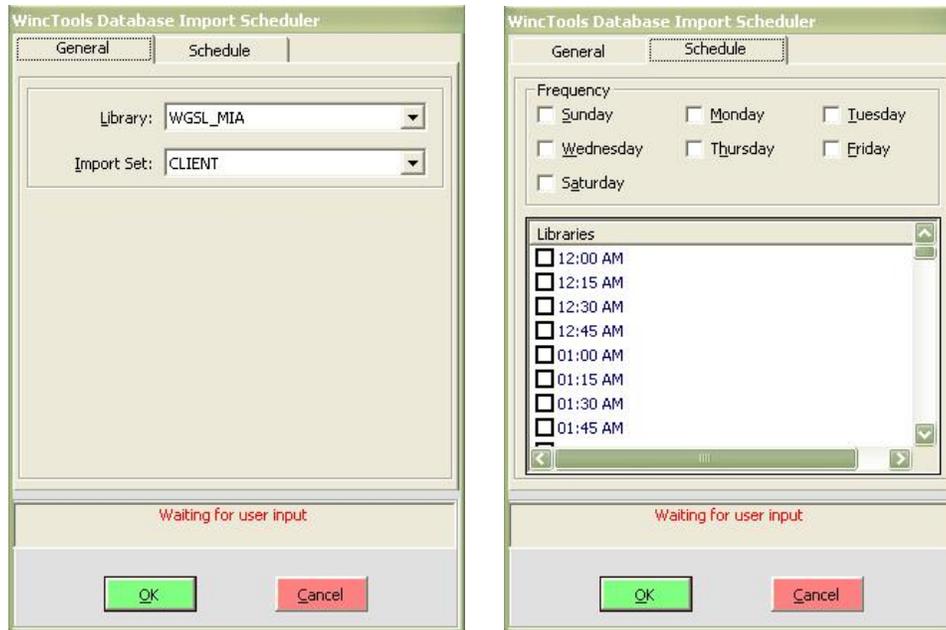


Select the purge set you wish to schedule; to view the details of a specific purge set, select that set and click the lookup (ellipsis) button. After choosing a purge set, switch to the Schedule tab to select the day(s) and time(s) to run the purge routine. Click OK to save the schedule for this event. Repeat this process to schedule additional purge sets.

Database Import

WincTools can schedule database imports to automate, for example, the import of client and matter data from an accounting system. Before scheduling an import, however, the database import set must first be defined using eDOCS Database Import utility. For more information on creating Database Import Sets, please refer to the appropriate eDOCS documentation.

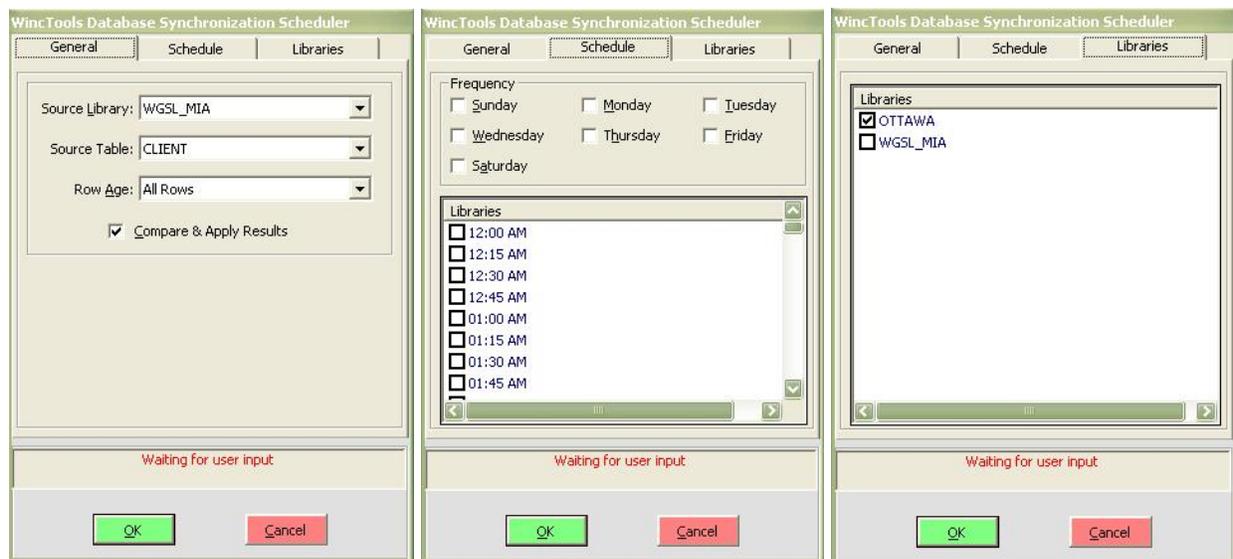
When you click on the Database Import option from the Schedule menu, the Database Import Scheduler will appear:



Select the appropriate library and import set from their respective drop-down lists, and then switch to the Schedule tab to select the day(s) and time(s) that this event should run. Click OK to save and schedule the event, or Cancel to exit the scheduler without saving the information for this event.

Synchronization

WincTools allows you to schedule the synchronization of validation tables between libraries; a sample Synchronization for the CATEGORY table is shown:



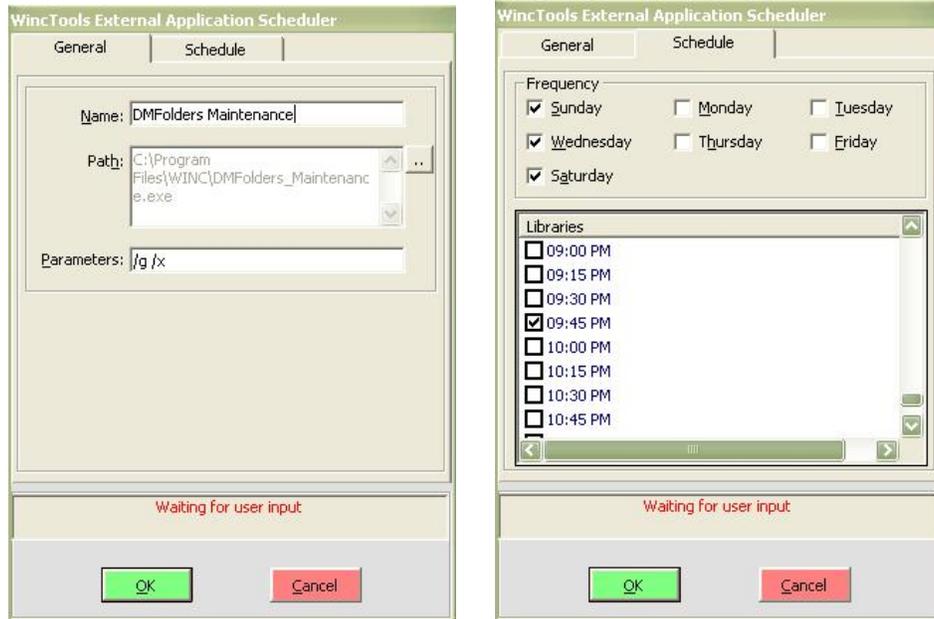
Select the source library and table as appropriate; note that a separate schedule must be created for each validation table you wish to synchronize. On the Schedule tab, choose the day(s) and time(s) that the synchronization should run, avoiding your enterprise's peak usage and backup windows to the extent possible. Select the target libraries for synchronization on the Libraries tab.

Rows can either be synchronized by age (e.g., rows in the source that have been added in the last 7 days), or by comparing the data between the two libraries and applying all missing rows. Note that

neither of these options are relevant for sites using WincSync; the NEEDS_UPDATING table will be used instead.

External Application

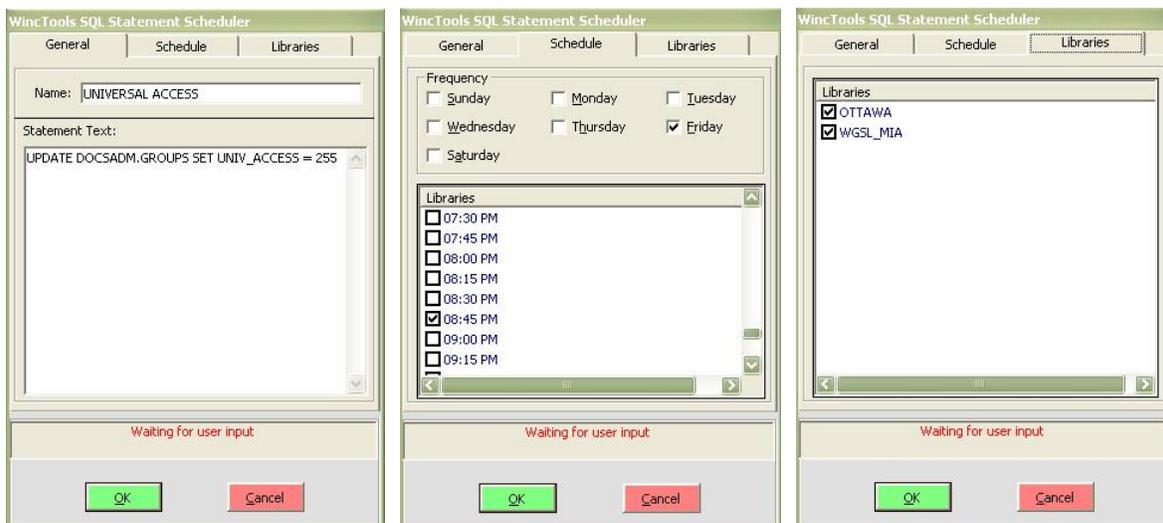
An external application can also be launched from the WincTools scheduler:



Enter a name, click the ellipses (...) to navigate to the executable to be launched, and enter any optional startup parameters. On the Schedule tab, select the day(s) and time(s) for the schedule to execute, and click OK to save the scheduled event.

SQL Statement

The WincTools schedule can automatically run SQL scripts against one or more libraries. This can be useful for running routine reports or updating specific values on a regular basis.



Fix Folders

The Fix Folders function, described on page 56, can be scheduled to run on a regular basis. As with the other scheduled tasks, use the Schedule tab to select the day(s) and time(s) that the task should run, and the Libraries tab to select the libraries on which the process should execute.

Purge Folders

The Purge Folders function, described on page 50, can be scheduled to run on a regular basis. As with the other scheduled tasks, use the Schedule tab to select the day(s) and time(s) that the task should run, and the Libraries tab to select the libraries on which the process should execute.

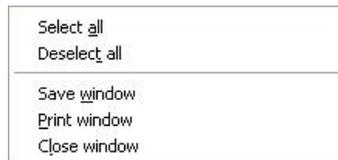
Missing Document Files Report

The Missing Document Files report, described on page 37, can be scheduled to run on a regular basis. As with the other scheduled tasks, use the Schedule tab to select the day(s) and time(s) that the task should run, and the Libraries tab to select the libraries on which the process should execute.

Missing Document Profiles Report

The Missing Document Profiles report, described on page 38, can be scheduled to run on a regular basis. As with the other scheduled tasks, use the Schedule tab to select the day(s) and time(s) that the task should run, and the Libraries tab to select the libraries on which the process should execute.

List Functions (Basic)



Select all

Selects all rows in the result set.

Deselect all

De-selects all rows in the result set.

Save window

Saves the contents of the result set to a comma-delimited ASCII file with the name and path you specify.

Print window

Prints the contents of the result set.

Close window

Closes the current result set.

List Functions (Validation Tables)

Functions available for use on result sets from validation tables include:

Copy to...

The Copy to function copies the selected row(s) to one other library.

Sync to all Libraries

Sync to all Libraries allows you to copy the selected row(s) to all other libraries in the enterprise. WincTools will prompt for confirmation before beginning the copy.

Edit

WincTools provides a dynamically-generated form to edit any non-key column in the validation table row, including those not typically exposed by the eDOCS administration utilities. The form includes arrows to navigate through the records; to reset a row's values back to their original values (before saving them), press **F12**. A new record may be created by pressing **Alt-Ins**.

Delete

WincTools will attempt to delete the selected row(s). In order to maintain referential integrity, WincTools will first search the database for any references to the value to be deleted. If any references are found, WincTools will inform you and will not delete the row. If all references are to the profile table, you can transfer documents to a new value, as described below, before executing the deletion. NOTE: for People and Groups, the Delete option is replaced with Remove & Re-Assign Documents and Rights. For more information, please see the additional information on page 63.

Transfer documents to another value

WincTools can change all profile references from one value to another. For example, this function can update all references from one matter to another, or transfer all files of one document type to a different document type. When using this function, you must always specify a new value to replace the old value; after selecting the new value, WincTools will ask if you would like to narrow the transfer to documents for a single author:



Clicking **Yes** will display a lookup to select an author or authors; clicking **No** will transfer the documents for all authors.

Where Used

The Where Used function displays information for every reference to the selected item (an example is shown below):

- Table making the reference.
- Value (name of the column referencing the table).
- Column(s) identifying the row making the reference, such as the key.
- Value(s) for each of the columns in the row making the reference.

Where Used list for selected APPS item (SYSTEM_ID 1049) in library WGSL_MIA

Table	Value	Column(s)	Values(s)
PROFILE	APPLICATION	DOCNUMBER, DOCNAME	46, DMSSync_for_DOCS_Open
PROFILE	APPLICATION	DOCNUMBER, DOCNAME	47, WincArchive_for_DOCS_Open
PROFILE	APPLICATION	DOCNUMBER, DOCNAME	48, WincSync_for_DOCS_Open
ACTIVITYLOG	APPLICATION	SYSTEM_ID, DOCNUMBER	4804, 42
ACTIVITYLOG	APPLICATION	SYSTEM_ID, DOCNUMBER	4805, 42
ACTIVITYLOG	APPLICATION	SYSTEM_ID, DOCNUMBER	4808, 42

Show Creation Date

WincTools will display the approximate date and time that the row was created. WincTools searches the database for the next lowest system_id in the activity log and retrieves the activity date for that item. It will then notify you of the approximate creation date of the selected row:



Remove & Re-Assign Documents and Rights (PEOPLE and GROUPS tables only)

This function deletes a user or group and re-assigns document history (including authorship & typist records) and security to another user or group (as appropriate). The selected user or group will receive all rights originally belonging to the deleted user or group. For deleted users, a history record will be created for any documents the old user authored or typed, noting both the old and new user IDs in the activity log entry.

Set Trustees

Will run WincWall, when installed, to create and modify Walls.

List Trustees (PEOPLE and GROUPS tables only)

Will show a report for the Walls set on the specified User or Group, if WincWall is installed.

Transfer Documents to another user (PEOPLE table only)

This function is similar to Remove & Re-Assign Documents & Rights, described above, but the original user is *not* deleted. All instances of author, typist, and security are re-assigned, however, with only the activity log retaining a record of the transfer and the original ID.

Move user(s) to... (PEOPLE table only)

Same option as described on page 30, with the sole difference that in this situation the users to move have been selected in advance

Network Aliases (PEOPLE and GROUPS tables only)

This option display the assigned network alias(es) for the specified User or Group.

Group Members (GROUPS table only)

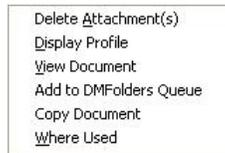
The Group Members function displays the members of the selected group and noting whether or not the group is the primary group for each user.

Group members for group DOCS_SUPERVISORS in library WGS_L_MIA		
User ID	User Name	Primary?
DMADMIN	DM Administrator	Y
DMUSER	DM User	N
INTERNAL	Internal User	Y
WINCADMIN	Winc Administrator	Y

Group Memberships (PEOPLE table only)

This function displays the groups of which the selected user is a member.

List Functions (Profiles)



Delete Attachment(s)

This function provides the ability to delete any attachments (e.g., redlines, etc) from a profiled document.

Display Profile

This option displays the profile for the selected document. Note that because the profile may appear minimized, it may be necessary to click the appropriate icon on the Windows taskbar to view the document profile.

View Document

WinTools will launch the INSO Viewer to display the contents of the document.

Add to DMFolders Queue

Used when DMFolders is installed, this function will add the selected document to the NEEDS_FOLDERING table.

Copy Document

WinTools can copy the selected document(s) to another library; this process operates in exactly the same manner as the library function described on page 32, with the sole difference that in this situation the documents for copying have been selected in advance.

Where Used

The Where Used function on the PROFILE table displays summary information about the document, such as the author and typist, the number of components, the number of trustees, the number of versions, and any missing document files.



Information
Document #61 Author is DMUSER and Typist is WINCADMIN
Document #61 has 1 component(s)
Document #61 has 1 trustee(s)
Document #61 has 1 version(s)

List Functions (Projects and QuickSearches)

Copy <Project/Quicksearch> To...

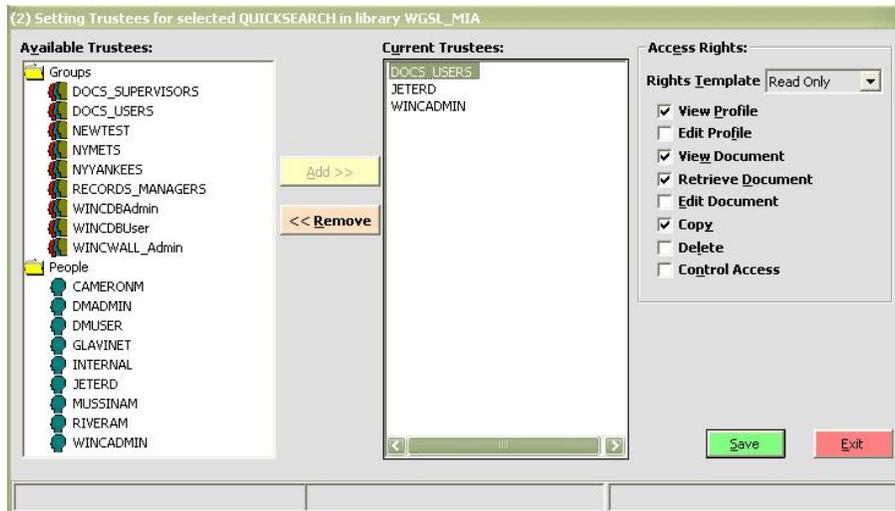
WinTools will copy the selected row(s) in the result list to one other library.

Display

WinTools will display the selected Project or Quick Search form.

Change Security

WinTools allows you to add, change, or remove trustees for Projects and Quick Searches, and for Projects, allows you to set the security on all components of the Project.

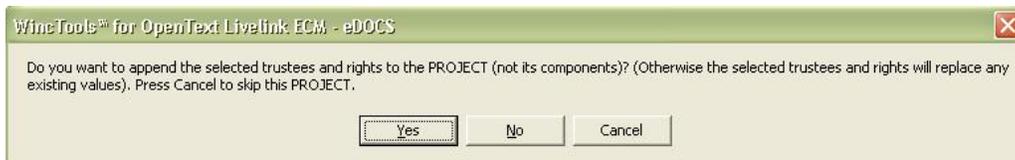


Select trustees from the list of available trustees, and set the rights for each trustee. The default access when a trustee is added is Full Access.

NOTE: Although the WincTools security dialogs do not display deny rights for each level of security, the enhanced ACL features of DM5 will be used if the library parameter has been enabled. Setting a Rights Template of No Access in WincTools will result in a Deny All setting for environments using Enhanced ACL.

For projects, the Secure Components checkbox can be used. Un-checking this box will modify the Project access only, not the security of the documents in the Project. This checkbox has no effect on Quick Searches.

Click Save to process the security changes, or Exit to return to WincTools without applying any changes to the Project or Quick Search. If you click Save, you will be asked whether to append or overwrite existing security.



Click **Yes** to append your security selections to the existing security, or click **No** to replace all existing security with the trustees you have assigned.

List Functions (Folders)

Copy Folder To...

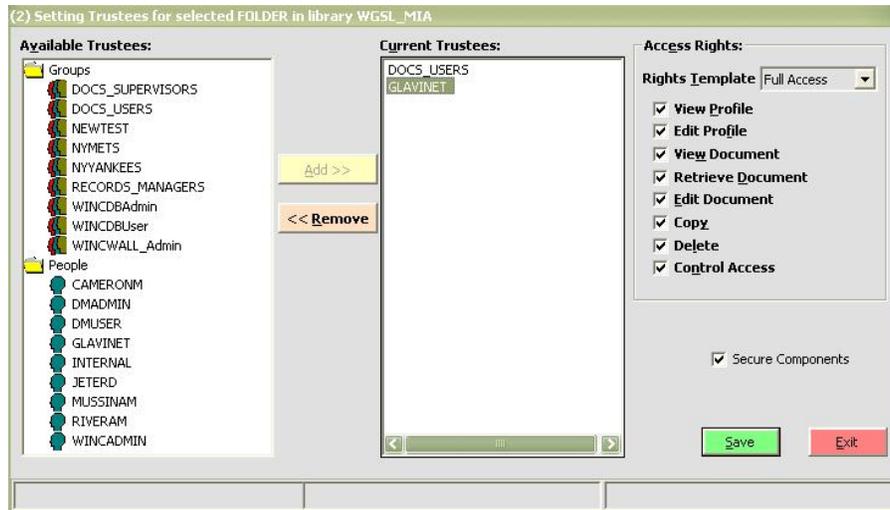
WincTools will copy the selected folder and its components to one other library; you will be prompted for confirmation before WincTools begins processing.

Display

WincTools will display the selected Folder's profile.

Change Security

WincTools allows you to add, change, or remove trustees for Folders and all components of the Folder.



Select trustees from the list of available trustees, and set the rights for each trustee. The default access when a trustee is added is Full Access.

NOTE: Although the WincTools security dialogs do not display deny rights for each level of security, the enhanced ACL features of DM5 will be used if the library parameter has been enabled. Setting a Rights Template of No Access in WincTools will result in a Deny All setting for environments using Enhanced ACL.

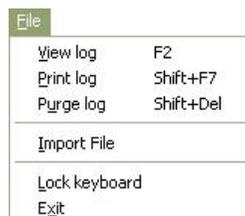
For Folders, the Secure Components checkbox will can be used. Un-checking this box will modify the Folder access only, not the security of the documents in the Folder.

Click Save to process the security changes, or Exit to return to WincTools without applying any changes to the Folder. If you click Save, you will be asked whether to append or overwrite existing security:



Click **Yes** to append your security selections to the existing security, or click **No** to replace all existing security with the trustees you have assigned.

File menu



View Log

Displays the log file using Notepad, you can also use the keyboard shortcut F2.

Print Log

Prints the log file, you can also use the keyboard shortcut Shift+F7.

Purge Log

Clears all information from the WincTools log file, you can also use the keyboard shortcut Shift+Del.

Import File

The Import File function allows you to display the contents of an ASCII text file in the WincTools results pane. This process will automatically format comma-delimited and fixed-position files into columns in the display. For fixed-position text files, at least three spaces must separate each column in order for the information to be correctly separated into individual columns.

Lock Keyboard

The Lock Keyboard function provides a measure of security when leaving WincTools unattended (for example, during off hours when the WincTools scheduler is active). The workstation will be locked out and cannot be accessed until the current user logs back on using Windows' credentials.

Help Functions



The following help functions can be accessed from the WincTools Help menu:

- **View Readme:** displays the readme file for WincTools.
- **Check for Upgrade:** searches the Wertheim Global Solutions website for a newer version of the WincTools application than you are currently running. If an update is available, you will be prompted to download the file. After completing the download, follow the instructions for upgrading WincTools, found on page 12.
- **About:** displays the WincTools splash screen, including your WincTools license and serial number information.

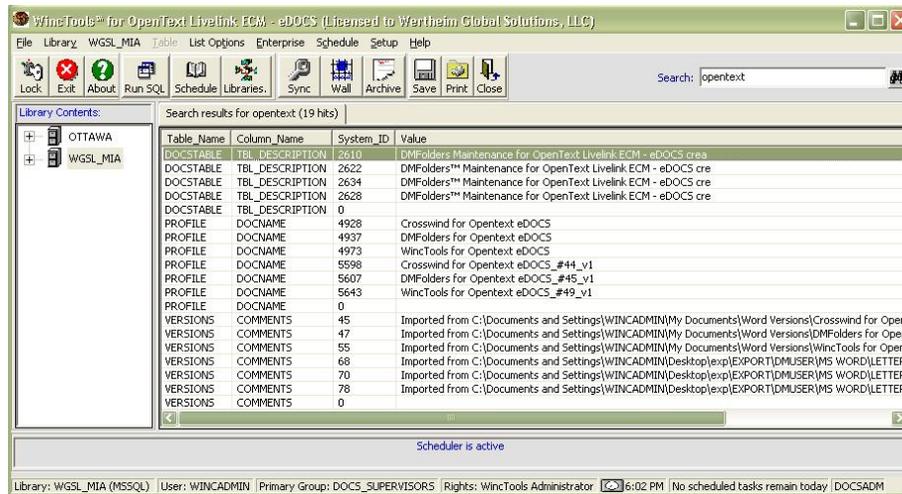
Miscellaneous Functions

Search

The search function locates all examples of a text string in the selected library. To use this function, enter the search text in the search box at the upper-right-hand corner of the WincTools console.

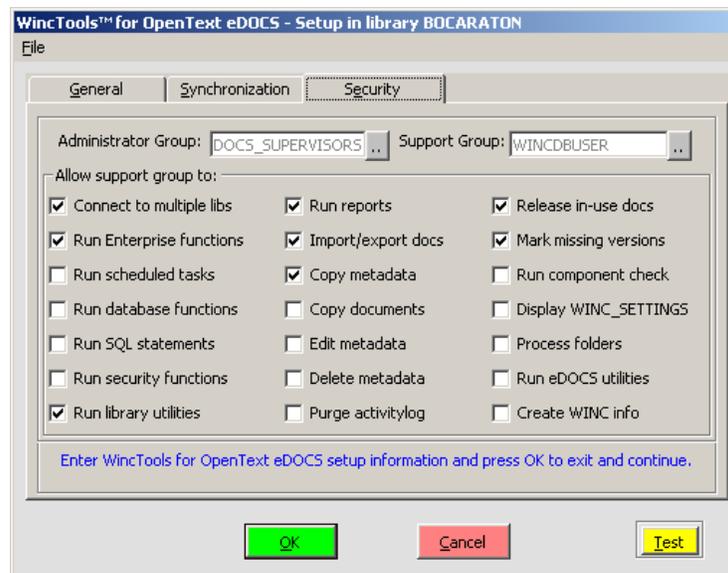


The search results will be displayed in a new results tab, listed by table name, column name, system_id, and value, as shown in the example below.



Security Configuration

The WincTools Setup configuration screen (accessed from the WincTools' Setup – Setup WincTools program options menu, then pressing the Security tab), which is only available to DOCS_SUPERVISORS, will display a form similar to the following:



- Administrator Group:** This is where you select the group with Administrator rights to WincTools. A member of this group has access to all of the functions of WincTools.
 - Note that DOCS_SUPERVISORS automatically have access to all of the functions of WincTools; this allows you to define another group with the same rights.
 - Note that the administrator group must have the UNIV_ACCESS column in the GROUPS table set to 255.
- Support Group:** This is where you can identify a support group (formerly known as the WincDBUser group). The support group can have access to all functions in WincTools, or a limited set of functions as defined by the checkboxes below.

- **Allow support group to:** These checkboxes define the rights of the Support group to access the functions of WincTools. The following chart defines which functions are disabled when a checkbox is unchecked.:

OPTION	Unchecked
Connect to multiple libs	Disables access to more than one library, which would be the first library to which DM connects.
Run Enterprise functions	Disables the Enterprise Menu; Disables access to the Enterprise Dictionary report; Disables access to the Library Contents Matrix report;
Run scheduled tasks	Disables access to all schedule functions
Run database functions	Disables access to the Compare table structure function; Disables access to the SQL Enterprise menu option; Disables access to the SQL library menu option
Run SQL Statements	Disables the Run SQL button; Disables access to the Run SQL library menu option; Disables access to scheduled tasks that run SQL statements.
Run security functions	Hides the SECURITY, WINC_SECURITY, WINC_AUDIT, and all WincWall tables from the table list; Disables the Secure documents library menu option; Disables the ability to remove users and/or groups; Disables the ability to transfer documents to another user; Disables the ability to delete documents; Disables the ability to delete versions; Disables the ability to delete attachments; Disables the ability to mark documents or versions unavailable; Disables the ability to display profile; Disables the ability to display where-used information on a profile; Disables the ability to remove or replace a trustee; Disables the ability to release a document from the Profile table list (does not disable the ability to release a document from the in-use document report); Disables the ability to secure quicksearches; Disables all access to WincWall functions
Run library utilities	Disables access to the Utilities library menu option
Run reports	Disables the Reports library menu option; Disables the Other document reports library menu option
Import/Export docs	Disables the Import library menu option; Disables the Export library menu option; Disables the Missing Document Profiles report library menu option (since this function allows importing the missing files)
Copy metadata	Disables ability to copy quicksearches to another library
Copy documents	Disables the Copy documents library menu option; Disables the Copy documents Profile table menu option; Disables the Move user library menu option;

	Disables the Move user People table menu option; Disables the ability to copy folders and contents
Edit metadata	Disables access to the Edit table menu option; Disables access to the Apply the results of a table contents comparison; Disables access to the Launch Method table menu option
Delete metadata	Disables access to the Delete table menu option;
Purge activitylog	Disables access to the Enterprise Purge Activitylog menu option; Disables access to the Purge Activitylog library menu option; Disables access to the Schedule Activitylog Purge jobs function
Release in-use docs	Disables the In-use documents report library menu option
Mark missing versions	Disables the Missing document files library menu option
Run component check	Disables the Component Check library menu option
Display WINC_SETTINGS	Hides the WINC_SETTINGS table from the table list.
Process folders	Disables access to the Remove duplicate folder function; Disables access to the Add to Needs_Foldering function
Run eDOCS utilities	Disables the Utilities menu (which otherwise only displays if the eDOCS utilities are installed on the WinTools computer).
Create WINC info	Disables the Create WinTools Groups library menu option; Disables the Setup menu option Create WinTools Security Groups