

# DOCUMENTS TAB

DOCUMENTS TAB

MICROSOFT WORD INTEGRATION

DOCUMENT TAB BUTTONS

## DOCUMENTS TAB

Beneath the Folder information is a window. Clicking one of the three tabs to the right of the window will change the information that is displayed. The folder in **Figure 1** is open with the Documents tab displayed.

The screenshot shows a software interface with search filters at the top and a table of document entries below. The filters include fields for Addressee, Referrer, Subject, Received Date, Referrer Due Date, and Related Folders. The table has columns for Document Type, Document Title, Author, Last Modified, Version #, and Batch #. Below the table is a grid of action buttons, and at the bottom are task buttons and a checkbox for Quick Print.

Addresssee: 1 King, Alex  
Referrer: 1 Kristman, Sandy  
Subject: ACCOUNTING 2  
Received Date: 01/06/2006  
Referrer Due Date: 02/04/2006  
Related Folders: [Empty]  
Go ...  
Save More

	Document Type	Document Title	Author	Last Modified	Version #	Batch #
pdf	Incoming Correspondence	Test ECM		01/06/2006	1	b1405

Grid Count: 1

Check Out | Check In No Changes | Doc Security | View in Viewer  
Check In | Open or Save Copy | Doc Templates | Remove Doc  
Add Document | List All Versions | Doc Indexes | Move Doc

Complete Task | Print Cover Sheet | Security | Refresh  
Put Back Task | Print Folder | Admin | Save and Close | Close

Quick Print

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Figure 1: Folder - Documents Tab

Each document in the folder will be listed. In **Figure 1**, only the initial Incoming Correspondence document is stored in the folder. As the workflow progresses, all documents added to the folder will appear in this list.

The Folder Owner may add documents to the folder at any time. Each assignee may add documents to the folder while they are working on a task in the folder.

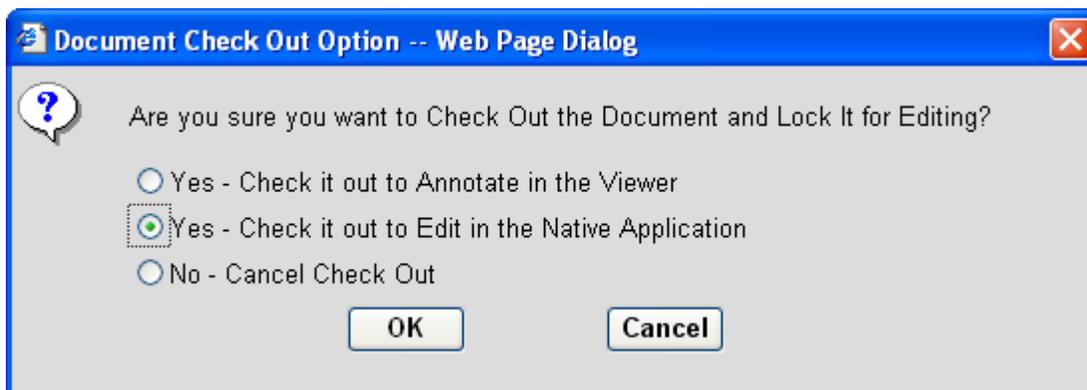
## MICROSOFT WORD INTEGRATION

It is important to note here that working with word documents in ECM is enhanced by the addition of the Microsoft Word Integration Add In. The Word Integration functions will only be available for documents added to ECM with a “doc” file extension. Once the application add-in is installed on a user’s workstation, this functionality is available for all modules within the ECM framework.

The ECM application allows users to check out, edit and check in documents directly from Microsoft Word. The ECM application also allows the user to save personal draft copies to the ECM repository without publishing them to the folder. Users do not need to navigate the Windows file system to locate documents to check in to ECM.

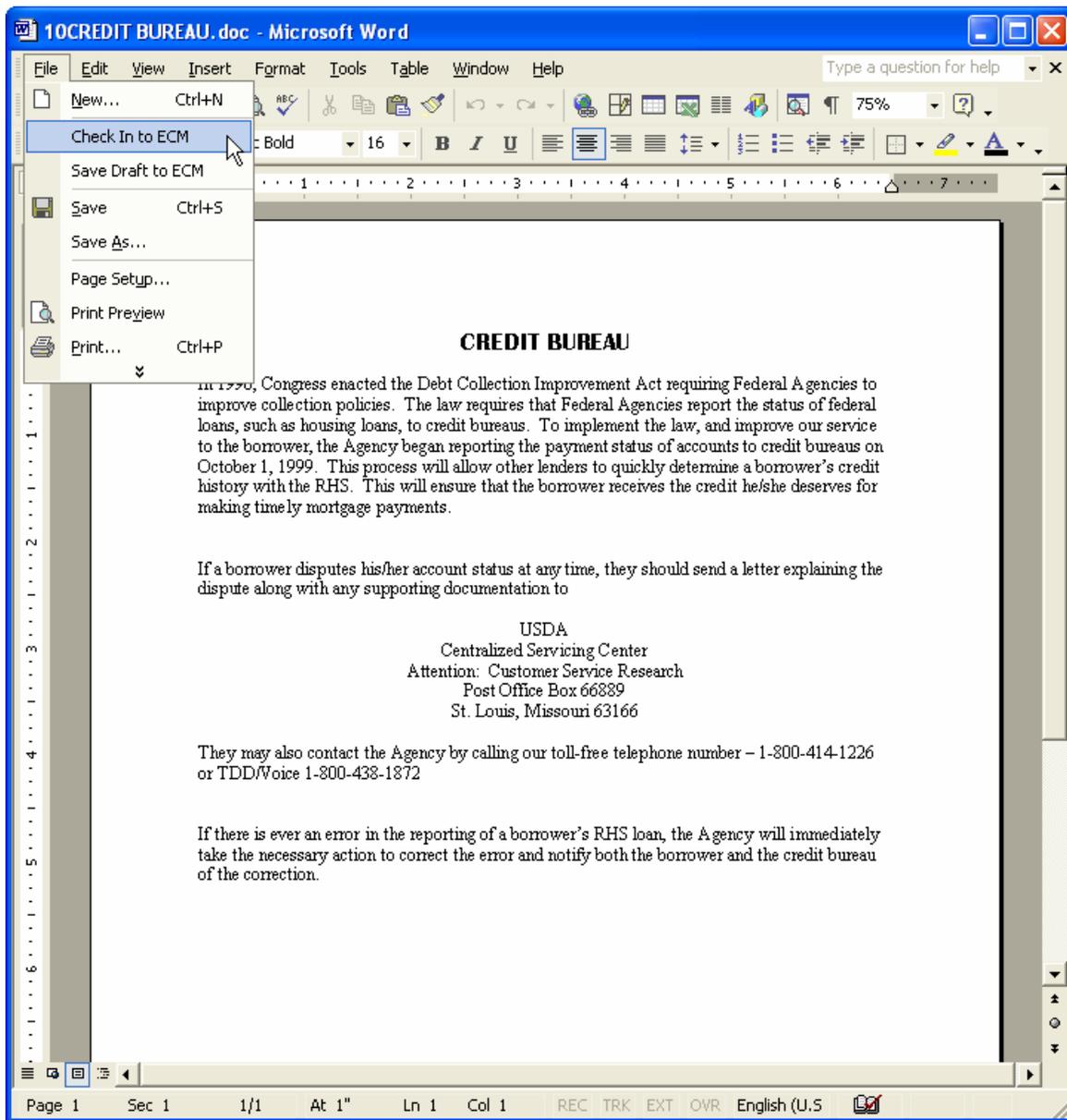
### Check Out Document – ECM Word Add-in

To check out a document from the folder and edit it in Microsoft Word, the user clicks the <Check Out> button. As with the existing functionality, the Document Check Out Option dialog is displayed in **Figure 2**.



**Figure 2: Document Check Out Options**

The user selects the “Yes – Check it out to Edit in the Native Application” option to open the document. If the user has the application add-in installed, an initial draft of the document is created in the repository. For the document draft, a minor version number is appended to the document version number (e.g. version 1 becomes version 1.1). The document draft version 1.1 is opened directly into Microsoft Word on the user’s workstation, as shown in **Figure 3**.



**Figure 3: Edit Document in Microsoft Word**

The Microsoft Word File menu is expanded in **Figure 3** to show the document options. These menu options only appear if the user has opened the document from the ECM application. The application add-in must also have been installed.

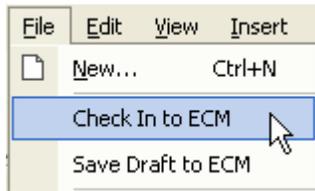
The user edits the document in Microsoft Word as needed. When allowing the system to manage drafts, it is recommended that the user not save changes using the Microsoft "Save" or "Save as" functions to prevent confusion regarding the location of the latest version of the document.

However, the system allows the user to save changes to the document at any time on the local workstation by clicking the native Microsoft Word "Save" button. The user can

also save document to another location or different filename using the Microsoft Word “Save As...” button. The latest version of the document is saved to the specified location on the user’s workstation. The user can still check in the document, or save a draft of the document in the repository after clicking the “Save As...” button.

### **Check In Document – ECM Word Add-in**

When the user is completely finished making changes to the document, it is ready to be checked in as a new version in the Folder. This may be considered “publishing” the new version to the folder. Within Word, the user clicks “Check In to ECM” from the File menu as shown in **Figure 4**.



**Figure 4: Microsoft Word File Menu – Check In and Save Draft Options**

The document is closed on the user’s desktop and checked in to the system. The document version number is increased by one (e.g. version 1 becomes version 2).

All users that access the folder see the latest checked in, or published, version of each document. In this case the latest published version is now version 2.

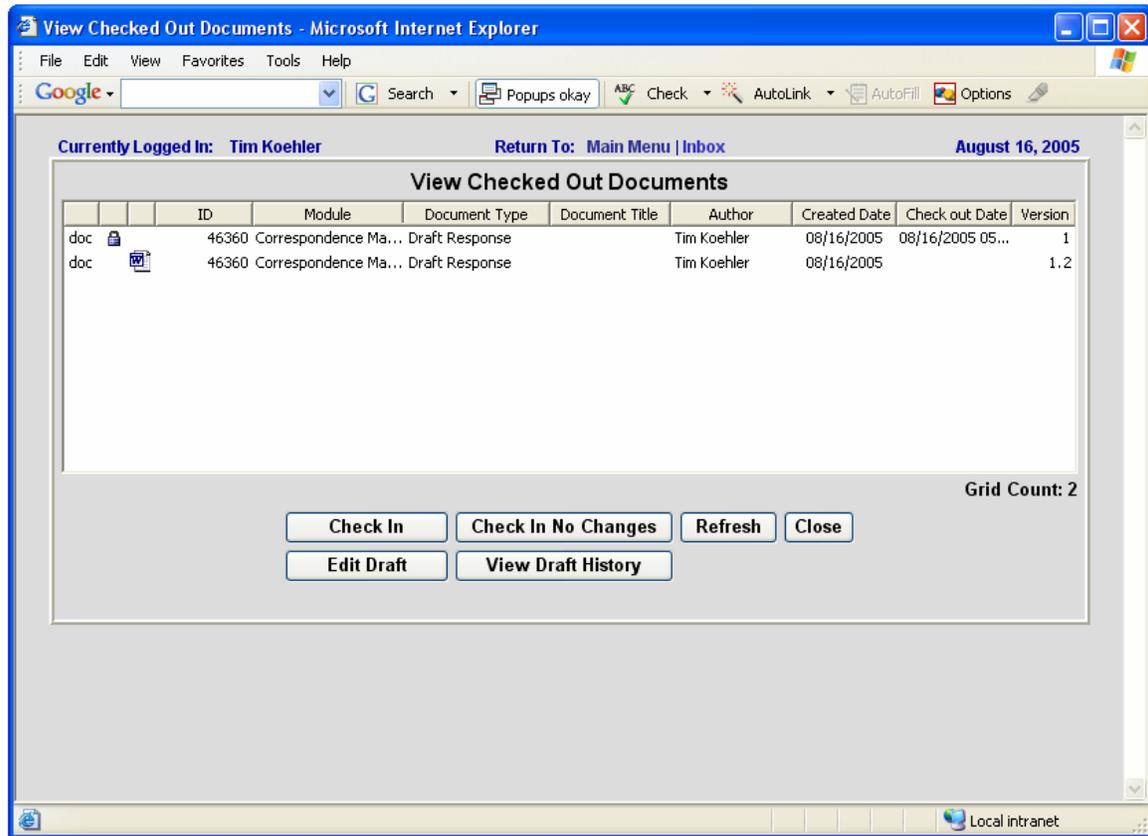
### **Save Document Draft – ECM Word Add-in**

If the user is not ready to check in the document to the folder, but wants to save the latest changes to the document repository, the user clicks “Save Draft to ECM” from the Microsoft Word File menu. The document is saved to the repository as a draft. The minor version number of the document is incremented (e.g. version 1.1 becomes version 1.2).

Document drafts are considered in process and are not visible in the Folder’s documents screen. In the documents list on the folder screen, a lock icon still shows that version 1 of the document is checked out.

While the document is checked out, the user may save a document draft and be able to work on the document later. The user clicks “Save Draft to ECM” from the Microsoft Word File menu and then closes the Microsoft Word application. The draft version of the document is saved to the system. Drafts are only visible to the author. When a draft version is saved, the draft version does not appear in the folder. On the folder, the document remains checked out.

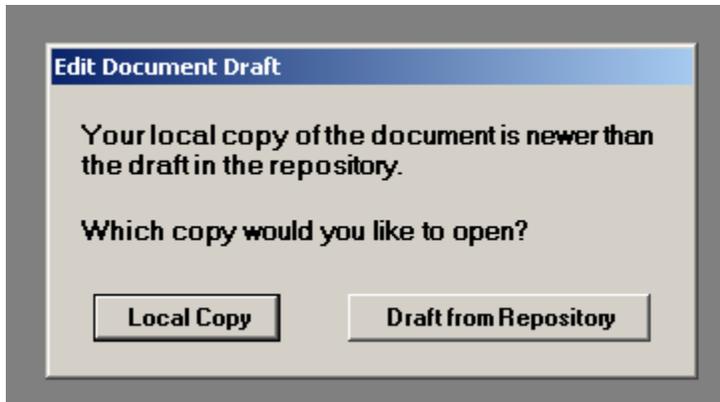
Later, to resume work on the document, the user accesses the View Checked Out Documents screen from the ECM main menu. This screen is shown in **Figure 5**.



**Figure 5: View Checked Out Documents Screen – With Add-In Installed**

The View Checked Out Documents screen lists all checked out documents and drafts for the logged-in user. The in process document drafts are listed below the checked out documents. In the example in **Figure 5**, the checked out document is listed with version number 1, and the document draft is listed with version number 1.2. To resume work on the document, the user highlights the document or the draft and clicks the <Edit Draft> button.

The system will first check to see if the same document is saved on the user's hard drive. If it is and the local document is a more recent version than the last draft saved to the repository, the user will be informed and will be asked which version they would like to edit – the local copy or the draft from the repository as shown in **Figure 6**. The desired document is opened directly into Microsoft Word.



**Figure 6: Edit Document Draft**

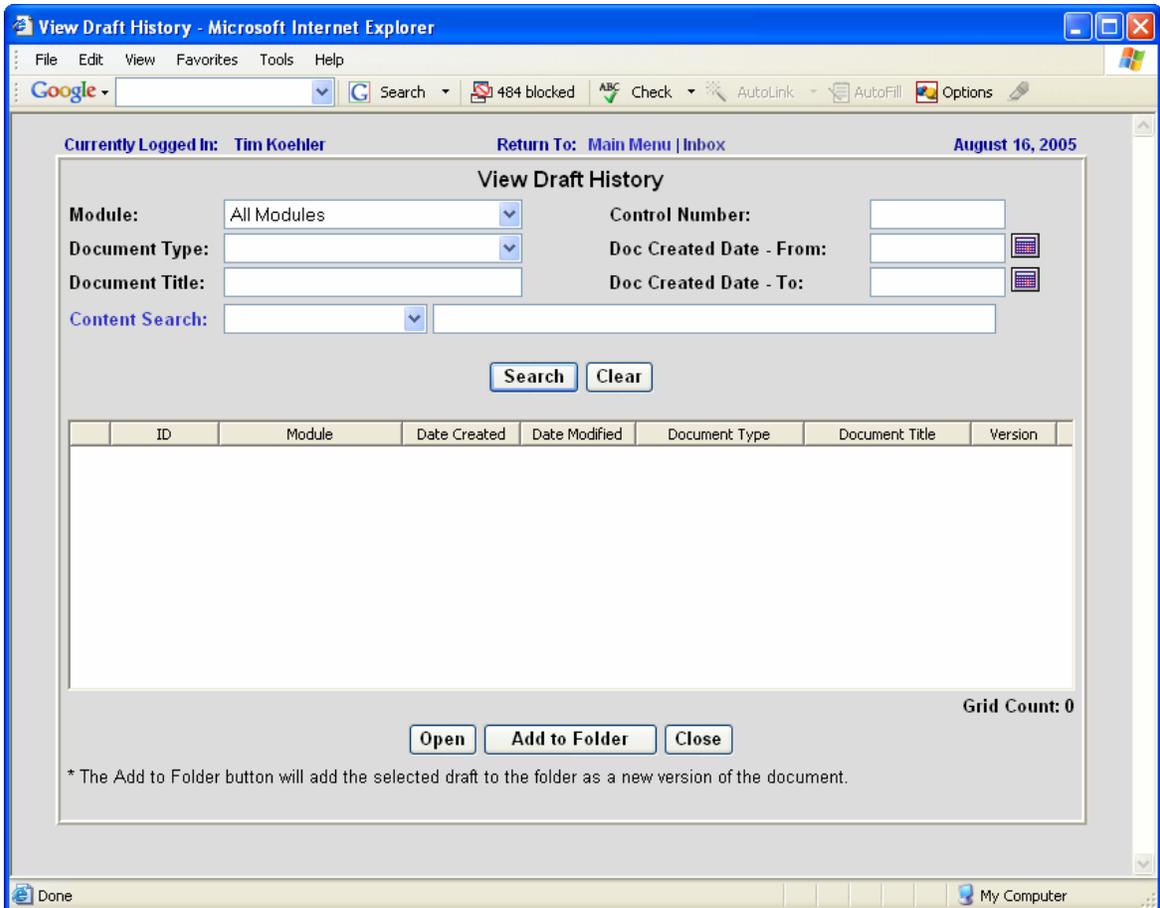
A local copy would be more up-to-date if the user made changes and clicked the native Microsoft Word “Save” button after saving a draft to ECM. If the document is not on the user’s hard drive, the draft document in the ECM repository is automatically displayed.

After making more changes, the user can save another draft by clicking “Save Draft to ECM” from the Microsoft Word File menu to save the latest changes. The document version number in the repository will now be 1.3. This is only visible in the View Checked Out Documents list. From the folder, users still only see version 1 of the document and see that it is checked out.

When finished making changes, the user clicks “Check In to ECM” from the File menu within Microsoft Word. The document is checked in to the system as version 2 and published to the folder. The document and draft is removed from the View Checked Out Documents list. At this point all users will see version 2 when the document is accessed from the folder screen.

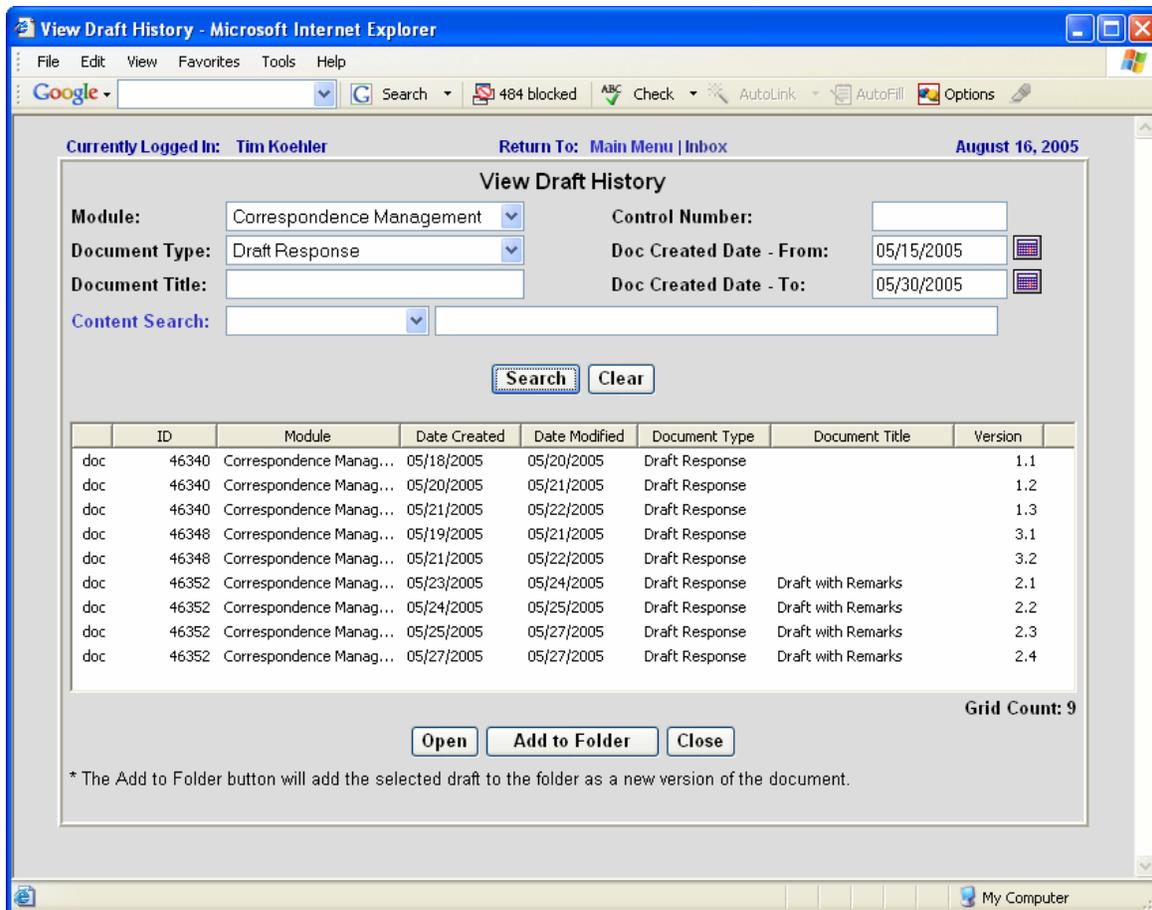
### **View Draft History – ECM Word Add-in**

The user can view a list of all document drafts that they created. These drafts are only visible to the author. To view previous drafts created, the author clicks the <View Draft History> button on the View Checked Out Documents screen. The Draft History screen is displayed as shown in **Figure 7**.



**Figure 7: View Draft History Search Screen**

The user enters a combination of criteria to locate the desired document draft. All versions of all drafts that match the search criteria are shown in the results list as shown in **Figure 8**.



**Figure 8: View Draft History - Results List**

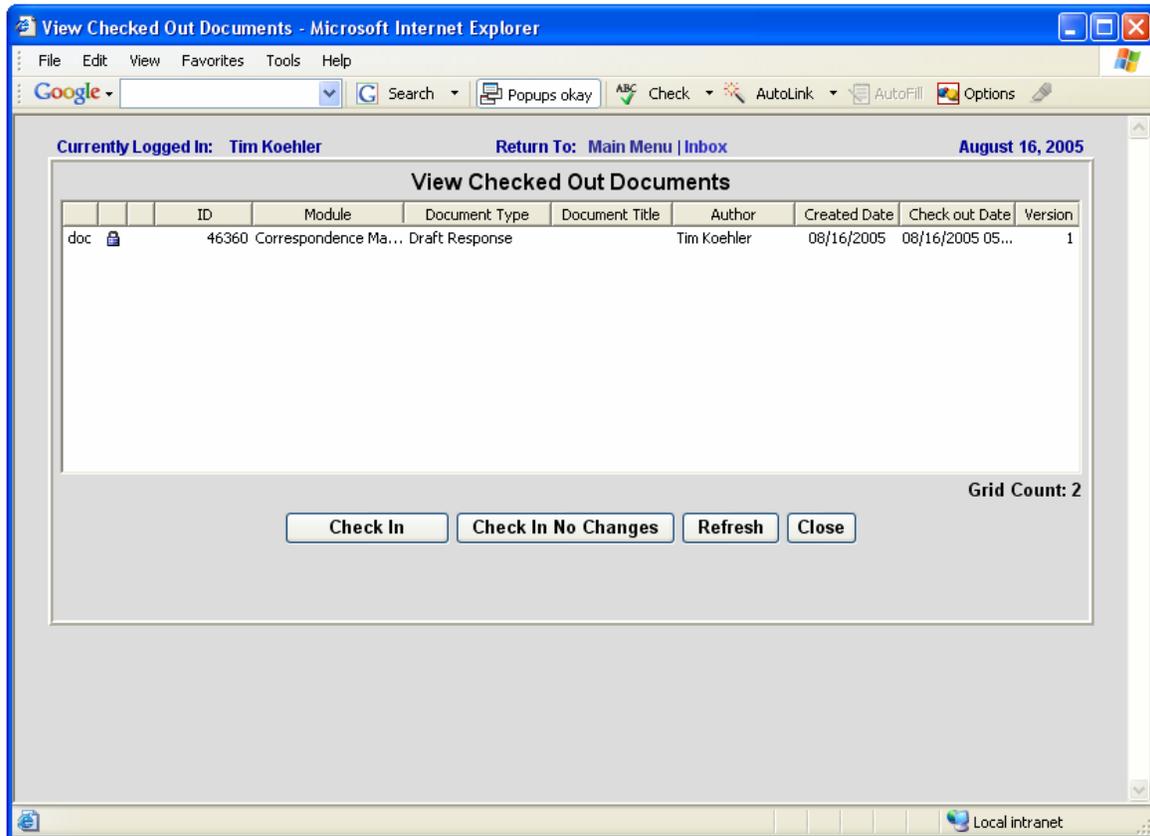
To open a draft, the user clicks the <Open> button. Additional drafts cannot be saved from this Draft History screen. Drafts of checked out documents can only be saved via the Microsoft Word application add-in.

If a mistake was made and a draft in history needs to be checked into the folder, the user can add it using this screen. To add a previous draft to the folder, the user selects the desired draft and clicks the <Add to Folder> button.

The selected draft is added as a new version of the document in the folder. Now when a user views the document in the folder, the displayed document will be the added draft. Regardless of the current version number of the document in the folder, the draft is added as a new version. If draft version 2.4 is added to the folder, and the latest version of the document is version 5, the draft version is added to the folder as version 6 of the document.

## **View Checked Out Documents with No Add-In Installed**

The ability to store and edit drafts in the repository is only available to users with the Microsoft Word application add-in. For users who do not have the application add-in installed, this screen will simply provide a list of documents currently checked out. In this situation, the View Checked Out documents is shown in **Figure 9**.



**Figure 9: View Checked Out Documents - No Add-In**

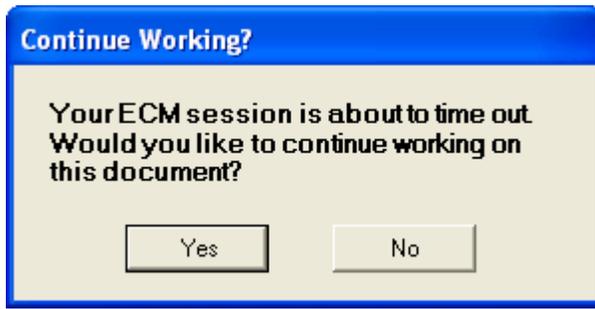
The <Edit Draft> and <View Draft History> buttons are not available. To edit a document, the user will locate the document on their local drive and then edit it. To check-in a document, the user can use this screen or the folder screen. The <Check In> and <Check In No Changes> buttons work the same way as on the Folder screen.

Since drafts can only be saved using the Microsoft Word application add-in, no draft history is available.

### **Auto-Save Document Draft – ECM Word Add-in**

Each user's ECM application session times out after a configured amount of time. By default, it is 30 minutes. While working on a Word document, the ECM session will time out if no actions are performed in ECM within the configured duration. The application will auto-save a draft of the document if necessary before the ECM session times out.

When the ECM session is about to time out, the screen in **Figure 10** will be displayed in Microsoft Word to notify the user.



**Figure 10: Session Time Out Notification**

If the user selects "Yes", a draft of the document will automatically be saved in ECM but the user may continue editing the document. If the user selects "No", a draft of the document will be saved, and the document will be closed. In either case, since the user responded to the question, the user's ECM session remains active. The amount of time before the session times out again is reset.

If there is no response from the user within 30 seconds, a draft of the document will be saved in ECM, the document will be closed, and the user's session will be logged out.

In all cases, the latest changes are saved as a draft in the repository. The minor version number of the document is incremented. As with all document drafts, the most recent draft is accessible by the current user from the View Checked Out Documents screen.

### **Check In No Changes – ECM Word Add-in**

From the ECM folder, folder owners and application administrators can check in documents checked out to other users without changes by clicking the <Check In No Changes> button. The user who checked out the document can also check in the document without changes from the folder or the View Checked Out Documents screen.

When a user checks in a document without changes, the document is checked in as a new version. The new version of the document will be identical to the previous version. All drafts saved while the document was checked out are retained in the draft history.

When a document is checked-in with no changes, an indicator will be shown in the lock column on the documents tab to indicate that the document was checked-in with no

changes. This will apply whether or not drafts were created (i.e. every time a document is checked in with no changes).

For example, if version 1 of a document is checked out and 3 drafts are saved, the checked out document has a draft version number of 1.3. If this document is checked in without changes, version 1 of the document is checked in without changes, becoming version 2. The 3 drafts (1.1, 1.2 and 1.3) are still accessible to the author from the View Draft History screen.

### List All Versions – ECM Word Add-in

When <List All Versions> is clicked on the folder documents tab, all checked in document versions are listed as shown in **Figure 11**. Documents saved as drafts are not listed. Only previous published versions of the document are listed.

The screenshot shows a document management interface with the following metadata fields:

- Control Number:** 5001561
- Status:** Active
- Security Level:** Public
- Folder Owner:** [Empty]
- Processing Code:** EAK01
- Mission/Staff:** Rural Development
- Agency:** Rural Business-Cooperative Service
- Division:** None
- Group:** Main Group

**Action Organization:**

- Mission/Staff:** Office of the Executive Secretariat
- Agency:** None
- Division:** None
- Group:** Main Group

**Correspondent:** 1 Abbott, Caroline

**Addresssee:** 1 Anderson, Stacey

**Referrer:** 1 Anderson, Sylvia

**Subject:** ACCOUNTING SYS

**Date on Letter:** 03/01/2006

**Received Date:** 03/08/2006

**Referrer Due Date:** 03/24/2006

**Related Folders:** 5001592

Buttons: Save, More

Document Type	Document Title	Author	Last Modified	Version #
Supporting Documentation		Ed Koenen	03/08/2006	1
Miscellaneous		Ed Koenen	03/08/2006	1
Supporting Documentation		Ed Koenen	03/08/2006	1
Incoming Correspondence		Ed Koenen	03/08/2006	1
Incoming Correspondence		Ed Koenen	03/08/2006	2
Supporting Documentation		Kathy Valdez	08/21/2006	1
Supporting Documentation		ECMM Administrator	08/21/2006	2
Supporting Documentation		ECMM Administrator	08/21/2006	3
Supporting Documentation		ECMM Administrator	08/21/2006	4

Vertical labels on the right: DOCUMENTS, WORKFLOW

**Figure 11: Documents With All Versions Listed**

### DOCUMENT TAB BUTTONS

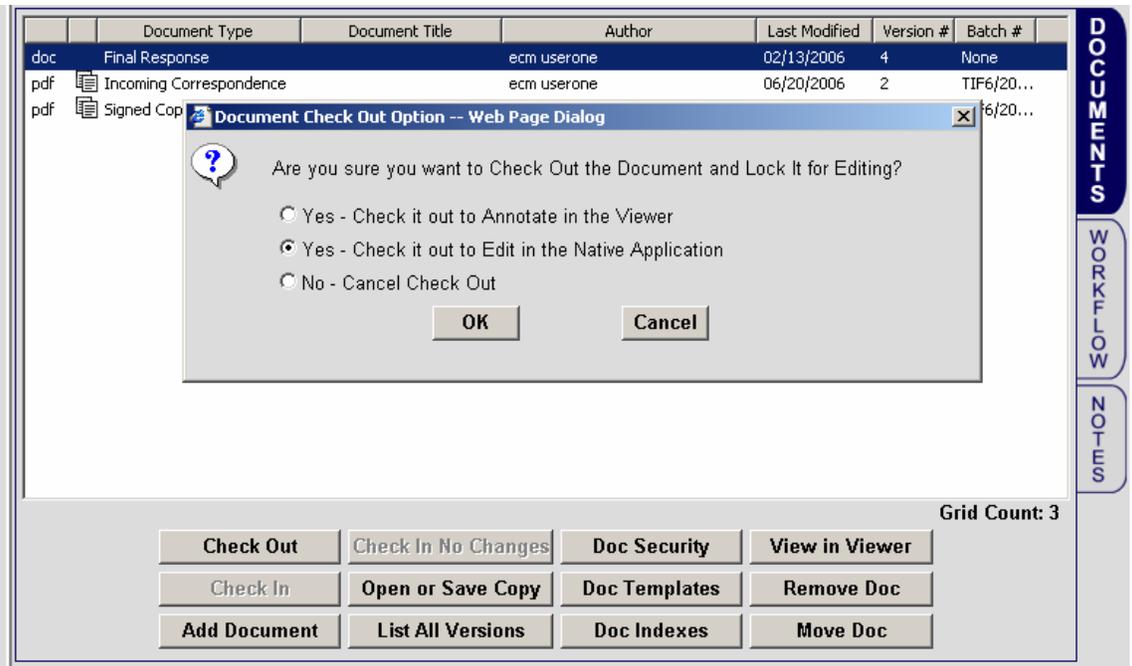
The table in **Figure 12** describes the operations of the buttons on the Documents Tab.

Button	Description
Check Out	This locks the document and no other user may check it out until it is checked back in. The user checks out a document before editing it or making comments on it. PDF documents cannot be checked out.
Check In	After a document has been edited, it can be checked back in. This creates a new version of the document in the repository.
Add Document	This feature allows the user to add documents to a folder. Documents that can be added include word documents, spreadsheets, TIFF images, and PowerPoint files.
Check In No Changes	This feature allows the user to check a document back into the repository with no changes. This does not create a new version of the document but unlocks it so it can be checked out by another user. No document is actually checked in – the lock is simply removed.
Open or Save Copy	The user can open a document in its native application or save a copy of the document to their workstation.
List All Versions	This option allows the user to view all prior versions of a document.
Doc Security	This option shows the security of the document and allows the Author or Folder Owner, or Administrator to change it.
Doc Templates	Allows the user to select a document template to open. An example of a document template would be a draft response to standard inquiries that can then be modified for a specific response.
Doc Indexes	The Folder Owner, Author or Administrator can change the Document Type and/or document Title.
View in Viewer	Allows a user to open a document in the Viewer rather than the native application.
Remove Doc	Allows the Folder Owner, Author, or Administrator to remove a document from the documents tab. The removed document is kept in a list of removed documents for the folder.
Move Doc	Allows the Folder Owner, Author or Administrator to move all versions of a document from one folder to another or copy the most recent version of a document to another folder. If removed, the document is kept in the list of removed documents for the folder.

**Figure 12: Document Tab Button Operations**

### **Check Out Document**

The user may check out a document for editing. To Check Out a document, the user highlights it and clicks the <Check Out> button. The Document Check out Options box will be displayed as seen in **Figure 13**.



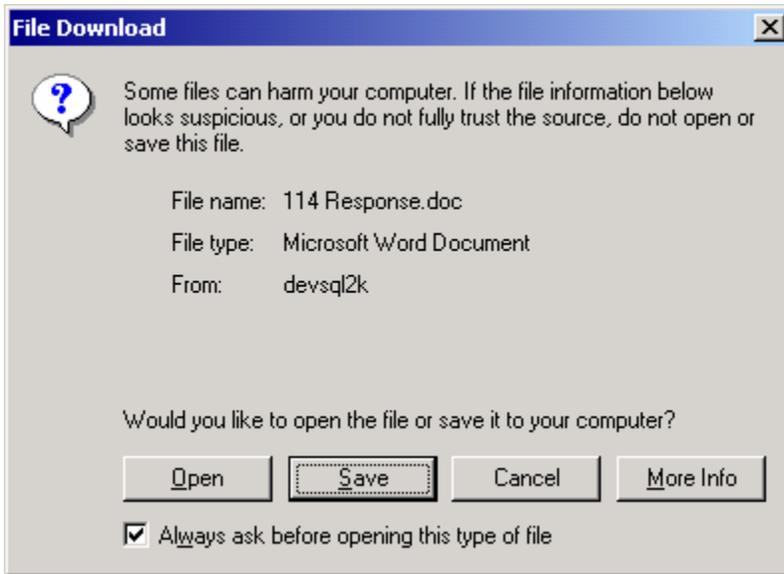
**Figure 13: Document Check Out Options**

To make annotations on a document in the viewer, the user should click the <Check-out to Annotate in the Viewer>. The user can enter comments on the document using annotations and highlighting. The annotations are stored in layers by author. They can later be viewed by author if desired. The viewer also provides redaction capabilities to support FOIA markup requirements.

The second option is to <Check it out to Edit in the Native Application>. With this option the document opens up in its application for editing.

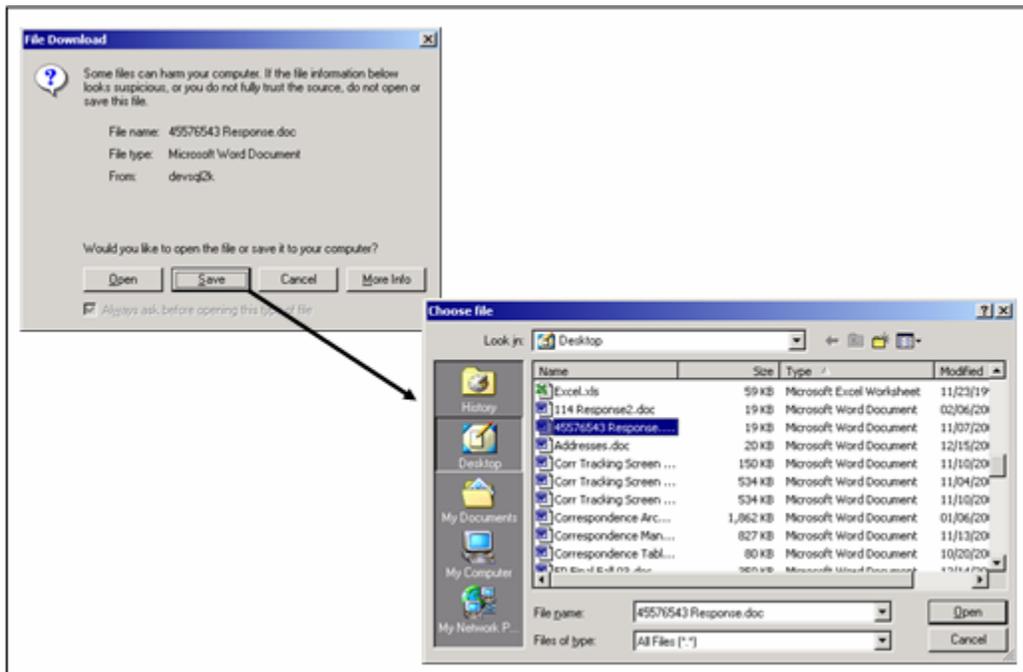
To cancel the Check Out, the user can click the <Cancel> button or select the 'No' radio button and click the <OK> button.

If the user does not have the ECM Word Add-in or is checking out another type of document, a box similar to the one in **Figure 14** will be displayed. The user may <Open> the document or <Save> it to the workstation.



**Figure 14: File Download Dialog Screen**

To save the checked out version to the workstation, the user will choose a location as shown in **Figure 15**.



**Figure 15: Check Out Document**

When the user checks out the document, it is locked and no other user can check it out until it is checked back in. When a document is checked out, a lock icon is shown next to the document on the Documents tab as shown in **Figure 16**.

**Folder Owner:** Document Management Group ... **Status:** Active  
**Control Number:** 1077 **Processing Code:** 01 ...  
**Mission/Staff:** Rural Development ... **Agency:** Rural Housing Service ...  
**Division:** Single Family Housing ... **Group:** Centralized Servicing Center ...  
**Correspondent:** 2 Koenen, Ed ... **Date on Letter:** 10/01/2004 ...  
**Addressee:** 1 Romano, Greg ... **Received Date:** 10/05/2004 ...  
**Referrer:** 1 Koehler, Tim ... **Referrer Due Date:** 10/22/2004 ...  
**Subject:** HOUSING ... **Save** **More**

	Document Type	Document Title	Author	Last Modified	Version #
pdf	Incoming Correspondence	Inquiry about denial of loan	Stephanie Johnson	10/13/2004	1
doc	Supporting Documentation	Mortgage Loan Application Refusal Letter	Paul Russell	10/13/2004	1
pdf	Supporting Documentation	2004 Mortgage Loan Eligibility Rules	Paul Russell	10/13/2004	1
doc	Draft Response	Mortgage Loan Eligibility Response	Mary Bowers	10/29/2004	1

**Check Out** **Check In No Changes** **Doc Security** **View in Viewer**  
**Check In** **Open or Save Copy** **Doc Templates** **Remove Doc**  
**Add Document** **List All Versions** **Doc Indexes** **Move Doc**

**Refresh** **Print** **Security** **Admin** **Close**

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**Figure 16: Folder with Document Locked for Check Out**

A user attempting to Move or Remove a locked document will get the error message shown in **Figure 17**. The name and e-mail address of the individual who has checked out the document is displayed under the Documents window.

Synopsis:

Final Signer: 1  Date Signed:

VIP Type:  Special Instructions:

Letter Count:  Receipt Mode:

Reference No.:  Event Date:

Special Attention:

Document Type	Document Title	Author	Last Modified	Version #	Batch #	
doc	test Document	test	ECMM Administrator	12/09/2005	2	None
doc	Incoming Attachment	Work in Progress	ECMM Administrator	08/31/2006	1	None
doc	Draft Response	Draft Response	ECMM Administrator	08/31/2006	1	None

**Microsoft Internet Explorer**

 This document is checked out.

Checked out by ECMM Administrator [Greg.Romano@qflowsystems.com] on 08/31/2006 07:31 AM CDT Grid Count: 3

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**Figure 17: Document Checked Out Pop-up**

While a document is checked-out, other users may view a copy of the document but can't check it out to make changes.

Some documents, such as PDF documents, cannot be checked out. The user will get an error message such as the one display in **Figure 18**.

Document Type	Document Title	Author	Last Modified	Version #	Batch #
doc	Final Response	ecm userone	02/13/2006	4	None
pdf	Incoming Correspondence	ecm userone	06/20/2006	2	TIF6/20...
pdf	Signed Copy	ecm userone	06/20/2006	2	TIF6/20...

**Microsoft Internet Explorer**

 pdf documents can not be checked out.

Grid Count: 3

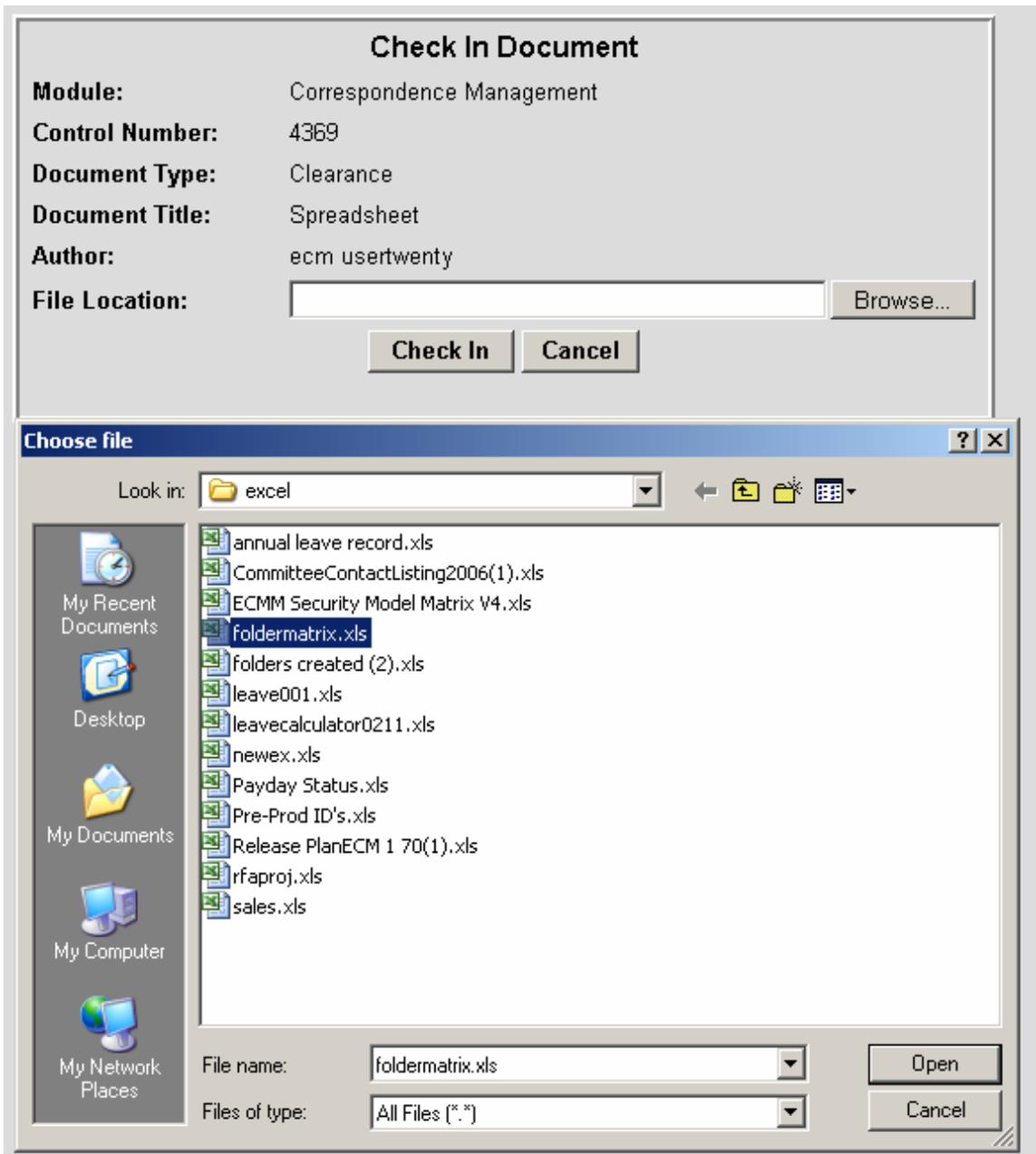
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## **Figure 18: Error Message – PDF Documents Cannot be Checked Out**

### **Check In Document**

If the user has the ECM Word Add-in and has modified a word document after checking it out, the user may check the document directly into ECM or Save a Draft to the ECM repository.

After making the desired changes, the user checks the document back in by clicking the <Check In> button. The Check in Document screen is displayed. The user clicks <Browse> and locates the document to be checked in as shown in **Figure 19**. The user can highlight the document and click <Open> or doubleclick the document to populate the File Location. The user then clicks <Check In>.



**Figure 19: Check In Document**

The system will compare the filename of the document being checked in with the filename when it was checked out. If the filename is not the same, a warning message will be displayed to the user as shown in **Figure 20**.

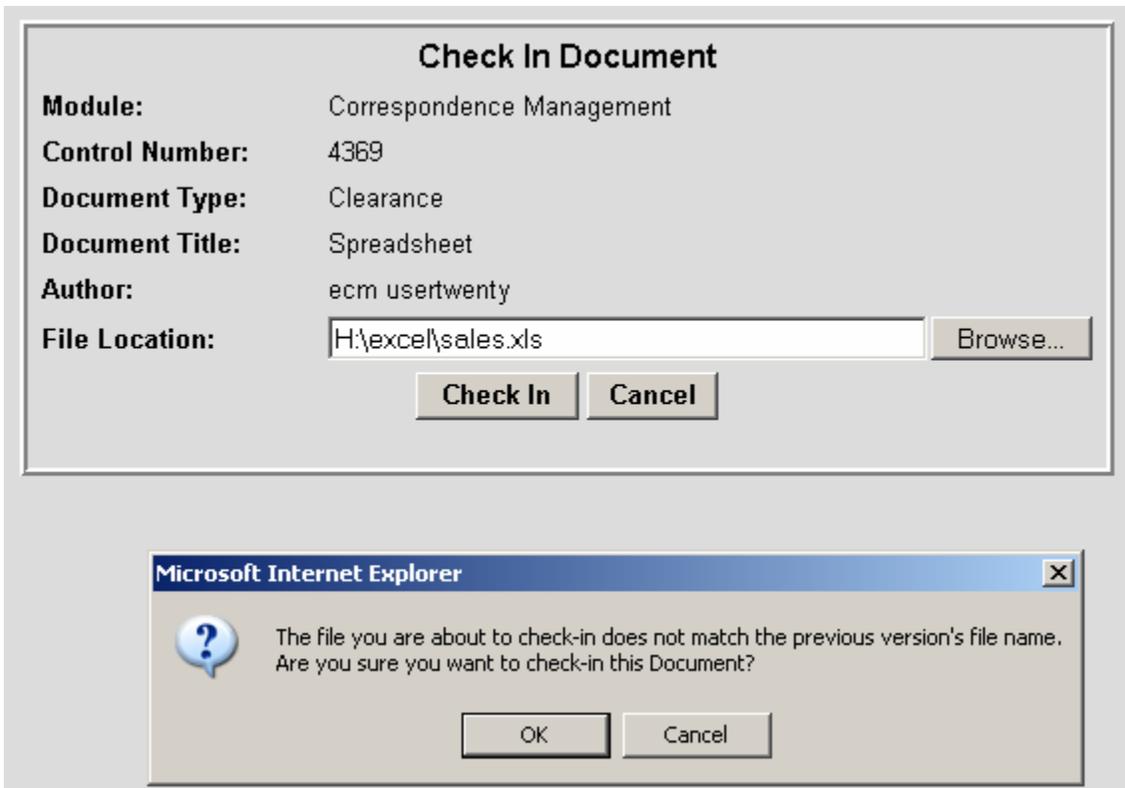


Figure 20: Check In Document – Different Document Name

When the document is checked in, a new version of the document is stored in the system. As seen in **Figure 21**, the 'Lock' icon has been removed.

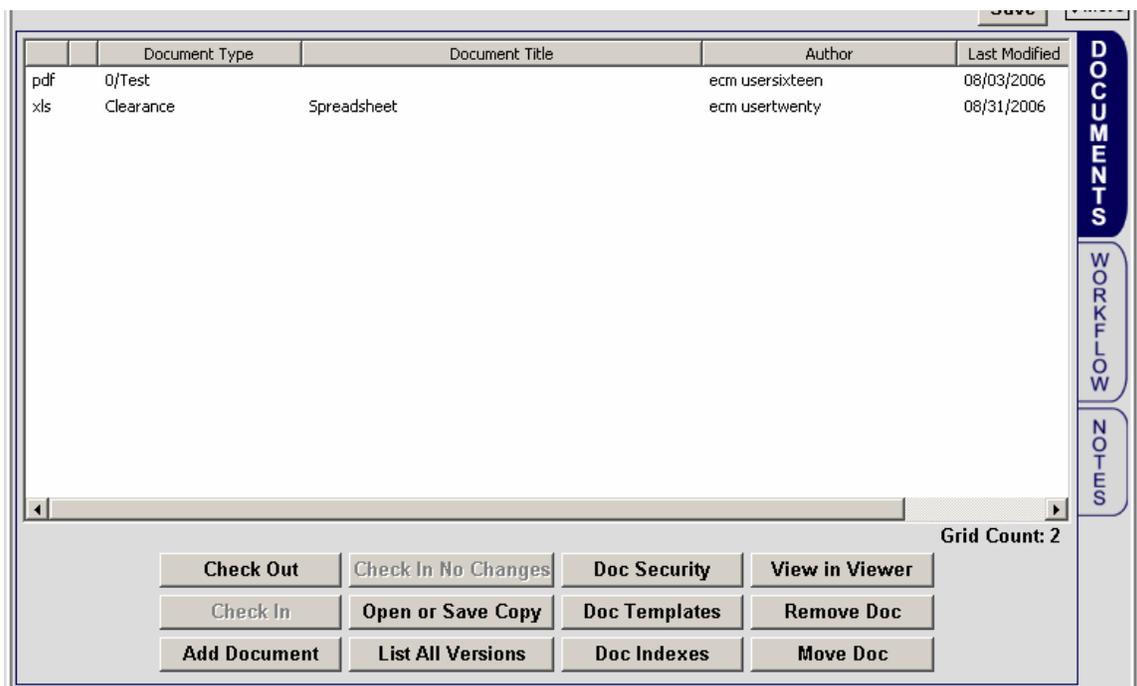
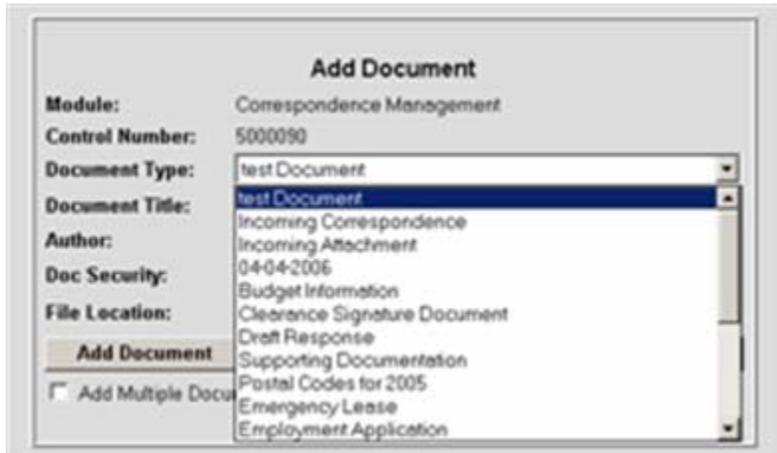


Figure 21: Document Checked In and Unlocked

## Add Document

To add a document to the folder the user clicks the <Add Document> button.

The user selects the Document Type from the dropdown list as shown in **Figure 22**.



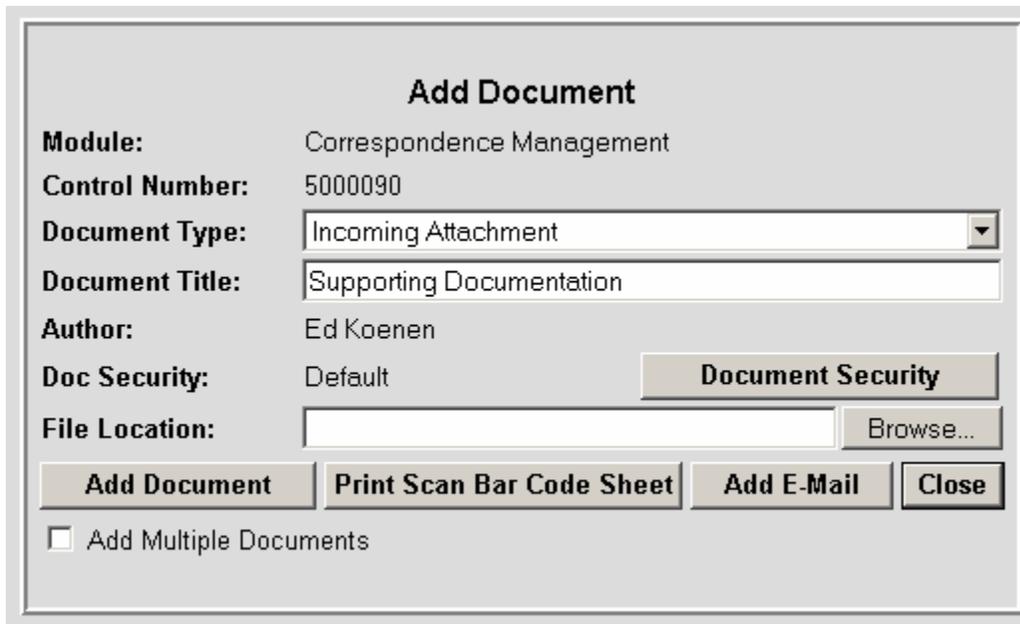
The screenshot shows a dialog box titled "Add Document" with the following fields and options:

- Module:** Correspondence Management
- Control Number:** 5000090
- Document Type:** A dropdown menu with "test Document" selected.
- Document Title:** test Document
- Author:** Incoming Correspondence
- Doc Security:** 04-04-2006
- File Location:** Budget Information

Below the fields are several buttons: "Add Document", "Add Multiple Documents" (with a checkbox), "Incoming Attachment", "Incoming Correspondence", "Clearance Signature Document", "Draft Response", "Supporting Documentation", "Postal Codes for 2005", "Emergency Lease", and "Employment Application".

**Figure 22: Document Type Drop-down List**

The user types in a descriptive Document Title as seen in **Figure 23**.



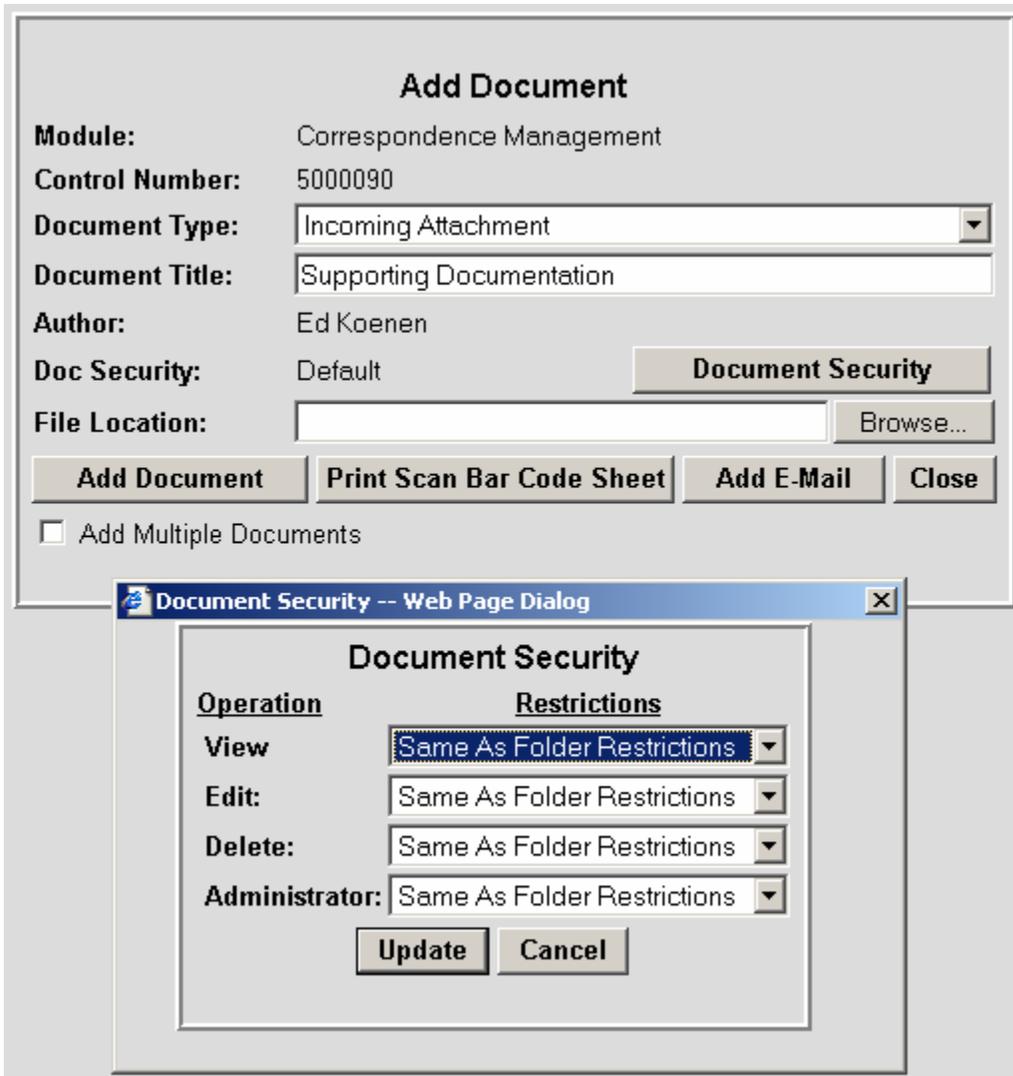
The screenshot shows the "Add Document" dialog box with the following fields and options:

- Module:** Correspondence Management
- Control Number:** 5000090
- Document Type:** Incoming Attachment
- Document Title:** Supporting Documentation
- Author:** Ed Koenen
- Doc Security:** Default
- File Location:** (empty field) with a "Browse..." button

At the bottom, there are buttons for "Add Document", "Print Scan Bar Code Sheet", "Add E-Mail", and "Close". A checkbox for "Add Multiple Documents" is also present.

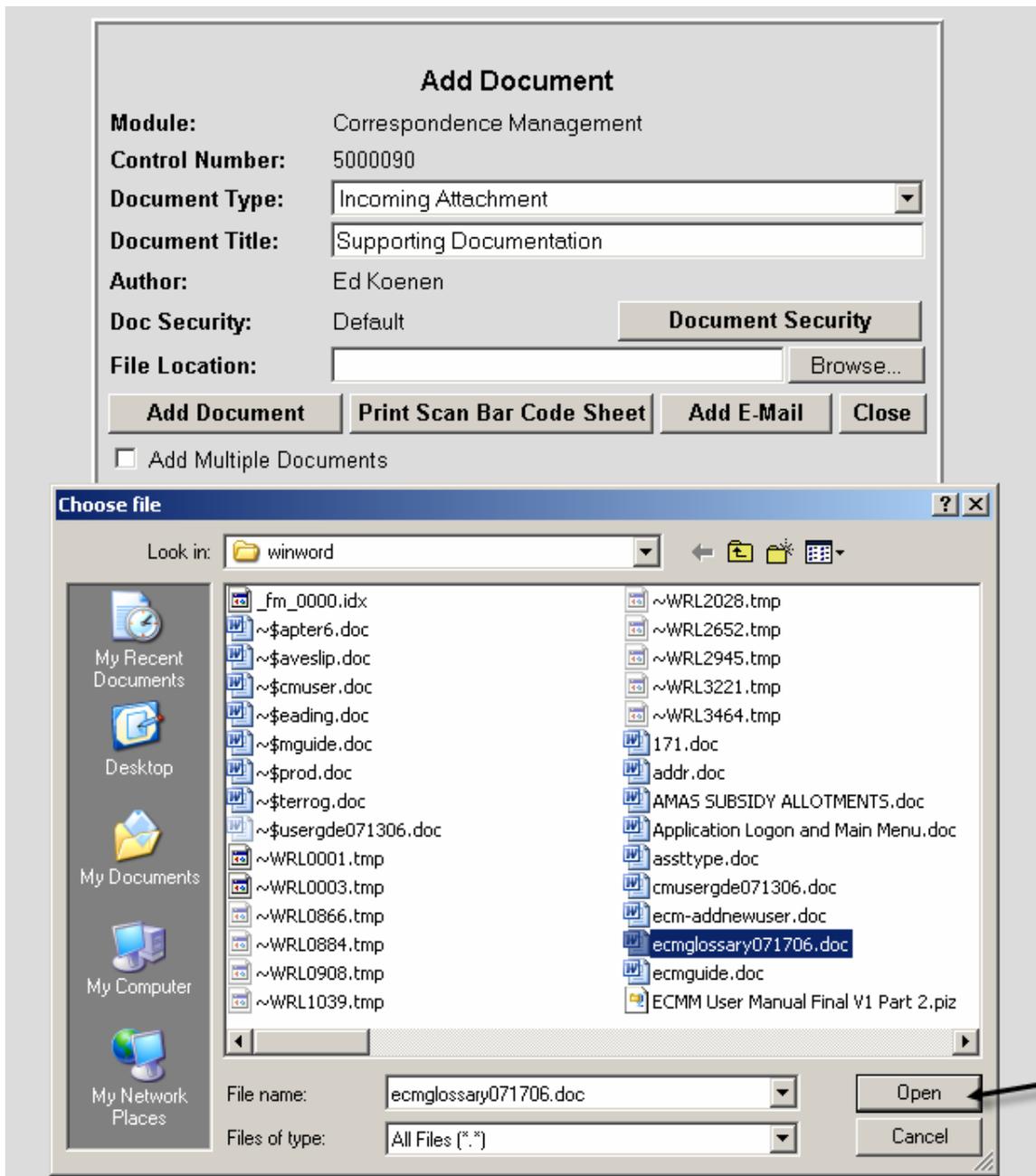
**Figure 23: Document Title**

The user may review or change the Document Security by clicking the < Document Security> button as shown in **Figure 24**.



**Figure 24: Document Security**

The User clicks the <Browse> key to open Choose File dialog box. The user selects the document to be added by double clicking on the File Name or highlighting the File Name and clicking <Open> to populate the File Name of the document as shown in **Figure 25**.



**Figure 25: Choose File**

If there are multiple documents to be added, the user clicks the Add Multiple Documents box in the lower left hand corner of the Add Document screen as shown in **Figure 26**. This will add the document to the folder and bring the user back to the Add Document screen to continue with additional documents.

### Add Document

**Module:** Correspondence Management  
**Control Number:** 5000090  
**Document Type:** Incoming Attachment  
**Document Title:** Supporting Documentation  
**Author:** Ed Koenen  
**Doc Security:** Default **Document Security**  
**File Location:** H:\winword\ecmglossary071706.doc Browse...

Add Document Print Scan Bar Code Sheet Add E-Mail Close

Add Multiple Documents

**Figure 26: Add Multiple Documents**

If there are no further documents to be added at this time, the user clicks <Add Document>. The user is returned to the folder. The added document(s) are shown in the Documents window (**Figure 27**).

	Document Type	Document Title	Author	Last Modified	Version #	Batch #
pdf	Incoming Correspondence	Rural Business Opportuni...	oldecn usertwelve	04/25/2005	1	None
doc	Incoming Attachment	Supporting Documentation	Ed Koenen	07/27/2006	1	None

Grid Count: 2

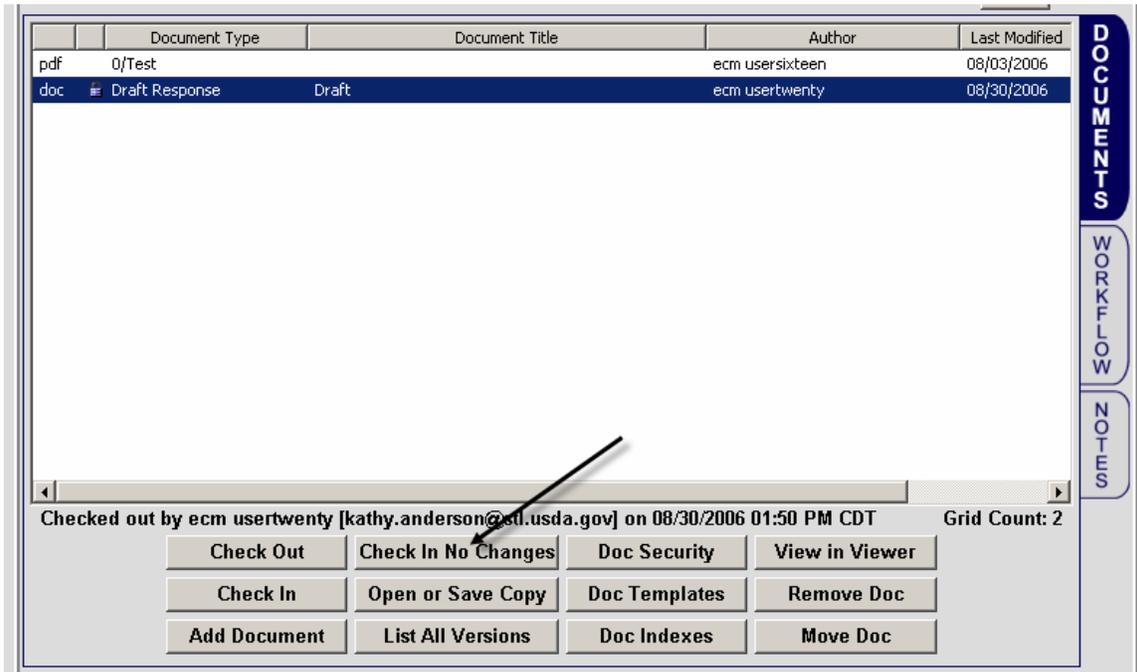
Check Out Check In No Changes Doc Security View in Viewer  
Check In Open or Save Copy Doc Templates Remove Doc  
Add Document List All Versions Doc Indexes Move Doc

**Figure 27: Documents Window Showing Added Document**

More documents can be added as necessary.

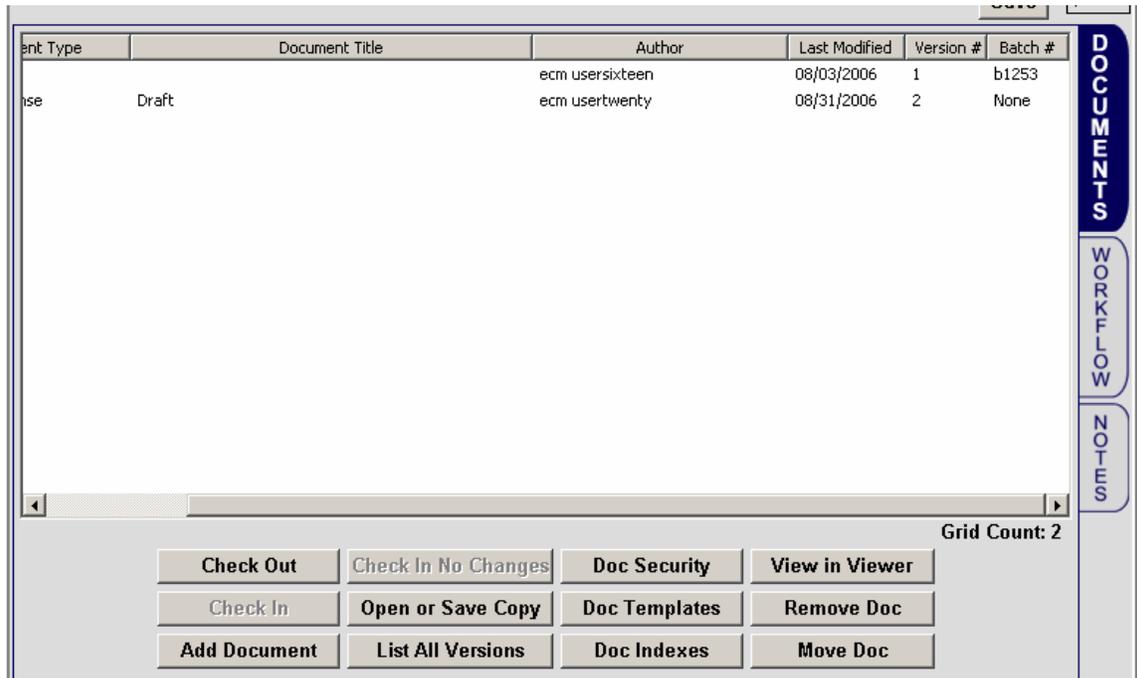
### Check in No Changes

The user can Check in a Document without making any changes by highlighting the document and clicking <Check In No Changes> as shown in **Figure 28**.



**Figure 28: Check In No Changes**

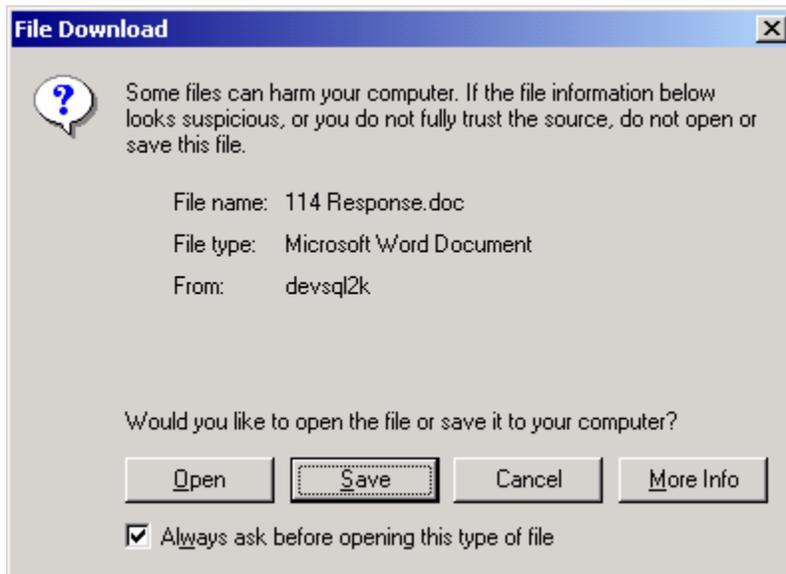
The documents window is redisplayed. The document is unlocked and the version number is increased by one. See **Figure 29**.



**Figure: Check In No Changes 29**

## Open or Save Copy of Document

The user may open a document in its native application or save a copy of a document on their workstation or other file-sharing drive. The user selects the document and clicks the <Open or Save Copy> button. The File Download Dialog box is similar to the one in **Figure 30**.



**Figure 30: File Download Dialog Screen**

The user can click the <Open> button to view the document in its native application. For scanned documents, the native application is the viewer. When opened in the native application, the user can view, print or edit the document as desired. The far left column of the documents list lets the user know the type of document and the native application that will be used to open the document.

To make annotations, the user should check out the document and then open it in the viewer since the viewer has more sophisticated annotation capability.

Alternatively, to save the document to their workstation or file sharing drive, the user clicks the <Save> button on the Download Dialog Screen.

## List All Versions

The <List All Versions> button allows the user to display all versions for all the documents in the Document window as shown in **Figure 31**.

In conjunction with the <Doc Indexes> feature, the Document Type and/or Document Title can be modified.

	Document Type	Document Title	Author	Last Modified	Version #	Batch #
doc	Draft Response		ecm userone	02/13/2006	1	None
doc	Draft Response		ecm userone	02/13/2006	2	None
doc	Signed Copy		ecm userone	07/21/2006	3	None
doc	Final Response		ecm userone	07/24/2006	4	None
doc	Final Response		Ed Koenen	07/24/2006	5	None
doc	Final Response		Ed Koenen	07/27/2006	6	None
tif	Signed Copy		ecm userone	06/20/2006	1	None
pdf	Signed Copy		ecm userone	06/20/2006	2	TIF6/20...
tif	Incoming Correspondence		ecm userone	06/20/2006	1	None
pdf	Incoming Correspondence		ecm userone	06/20/2006	2	TIF6/20...

Grid Count: 10

Figure 31: All Versions Of All Documents

## Document Security

Document Security automatically defaults to the same settings as Folder Security but it can be tailored to suit different needs. The Document Security screen in **Figure 32** shows the Operations that can be modified and the security setting options. The security options can be changed for any operation.

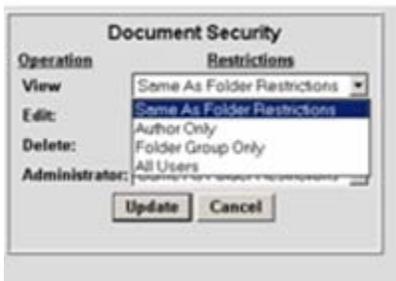


Figure 32: Document Security

## Document Templates

The Document Template button gives the user access to a list of document templates that can be used to create new documents. Initially, the document template screen opens with a list of all templates for the module as seen in **Figure 33**.

**Select Document Template**

**Module:**  **Subject:**

**Mission/Staff:**  **Agency:**

**Division:**  **Group:**

**Content Search:**

Title	Version	Subject	Date Modified	Date Expired	Author	Group	Mission/...	Agency	Division
testing template ad...	1	ACP	03/11/2006	05/09/2006	CMS Tes...	Main Group	Office of...	None	None
test	1	0/92	03/13/2006	05/12/2006	CMS Tes...	Main Group	Office of...	None	None
Test03/14/06	1	ANIMAL ...	03/14/2006	05/13/2006	CMS Tes...	Main Group	Office of...	None	None
Test 03-13-06	1	ACCOUN...	03/14/2006	03/31/2007	CMS Tes...	Main Group	Office of...	None	None
test	1	ACP	03/22/2006	05/21/2006	CMS Tes...	Main Group	Office of...	None	None
tteesstt	1	ACCOUN...	03/23/2006	05/22/2006	CMS Tes...	Main Group	Office of...	None	None
Preprodtest	1	A-129	05/10/2006	07/09/2006	CMS Tes...	Main Group	Office of...	None	None
test 9/1/05	2	ACCOUN...	05/23/2006	10/31/2008	CMS Tes...	Corresp...	Rural De...	None	None
testing adding GU t...	1	AD PRA...	06/30/2005	08/29/2005	Kathy A...	Corresp...	Rural De...	Rural Bu...	Coopera...
testing ppd GU sma...	1	ACS	06/30/2005	08/29/2005	Kathy A...	Corresp...	Rural De...	Rural Bu...	Coopera...

**Grid Count: 15**

**Figure 33:Select Document Template**

The user may search for a template by using any combination of Module, Subject, Mission/Staff, Agency, Division, Group or even by content.

### Add New Template

If a user has a template of a commonly used document and wishes to add it to the template library, this can be done by clicking <Add New Template> . The Window shown in **Figure 34** is displayed.

**Add New  
Document Template**

**Module:** Correspondence Management

**Group:** Main Group

Parent Groups	Mission/Staff	Agency	Division
None	Office of the Exe...	None	None

**Title:**

**Subject:**

**Date Expired:** 10/30/2006

**File Location:**

**Figure 34: Add New Template**

The user may stay in their default user group or choose to save the template in another group by clicking <Select Group>. The user enters the Title and Subject of the template, an expiration date and the file location of the template and clicks <Save>. This will place the template in the Template Library and make it available for other users.

#### Cancel

The user may leave the template menu and return to the folder.

#### List All Versions

<List All Versions> will display the different versions of a changed template. The user may choose to use a prior version.

#### Check Out and Edit

#### Check In and Save

#### Check In No Changes

#### Template Indexes

Only users with the appropriate privileges may use these options.

#### Document Indexes

The user can enter or make changes to the Document Type and/or Document Title. The user highlights the document to be modified on the Document Tab and clicks the <Doc Indexes> button. The Document Index Maintenance screen is displayed as shown in **Figure 35**.

**Document Index Maintenance**

**Document Type:** Incoming Correspondence

**Document Title:** Inquiry about denial of loan

**Author:** sjohnson123456789

**Date Created:** 10/05/2004

**Received Date:**

**Date Modified:** 10/05/2004

**Batch Number:** b1087

**Revision Number:** 1

Save New Indexes Cancel

**Figure 35: Document Index Maintenance**

The user may choose a different Document Type from the drop down box, and/or enter a new Document Title as shown in **Figure 36**.

**Document Index Maintenance**

**Document Type:** Draft Response

**Document Title:** Finalized Spreadsheet

**Author:** 00604050010928410225

**Date Created:** 08/31/2006

**Received Date:** 08/31/2006

**Date Modified:** 08/31/2006

**Batch Number:**

**Revision Number:** 3

Save New Indexes Cancel

**Figure 36: Document Index Maintenance -**

Clicking <Save New Indexes> will save the changes and return the user to the Folder as seen in **Figure 37**. Clicking <Cancel> will discard the changes and return the user to the Folder.

	Document Type	Document Title	Author	Last Modified
xls	Clearance	Spreadsheet	ecm usertwenty	08/31/2006
xls	Clearance	Spreadsheet	ecm usertwenty	08/31/2006
xls	Draft Response	Finalized Spreadsheet	ecm usertwenty	09/01/2006
pdf	0/Test		ecm usersixteen	08/03/2006

Grid Count: 4

**Figure 38: Document Indexes – Modified Document Type and Title**

### Changing a Specific Revision

This feature also allows the user to change the Document Type and Document Title of a specific revision. From the Documents Tab the user clicks <List All Versions>, highlights the version to be renamed, clicks <Doc Indexes>, enters the changes and clicks <Save New Indexes>.

### **View in Viewer**

The user can view a document in the list by selecting the desired document and clicking the <View in Viewer> button. The document is opened in the viewer as shown in **Figure 39**.

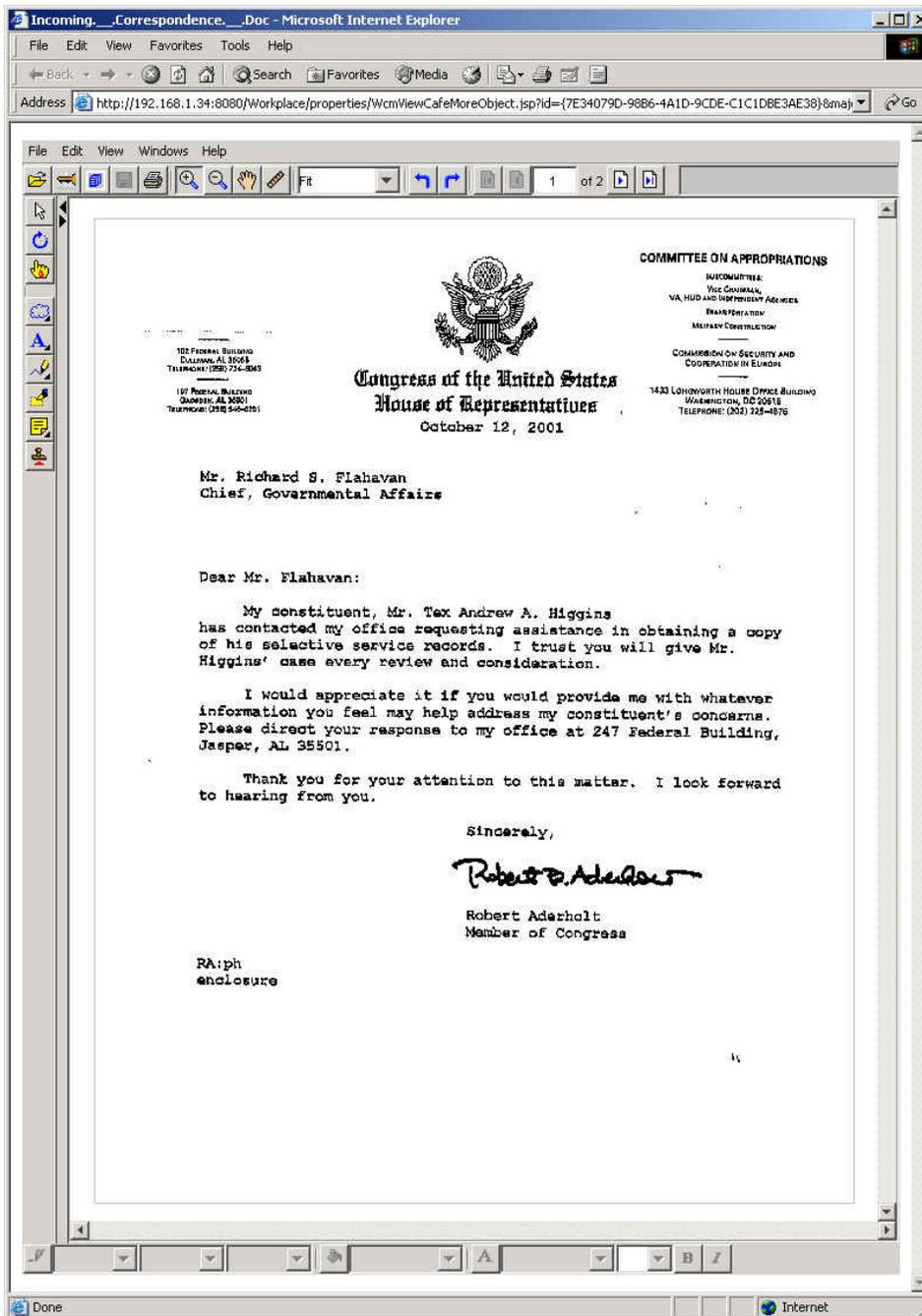


Figure 39: Scanned Document Displayed in Viewer

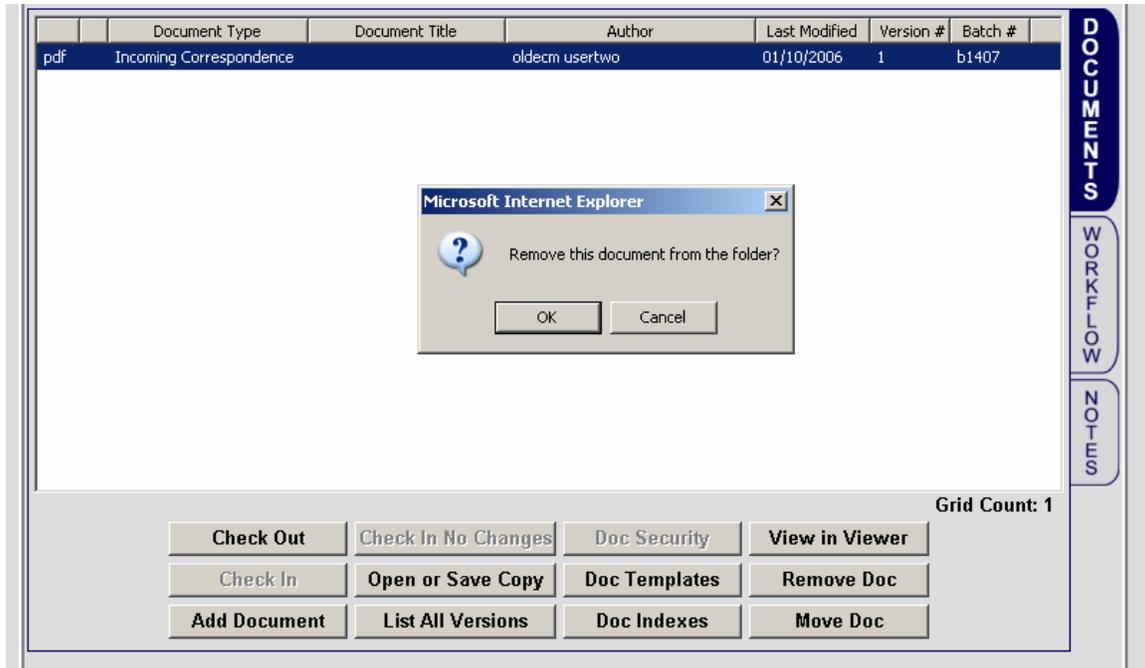
The viewer can display over 200 different electronic file formats. The user can adjust the size, brightness and contrast of the document. The user can zoom in or out, view thumbnails of pages, rotate, and print documents.

The user can also enter comments on the document using annotations and highlighting. The annotations are stored in layers by author. They can later be viewed by author if desired. The viewer also provides redaction capabilities to support FOIA markup

requirements. To make annotations on a document in the viewer, the user should click the <Check-out> button instead of the <View in Viewer> button.

## Remove Document

The <Remove Document> function allows the user to remove all versions of the selected document from the folder. The user first highlights the document to be removed and clicks the <Remove Document> button. A dialog box will appear as shown in **Figure 40**.



**Figure 40: Remove Document Prompt**

To remove the document, click <OK>. The document is deleted. See **Figure 41**.



**Figure 41: Documents Window After the Removal**

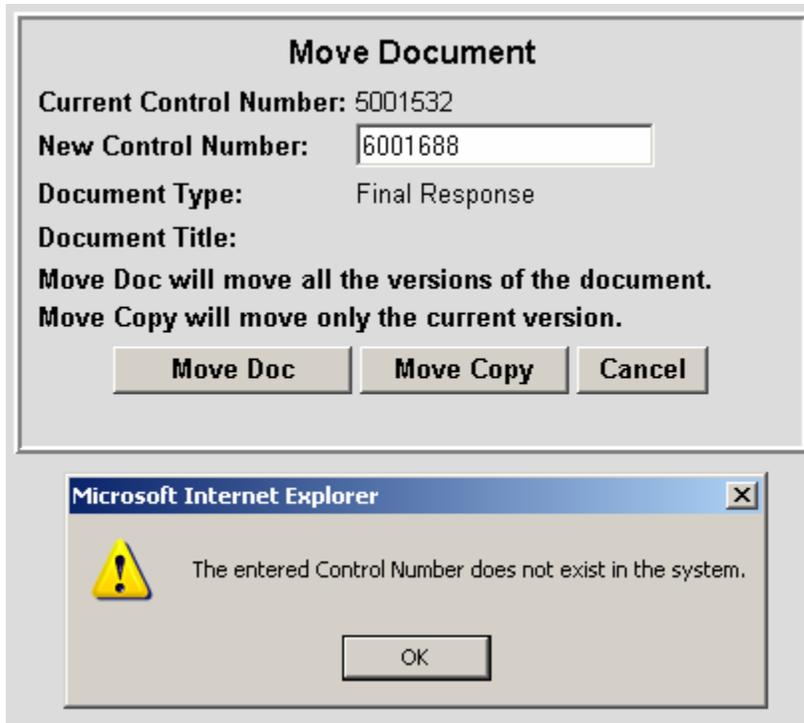
Users with authority can view and replace removed documents to the folder through Folder Administration.

### **Move Document**

The <Move Document> function allows the user to move all versions of the selected document to another folder or to move a copy of the most current version of the selected document to a new folder.

To move a document or a copy of the current version of a document to another folder, the user highlights the document and clicks the <Move Document> button. The Move Document screen is displayed.

The user enters the control number of the folder where the document should be moved. A folder with that control number must exist or the user will receive an error message as shown in **Figure 42**.



**Figure 42: Non-existent Control Number Error Message**

The <Move Doc> function removes the document from the existing folder, and adds it to the folder number input on the screen.

To keep the document in the current folder and move a copy of the document to another folder, the user clicks the <Move Copy> button. A copy of the most current version of the document is placed in the input folder number. All versions still remain in the original folder .

Users with authority can view moved documents through Folder Administration.