



# DMFOLDERS v9 SUBSCRIPTION MODULE

## *User Guide*

---

© 2009 Wertheim Global Solutions, LLC

This material is copyrighted and all rights are reserved by Wertheim Global Solutions, LLC. No part of this publication may be reproduced, transmitted, transcribed, stored in a retrieval system, or translated into any language or computer language, in any form or by any means, electronic, mechanical, magnetic, optical, chemical, manual, or otherwise, without the prior written permission of Wertheim Global Solutions, LLC.

We made a sincere effort to ensure the accuracy of the material described herein; however, Wertheim Global Solutions, LLC makes no warranty, express or implied, with respect to the quality, correctness, reliability, accuracy, or freedom from error of this document or the products it describes.

The names of the software products referred to in this manual are claimed as trademarks of their respective companies.

## Table of Contents

Introduction.....	3
How It Works .....	4
Preparing to use DMFolders Subscription .....	5
Running DMFolders Subscription.....	5
Information Bar.....	5
Button Bar .....	6
Menu Items .....	6
File.....	6
Libraries.....	6
View .....	6
System.....	7
Help .....	7
Navigating Folders .....	7
Folder Tab .....	7
Search Tab .....	9
Profile Tab .....	10
Proxy Tab.....	11
List display .....	12

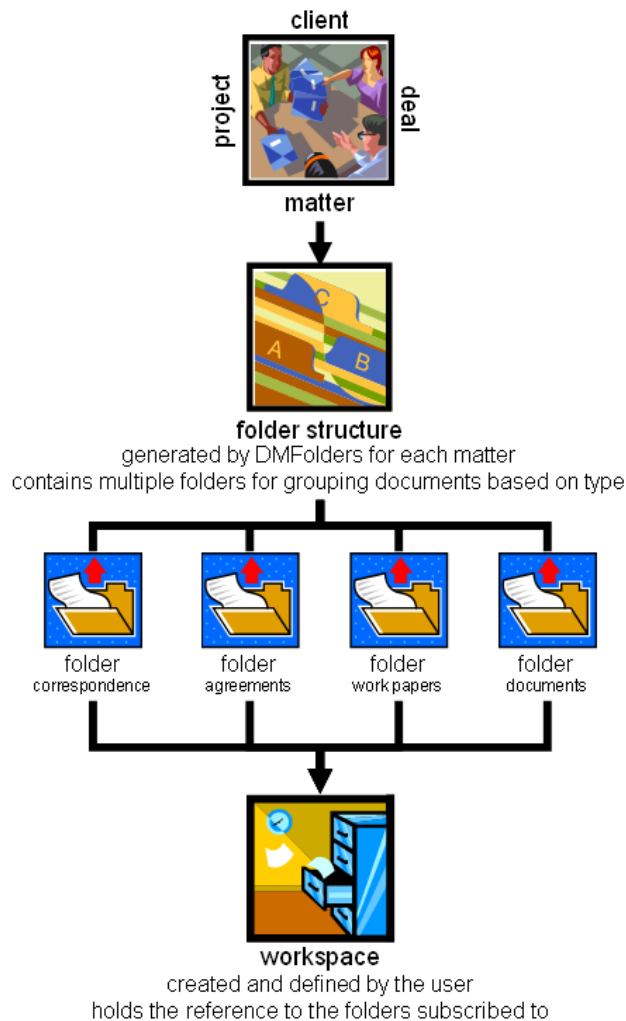
## Introduction

DMFolders is an application designed for integration with Open Text eDOCS Document Management system that leverages the power of matter-centricity by generating a folder structure for each matter handled by the company. Depending on the industry, a matter could be defined as a project, deal, case, client or location. DMFolders Subscription is the user interface that enables users to subscribe to these folder structures, for the purpose of organizing and sharing information throughout the company.

The DMFolders Subscription utility is designed for end-users. Using DMFolders Subscription, users can search for folders profiled with any combination of profile values (for example, client, matter, document type) which would contain documents of interest. The user selects a workspace to which the subscriptions should be added, searches for the folders they wish to monitor and track, and DMFolders will add those folders to the user's workspace. DMFolders Subscription also includes a function for one user to delegate this responsibility to another user.

## How It Works

DMFolders connects to the Open Text eDOCS database and automatically generates a folder structure for each matter contained in the database. These folders are maintained and administered by the company. Based on the profile assigned to the folder, certain users, or groups of users, are granted subscription rights to the folder. Subscribing to a folder means that the user is able to add a reference to the folder to their personal Workspace.

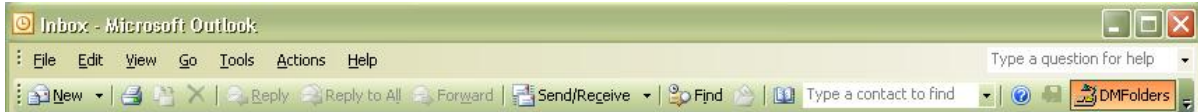


From DMFolders Subscription, users are able to:

- Subscribe to folders and individual documents
- Search for folders and documents
- Proxy and manage another user's subscriptions

## Preparing to use DMFolders Subscription

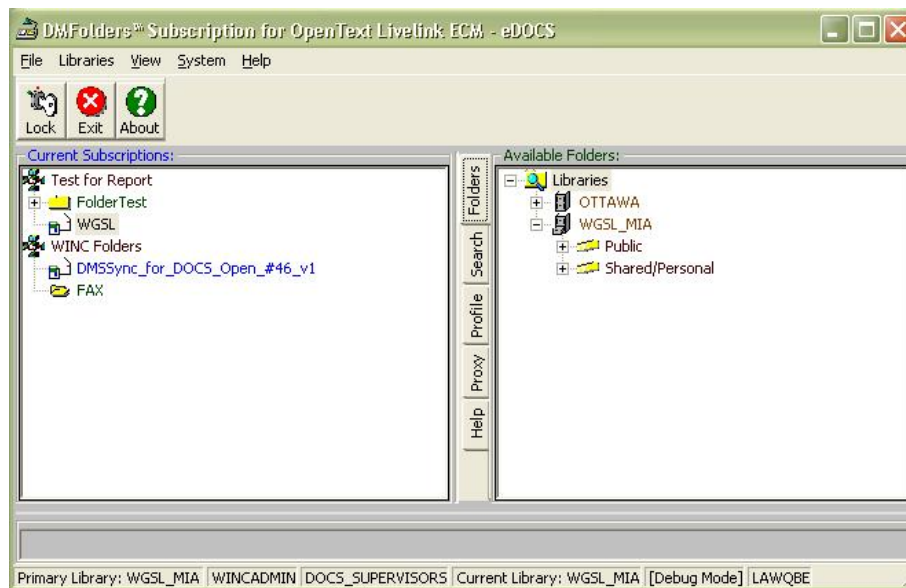
The first time DMFolders Subscription is launched, the End User License Agreement (EULA) will be displayed. The user will then have an opportunity to create and name a new workspace if none exists. The installation process also adds a DMFolders button into Outlook, as displayed below.



**NOTE:** If the EULA has not yet been accepted, the Outlook DMFolders button will not function.

## Running DMFolders Subscription

The DMFolders Subscription module allows users to search for folders and add them to their workspaces. The DMFolders Subscription application is shown below:



## Information Bar

The following information is displayed along the bottom of the form:

- Primary Library
- User ID
- Primary Group
- Current Library
- Whether verbose logging (debug mode) is enabled
- The current DM form used as the basis for displaying the search and profile forms when debug mode is enabled.

## Button Bar

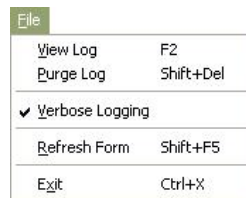
The following buttons are available from the DMFolders Subscription form:

- **Lock:** Provides a measure of security when leaving DMFolders Subscription unattended. The entire workstation screen will be locked out and cannot be accessed.
- **Exit:** Exits DMFolders Subscription
- **About:** Displays the DMFolders splash screen.

## Menu Items

Note that not all menu items may display, depending upon your rights within DM.

### *File*



- **View Log (F2):** Displays the program's log file in Notepad.
- **Purge Log (Shift+Del):** Deletes the program's log file from the computer.
- **Verbose Logging:** Enable Debug Mode.
- **Refresh Form (Shift+F5):** This option will reset the borders for each displayed tab item, useful if you make the borders for an item too small.
- **Exit (Ctrl+X):** Exits DMFolders Subscription.

### *Libraries*

The list of available libraries are displayed. To change your current library, select (check) the library.

### *View*

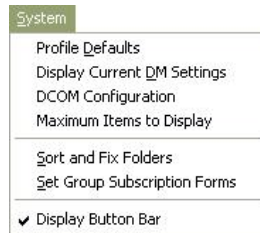


To change the selected view, equivalent to clicking on one of the tabs.

- Folders
- Search
- Profile
- Proxy

- Help

## System



- **Profile Defaults:** Launch the Profile Defaults from DM Client.
- **Display Current DM Settings:** Will display the eDOCS Library settings.
- **DCOM Configuration:** Launch DCOM Configuration utility.
- **Maximum Items to Display:** Specify the maximum number of folder items to display in the tree.
- **Sort and Fix Folders:** This function will sort and fix the order of Folders, used for versions previous to SR6.
- **Set Group Subscription Forms:** Allow you to designate the profile form for users.
- **Display Button Bar:** Show/hide the Button bar.

## Help

- **About:** Displays the DMFolders splash screen.

## Navigating Folders

### Folder Tab

Users can browse the Public Folder tree or their Shared/Personal Folders, and then add any folder to any workspace by dragging and dropping from the right-hand pane to the left. Alternatively, you can right-click on a folder and select **Subscribe**. Multiple workspaces can be managed by the Subscription module, even if they were not created by DMFolders.

To remove a folder from a workspace, expand the Current Subscriptions tree, right-click on the folder you want to remove, and click **Unsubscribe**.

Other functions available from the Folders tab and Workspace tree:

To refresh the display of a folder's contents:

Select the folder and press the F5 key to refresh the item's contents. Note that you can also refresh the view of a workspace, or the Public or Shared/Personal items, by selecting them and pressing F5.

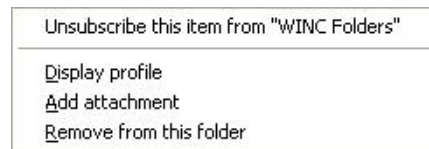
When a folder is selected:

Right mouse-click on the folder to display the following menu:



When a folder item (i.e., a document) is selected:

Right mouse-click on the item to display the following menu:



Shift+Right mouse-click to display the DM document menu for the selected item.

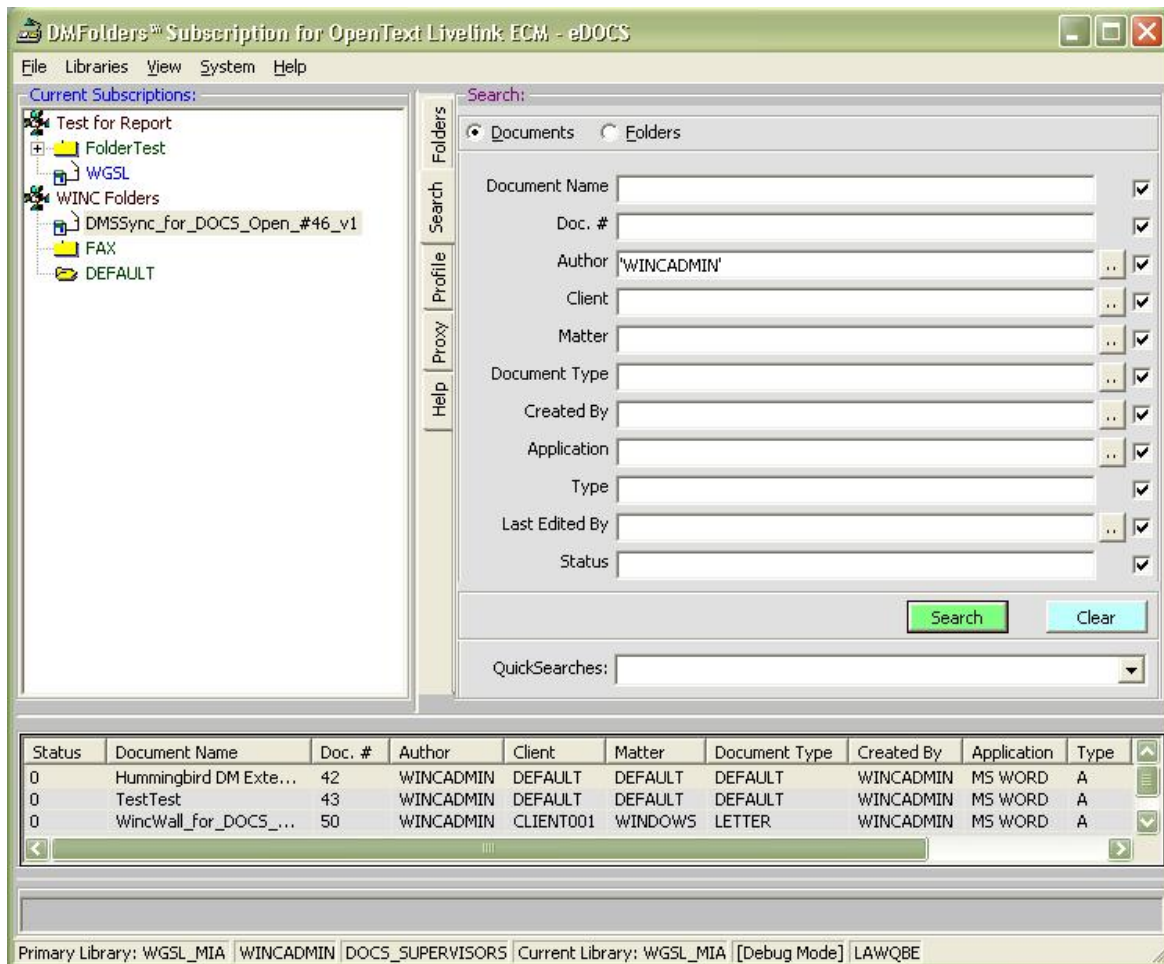
You can also perform the following drag & drop operations from a Windows file or directory:

- **Drag a Windows file to a folder item:** If the Windows file contains the same extension as the folder item's application extension, the file will be added to the document as a version; otherwise, it will be added as an attachment. If an attachment already exists, you will be asked whether you wish to replace the existing attachment.
- **Drag a Windows folder to a DM folder:** This will re-create the Windows folder and contents underneath the selected DM folder.



## Search Tab

To search for folders or documents by profile criteria, click on the Search tab at the center, then enter search values in the appropriate fields and click **Search**. A list of folders or documents whose profiles match the specified criteria will be displayed in the bottom pane of the application. You can also select a saved Quick Search from the Quick Searches drop-down box.



See the List Tab section below for details on the tasks that can be performed from the resulting list.

## Profile Tab

Switch to the Profile tab to view the profile for the currently selected item.

The screenshot shows the 'DMFOLDERS™ Subscription for OpenText Livelink ECM - eDOCS' application window. The 'Profile' tab is selected in the left-hand navigation pane. The main area displays a form for the selected profile, 'Hummingbird DM Extensions 5.2.1-install'. The form fields are as follows:

Field	Value
Document Name	Hummingbird DM Extensions 5.2.1-install
Doc. #	42
Author	WINCADMIN
Client	DEFAULT
Matter	DEFAULT
Document Type	DEFAULT
Created By	WINCADMIN
Application	MS WORD
Type	
Last Edited By	Winc Administrator
Status	0
Library	WGSL_MIA

An 'Open' button is located at the bottom right of the profile form. Below the form is a table listing the profiles:

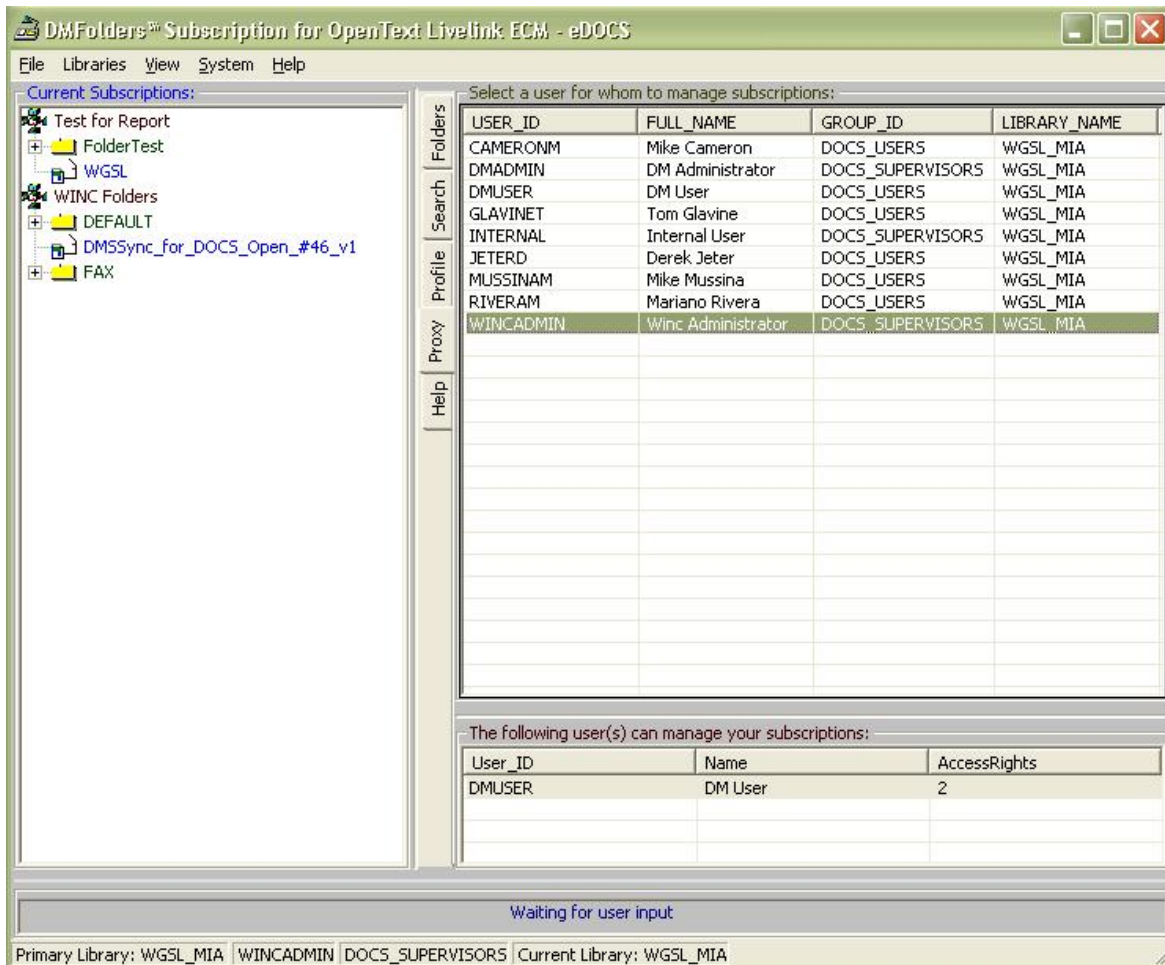
Status	Document Name	Doc. #	Author	Client	Matter	Document Type	Created By	Application	Type
0	Hummingbird DM Exte...	42	WINCADMIN	DEFAULT	DEFAULT	DEFAULT	WINCADMIN	MS WORD	A
0	TestTest	43	WINCADMIN	DEFAULT	DEFAULT	DEFAULT	WINCADMIN	MS WORD	A
0	WincWall_for_DOCS_...	50	WINCADMIN	CLIENT001	WINDOWS	LETTER	WINCADMIN	MS WORD	A

At the bottom of the window, the status bar shows: Primary Library: WGSL\_MIA | WINCADMIN | DOCS\_SUPERVISORS | Current Library: WGSL\_MIA | [Debug Mode] | LAWQBE

You can open the displayed profile item by pressing the **Open** button.

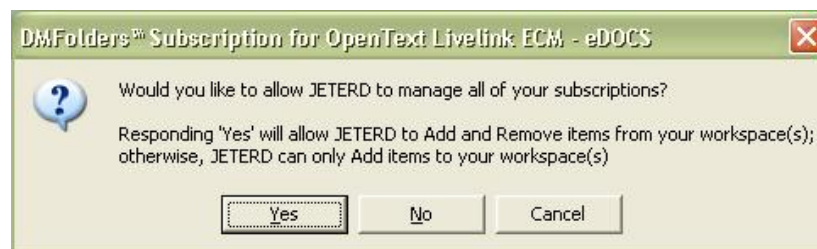
## Proxy Tab

To administer workspaces for another user click on the Proxy tab. A list of users for whom you have rights to manage subscriptions will be displayed in the top-right pane; double-click a user to manage their workspaces.



That user's workspaces will then be displayed instead of your own. Members of DOCS\_SUPERVISORS have Add Subscription rights for all users' workspaces, while other users can only administer those workspaces to which they have been granted Proxy rights.

To grant Proxy rights to another user, right-click in the lower-right pane of the Proxy tab and select **Insert**. Select a user from the People table and then choose the level of permissions to grant:



Responding **Yes** will give that user add and delete rights, while responding **No** will allow that user to add but not remove items from your workspace.

### List display

When a list of items appears on the bottom, you can perform the following functions:

#### When a folder is selected:

Right mouse-click on the folder to display the following menu:

Status	Document Name	Doc. #	Author	Client	Matter	Document Type	Created By	Application	Type	La
0	ACROBAT	38	WINCADMIN				WINCADMIN	FOLDER	A	WJ
0	DEFAULT	39	WINCADMIN				WINCADMIN	FOLDER	A	WJ

Display profile

Create folder

Create document

Checkout or export folder & contents

Delete folder and contents

Remove folder

Remove folder Tree

#### When a folder item (i.e., a document) is selected:

Right mouse-click on the item to display the following menu:

Status	Document Name	Doc. #	Author	Client	Matter	Document Type	Created By	Application	Type	La
0	Hummingbird DM Exte...	42	WINCADMIN	DEFAULT	DEFAULT	DEFAULT	WINCADMIN	MS WORD	A	
0	TestTest	43	WINCADMIN	DEFAULT			WINCADMIN	MS WORD	A	
0	WinWall_for_DOCS_...	50	WINCADMIN	CLIENT00			WINCADMIN	MS WORD	A	

Display profile

Add attachment

Shift+Right mouse-click to display the DM document menu for the selected item.

You can also perform the following drag & drop operations from a Windows file or directory:

- **Drag a Windows file to a folder item:** If the Windows file contains the same extension as the folder item's application extension, the file will be added to the document as a version; otherwise, it will be added as an attachment. If an attachment already exists, you will be asked whether you wish to replace the existing attachment.