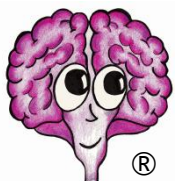


# DocuBrain® TechDoc Client Guide



A DocuBrain® Product

<http://docubrain.com/>

By Prevo Technologies, Inc.

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### Revision History

Revision	Date	Comments
9	05/17/2016	Initial TechDoc Client 9 Release

## **1. Introduction**

The TechDoc Client is a desktop application that allows you to perform most of the basic TechDoc operations along with various mass document operations. The TechDoc client is part of the DocuBrain family of products.

Upon connecting to a Document Manager, all of its folders and documents that are accessible to you are displayed in a Windows Explorer type of interface. For the most part, performing operations in the TechDoc Client should be a familiar experience as most of them look, feel, and function very similar to the operations you perform in TechDoc using a web browser.

## **2. New Concepts**

The TechDoc Client can perform many of the functions that can be done from a web browser but it also comes with some exciting new features. It is a good idea to read over this section and get familiar with these new features so that you will be able to take full advantage of the TechDoc Client has to offer.

### ***2.1. Bulk Loading***

Have you ever had to go through the daunting task of creating dozens, hundreds, or thousands of documents that are all similar in nature? The TechDoc Client can now help make this a much easier task with the ability to bulk load documents. Bulk loading documents means that you can create many documents while only having to go through the create document process one time. More details on bulk loading are provided in section 5.2.

### ***2.2. Drag and Drop***

The TechDoc Client allows one or more documents and/or folders to be bulk loaded to the Document Manager using Windows-style Drag and Drop functionality. You simply select the folder that you want to upload the documents to in the left panel of the client and then drag and drop the desired documents and/or folders (from your desktop, from a folder in your Windows Explorer, etc.) into the right side panel of the client and the document creation process will begin. More details on bulk loading are provided in section 5.2.

## ***2.3. Profiles***

You can think of profiles as templates that will help pre-fill the data for you when creating documents. Let's say that once a month, you receive a hundred *As-Run* documents from the previous month that you need to load into TechDoc. All of these documents always come from the same organization and all have the same document type and document category. Because they are *As-Run* documents, they must also have numerous keywords pertaining to the origin of the document, the contract number, etc. Before the TechDoc Client, this would have been quite time consuming; but now it can be done much easier and faster with the use of the TechDoc Client and profiles.

Creating a profile is exactly like the create document process except that there are no required fields except for a name for the profile. Once the process is completed, the fields that were entered are saved in the profile.

To continue with our example from above, we could create a profile called *As-Run* with the organization, document category, document type, and keywords all entered. Then each month when you need to load *As-Run* documents, you would simply select the *As-Run* profile and each time you start to create documents the organization, document category, document type, and keywords will all be pre-filled for you. By using Bulk Loading and Profiles, you can almost completely automate the create document process, even when creating thousands of documents at a time. More details on profiles are provided in section 5.4.

## ***2.4. Search Folders***

Search folders are a handy new feature that can help you create a "virtual" folder of documents that all match a stored set of search criteria. A search folder is used to group a set of documents even if they reside in different TechDoc folders on the Document Manager. Every search folder that is created will be placed in the "Search Folders" folder so that it can be accessed just as a normal TechDoc folder can.

If you often want to access all the documents that you own in the Document Manager, you can create a search folder called "Documents I Own" and select yourself for the owner in the search criteria. Then when you click on the "Documents I Own" search folder, the TechDoc Client will search the Document Manager and return all of the documents that you currently own. More details on Search folders are provided in section 5.5.

## 3. Getting Started

This section describes the basics to get you up and running with the TechDoc Client. If you haven't already, install the TechDoc Client by double-clicking on the setup program. It's easy because the TechDoc Client requires no special privileges or access to your computer so it can be installed without Administrator privileges.

### 3.1. Making a Connection

In order to connect to a Document Manager, a connection must be created that specifies the information needed to connect with that Document Manager. The TechDoc Client stores each of the connections that you create along with various pieces of information that are specific to only that connection (i.e. document profiles, search folders, etc.).

When the TechDoc Client first launches, it will prompt you with the Connect dialog. Using this dialog, select the host (Document Manager) that you wish to connect to and work with. If you authenticate on this Documents Manager with a traditional TechDoc username and password, the username will be displayed and the corresponding password should be entered. If you authenticate via Single Sign-On (SSO), a browser will launch when the *Connect* button is clicked and direct you to the site where you normally log in when using the selected Document Manager. Click the *Connect* button to open the connection. If you have not created a connection yet, click the *Manage* button and refer to the following subsections.

#### 3.1.1. Creating a Connection

To create a connection, on the Manage Connections dialog, click the *New* button. On the Create Connection dialog, enter the host name of the Document Manager that you wish to connect to. You should always use the fully qualified host name of the server running TechDoc; such as *'techdoc.example.com'* without the quotes. If you normally log in with Single Sign-On (SSO), check the box next to *Connect using Single Sign-On*. If you still use a traditional TechDoc username and password, enter them in their corresponding boxes. Select whether or not to use HTTPS (HTTPS is a secure connection and is normally required) when connecting to it.

If you are required to use a proxy when using the internet (normally this is not required and should be left blank), enter the information for the proxy server; the proxy server should be entered at *'host:portnumber'* without the quotes such as *'127.0.0.1:8888'* or *'proxy.example.com:8888'*.

If for some reason, you have an extremely slow connection to the Document Manager because of network congestion, connection limitations, etc., the timeout may be adjusted to help with this (normally this should be left at the default). The timeout specifies the number of seconds that the client will wait to hear back from the server when performing a request such as showing a document, loading the documents in a folder, etc. By default, the timeout is set to 30 seconds and should be more than adequate for most situations.

Once all of the connection information has been entered, click the *OK* button to test and save the connection. Please note that the TechDoc Client will never store your password; it is only used here to verify your connection information is correct.

### **3.1.2. Editing a Connection**


To edit a connection, on the Manage Connections dialog, select the connection to edit and click the *Edit* button. On the Edit Connection dialog, edit the information necessary and click the *OK* button to test and save the connection. Please note that the TechDoc Client will never store your password; it is only used here to verify your connection information is correct.

### **3.1.3. Deleting a Connection**

Deleting a connection from the TechDoc Client also deletes all the associated data for that connection (i.e., search folder settings, profiles, etc.). To delete a connection, on the Manage Connections dialog, select the connection to delete and click the *Delete* button.


## ***3.2. Navigation and Interaction***

After you've connected to a Document Manager, the folder tree will be displayed. It's important to note that some folders of the Document Manager will not be accessible if you do not have read access to them. Navigation in the TechDoc Client works just like the Windows Explorer, clicking on the plus or minus sign next to a folder expands or collapses the folder, respectively, and clicking on a folder displays its documents in the right panel. Keep in mind that you are remotely connected and it can take some time for the information from large numbers of folders or documents to be downloaded from the server.

Most of the basic TechDoc document operations are available in the client. The operations are accessed by using the File menu, toolbar, or right click menu of a folder or document. For example, to show the information on a folder, select the folder and then choose "Show Info" from the File menu, or click the  icon on the toolbar, or right

click on the folder and select "Show Info". The client will then download the folder's current information from the Document Manager and display it to you.

Many operations are small and basic and therefore will execute quickly while others can take much longer due to their size and complexity. Most operations are only available when a single folder or document is selected. However, several operations support multiple documents. If you select two or more documents and then right click on them, you will see the multi-document operations that are available.

While you click around through the folder tree, folders and documents are reloaded periodically from the server. It is possible that at any given moment, a folder or document may be modified by another user and the client may not have reloaded the information yet to reflect that change. As a convenience, a refresh operation has been added to allow you to reload your current view of the folders and documents. When necessary, you can click the  icon on the toolbar or select Refresh from the View menu to immediately reload the folder tree and document information from the Document Manager that you are connected to.

### **3.2.1. Fast Switching between User Accounts**

Starting with TechDoc 9, a new feature called Fast Switching was introduced. If you Single Sign On to a TechDoc 9 or higher Document Manager and you have more than one TechDoc user account tied to the same Single Sign On account, you can now fast switch between the accounts.

Once you connect to a server and the conditions above are met, you will see a Fast Switch drop down on the far right side of the menu bar of the TechDoc Client (just above the profile drop down) that has the current TechDoc user name in it. At any time, you can click on the Fast Switch drop down and change to one of the other users associated with your Single Sign On account. The username on the title bar will change and now you will be accessing TechDoc as the other user.

## **4. TechDoc Operation Changes**

In this section, we'll discuss the TechDoc operations that perform differently than what you may be used to seeing when using TechDoc with a the web browser.



## 4.1. Associate Access and Mail

The changes for associate access, associate notification, and associate distribution apply when you have selected multiple documents to associate at the same time. Currently, the TechDoc Client only supports associating access and mail for one folder at a time.

Say that we have 500 newly created documents to which we want to associate the group named "Logistics" with *Reserve/Replace* access. First, you would select the 500 documents in the client, right click on them, and choose Associate Access. The client will now start to download the current access settings for the 500 documents. If you look at the lower left corner of the client window, you'll see the message "Retrieving associated access of documents" and a progress bar that indicates that the client is working. Any time the client performs an action that may take a little time, it will display a message and progress bar to let you know that it's working on your request.

After the current association information has been downloaded, the Associate Access window will display all the groups, users, and remote users currently associated to the selected documents. Enter a reason and click *Next* to continue. On the next screen select the group "Logistics", check the reserve/replace access setting, click the *Add* button, and click *Next* to continue. On the next screen, click *Next* since we are not associating any users. Finally, on the Remote Users screen, click *OK* to start the association process. The client will begin associating each of the 500 documents with the reserve/replace access to the group "Logistics". If you look at the lower left corner of the client window, you will see the message "Associating access for documents" until the job completes.

Association in the client works with the idea of accumulating all of the associated access, notification, or distribution settings of the documents you are working with. For example, let's say that we have 30 documents that we are going to associate notification for. The first ten of these documents do not have any groups, users, or remote emails associated with them. The second 10 documents already have a group "TestUsers" associated for notification. The last 10 documents already have a user "John" associated for notification. If you select the 30 documents and click Associate Notification, the client will load the associated notification settings of the 30 documents and combine them all together. When the Associate Notification window comes up, it will appear that all 30 documents have the group "TestUsers" and the user "John" currently associated. If you continue through the dialog not making any other changes, the client will associate the group and user with all 30 documents.

It's also important to note that when associating access of documents, the documents' category/categories come into play. Since associate access also sets the read access of the documents, the client has to determine the highest read access setting that will be allowed for the given group of documents. The highest read access setting of a document is determined by what its doc category allows. Let's say you have 20

documents, 10 documents have a doc category that allows *Global* read access while the other 10 documents have a doc category that only allows *Community* read access. If you attempt to associate access to the 20 documents, the client will only allow the read access to be set as high as *Community* for all 20 documents.

There are two important things to remember when performing associations on multiple documents. First, after associating access, notification, or distribution for a group of documents, all of the documents will have the exact same access, notification, or distribution. Second, when associating the access of a group of documents, you will only be able to set the read access as high as the lowest document category allows.

## ***4.2. Delete***

Deleting a folder or document in the TechDoc Client works the same as it does from a web browser, you must have the privilege and access to delete the folder or document and in the case of a folder, the folder must be empty. The client does allow you to delete multiple documents at once by selecting all of the documents, right clicking on them, and selecting *Delete*. The same rules apply; you must have delete privilege and access to all of the documents that you are attempting to delete. Let's say you select 100 documents to delete and only have delete access to 50 of them. The client will inform you that only 50 of the 100 documents can be deleted and give you the option to continue. If you do continue, the client will only delete the 50 documents that you are allowed to delete.

## ***4.3. Showing Generations***

Because of the Windows Explorer design, the TechDoc Client does not use the main window to display generations. In order to view the generations of a document, right click on the document and select "Show Generations".

The Document Generations window will display all of the generations for the selected document and allow you to access all of the generation-specific commands. Note that some operations apply only to native generations while other operations apply only to rendered generations. To access any of the generation operations, right click on a generation and a popup menu will be displayed showing the available operations.

# **5. New Functionality**

In this section, we'll discuss the new capabilities of the TechDoc Client and some of its great time saving features. If you come up with any new ideas, we'd like to hear them. See section 6 for details on providing us with your feedback.


## ***5.1. Save As***

"Save As" is a new feature in the client that allows you to select one or more documents and download all of them at once. After selecting the document(s) and clicking "Save As...", the "Save As" window will display. Then you select where to place the document(s) on your computer and which generations of the documents to download (either the latest generation or latest revision, and native or rendered). After clicking the *Download* button, the client will first retrieve all of the information about the files to download. Next, the Downloads window will pop up to display the status of the download as the files are downloaded to your computer.

The Downloads window tracks the progress of all downloads started during a TechDoc Client session. Download jobs are only processed one at a time, so you to perform multiple "Save As..." operations, multiple download jobs will be created and queued in the Downloads window. The Downloads window allows you to right click on a single download and perform various operations depending on the state of that download. If you right click on a download that has completed, you can click open and your computer will open that file. If a download should fail for any reason (i.e. your network connection briefly goes out), you can right click on a failed download and click retry to attempt to re-download it.

You can close the Downloads window at any time and the downloads will continue to run in the background. If you wish to view the Downloads window, click "Show Downloads" under the View menu on the client's main window.

## ***5.2. Bulk Loading***

Bulk loading is used to create one or more documents and/or folders via the TechDoc Client. To start the creation process, navigate to the folder where you wish to create the document(s) and/or folder(s) in the TechDoc Client. After navigating to the folder, either select "Create Document" from the file menu, right click on the folder, select "Create Document", click the  icon on the toolbar or drag and drop the files and/or folders to be uploaded onto the client. If you use one of the first three (non-drag and drop) methods, you will be presented with the Open window where you select the file(s) to be bulk loaded.

Next, the Create Document window will be displayed. The window looks and functions very similar to the Create Document process when using a web browser. If you've started the document creation process with a single file, you will only be creating a single document and the rest of this procedure is just like the web browser.

Here's what happens when multiple files are used. The Create Document window works similar to the web browser experience, but there is one exception. The document number field has some special abilities. Normally when you create a document, you would just enter a document number and move on. When creating multiple documents, there are two special functions you can utilize in the document number field: client auto-numbering and server auto-numbering.

### 5.2.1. Client Auto-Numbering

The first function is client auto-numbering. Client auto-numbering works by utilizing special codes that begin with percent signs in the document number mask to identify computed values that should be inserted into each document number as it is being created.

Client auto-numbering uses the same codes that server auto-numbering does. The reason for having client auto-numbering is that it allows you to use a different document number mask for each set of documents you upload, rather than sharing the same one as everyone else when using server auto-numbering.

The following is a list of the codes that can be used for client auto-numbering:

- %H* The two-digit hour of the current time.
- %M* The two-digit minute of the current time.
- %S* The two-digit second of the current time.
- %L* The three-digit millisecond of the current time.
- %m* The two-digit month of the current date.
- %d* The two-digit day of the current date.
- %y* The four-digit year of the current date.
- %Y* The two-digit short year of the current date.
- %u* The username that you are currently connected to the server with.
- %#* An auto-generated sequence number. More pounds signs are added for more digits. For example, *#####* specifies a five digit sequence number that will be zero-padded on the left, if necessary.
- %f* Use the filename (minus the extension) as the document number. *%f* cannot be used with any other codes or text.

For example, if we were creating 20 As-Run documents, we could enter "AS-RUN-%y-%####" without the quotes. In this case, the client would then create the documents in a sequential order starting at one. Assuming the current year is 2011, you

would end up with 20 documents named: *AS-RUN-2011-001*, *AS-RUN-2011-002*, *AS-RUN-2011-003*, ..., *AS-RUN-2011-019*, and *AS-RUN-2011-020*.

When using client auto-numbering, there are two important things to remember. First, you must use enough pound signs for the given number of documents: *%#* for 8 documents, *###* for 91 documents, *####* for 605 documents, etc. It is acceptable to use more pound signs than there are digits in the number of documents. This will result in extra leading zeroes. Second, the fixed prefix portion of the auto-number must not be in use on the Document Manager. For example, you wouldn't have been able to perform the example above (*AS-RUN-%y-%####*) if any other documents already existed in the same Document Manager with a document number of *AS-RUN-2011-* followed by any three digits. A good practice to avoid this situation is to include the date and time (i.e. *AS-RUN-%y%m%d-%h%m%s-%#####*), or a "batch number" in the document number (i.e. *AS-RUN-0001-%#####* for the first batch, *AS-RUN-0002-%#####* for the second batch, etc.).

When using the *%f* code, no other codes may be used nor can any additional text be used. If the *%f* code is being used, it can be the only thing entered into the doc number field. For each document being created, the client will use the filename for the document number minus the extension. The last period is used when determining where the extension begins. If you uploaded a file with the name *MyExampleFile.txt*, the client would strip the extension and the document would be created with *MyExampleFile* as the document number. Since document numbers must be unique, the client will not allow you to upload two files with the same name but different extensions (like *MyExampleFile.txt* and *MyExampleFile.doc*) because they would resolve to the same document number (*MyExampleFile*) and collide.

Additionally, the filenames must not already exist as document numbers in the Document Manager. The client will check each filename against the already existing document numbers in TechDoc. If a collision is detected, the client will let you know. You will have to rename the file(s) so that the name portion of the filename results in document number(s) that are not currently in use before attempting to upload them again. For example, if you attempt to upload *MyExampleFile.txt* and the document number *MyExampleFile* already exists; you could rename the file to *MyExampleFile2.txt* and try again.

### 5.2.2. Server Auto-Numbering

The second function is server auto-numbering. It is important to note that auto-numbering must be enabled on the Document Manager that you are connected to for server auto-numbering to work from the TechDoc Client. Server auto-numbering works in the client just like server auto-numbering works when using TechDoc via a web browser. You simply leave the doc number empty and the server will generate a unique number for each document that is bulk loaded.

### **5.2.3. Bulk Loading Folders**

One or more folders can be dragged onto the client. For each folder that is dropped, a corresponding folder is created in TechDoc if it does not exist. Then any documents in that folder are created in TechDoc under the corresponding folder. Then the process is repeated for any child folders until the entire folder tree and documents under it have been created in TechDoc. This allows you to organize your documents in a folder tree and maintain that folder tree when it is dropped onto the client.

## ***5.3. Special Input Handling***

As discussed in the previous section on bulk loading, document numbers can support client auto-numbering and server auto-numbering. This special input handling is used on the Create Document screens and Profile screens to tell the client to fill in a particular field with a calculated value. In addition to document auto-numbering, the following special input handling is also available.

### **5.3.1. Document Title**

The document title has a drop down box that allows you to choose alternate ways to provide a title. Currently, the only option is to use the source file name as the title for the document. If you do not wish to use the drop down box, you can still leave the title blank or manually enter a specific title to use. Note that this ability is not available when modifying a document.

## ***5.4. Profiles***

Profiles come into play when you are creating documents. We discussed profiles earlier and how creating a profile is similar to creating a document except that when you are finished, any document metadata that you entered is simply stored in the profile. Then if you select a profile, when you start creating new documents, the Create Document screens are pre-filled in with any metadata contained in the profile. Note that you still have the chance to change any of the metadata before the actual creation process begins.

For example, let's say that you have financial records like receipts that you're putting into the Document Manager all the time. The receipts always have a doc type of *Receipt*, a doc category of *Financial*, you are the point of contact, they always belong to your organization, and you always have to add the same 5 keywords to them. This can take a

lot of time to re-enter all of this information repeatedly, not to mention how monotonous it is. A situation like this is perfect for a profile.

To create a profile for the example above, you'd click "Create Profile" from the profiles menu. Enter a profile name such as Receipts and select the doc type, doc category, organization and even the reason if it's usually the same. Click the *Next* button, and fill in all of the information for the keywords. After you have all of the information filled in, click the *OK* button. The client will then save all of this information under a profile named *Receipts*.

Now any time you have to enter one or more receipts, it will be much easier and quicker. Simply select the *Receipts* profile from the profiles box in the upper right hand corner of the main client window and start the create document process. You'll notice that all of the information from the profile has been pre-filled in for you on the Create Document window so all you have to do is enter a document number, click *Next* and then *OK*. Keep in mind, profiles can be modified and deleted at any time by selecting a profile from the profiles combo box, and selecting either "Modify Profile" or "Delete Profile" from the profiles menu.

That saved a little bit of time, but you have 100 receipts to enter every day. Auto numbering (described in section 5.2) could also be used here. You could use one of two methods:

- If the Document Manager that you are connected to has document auto-numbering enabled, when you create your profile, simply leave the document number blank. The when you select the *Receipts* profile, all of the information is filled in and the document number is left blank. Then when you click the *OK* button to create those 100 receipts, the server will automatically assign number for you and boom, you are finished.
- If the Document Manager doesn't support auto doc numbering, you can always take advantage of client auto-numbering. In this instance, it might not make sense to fill in the document number in the profile because a client auto-numbering pattern can only be used a single time. For example, if you entered the document number *Receipts-###* on the receipts profile, the first time you used the profile and created documents, documents numbered *Receipts-001*, *Receipts-002*, ..., *Receipts-100* would be created. The next time you tried to use the profile and create documents with the same *Receipts-###* client auto-numbering pattern, the client would inform you that documents already exist with those document numbers. Most of the time it's better to determine a client-numbering pattern that can be used to help provide new and unique document numbers. For instance, you could always use a date like *Receipts-2011-02-28-###*. If you only enter receipts once a day, the client-numbering pattern should always be unique.

Lastly, you may have noticed in the profiles box there are two options listed: (No profile selected), and (Use last inputs). The first option, (No profile selected), simply means that no values will be pre-filled in when the Create Document window is displayed. The second option, (Use last inputs), is a special profile that the client creates for you. This profile remembers whatever you input on the Create Document window the last time you created document(s). The next time you create a document, the last inputs profile will fill in everything you entered last time. If you make any changes, the last inputs profile will remember these changes and use them next time you create a document.

## ***5.5. Search Folders***

We talked briefly about search folders in the beginning of this guide. A search folder is nothing more than a set of documents that match a set of search criteria that you specify. When you create a search folder, you enter all the document metadata that you wish to search on. When you click the *OK* button to save the search folder, the client stores the search folder information with the current connection's settings and places an entry for it under the "Search Folders" folder in the folder tree. Now any time you want to search or re-search for documents that belong to a certain organization, or were created by a particular individual, you can click on that search folder and the client will perform a search on the Document Manager and display any documents that match.

This can be useful for many reasons. Perhaps you have to work on schematic documents often and schematic documents always have a doc type of *Schematic*. You can create a search folder that is named *Schematics* and searches for documents that have a doc type of *Schematic*. Now every time you click on the *Schematics* search folder, all of the schematic documents from the Document Manager will be displayed. With all of these documents showing in the same search folder, it is easy to select them all and change associations on all of them or even download the latest revision of them to a folder on your hard drive.

Search folders can be created by right clicking on the "Search Folders" folder in the folder tree and selecting "Create Search Folder", or by selecting "Create Search Folder" from the file menu. On the Create Search Folder window, give the search folder a name and enter any data that you want to search on. Click the *OK* button to save it and you're finished. You can modify and delete search folders any time by simply right clicking on the search folder and selecting either *Modify* or *Delete*.



## 6. Suggestions and Feedback

We hope you enjoy the TechDoc Client but if you use it frequently, we also expect you to say, "I like the TechDoc Client but I wish it could ..." If you find yourself in this situation, please let us know by sending us email at [suggestions@docubrain.com](mailto:suggestions@docubrain.com)

If you do happen to find a problem, please feel free to use the same email above. While we do prefer suggestions and compliments, we also accept criticism (preferably constructive :-)

At Prevo Technologies, Inc., we take the quality of our products very seriously. If you do find an issue or something that you feel can be improved upon in the TechDoc Client, please let us know.