



User Manual

Dart EDM	:	Electronic Document Management
Version Number	:	2.6.0.6
Completion Date	:	07 July 2010
Created by	:	Stephen Maddison

Plumtree Group Limited

The information contained in this document is confidential and is intended for the addressee only. If you have received this document in error or there are any problems please notify the originator immediately. The unauthorised use, disclosure, copying or alteration of this document is strictly forbidden. Plumtree Group Ltd will not be liable for direct, special, indirect or consequential damages arising from alteration of the contents of this document by a third party.

I. TABLE OF CONTENTS.

ii. Table of Figure.....	6
1.0 Dart EDM - Login.	7
1.1 Dart EDM - How to Get Started.	7
1.1.1 Getting Started Description.....	7
1.1.2 Getting Started Procedure	7
1.2 Dart EDM - Logging into the System.	7
1.2.1 login Description.....	7
1.2.2 Login field definition.....	8
1.2.3 Login procedure.....	9
1.3 Dart EDM - Getting to know the screen.	9
1.3.1 Description.....	9
1.3.2 Screen Area Definition.....	9
1.3.3 Main Menu Region:-	10
1.3.4 Actions Region:-	10
1.3.5 Bookmarks:-	10
1.4 Dart EDM - How to Navigate Around the System.	11
2.0 Dart EDM - Main Menu.	12
2.1 Dart EDM -Home Screen.....	12
2.1.1 Home Screen Description.	12
2.1.2 Home Screen Field Definition	12
2.1.3 Reading Messages Procedure	12
2.1.4 Removing Messages Procedure	13
2.2 Dart EDM - File System.....	13
2.2.1 Upload Document.....	13
2.2.1.1 Upload Document Description.	13
2.2.1.2 Upload Document Field Definition	14
2.2.1.3 Upload Document Procedure.....	14
2.2.2 Create New Work Area.	15
2.2.2.1 Create New Work Area Description.	15
2.2.2.2 Create New Work Area Field Definition	15
2.2.2.3 Create New Work Area Procedure	16
2.2.3 Remove New Work Area.	17
2.2.3.1 Remove New Work Area Description.....	17
2.2.3.2 Remove New Work Area Field Definition.	17
2.2.3.3 Remove New Work Area Procedure	17
2.2.4 Create New Folder.	17
2.2.4.1 New Folder Description.	17
2.2.4.2 New Folder Field Definition.	18
2.2.4.3 Create New Folder Procedure.	18
2.2.5 Remove Folder.	19
2.2.5.1 Remove Folder Description.....	19
2.2.5.2 Remove Folder Field Definition.	19
2.2.5.3 Remove Folder Procedure.	19
2.3 Dart EDM - Recycle Bin.....	20
2.3.1 Restore Folder/Document Description.....	20
2.3.1.1 Restore Folder/Document Description.	20
2.3.1.2 Restore Folder/Document Field Definition.....	21
2.3.1.3 Restore Individual Documents Procedure.....	22
2.3.2 Restore Folder.	22
2.3.2.3 Restore Folder Procedure	22
2.3.3 Permanently Delete individual Document.....	22
2.3.3.3 Permanently Delete Document Procedure	22
2.3.4 Permanently Delete Folder	23
2.3.4.3 Permanently Delete Folder Procedure	23
2.4 Dart EDM - Reports.....	23
2.4.1 Reports Description.	23

2.4.2 Reports Field Definition.	23
2.4.2.1 Document Activity.	24
2.4.2.2 User Activity.	24
2.4.2.3 No Document Index Info.	25
2.4.2.4 Document Index Info.	25
2.4.2.5 General Reports.	26
2.4.3 Reports Procedure.	27
2.5 Dart EDM - Check IN.	27
2.5.1 Check IN Description.	27
2.5.2 Check IN Field Definition.	27
2.5.3 Check IN procedure	28
2.6 Dart EDM -Automated Invoice Management.	29
3.0 Dart EDM -Document Functions.	30
3.1 Viewing Documents.	30
3.1.1 Viewing Documents Description.	30
3.1.2 Viewing Documents Field Definition.	30
3.1.3 Document Details ICON Description:-	30
3.1.4 Document Details.	31
3.1.5 Document Index Summary.	32
3.2 Add Notes.	32
3.2.1 Add Notes Description.	32
3.2.2 Add Notes Field Definition.	32
3.2.3 Add Notes Procedure.	33
3.3 Messages.	34
3.3.1 Messages Description.	34
3.3.2 Messages Field Definition.	34
3.3.2.1 Add message.	34
3.3.2.2 Due Date.	34
send to.	35
3.3.3 Messages Procedure.	35
3.4 E-Mailing Documents.	36
3.4.1 E-Mailing Description.	36
3.4.2 E-Mailing Field Definition.	36
3.4.3 Send E-Mailing Documents Procedure.	37
3.4.4 Remove Selected documents Procedure.	38
3.5 Save Document to PC.	38
3.5.1 Save Document to PC Description.	38
3.5.2 Save Document to PC Field Definition.	38
3.5.3 Save Document to PC Procedure.	38
3.6 CheckOUT Document.	39
3.6.1 CheckOUT Document Description.	39
3.6.2 CheckOUT Document Field Definition.	39
3.6.3 CheckOUT Document Procedure.	39
3.7 Delete Document.	40
3.7.1 Delete Document Description.	40
3.7.2. Delete Document Field Definition.	40
3.7.3. Delete Document Procedure.	41
3.8 Delete Folder.	41
3.8.1 Delete Folder Description.	42
3.8.2 Delete Folder Field Definition.	42
3.8.3 Delete Folder Procedure.	42
3.9 Versions.	42
3.9.1 Versions Description.	42
3.9.2 Versions Field Definition.	43
3.9.3 View Version Procedure.	44
3.9.4 Restore Version Procedure.	44
3.10 Activity.	45
3.10.1 Activity Description.	45
3.10.2 Activity Field Definition.	45
3.10.3 Activity Procedure.	45

3.11 Change Index Information.....	46
3.11.1 Change Index Information Description.	46
3.11.2 Change Index Information Field Definition.	46
3.11.3 Change Index Information Procedure.....	47
3.12 Associating Documents.	47
3.12.1 Associating Documents Description.	47
3.12.2 Associating Documents Field Definition.	48
3.12.3 Associating Documents Procedure.	48
4.0 Document Searching.	50
4.1 Content Search.	50
4.1.1 Content Search Description.	50
4.1.2 Content Search Field Definitions.	50
4.1.3 Content Search Procedure.	52
4.2 Meta Search.	52
4.2.1 Meta search Description.	52
4.3 Quick Search.	52
4.3.1 Quick search Description.	53
4.3.2 Quick Search Field Definition.....	53
4.3.3 Quick Search Procedure.	54
How to create a Desktop Icon for Dart EDM.	56

II. TABLE OF FIGURE.

Figure 1 Login Screen.	8
Figure 2 : Menu Bar.....	9
Figure 3 : Directory Tree.	10
Figure 4 : Main Menu.	10
Figure 5 : Actions List.....	10
Figure 6 : Bookmark List.....	11
Figure 7 : Bookmark Addition.....	11
Figure 8 : Remove Bookmark.	11
Figure 9 : Home Screen.....	12
Figure 10 : File System Screen.	13
Figure 11 : Upload Document Screen.	14
Figure 12 : Work Area.....	16
Figure 13 : New Folder.	18
Figure 14 : Recycle Bin	20
Figure 15 : Directory Tree.....	21
Figure 16 : Recycle Bin.	21
Figure 17 : Report List	24
Figure 18 : Check IN Document.	27
Figure 19 : Document Details Screen.....	30
Figure 20 : Notes Screen	33
Figure 21 : Messages Screen.	34
Figure 22 : Message Screen	36
Figure 23 : Delete Documents Screen.....	40
Figure 24 : Versions Screen.	43
Figure 25 : Activity Screen.....	45
Figure 26 : Attachments Screen.....	46
Figure 27 : Content Search Screen	50
Figure 28 : Quick Search Box.	53

1.0 DART EDM - LOGIN.

1.1 DART EDM - HOW TO GET STARTED.

1.1.1 GETTING STARTED DESCRIPTION.

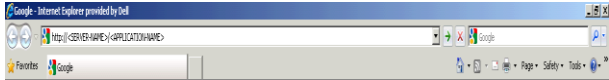
Dart EDM is categorised as a Microsoft Web Application. What this means, is that you do not need to be at any specific Desktop computer to start using the Dart EDM™ System.

Providing the Desktop computer has the standard Microsoft™ Internet Explorer software installed and there is a networked link to the Dart EDM Server, you can invoke the Dart EDM System.

Follow the instructions in the “Getting Started Procedure”, to start using the Dart EDM™ system.

Using a Desktop icon, you can invoke the Dart EDM system quicker. Appendix A will guide you through creating a Desktop icon.

1.1.2 GETTING STARTED PROCEDURE

ACTION	RESPONSE
1. From your Desktop computer.	↙
2. Start Microsoft™ Internet Explorer.	↙
3. In the Microsoft Internet Explorer “Address Bar” enter the following:-	→ ↙ 
4. “http://<SERVER-NAME>/<APPLICATION-NAME>” (See Footnotes ¹)	→ The Dart EDM “Login” Screen will be displayed. See figure 1. ↙
5. Finished.	

Footnotes:-

¹Contact your local Dart EDM administrator, for details about the “<SERVER-NAME>” and “<APPLICATION-NAME>” parameters. Each organizations Login parameters differ.

1.2 DART EDM - LOGGING INTO THE SYSTEM.

1.2.1 LOGIN DESCRIPTION.

You will need a set of Credentials that will dictate what you can, and cannot do, within Dart EDM. The Credentials consist of a **Username** and **Password** (see Login Field Definitions).

Dart EDM is configured to allow the user 3 tries, when entering their credentials. After the 3rd try, Dart EDM will lock the **User’s** credentials for 15 minutes, before you are given the chance to reenter.

If your Credentials are unknown, contact your local Dart EDM Administrator, who will either:-

- Create your new credentials.
- Update your existing credentials.

PLEASE NOTE

It is important that you do not allow other users, access to your personal credentials. If you suspect that your credentials are known by other Users, please contact your Local Dart EDM Administrator.

1.2.2 LOGIN FIELD DEFINITION

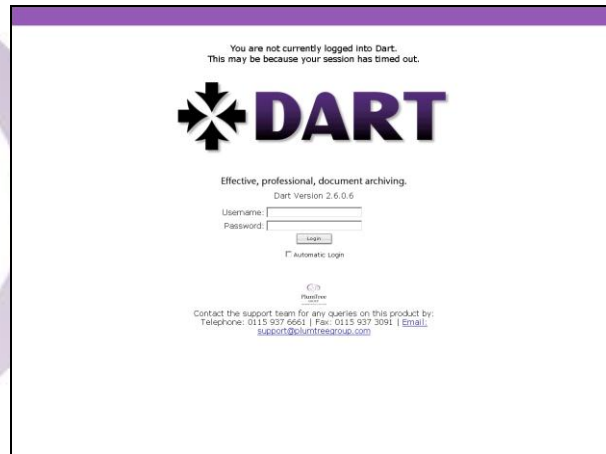


Figure 1 : Login Screen.

❖Username:-

Description	:	This is a valid Username, created in “User Management” by your local Dart EDM Administrator.
Type	:	Input Field.
Information Type	:	Alphabetic and Numeric characters.
Mandatory	:	Yes
Minimum Length	:	6
Maximum Length	:	60

❖Password:-

Description	:	This must be a valid Password, created in “User Management” by your local Dart EDM Administrator.
Type	:	Input Field.
Information Type	:	Alphabetic and Numeric characters.
Mandatory	:	Yes
Minimum Length	:	6
Maximum Length	:	60

❖Login:-

Description	:	Submit’s your valid credentials to Dart EDM for checking.
Type	:	Process Button.

❖Automatic Login¹:-

Description	:	Allow the user to login to Dart EDM using their windows login credentials
Type	:	Process Button.

¹Dart EDM needs configuring to allow the “Automatic Login” to work. Please contact your local Dart EDM Administrator for further information.

1.2.3 LOGIN PROCEDURE.

ACTION	RESPONSE
1. The Dart EDM Login Screen is currently displayed (see 1.1.2.Getting Started Procedure).	↙
2. Using the mouse pointer, click the Username box or use the tab key (if needed).	↙
3. Enter Username .	↙
4. Using the mouse pointer click the Password box or use the tab key.	↙
5. Enter your Password .	↙
6. Either:-	↙ This needs reworking
7.	
8. Press the Enter key	➔ If your login Credentials are correct, the system will advance to the Home screen in Dart EDM. (See Footnote ¹).
9. or	↙
10.Using the mouse pointer click the Login button.	
11.Finished.	

Footnotes :-

¹If your login Credentials are wrong, you will receive the following message

“The username and password that you provided is incorrect. Please try again. (Attempt 1 of 3)”

You will have a further two tries to correct your login Credentials, after which, the Dart EDM will lock you out for 15 minutes.

1.3 DART EDM - GETTING TO KNOW THE SCREEN.

1.3.1 DESCRIPTION.

This manual will regularly refer to different regions of the screen. The purpose of this section is to familiarise yourself with these different regions, when performing tasks within Dart EDM.

1.3.2 SCREEN AREA DEFINITION.

Menu Bar:-



Figure 2 : Menu Bar.

Located at the top of the screen, this region contains different icons that will direct you to different parts of the Dart EDM system.

Directory Tree Region:-

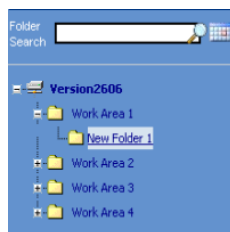


Figure 3 : Directory Tree.

Found in the left region of the screen, it contains the **Directory Tree** of all **Work Areas** and **Folders** stored within Dart EDM.

Level one of the **Directory tree** called the **Root Directory**, is configured when Dart EDM is first installed.

Under the **Root Directory** consists of any number of **Sub Directories**, these **Sub Directories** are created by users or by the local Dart EDM administrator.

There are two different types of Sub Directories:-

- Work Area Directories.
- Folder Directories.

Refer to the sections Create/Remove **Work Area's** and **Folders** for more information.

1.3.3 MAIN MENU REGION:-



Figure 4 : Main Menu.

Found in the top right region of the screen, this region provides quick access to other roles within the Dart EDM that are not directly related to Document processing.

Refer to the various sections of the User Guide for more information.

1.3.4 ACTIONS REGION:-

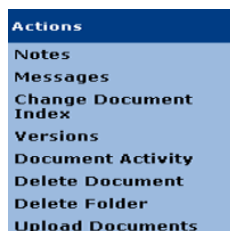


Figure 5 : Actions List.

Found in the centre right region of the screen, this region provides access to the roles specific to the screen you are viewing. As you change from screen to screen, then the Actions listed will vary.

1.3.5 BOOKMARKS:-

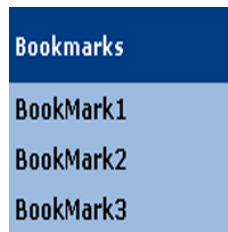


Figure 6 : Bookmark List.

Bookmarks allow the Dart EDM user to navigate quickly to any location within the Directory Tree with just one click.

To create Bookmarks perform the following:-

1. Using the **Directory Tree**, navigate to the **Work Area/Folder** that you wish to Bookmark.
2. Using the mouse, drag the **Folder Name** and place it over the **Bookmark** wording.
3. Within the **Bookmark Addition** dialog screen (See figure 7), enter a reference name for this Bookmark.
4. Click **OK**.

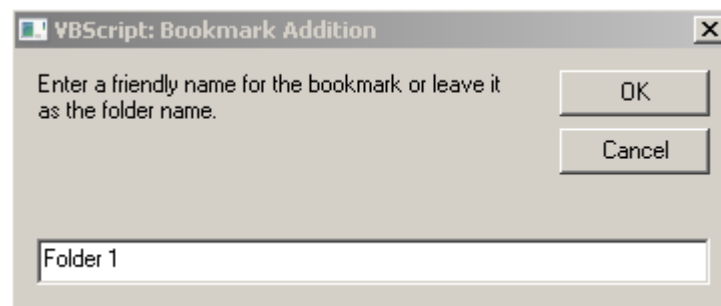


Figure 7 : Bookmark Addition.

To Remove Bookmarks Perform the following:-

1. Using the mouse, drag the Bookmark name into the centre of the screen.
2. Click **OK**, to the "Remove xxxxxx from Bookmarks?".

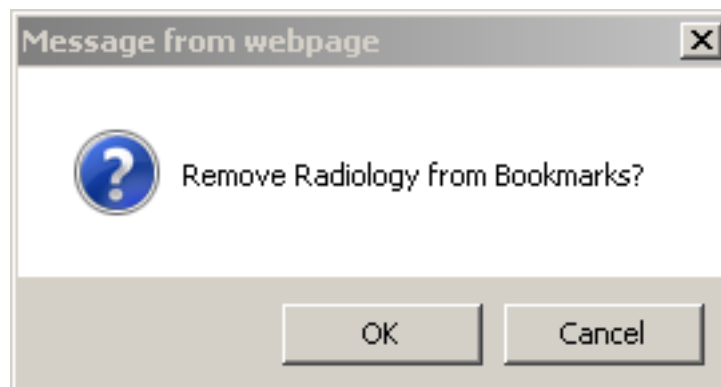


Figure 8 : Remove Bookmark.

1.4 DART EDM - HOW TO NAVIGATE AROUND THE SYSTEM.

1.4.1 Navigate Around the System Description.

Error! Not a valid link.

2.0 DART EDM - MAIN MENU.

2.1 DART EDM -HOME SCREEN.

2.1.1 HOME SCREEN DESCRIPTION.

By default, when a user is first added to Dart EDM. The user is automatically assigned to the **Home** screen.

From the **Home** screen, the user can immediately see existing and new messages that have been sent by other Dart EDM users.

From this screen the user can:-

- Read Messages - Refer to 2.1.3 Reading Messages Procedure.
- Remove Messages - Refer to 2.1.4 Removing Messages Procedure.

2.1.2 HOME SCREEN FIELD DEFINITION

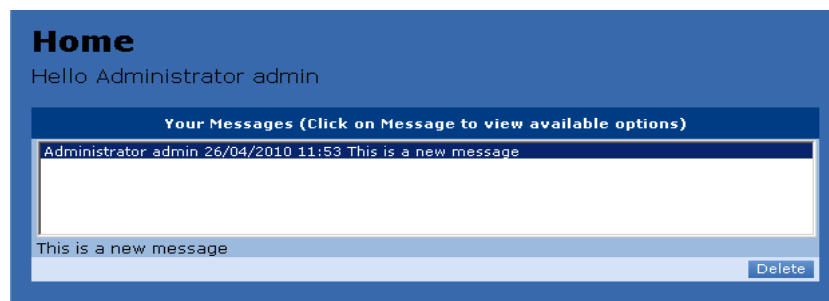


Figure 9 : Home Screen

❖Your Messages:-

The Display box will display the first line of all messages associated with this current “User Sign-on”.

Description : Each line contains:-

- The “User Name” of the sender.
- Date and Time the message was sent.
- The first line of the message as part of the Description.

Type : Display Box.

❖Delete:-

Description : Deletes the message from Dart EDM.

Type : Process Button.

2.1.3 READING MESSAGES PROCEDURE


ACTION	RESPONSE
1. From the Main Menu , select Home .	➔ The Home screen is displayed.
2. Using the Your Messages select the Message to be read.	➔ The full Message is displayed (see footnotes ¹).

3. Finished.

Footnotes: -

¹If the message exceeds one line; Dart EDM will expand the message area until the entire message is displayed.

2.1.4 REMOVING MESSAGES PROCEDURE

ACTION	RESPONSE
1. From the Main Menu , select Home .	➔ The Home screen is displayed.
2. Using the Your Messages select the Message to be read.	➔ ➤ The full Message is displayed. ➔ ➤ The Delete button is visible.
	Message:-
3. Click Delete button.	➔ 
	The “Delete” button is no longer available. Short Message is no longer visible.
4. Finished.	

Footnotes:-

2.2 DART EDM - FILE SYSTEM.

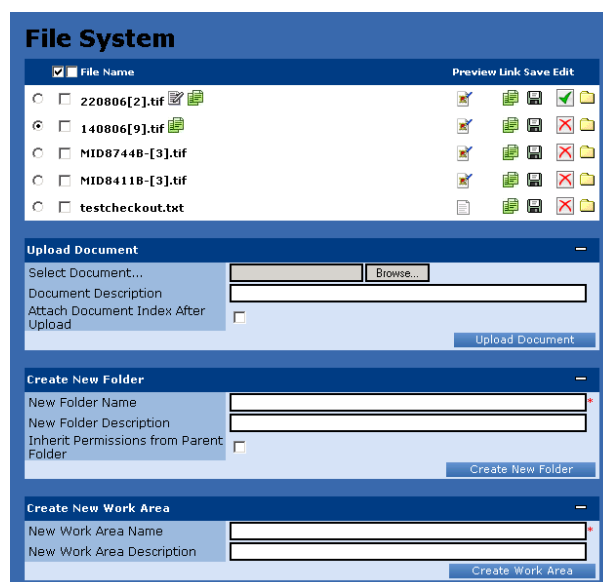


Figure 10 : File System Screen.

2.2.1 UPLOAD DOCUMENT.

2.2.1.1 UPLOAD DOCUMENT DESCRIPTION.

If you are not able to capture documents into Dart EDM using the Plumtree Groups suite of programs for example Dart Qscan™, Dartloader™. You will be able to use the internal Dart EDM facility called “Upload Document”.

“Upload Document” provides the user with a method of importing documents into Dart EDM, one document at a time. Like Dart Qscan, you can also attach “Index Data” associated with the document, by choosing the “Document Index” at the time of upload, and manually entering the data into the “Meta Data” fields.

2.2.1.2 UPLOAD DOCUMENT FIELD DEFINITION

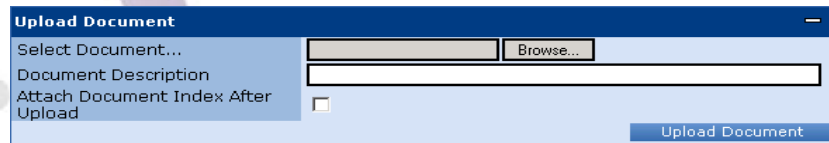


Figure 11 : Upload Document Screen.

Select Document:-

Description	:	Will contain the full directory path and file name of the document that will be uploaded into Dart EDM.
Type	:	Input Field.
Mandatory	:	Yes
Information Type	:	Alphabetic and numeric characters.

Select Document Browser:-

Description	:	Use the Browse button to navigate to the document name using the standard Windows Directory Tree.
Type	:	Process Button.

Document Description:-

Description	:	Additional information to better describe the document to be uploaded.
Type	:	Input Field.
Mandatory	:	No
Information Type	:	Alphabetic and numeric characters.
Minimum Length	:	1
Maximum Length	:	60

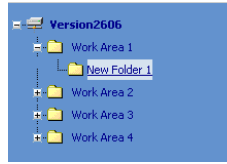
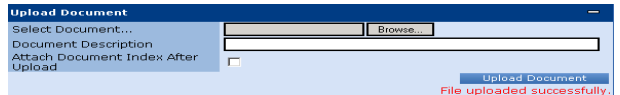
Attach Document Index after Upload:-

Description	:	If this is checked, then Dart EDM will ask you to select a “Document Index” to be associated with the uploaded document.
Type	:	Check Box.

Upload Document:-

Description	:	Process the Uploading of the Document into Dart EDM.
Type	:	Process Button.

2.2.1.3 UPLOAD DOCUMENT PROCEDURE

ACTION		RESPONSE
1. From the Main Menu , select File System .	→ ↩	➤ The File System screen is displayed. ➤ The Upload Document section is open.
2. Using the Directory Tree , navigate to the Folder where this Document is to be placed.	→ ↩	
3. Using the Browse button, navigate to the location of the Document on the desktop/Network.	→ ↩	The File Location and Document Name are displayed in the Select Document box.
4. Using the Document Description , add additional information about the upload (If needed).	↩	
5. Select the Attach Document Index after Upload check box (if needed).	→ ↩	
6. Click Upload Document .	→ ↩	
7. If you selected Attach Document Index after Upload check, complete the Index Data panel.	↩	
8. Finished.		

Footnotes:- If you need more information regarding “Meta Data” information, refer to the “Dart EDM Upload Document Description” section.

2.2.2 CREATE NEW WORK AREA.

2.2.2.1 CREATE NEW WORK AREA DESCRIPTION.

A Work Area is a way of using Dart EDM to logically break down the way that documents are stored internally. There are many reasons you would logically break down your documents, some reasons may be to provide:-

- Hierarchical structure of your documents.
- Different User permissions at Hierarchical Structure level.
 - ↳ Different people within your organization may have different access permissions to documents stored within Dart EDM.
- Ability to find documents more easily.
 - ↳ If for any reason you do not have any information about a document that could be used during a search. Then you can narrow your search by means of the hierarchical structure.

You cannot store Document in Work Area's, they can only be stored in Folders (See “Creating new folder” section).

The number of Work Area's that you can create is unlimited, and will depend on the file system structure and operating system in use.

2.2.2.2 CREATE NEW WORK AREA FIELD DEFINITION

Figure 12 : Work Area.

New Work Area Name:-

Description	:	Name of the Work Area to be created. This name will appear next to the folder icon within the Directory Tree.
Type	:	Input Box.
Mandatory	:	Yes
Information Type	:	Alphabetic and Numeric.
Minimum Length	:	1
Maximum Length	:	60

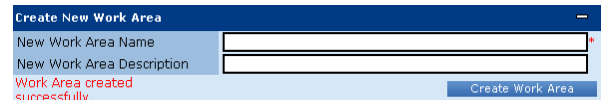
New Work Area Description:-

Description	:	Provide additional information about the New Work Area
Type	:	Input Box
Mandatory	:	No
Information Type	:	Alphabetic and Numeric.
Minimum Length	:	0
Maximum Length	:	60

Create Work Area:-

Description	:	Process your new Work Area.
Type	:	Process Button.

2.2.2.3 CREATE NEW WORK AREA PROCEDURE

ACTION	RESPONSE
1. From the Main Menu , select File System .	↙ The File System screen is displayed.
2. Using the “+” symbol, for Create New Work Area .	↙
3. Enter Work Area Name , in the box provided.	↙
4. Enter Work Area Description , in the box provided (if required).	↙
5. Click Create Work Area button (see footnote ¹)	→ 
6. Finished.	→ The New Work Area Folder will now be visible in the Directory Tree.

Footnotes: -

¹Please note that all new Work Areas are created directly under the “Root Directory” within the Directory Tree.

2.2.3 REMOVE NEW WORK AREA.

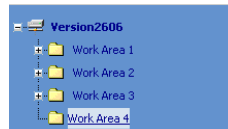

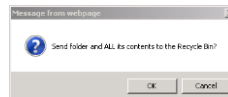
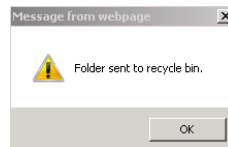
2.2.3.1 REMOVE NEW WORK AREA DESCRIPTION.

Description required here

2.2.3.2 REMOVE NEW WORK AREA FIELD DEFINITION.

Field Definition required here

2.2.3.3 REMOVE NEW WORK AREA PROCEDURE.

ACTION	RESPONSE
From the Main Menu , select File System .	<div>→</div> <div>↩</div> The File System screen is displayed.
Using the Directory Tree , select the Work Area to be deleted.	<div>→</div> <div>↩</div> 
From the Actions menu, select Delete Folder .	<div>→</div> <div>↩</div> 
Click OK , to confirm deletion.	<div>→</div> <div>↩</div> 
Click OK , to acknowledge deletion.	<div>→</div> <div>↩</div> 
Finished.	

Footnotes :-

2.2.4 CREATE NEW FOLDER.

2.2.4.1 NEW FOLDER DESCRIPTION.

Folders are sub divisions of Work Area's. This is where the document will be stored when imported/uploaded into Dart EDM.

When a new folder is created, Dart EDM will need to know what kind of permissions the folder has. There are

a number of options available:-

- The folder can inherit the same permissions as the parent folder in the Directory Tree.
- The folder can be created without any permission; however, permissions will need to be assigned at the configuration level at a later date.

The number of documents that can be stored within Dart EDM will depend solely on the amount of disk drive space available.

The number of Sub folders that you can create is virtually unlimited, and will depend on the file system structure and operating system in use.

2.2.4.2 NEW FOLDER FIELD DEFINITION.

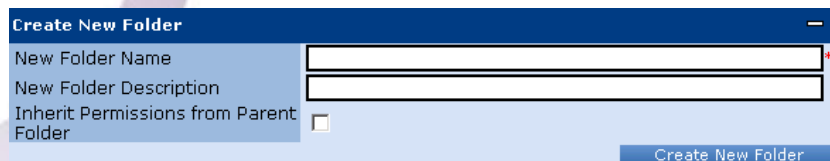


Figure 13 : New Folder.

❖New Folder Name:-

Description	: The Folder Name that will appear in the Directory Tree.
Type	: Input Field.
Mandatory	: Yes
Information Type	: Alphabetic and Numeric.
Minimum Length	: 0
Maximum Length	: 60

❖New folder Description:-

Description	: Addition information about the Folder.
Type	: Input Field.
Mandatory	: No
Information Type	: Alphabetic and Numeric.
Minimum Length	: 0
Maximum Length	: 60

❖Inherit Permissions from Parent Folder:-

Description	: If you check this box, then the system will copy the permissions that are set in the parent, and replicate the permission for all child folders.
Type	: Check Box.
Mandatory	: Yes

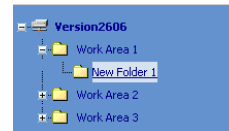
2.2.4.3 CREATE NEW FOLDER PROCEDURE.

ACTION	RESPONSE
From the Main Menu , select File System .	➔ The File System screen is displayed.

Using the “+” symbol, select **Open Create New Folder**.



Using the **Directory Tree**, Select the **Work Area / Folder** where the folder is to be positioned.



Enter the **Folder name**, in the box provided.



Enter **additional folder information** in the box provided (if Required).



Using the Check Box, Check the **Inherit Permissions from Parent folder** (if Required).



Click **Create New Folder** button.



Finished.



The new folder will now be visible in the **Directory Tree**.

Footnotes:-

2.2.5 REMOVE FOLDER.

2.2.5.1 REMOVE FOLDER DESCRIPTION.

If a particular “Document folder” within Dart EDM is no longer needed, then you will use “Delete Folder”.

You may/may not have the appropriate permissions to remove “Document Folders” from within Dart EDM. If you receive a message stating you have not got the rights, then you will need to contact your local Dart EDM Administrator.

It is important to remember that when a “Document folder” is removed from the system, the Documents contained within the “Document Folder” are also removed.

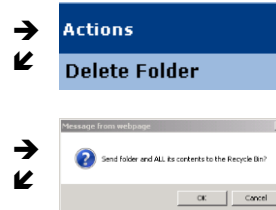
2.2.5.2 REMOVE FOLDER FIELD DEFINITION.

There are no field definitions to describe.

2.2.5.3 REMOVE FOLDER PROCEDURE.

ACTION	RESPONSE
From the Main Menu , select File System .	The File System screen is displayed.
Using the Directory Tree , select the Folder to be deleted.	

From the **Actions** menu, select **Delete Folder**.



Click **OK**, to confirm deletion.

Finished.

Footnotes :-

2.3 DART EDM - RECYCLE BIN.

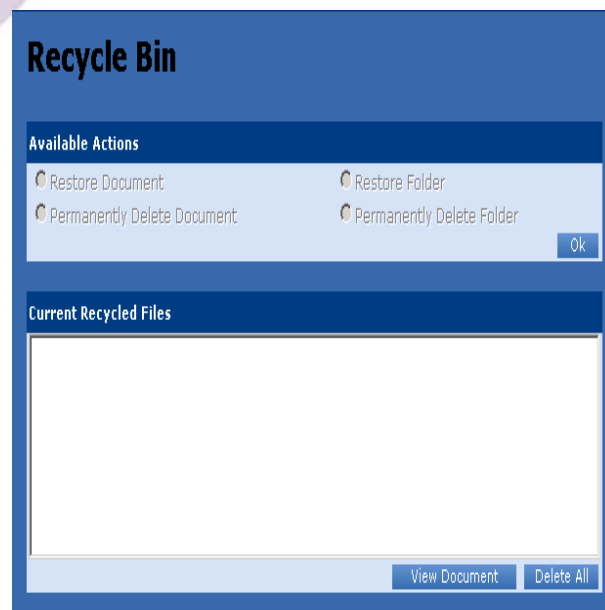


Figure 14 : Recycle Bin

2.3.1 RESTORE FOLDER/DOCUMENT DESCRIPTION.

2.3.1.1 RESTORE FOLDER/DOCUMENT DESCRIPTION.

When a Folder/Document has been deleted from Dart EDM, it first transfers the **Folder/Document** into the **Recycle Bin**, where you can choose to:-

- Restore the Folder/Document back to its original location within the Directory Tree.
 - ↳ If you accidentally deleted a Folder/Document, this feature will give you the opportunity to recover the Folder/Documents.
 - ↳ Please be aware that while a Folder/Document exists in the Recycle Bin, you are unable to Create/Upload another Folder/Document with the same name.
- Permanently delete the **Folder/Document** from Dart EDM.
 - ↳ Once the Folder/Document is permanently deleted, it can no longer be recovered.

Once a **Document** is placed in the **Recycle Bin**, you can opt to delete individual **Documents**, alternately, you can choose to delete all **documents** that currently remain in the **Current Recycled Files** list.

When deleted, Dart EDM will perform the following:-

- The folder colour is changed from yellow to red.

- The folder name and all documents contained within will be deleted.

2.3.1.2 RESTORE FOLDER/DOCUMENT FIELD DEFINITION.

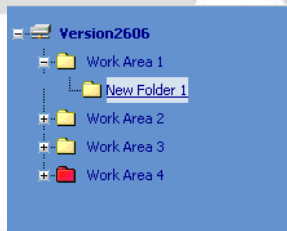


Figure 15 : Directory Tree.

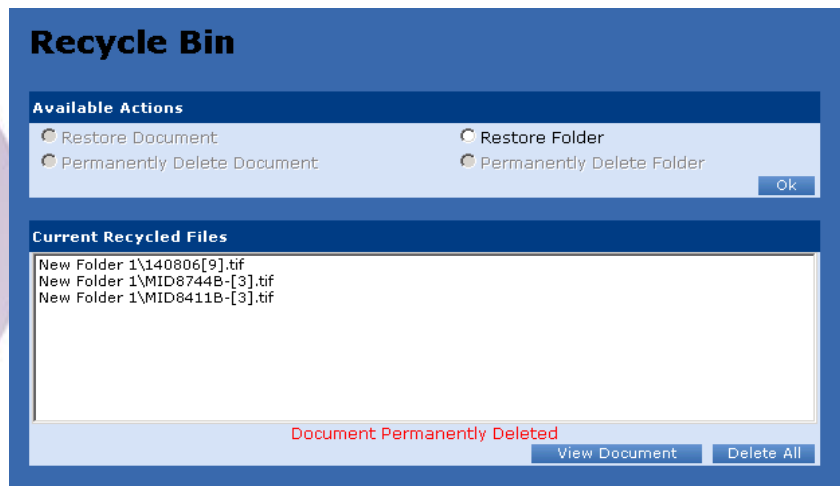


Figure 16 : Recycle Bin.

Restore Document:-

- Description : When you select this radio button, the system will restore the Document back to its original location with Dart EDM.
- Type : Radio Button.

Restore Folder:-

- Description : When you select this radio button, the system will restore the Folder back to its original location with Dart EDM.
- Type : Radio Button.

Permanently Delete Document:-

- Description : When you select this radio button, the system will remove the document within Dart EDM.
- Type : Radio Button.

Permanently Delete Folder:-

- Description : When you select this radio button, the system will remove the document and its entire contents within Dart EDM.
- Type : Radio Button.


View Document:-

- Description : The system will open another window and display the contents of the Document.
- Type : Process Button.

Delete All:-

- Description : All file names displayed “Current Recycled File” section, is removed from Dart EDM.
- Type : Process Button.

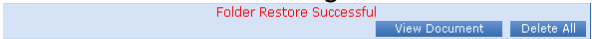
2.3.1.3 RESTORE INDIVIDUAL DOCUMENTS PROCEDURE

ACTION	RESPONSE
1. From the Main Menu , click Recycle Bin .	➔ The Recycle Bin screen is displayed.
2. Using Current Recycled Files box, select the Document Name .	➔ The Restore Document radio button is now visible.
3. Using the Radio button, Select Restore Document .	➔
4. Click OK button.	➔ You will receive the message:- 
5. Finished.	

Footnotes :-

2.3.2 RESTORE FOLDER.

2.3.2.3 RESTORE FOLDER PROCEDURE

ACTION	RESPONSE
1. From the Main Menu , select Recycle Bin .	➔ The Recycle Bin screen is displayed.
2. Using the Directory Tree , Navigate to the Folder to be restored (Red Folder symbol).	➔ The Restore Folder radio button is now visible.
3. Select Restore Folder radio button in the “Available Actions” by clicking the button.	➔
4. Click the “OK” button.	➔ You will receive the message:- 
5. Finished.	

Footnotes :-

2.3.3 PERMANENTLY DELETE INDIVIDUAL DOCUMENT

2.3.3.3 PERMANENTLY DELETE DOCUMENT PROCEDURE

ACTION	RESPONSE
1. From the Main Menu , select Recycle Bin .	➔ The Recycle Bin screen is displayed.

2. Using the **Current Recycled Files** section, select the **Document Name** to be deleted.
3. Using the **Available Actions** section, select **Permanently Delete Document** radio button.
4. Click **OK** button.
5. Finished.

Footnotes :-

→ The **Permanently Delete Document** radio button is now visible.



→ You will receive the message:-



2.3.4 PERMANENTLY DELETE FOLDER

2.3.4.3 PERMANENTLY DELETE FOLDER PROCEDURE

ACTION	RESPONSE
1. From the Main Menu , select Recycle Bin .	→ The Recycle Bin screen is displayed
2. Using the Directory Tree , select the folder to be permanently deleted (Red Folder symbol).	→ The Restore Document radio button is now visible.
3. Select Permanently Delete Folder radio button in the Available Actions section.	→
4. Click OK button.	→ You will receive the message:-
	→
5. Finished.	

Footnotes :-

2.4 DART EDM - REPORTS.

2.4.1 REPORTS DESCRIPTION.

The purpose of these reports is to obtain statistical information about how the **Documents**, **User** and **Index Information** is being utilised within Dart EDM.

2.4.2 REPORTS FIELD DEFINITION.

The screenshot shows a web application interface titled "Reports". It contains five distinct report configuration sections, each with a title bar and a "Report" button:

- Document Activity:** Includes "Date from:", "Date to:", and "Excel compatible" (checked) fields.
- User Activity:** Includes "Date from:", "Date to:", and "Excel compatible" (checked) fields.
- No Document Index Info:** Includes "Date from:", "Date to:", and "Excel compatible" (checked) fields.
- Document Index Info:** Includes a "Document Index Name:" dropdown menu (showing "Select Index***"), "Date from:", "Date to:", and "Excel compatible" (checked) fields.
- General Reports:** Includes a "Reports" dropdown menu (showing "Select Report..."), "Date from:", "Date to:", and "Excel compatible" (checked) fields.

Figure 17 : Report List.

2.4.2.1 DOCUMENT ACTIVITY.

This creates a report based on all the activity that has occurred for each document, which includes the Check IN, Check OUT and Viewing of documents.

❖Date From:-

Description	: Start date of the report.
Type	: Date field.
Mandatory	: Yes

❖Date To:-

Description	: End date of the report.
Type	: Date field.
Mandatory	: Yes

❖Excel compatible:-

Description	: If checked, this will restrict the amount of output to the report to 65,000 rows. If not checked, then you could expect to wait for some time. This will depend on the amount of Documents that exist within Dart EDM.
Type	: Check box.
Mandatory	: No

2.4.2.2 USER ACTIVITY.

This creates a report based on all the activity that has occurred for each **User**, e.g. Deleting, Viewing, and Adding etc.

❖Date From:-

Description	: Start date of the report.
-------------	-----------------------------

Type : Date field.

Mandatory : Yes

❖Date To:-

Description : End date of the report.

Type : Date field.

Mandatory : Yes

❖Excel compatible:-

Description : If checked, this will restrict the amount of output to the report to 65,000 rows. If not checked, then you could expect to wait for some time. This will depend on the amount of **Documents** that exist within Dart EDM.

Type : Check box.

Mandatory : No

2.4.2.3 NO DOCUMENT INDEX INFO.

This creates a report which identifies all **Documents** which have no **Index Information** associated with them.

❖Date From:-

Description : Start date of the report.

Type : Date field.

Mandatory : Yes

❖Date To:-

Description : End date of the report.

Type : Date field.

Mandatory : Yes

❖Excel compatible:-

Description : If checked, this will restrict the amount of output to the report to 65,000 rows. If not checked, then you could expect to wait for some time. This will depend on the amount of **Documents** that exist within Dart EDM.

Type : Check box.

Mandatory : No

2.4.2.4 DOCUMENT INDEX INFO.

This creates a report which identifies all **Documents** which have **Index Information** associated with them. The report must have a **Document Index Name** selected.

❖Document Index Name:-

Description : Select the Index Name that this report must use.

Type : Date field.

Mandatory : Yes

❖Date From:-

Description : Start date of the report.

Type : Date field.

Mandatory : Yes

❖Date To:-

Description : End date of the report.

Type : Date field.

Mandatory : Yes

❖Excel compatible:-

Description : If checked, this will restrict the amount of output to the report to 65,000 rows. If not checked, then you could expect to wait for some time. This will depend on the amount of **Documents** that exist within Dart EDM.

Type : Check box.

Mandatory : No

2.4.2.5 GENERAL REPORTS.

The reports available in the **Reports** select box are user specific. If you think your organisation has a requirement for such reports, you must contact your Plumtree Group Account Manager, who will be happy to arrange for the report to be designed and made available.

Please be aware that there is a cost associated with each report, depending on the reports complexity.

❖Reports:-

Description : Select the report you require from the selection available.

Type : Date field.

Mandatory : Yes

❖Date From:-

Description : Start date of the report.

Type : Date field.

Mandatory : Yes

❖Date To:-

Description : End date of the report.

Type : Date field.

Mandatory : Yes

❖Excel compatible:-

Description : If checked, this will restrict the amount of output to the report to 65,000 rows. If not checked, then you could expect to wait for some time. This will depend on the amount of **Documents** that exist within Dart EDM.

Type : Check box.
Mandatory : No

2.4.3 REPORTS PROCEDURE.

ACTION	RESPONSE
1. From the Main Menu , select Reports .	→ The Reports screen is displayed. ↩
2. Using the “+” symbol, expand the Report Name you want to produce.	↩
3. Using the parameter boxes provided, enter your selection criteria.	→ This will vary, depending on which report you have selected. ↩
4. Click Report .	→ The report has been saved here: Report <input type="button" value="Report"/> ↩
5. Using the message received from step 4, click the word Report .	→ The Report is displayed in Microsoft Excel. ↩
6. Finished.	

Footnotes :-

Your report could take some time to produce, depending on the amount of **Documents** it must process.

2.5 DART EDM - CHECK IN.

2.5.1 CHECK IN DESCRIPTION.

Please refer to the **Versions Description**, before continuing with “Check IN”.

You cannot perform **Check IN**, if the **Document** has not previously been checked out (see **Check OUT Document Description**).

2.5.2 CHECK IN FIELD DEFINITION.

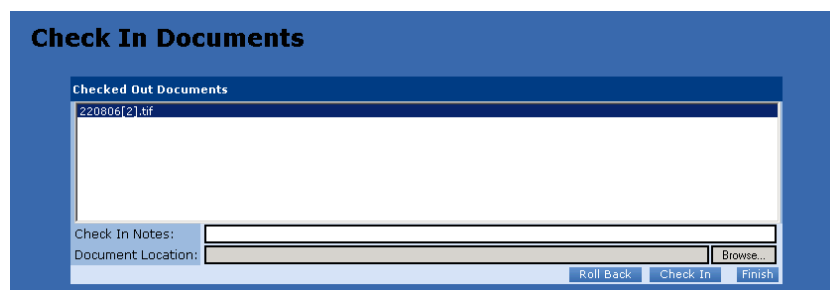


Figure 18 : Check IN Document.

❖Checked Out Documents:-

Description	:	List of all documents within Dart EDM that have been previously “Check OUT”. You must select a “File Name” before you can “Check In” the document.
Type	:	Display Box.
Mandatory	:	Yes

❖Check IN Notes:-

Description	:	Additional information regarding the “Check IN” of the document.
Type	:	Input Field.
Mandatory	:	No
Information Type	:	Alphabetic and Numeric.
Minimum Length	:	0
Maximum Length	:	60

❖Document Location:-

Description	:	Location of the document when the “Check OUT” procedure was performed.
Type	:	Input Field.
Mandatory	:	Yes.
Information Type	:	Alphabetic and Numeric.
Minimum Length	:	0
Maximum Length	:	60

❖Browse:-

Description	:	To assist the user with locating the whereabouts of the “Checked Out” document using the standard Window Directory Tree.
Type	:	Process Button.

❖Roll Back:-

Description	:	Allows the user to restore a previous version.
Type	:	Process Button.
Mandatory	:	Yes.
Information Type	:	Alphabetic and Numeric.
Minimum Length	:	0
Maximum Length	:	60

❖Check In:-

Description	:	Process the Check IN Information.
Type	:	Process Button.

❖Finish:-

Description	:	Return to the Document Screen.
Type	:	Process Button.

2.5.3 CHECK IN PROCEDURE

ACTION	RESPONSE
1. From the Main Menu , select Check IN .	→ The Check IN Documents screen is displayed. ↩
2. Using the Checked Out Documents list, select the Document Name to be Checked IN.	→ The Document Name is highlighted. ↩
3. Enter “ Check IN Notes ” in the box provided (if required).	↩
4. Using the browse button , navigate to the location of the document to be “Checked IN”.	↩
5. Click Check IN button.	→ You will receive the following message:- ↩
6. Finished.	<div>File checked in successfully. Roll Back Check In Finish</div>

Footnotes :-

2.6 DART EDM -AUTOMATED INVOICE MANAGEMENT.

3.0 DART EDM -DOCUMENT FUNCTIONS.

3.1 VIEWING DOCUMENTS.

3.1.1 VIEWING DOCUMENTS DESCRIPTION.

When you view a document within Dart EDM, you are presented with three separate sections:-

➤ DOCUMENT DETAILS.

- ↳ In this section, you are presented with the physical properties associated with the document.
- ↳ Versioning information.

➤ DOCUMENT INDEX SUMMARY.

- ↳ In this section you are presented with the “Meta Data” associated with the document.
- ↳ The user has the opportunity to modify the “Meta Data” simply by overwriting the values associated with each “Document Index Field”. Then using the “Update Index” button to process the changes.

➤ ASSOCIATED DOCUMENTS.

- ↳ In this section, you are presented with the information about the links to other documents.

Please refer to the 3.1.4 Document Details for further information.

3.1.2 VIEWING DOCUMENTS FIELD DEFINITION.

Document Details			
File Name	220806[2].tif	Size	30 kb
Description		Version	1
Last Modified	14/04/2010 17:39:00	Last Accessed	14/04/2010 17:39:00
Checked out by		Date Checked out	

Document Index Summary			
TestIndex1			
Index Field 1	<input type="text" value="Value 1"/>	Text (Max size: 50)	
Index Field 2	<input type="text" value="1"/>	Numeric	
Index Field 3	<input type="text" value="01/01/2010 00:00:00"/>	DateTime	
			<input type="button" value="Update Index"/>

Associated Documents		
	File Name	Delete
	140806[9].tif	<input type="button" value="Delete"/>
		Parent Folder

Figure 19 : Document Details Screen.

3.1.3 DOCUMENT DETAILS ICON DESCRIPTION:-

Preview icon:-



If you place the mouse pointer over the “Preview” icon, another panel is displayed, showing you the document image associated with this file name. You are not able to control the size of the image, nor can you zoom the image in or out, therefore it is useful for a quick glance at the document contents only, but you are not guaranteed to see fine detail.

Association Link icon:-



Use the “Association Link” to associate one document with another or many other documents.

Save to PC icon:-

allow you to save a copy of the document image to any directory on your desktop.

Check OUT Document icon:-

This icon will allow the user to Save the current document to there own Desktop or network location.

Go to Parent Folder icon:-

This icon will open the “Directory tree” to the location that contains this document.
Using the radio button for this document will expand the Document display, showing all the document details and Index information.

3.1.4 DOCUMENT DETAILS.**❖File Name:-**

Description : This is the internal file name that is known to Dart EDM.
Type : Display Field Only.

❖Size:-

Description : The amount of disk space used by this document in K (kilobytes) or M (Megabytes).
Type : Display Field Only.

❖Description:-

Description : Additional information about the document. If no Description was entered when the document was uploaded, the description will contain “No Description”
Type : Display Field Only.

❖Version:-

Description : If this document has been “Checked IN/OUT”, then this field will show the count of how many times the process has occurred. If no “Check IN/OUT” has occurred then “Version” is set to 1.
Type : Display Field Only.

❖Last Modified:-

Description : If this document has been “Checked IN/OUT”, this field will contain the Date & Time of the last process. If this document has not been “Checked IN/OUT”, then this field will contain the date and time the document was first uploaded.
Type : Display Field Only.

❖Last Accessed:-

Description : The Date and Time that this document was last Accessed.
Type : Display Field Only.

❖Checked Out by:-

Description	:	The name of the “User” that last “Checked OUT” this document. If this document has not been “Checked OUT”, then this field will be blank.
Type	:	Display Field Only.

❖Date Checked Out:-

Description	:	If this document has been “Checked IN/OUT”, this field will contain the Date & Time of the last process. If this document has not been “Checked IN/OUT”, then this field will contain the date and time the document was first uploaded.
Type	:	Display Field Only.

3.1.5 DOCUMENT INDEX SUMMARY.

❖Document Index Name:-

Description	:	This is the name of the Index used to store the Meta Data information for this document. (Refer to Change Index Information Description for more information).
Type	:	Display Field Only.

❖Index Field Names¹:-

Description	:	Following the “Document Index Name” will be a list of all the “Index Field Names” and their data values.
Type	:	Display Field Only.

¹Because each “Document Index” is different, this information will change.

❖Update Index:-

Description	:	If the “User” has elected to change any of the “Index Field Name” values. Then selecting this will process the changes.
Type	:	Process Button.

❖Associated Documents:-

Description	:	If this document has been linked to one/many other documents within Dart EDM, then this section will display the information about the links. (Refer to 3.12.1 Associating Documents Description for more information).
Type	:	Input Field.

3.2 ADD NOTES.

3.2.1 ADD NOTES DESCRIPTION.

When a document has been added to the Dart EDM System, any user can add notes/actions. The notes that are added are specific to that document and can be retrieved by any user.

The Notes that are currently associated with the document are listed in an archive format that is in a Date and Time sequence.

3.2.2 ADD NOTES FIELD DEFINITION.



Figure 20 : Notes Screen.

❖Add Note:-

Description	:	The context of the note.
Type	:	Input Field.
Mandatory	:	Yes
Information Type	:	Alphabetic and numeric characters.
Minimum Length	:	1
Maximum Length	:	256


❖Add Note:-

Description	:	Add this note to the associated document; see “Add Note Procedure” for further information.
Type	:	Process Button.

❖Finish:-

Description	:	Returns to the Document Screen.
Type	:	Process Button.

3.2.3 ADD NOTES PROCEDURE.

ACTION	RESPONSE
1. From the Menu Bar , click the Documents icon.	→ The Documents screen is displayed. ↩
2. Using the Directory Tree , select the folder that containing the document.	→ A list of all Documents is displayed for this folder. ↩
3. Using the “File Name List”, select the Check Box next to the document file name.	→  ↩
4. From the Action list, select Notes .	→ The Notes Screen is displayed. ↩
5. Enter the Note in the box provided.	↩
6. Click Add Note .	→ A new panel is created on the screen showing a list of all notes associated with this document, including the user name and time sent ¹ . ↩
7. Finished.	

Footnotes:-

¹If there have been previous notes associated with this document, the panel above the “Add Notes” will be visible immediately.

3.3 MESSAGES.

3.3.1 MESSAGES DESCRIPTION.

There are basically three types of messages that you can send to other users:-

- User Message
 - ↳ This is a simply a plain message sent in the form of a text message, and will appear in another Dart EDM users home screen.
- Document Message
 - ↳ This is similar to the User Message, but the difference is that the text message will have an attachment of the document image included.
- Email Message
 - ↳ This has the same functionality as the User/Document message; however, if they are external recipients to Dart EDM, then the message is delivered via their email address.
 - ↳ In order for this to work your Dart EDM system must be configured with a Mail Server. If you received “Mail Server not found” messages, then you must refer to your local Dart EDM Administrator.

3.3.2 MESSAGES FIELD DEFINITION.

Figure 21 : Messages Screen.

3.3.2.1 ADD MESSAGE.

❖Add Message:-

Description	:	Enter the message that you wish to convey to the recipient.
Type	:	Input Field.
Mandatory	:	Yes
Information Type	:	Alphabetic and Numeric.
Minimum Length	:	1
Maximum Length	:	256

3.3.2.2 DUE DATE

❖Due Date:-

The date this message is sent. The format of the date is as follows:-

Description	:	<ul style="list-style-type: none"> ➤ dd 2 digit Day ➤ / ➤ mm 2 digit Month ➤ / ➤ yyyy 4 digit Year
Type	:	Date Field.
Mandatory	:	No
Information Type	:	Alphabetic and Numeric.
Minimum Length	:	0
Maximum Length	:	10 (including separation characters).

❖Due Time:-

The time this message is sent. The format of the time is as follows:-

Description	:	<ul style="list-style-type: none"> ➤ hh 2 digit Hour ➤ : ➤ mm 2 digit minutes
Type	:	Input Field.
Mandatory	:	No
Information Type	:	Alphabetic and Numeric.
Minimum Length	:	0
Maximum Length	:	60

SEND TO.

❖User:-

Description	:	If you are sending this message to an individual recipient. See Group as an alternative.
Type	:	Select box.
Mandatory	:	Yes, only if group has not been selected.

❖Group:-

Description	:	If you are sending this message to a group of recipients. See User as an alternative.
Type	:	Input Field.
Mandatory	:	Yes, only if User field has not been selected.

❖Send via Email:-

Description	:	If you would like to send the message via the Email Server then you must check this box. Note that the recipient must have a valid E-mail address assigned in User Configuration.
Type	:	Check box.
Mandatory	:	No

3.3.3 MESSAGES PROCEDURE.

ACTION	RESPONSE
--------	----------

1. From the **Menu Bar**, click the **Documents** icon. → The **Documents** screen is displayed.
2. Using the **Directory Tree**, select the folder that containing the document. → A list of all **Documents** is displayed for this folder.
3. Using the **Radio Button**, select the **Document Name** that you wish to add a message. → The **Actions** list will expand, giving you more options.
4. Using the **Action** list, select **Messages**. → A new “Message” screen will be displayed.
5. Finished.

Footnotes :-

3.4 E-MAILING DOCUMENTS.

3.4.1 E-MAILING DESCRIPTION.

E-Mail Documents, allows the user to send a copy of the document to any person that has a valid e-mail address.

If you need to send a number of different documents in an e-mail, you simply select the radio button associated with each document.

In order for e-mail to function correctly in Dart EDM, the system must first be configured to use a mail server. Contact your local Dart EDM administrator for any further information.

3.4.2 E-MAILING FIELD DEFINITION.

Figure 22 : Message Screen.

❖To:-

Description	: The intended recipients e-mail address.
Type	: Input Field.
Mandatory	: Yes
Information Type	: Alphabetic and numeric characters.
Minimum Length	: 1
Maximum Length	: 60

❖Subject:-

Description	: Short description about the e-mail content. Dart EDM will populate this field automatically; however you can amend if required.
-------------	---

Type	:	Input Field.
Mandatory	:	Yes
Information Type	:	Alphabetic and numeric characters.
Minimum Length	:	1
Maximum Length	:	60

❖Cc:-

Description	:	The intended recipients e-mail address of any person that will receive a copy of this e-mail. If more than one person is copied, then separate each e-mail address with a “;” symbol.
Type	:	Input Field.
Mandatory	:	Yes
Information Type	:	Alphabetic and numeric characters.
Minimum Length	:	1
Maximum Length	:	60

❖Bcc:-

Description	:	The intended recipients e-mail address of any person that will receive a “Blind Copy” of this e-mail. If more than one person is copied, then separate each e-mail address with a “;” symbol.
Type	:	Input Field.
Mandatory	:	Yes
Information Type	:	Alphabetic and numeric characters.
Minimum Length	:	1
Maximum Length	:	60

❖Message:-





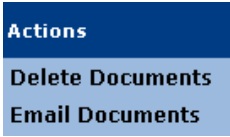





Description	:	Enter the content of the message for this e-mail.
Type	:	Input Field.
Mandatory	:	Yes
Information Type	:	Alphabetic and numeric characters.
Minimum Length	:	1
Maximum Length	:	256

❖Attachments:-

Description	:	The document image is automatically added to the e-mail by Dart EDM.
Type	:	Input Field.
Mandatory	:	Yes
Information Type	:	Alphabetic and numeric characters.
Minimum Length	:	1
Maximum Length	:	60

3.4.3 SEND E-MAILING DOCUMENTS PROCEDURE.

ACTION	RESPONSE
--------	----------

1. From the **Menu Bar**, click the **Documents** icon.  The **Documents** screen is displayed.
2. Using the **Directory Tree**, select the folder that containing the document.  A list of all **Documents** is displayed for this folder.
3. Using the **Check Box**, select the **Document Name** you wish to e-mail. 
4. Using the **Action list**, select **Email Documents** 

5. Enter the **e-mail address** of the recipient in the **To** box provided. 
6. Enter the **e-mail address** of anyone requiring a copy of this e-mail in the **Cc** box provided (if required). 
7. Enter the **e-mail address** of anyone requiring a blind copy of this e-mail in the **Bcc** box provided (if required). 
8. Enter the **message** associated with this **Document** in the **Message** box provided. 
9. Click **Send** button.  See Footnotes¹.
- 10.Finished.

Footnotes :-

¹If your Dart EDM system has not been configured to use the mail server, then you will receive the following message

“Error occurred: The transport failed to connect to the server.”

3.4.4 REMOVE SELECTED DOCUMENTS PROCEDURE.

3.5 SAVE DOCUMENT TO PC.

3.5.1 SAVE DOCUMENT TO PC DESCRIPTION.

Save Document will allow the user to save a copy of the document currently residing in the Dart EDM system to any files location on the users Desktop or Network.

3.5.2 SAVE DOCUMENT TO PC FIELD DEFINITION.

No Field Definition defined.

3.5.3 SAVE DOCUMENT TO PC PROCEDURE.

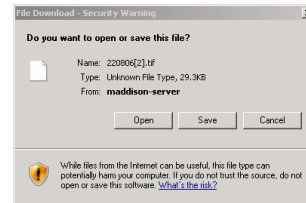
ACTION	RESPONSE
1. From the Menu Bar , click the Documents icon.	 The Documents screen is displayed.

- Using the **Directory Tree**, select the folder that containing the document.

→ A list of all **Documents** is displayed for this folder.

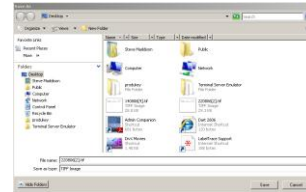
- Select **Save** icon , associated with the Document Name.

→



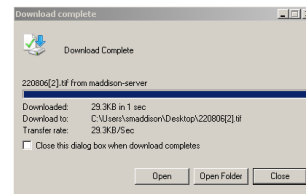
- Select **Save** button.

→



- Using Windows **Save As** dialog, Navigate to the Location on the Desktop/Network, where the document is to be saved.

→



- Select **Close** button.

→

- Finished.

Footnotes :-

3.6 CHECKOUT DOCUMENT.

3.6.1 CHECKOUT DOCUMENT DESCRIPTION.

If you need to keep a history of the changes that has occurred to a document that is held within Dart EDM. Then you can use “Versioning”.

What Dart EDM will do is keep as many versions of the document as is required, but will always hold the last version as its current copy.

“Document Details” will keep track of the number of versions.

3.6.2 CHECKOUT DOCUMENT FIELD DEFINITION.

There are no Field Definitions to describe.

3.6.3 CHECKOUT DOCUMENT PROCEDURE.

ACTION	RESPONSE
1. From the Menu Bar , click the Documents icon.	→ The Documents screen is displayed.
2. Using the Directory Tree , select the folder that containing the document.	→ A list of all Documents is displayed for this folder.

3. Select the **Check OUT** icon  associated with the **Document Name**


4. Select **Save** button.

5. Using the standard Windows **Save As** dialog, navigate to a location where the “Check OUT” document is to be saved, and select **Save** button.

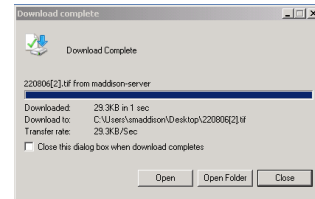
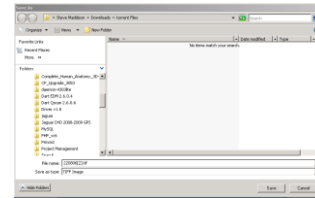
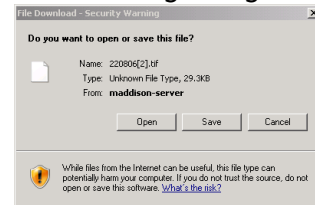
6. Click the **Close** Button.

7. Finished.

Footnotes:-

¹If the Icon looks like , then the document has been previously checked out by another user. Use the radio button to see the “Document Details” for further information.

The following dialog box is displayed:-



➔ A version of the document is now located on the
↩ Desktop computer.

3.7 DELETE DOCUMENT.

3.7.1 DELETE DOCUMENT DESCRIPTION.

You may/may not have the appropriate permissions to remove “Documents Folders” from within Dart EDM. If you receive a message stating you have not got the rights, then you will need to contact your local Dart EDM Administrator.

3.7.2. DELETE DOCUMENT FIELD DEFINITION.

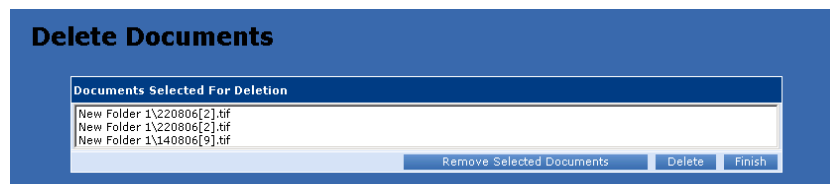


Figure 23 : Delete Documents Screen.

❖ Documents Selected for Deletion:-

Description : This box contains a complete list of all documents that have been deleted and transferred to **Recycle Bin**, awaiting final deletion.
Type : Select Item Box.
Mandatory : No

❖ Documents Selected for Deletion:-

Description	:	This button will permanently delete any Documents selected from the Document Selected for Deletion box.
Type	:	Process button.
Mandatory	:	No


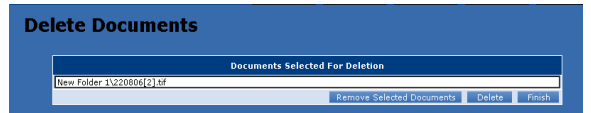
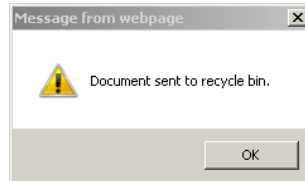
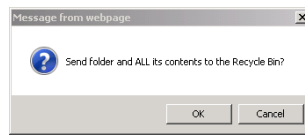
❖ Delete:-

Description	:	Delete all Documents that are currently sitting in the Document Selected for Deletion box.
Type	:	Process button.
Mandatory	:	No

❖ Documents Selected for Deletion:-

Description	:	.
Type	:	Process button.
Mandatory	:	No

3.7.3. DELETE DOCUMENT PROCEDURE.

ACTION	RESPONSE
1. From the Menu Bar , click the Documents icon.	→ The Documents screen is displayed. ↩
2. Using the Directory Tree , select the folder that containing the document.	→ A list of all Documents is displayed for this folder. ↩
3. Select the document to be deleted, by clicking the check box in the file name list.	→  ↩
4. Using the Actions List , select Delete Documents .	→  ↩
5. Select Delete button.	→  ↩
6. Select OK button.	→  ↩
7. Finished.	
Footnotes :-	

3.8 DELETE FOLDER.

3.8.1 DELETE FOLDER DESCRIPTION.

If you need to remove a folder from Dart EDM, then you will use **Delete Folder**. When a folder is deleted from Dart EDM it will automatically erase all of the documents that pertain to the folder.


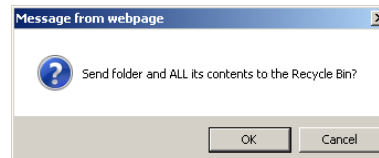
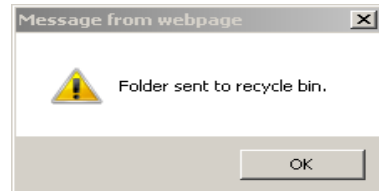
When you have completed the **Delete Folder** procedure, the folder is placed in the **Recycle Bin**. This is a safety measure which will allow the user to recover the folder in the case of an inadvertent error.

Remember, once the document has been removed from the recycle bin (see 3.7.1 Delete Document), the folder and its contents are no longer recoverable (you can recover from a backup cycle).

3.8.2 DELETE FOLDER FIELD DEFINITION.

Field Definition required here

3.8.3 DELETE FOLDER PROCEDURE.

ACTION	RESPONSE
1. From the Menu Bar , click the Documents icon.	→ The Documents screen is displayed.
2. Using the Directory Tree , select the Folder that you want to delete.	↙
3. From the Actions list, select Delete Folder	→ ↙ 
4. Select OK button.	→ ↙ 
5. Select OK button.	→ ↙ 
6. Finished.	See Footnotes ¹

Footnotes :-

¹The Document name will no longer be visible in the Directory Tree.

3.9 VERSIONS.

3.9.1 VERSIONS DESCRIPTION.

If the user needs to retain a history of the changes made to a particular document, then you will use “Versioning”.

With each change to the document, Dart EDM will keep a copy of each update (full copy), and will keep track

of each update by assigning a version number.

The procedure for using Versioning is as follows:-

- The user will “Check OUT” the document from Dart EDM (see “Checking OUT a Document procedure”).
- The user will make the necessary changes to the document using a preferred editor.
- The user will then “Check IN” the document.

While the document is “Checked OUT”, the document is locked in Dart EDM, and will not allow another user to “Check OUT” the document until it has been “Checked IN”.

When the “Check IN” procedure is performed, Dart EDM will automatically assign a new version number to the Document.

You are able to use the “Document Viewing” procedure to keep track of the version number.

If for any reason, the user needs to restore a document back to a previous version, then the “3.9.4 Restore Version Procedure” can be used.

Versioning is useful with Text, Microsoft Word or PDF type documents.

3.9.2 VERSIONS FIELD DEFINITION.

Version History						
Version	Uploaded on	Uploaded by	Description	View	Save	Restore Version
2	20/04/2010 10:51:49	sa	This document has been changed and checked back into Dart EDM			
1	16/04/2010 15:43:57	sa				
				Restore Version		Finish

Figure 24 : Versions Screen.

❖Version:-

- Description : Each time the document is checked Out and Checked In. This reflect the version number.
- Type : Display Field Only.

❖Uploaded on:-

- Description : This is the Date and Time that document was Uploaded (i.e. Checked In).
- Type : Display Field Only.

❖Uploaded by:-

- Description : This is the Dart EDM User Name that was used to Upload the document.
- Type : Display Field Only.

❖Description:-

- Description : This will contain the comment used by the Dart EDM user at the time of Upload.
- Type : Display Field Only.

❖View:-

- Description : Clicking this icon will display the document in a separate window.
- Type : Process Icon.



❖Save:-

- Description : Allows the User to Save the document to there Desktop or Network Location.
- Type : Input Field.

❖Restore Version:-




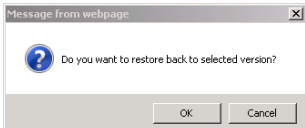
- Description : Used to restore this version of the document as the current version. (See “Restore Version” procedure for more information.)
- Type : Radio Button.

3.9.3 VIEW VERSION PROCEDURE.

ACTION	RESPONSE
1. From the Menu Bar , click the Documents icon.	➔ The Documents screen is displayed.
2. Using the Directory Tree , select the folder that containing the document.	➔ A list of all Documents is displayed for this folder.
3. Using the Radio Button , select the Document Name .	➔   140806[9].tif
4. From the Actions list, select Versions .	➔ The Document Versions screen is displayed (see Version Field Definition).
5. Finished.	

Footnotes :-

3.9.4 RESTORE VERSION PROCEDURE.

ACTION	RESPONSE
1. From the Menu Bar , click the Documents icon.	➔ The Documents screen is displayed.
2. Using the Directory Tree , select the folder that containing the document.	➔ A list of all Documents is displayed for this folder.
3. Using the Radio Button , select the Document Name .	➔   140806[9].tif
4. From the Actions list, select Versions .	➔ The Document Versions screen is displayed (see Version Field Definition).
5. Using the Radio button , select the Restore Version inside the row.	➔ 
6. Select Restore Version button.	➔ 

7. Select **OK** button.

→ If the restore is successful, you will receive the following message:-
↩

File Version updated successfully. Restore Version Finish

8. Finished.

Footnotes :-

3.10 ACTIVITY.

3.10.1 ACTIVITY DESCRIPTION.

When you want to see the history of what has previously happened to the document within Dart EDM, then you can achieve this by using the “Activity” screen.

From this screen you can obtain the following information:-

- What has happened to this document from the moment it loaded into Dart EDM!
- What Date and Time each activity has occurred.
- Which user performed each of the actions?

3.10.2 ACTIVITY FIELD DEFINITION.

Activity History			
Date Logged	Description	User	Version
20/04/2010 10:53:36	140806[9].tif was checked in by sa	Administrator admin	3
20/04/2010 10:52:05	140806[9].tif was checked out by sa	Administrator admin	2
20/04/2010 10:51:49	140806[9].tif was checked in by sa	Administrator admin	2
20/04/2010 10:27:13	Document Associated with 220806[2].tif	Administrator admin	1
16/04/2010 15:46:50	140806[9].tif was checked out by sa	Administrator admin	1
16/04/2010 15:43:57	140806[9].tif was uploaded by sa	Administrator admin	1
			Finish

Figure 25 : Activity Screen.

❖Date Logged:-

- Description : The Date and Time that this activity occurred.
- Type : Display Field Only.

❖Description:-

- Description : A description of the activity.
- Type : Display Field Only.




❖User:-

- Description : The Dart EDM user that performed this activity.
- Type : Display Field Only.

❖Version:-

- Description : What document version this activity occurred on. (see “Document Activity” for more information).
- Type : Display Field Only.

3.10.3 ACTIVITY PROCEDURE.

ACTION	RESPONSE
1. From the Menu Bar , click the Documents icon.	→ The Documents screen is displayed.
2. Using the Directory Tree , select the folder that will contain the document.	→ A list of all Documents is displayed for this folder.
3. Using the Radio Button , select the document name.	→   140806[9].tif 
4. From the Actions list, select Document Activity .	→ The Document Versions screen is displayed (see Version Field Definition).
5. Finished.	
Footnotes :-	

3.11 CHANGE INDEX INFORMATION.

3.11.1 CHANGE INDEX INFORMATION DESCRIPTION.

By default, each document that is imported/uploaded into Dart EDM will not have been assigned to a Document Index.

A Document Index can be described as a table, which contains pre-defined pieces of information.

Each piece of information is referred to as “Meta Data”, and you can define up to 50 Meta Data fields.

Example of a Document Index (see figure 25)

➤ “TestIndex1”		
↳ Index_Field_1	Character(5)	e.g. “ABCDE”
↳ Index_Field_2	Numeric	e.g. “99”
↳ Index_Field_3	Date/Time	e.g. “01/01/2010 23:55:55”

Using Change index, you can perform the following:-

- Change Document Index.
 - ↳ The document is already assigned to a Document Index, but you want to re-assign an alternative.
- Add Document index.
 - ↳ The document has not yet been assigned to a “Document index”.

3.11.2 CHANGE INDEX INFORMATION FIELD DEFINITION.

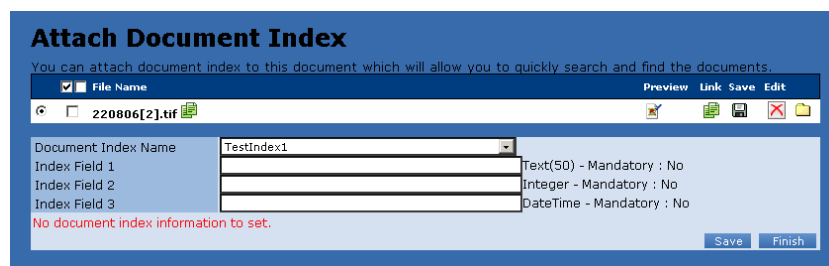


Figure 26 : Attachments Screen.

❖ Document Index Name:-

Description : The name of the Document Index defined to Dart EDM.
 Type : Selection Box.

❖ Index Field 1*:-

Description : The name of the first Meta Data Field.
 Type : Input Field.

❖ Index Field 2*:-


Description : The name of the second Meta Data Field.
 Type : Input Field.

Index Field 3*:-

Description : The name of the Third Meta Data Field.
 Type : Input Field.

* Please note that the Meta Data fields will be different for each Document Index.

3.11.3 CHANGE INDEX INFORMATION PROCEDURE.

ACTION	RESPONSE
1. From the Menu Bar , click the Documents icon.	➔ The Documents screen is displayed.
2. Using the Directory Tree , select the folder that contains the document.	➔ The selected folder is highlighted.
3. Using the Radio Button , select the document file name .	➔ The Documents panel is expanded to show:- ➤ Document Details. ➤ Document Index Summary. ➤ Associated Documents.
4. Using the data field boxes provided, make your changes to the Index Data .	➔
5. Click Update Index .	➔ Message:- 
6. Finished.	

Footnotes :-

3.12 ASSOCIATING DOCUMENTS.

3.12.1 ASSOCIATING DOCUMENTS DESCRIPTION.

Sometimes it is not always possible to link documents together using “Index Data”. Using Association, allows the user to link any number of documents, located anywhere within Dart EDM.

Once the association has been established, an association icon (📄) will be appended to the end of each file name.

For every document that has an association, you can see the details of that association, using the Document icon, and then selecting the radio button for the file name. (See “Associating documents field definition” for more detail).


Any document can be associated to any number of different documents.

3.12.2 ASSOCIATING DOCUMENTS FIELD DEFINITION.


❖File Name:-

Description : This is the list of all associated documents.
Type : Input Field.


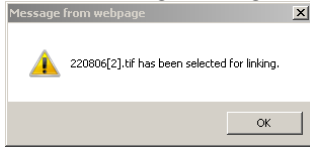
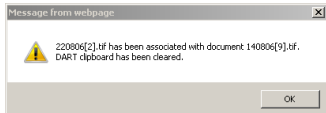

❖Delete :-

Description : When you click the delete icon , Dart EDM will delete the association information only. The documents will remain in Dart EDM.
Type : Process button.

❖Parent Folder :-

Description : When you click the “Parent Folder” icon , This will navigate you from this document to the associated document location.
Type : Process button.

3.12.3 ASSOCIATING DOCUMENTS PROCEDURE.

ACTION	RESPONSE
1. From the Menu Bar , click the Documents icon.	➔ The Documents screen is displayed ↩
2. Using the Directory Tree , locate the folder containing the first document to be associated.	➔ A list of all Documents is displayed for this folder. ↩
3. Select the Association icon  for the first document.	➔ The following message is displayed:-  ↩
4. Using the Directory Tree , locate the folder containing the Second document to be associated.	➔ A list of all Documents is displayed for this folder. ↩ The following message is displayed:- 
5. Select the Association icon  for the second document.	➔ The following actions have also occurred. ↩ <ul style="list-style-type: none"> ➤ An association icon will now be appended to both of the file names. ➤ Using the Documents icon and the associated files radio button. You will addition information about the associated files.

6. Finished.

Footnotes :-

4.0 DOCUMENT SEARCHING.

4.1 CONTENT SEARCH.

4.1.1 CONTENT SEARCH DESCRIPTION.

When searching for a particular document that has complex search criteria e.g. Name, Postcode and Date, then the user will use the Content Search facility.

With content Search, the user has the ability to include a combination of any number of “Index Data Fields”, which can be separated by a number of different logical operators (see Content Search Field Descriptions).

The Logical operators available are:-

- AND
 - ↳ Both search criteria must be met.
- OR
 - ↳ One of the search criteria must be met.
- NOT
 - ↳ Not the search criteria.
- BETWEEN
 - ↳ Usually associated with date or numeric fields, where the value must be between the search criteria.

You must choose a Document Index to use with a Content Search, you cannot search all Document Indexes (see Quick Search for all Document Index search).

4.1.2 CONTENT SEARCH FIELD DEFINITIONS.

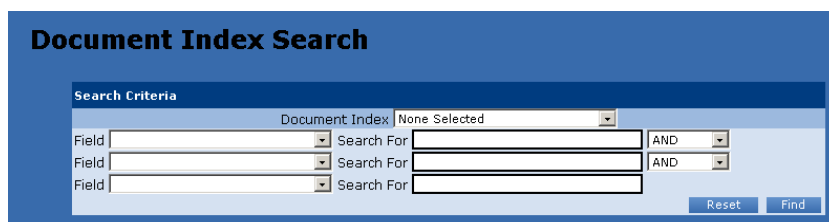


Figure 27 : Content Search Screen.

❖ Document Index:-

- Description : Select the Document Index that will be used for the search.
- Type : Select list box.
- Mandatory : Yes

❖ Field (1):-

- Description : From the drop down list, select the Document Index field that you want to search.
- Type : Select List Box.
- Mandatory : Yes

❖ Search for (1):-

- Description : Enter the search expression you are looking for.
- Type : Input Field.
- Mandatory : Yes

Information Type	:	Alphabetic and numeric characters.
Minimum Length	:	1
Maximum Length	:	60

❖ Logical Operator (1):-

Description	:	If you are using many search criteria, then you must select the logical operator to be used between the search expressions.
Type	:	Input Field.
Mandatory	:	Yes
Information Type	:	Alphabetic and numeric characters.
Minimum Length	:	1
Maximum Length	:	60

❖ Field (2):-

Description	:	Additional Field Search (See Field (1)).
Type	:	Input Field.
Mandatory	:	No
Information Type	:	Alphabetic and numeric characters.
Minimum Length	:	1
Maximum Length	:	60

❖ Search for (2):-

Description	:	Additional Search Expression (See Search for (1)).
Type	:	Input Field.
Mandatory	:	No
Information Type	:	Alphabetic and numeric characters.
Minimum Length	:	1
Maximum Length	:	60

Logical Operator (2):-

Description	:	If you are using many search criteria, then you must select the logical operator to be used between the search expressions.
Type	:	Input Field
Mandatory	:	No
Information Type	:	Alphabetic and numeric characters.
Minimum Length	:	1
Maximum Length	:	60

❖ Field (3):-

Description	:	See Field(1).
Type	:	Input Field.
Mandatory	:	Yes
Information Type	:	Alphabetic and numeric characters.
Minimum Length	:	1
Maximum Length	:	60

❖ Search for (3):-

Description	: Additional Search Expression (See Search for (1)).
Type	: Input Field.
Mandatory	: Yes
Information Type	: Alphabetic and numeric characters.
Minimum Length	: 1
Maximum Length	: 60

❖ Logical Operator (3):-

Description	: See Logical Operator (1).
Type	: Input Field.
Mandatory	: Yes
Information Type	: If you are using many search criteria, then you must select the logical operator to be used between the search expressions.
Minimum Length	: 1
Maximum Length	: 60

4.1.3 CONTENT SEARCH PROCEDURE.

ACTION	RESPONSE
1. From the Menu Bar .	↙
2. Using the Quick Search , Enter the expression that you want to search.	↙
3. Click Enter button.	→ ↙ Results are displayed.
4. Finished.	

Footnotes :-

As well as using a standard search expression, you can incorporate the use of Wildcards to help locate your document. See Quick Search Description for more information.

4.2 META SEARCH.

4.2.1 META SEARCH DESCRIPTION.

Meta Searching is currently unavailable, and will be included in a future release.

Meta Searching does not search the “Meta Data” associated with each document, instead, it searches the actual contents of the document subject matter, and if a match is found, it is added to the “Results Panel”.

Meta Searching will only work with PDF type documents that contain Typed Transcript.

4.3 QUICK SEARCH.

4.3.1 QUICK SEARCH DESCRIPTION.

When searching for particular documents that have simple search criteria e.g. “Date of Birth”, then the User will use the Quick Search Facility.

The User simply types the expression in the Quick Search box (see Quick Search procedure), the system will then perform a methodical search of all “Index Data” associated with each document, and if a match is found, then the system will add the document to a “Results Panel”. It is possible that a number of “Result panels” are created, providing the user with a paging facility.

If you are unsure about the entire search expression, you can use the Wildcards symbol “%”, to help find your document. The “%” symbol can be use to substitute for character/s in your express.

Let’s suppose that we have a number of documents that have Index Data Fields containing:-

1. Smith Corp
2. Smithson Corp
3. Smythsen Corp
4. SmoothCorp
5. Smithson Inc

If we use the wildcard symbol in the following search expressions:-

- “Smith%” - find all Index Data Fields that begin with the characters “Smith”.
 ↳ In this case, documents 1, 2 and 5 would be found.
- “%son” - return all Index Data Fields that end in the characters “son”.
 ↳ In this case, documents 2 and 5 would be found.
- “%myth%” - return all Index Data Fields that contain the character “myth”.
 ↳ In this case, document 3 would be found.
- “Smith% Corp” - return all Index Data Fields that begin with “Smith” and finish with “Corp”.
 ↳ In this case, documents 1 and 2 would be found.

A message is displayed if there are no results found.

4.3.2 QUICK SEARCH FIELD DEFINITION.

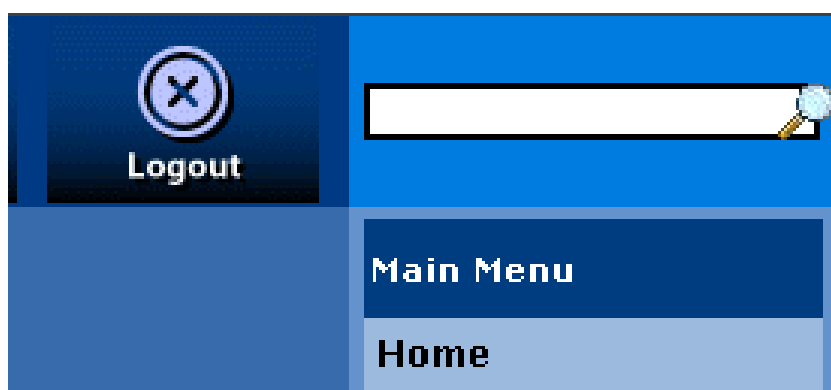


Figure 28 : Quick Search Box.

❖ Quick Search:-

Description	:	Enter the expression that you are searching. Remember the use of Wildcards (see Quick Search Description for more information).
Type	:	Input Field
Mandatory	:	Yes

4.3.3 QUICK SEARCH PROCEDURE.

ACTION	RESPONSE
5. From the Menu Bar .	↙
6. Using the Quick Search , Enter the expression that you want to search.	↙
7. Click Enter button.	→ ↙ Results are displayed
8. Finished.	

Footnotes :-

As well as using a standard search expression, you can incorporate the use of Wildcards to help locate your document. See Quick Search Description for more information.

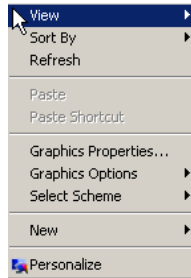
Field Description Index

Add Note	34	Meta Data	47
Association Link icon	31	Meta Data fields	47
Attach Document Index after Upload	15	New folder Description	19, 35, 36
Attachments	38, 41, 42	New Folder Name	19
Automatic Login.....	8	New Work Area Description.....	17
Bcc	38	New Work Area Name	17, 25
Browse	29	Parent Folder	49
Cc.....	38	Password	8
Check In	29	Permanently Delete Document.....	22
Check IN Notes	29	Permanently Delete Folder	22
Checked Out by	32, 33	Preview icon	31
Checked Out Documents	28	Quick Search.....	54
Create Work Area	17	Reports	27
Date Checked Out	33	Restore Document	22
Date From.....	25, 26, 27	Restore Folder.....	22
Date Logged	46	Restore Version	45
Date To	25, 26, 27	Roll Back	29
Delete.....	13, 49	Save	44
Delete All.....	22	Select Document	15
Description.....	32, 44, 46	Select Document Browser	15
Directory Tree Region.....	9	Size.....	32
Document Description	15	Subject	37
Document Index.....	51	To.....	37
Document Index Name.....	26, 48	Update Index	33
Document Location	29	Upload Document.....	15
Excel compatible	25, 26, 27	Uploaded by	44
File Name	32, 49	Uploaded on	44
Finish.....	29, 34	User	46
Inherit Permissions from Parent Folder.....	19	Username	8
Last Accessed.....	32	Version.....	32, 44, 46
Last Modified	32	View.....	44
Login	8	View Document	22
Menu Bar	9	Wild Character	54
Message.....	38	Your Messages	13

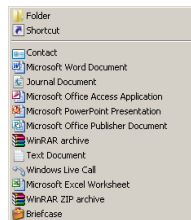
Appendix A

HOW TO CREATE A DESKTOP ICON FOR DART EDM.

1. Using the mouse, right click anywhere on the desktop and select **New**.

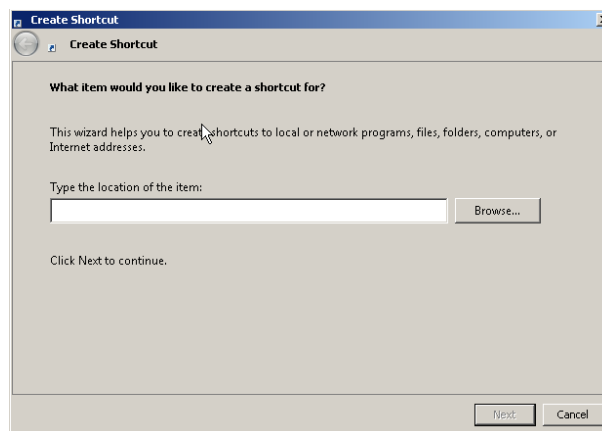


2. Select **Shortcut**

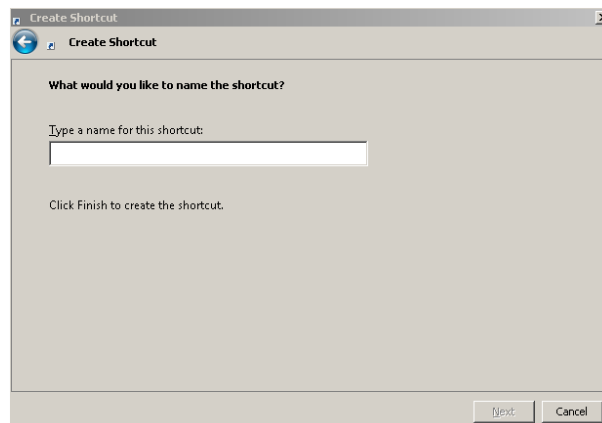


3. Enter the **URL** for your Dart EDM.

e.g. HTTP://<server-name>/<Virtual Directory> - Please consult you local Dart EDM Administrator for assistance.



4. Enter the name that you would like to see on the Desktop.
e.g. Dart EDM



5. Click **Finish** button.

