

enaio[®]

Software Documentation
enaio[®] office-utilities

Version 8.50

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Introduction

About enaio® office-utilities

enaio® office-utilities gives you access to functions which make it easier work with W-Documents. The functions are integrated with Microsoft Office products, and appear on the new **ENAIO** tab on the ribbon.

W-Documents are edited in external applications. To edit them, they have to be checked out first and later checked back in. Checked-out documents can be opened in the read-only mode by other staff members. As a result, it is ensured that one document cannot be edited by more than one employee at a time.

In particular, enaio® office-utilities makes it easier to check W-Documents in and out, and also allows direct access to enaio® functions from external applications.

Data transfer from enaio® and the enaio® editor-for-office field editor are also integrated into enaio® office-utilities. For further details about these and other optional components please contact your administrator.

The following Microsoft Office products are supported:

§ Installed Microsoft Office applications – Word, Excel, PowerPoint, Publisher, Project, Visio



Microsoft Word



Microsoft Excel



Microsoft PowerPoint



Microsoft Project



Microsoft Visio



Microsoft Publisher

§ Tablets – enaio® office-utilities cannot be installed in the tablet versions of Microsoft Office; documents can be edited with Office Mobile from the OS|mobileDMS app

§ Smartphones – see tablets

§ Office on Demand – Office utilities cannot be installed in the streamed Office on Demand version of Microsoft Office

The enaio® office-utilities functions are only available if enaio® client is installed and running on the workstation.

Your workstation will only provide functions on the **ENAIO®** tab that have been made available by your administrator.

In the same way, a limited range of functions is available in the Adobe Acrobat Standard and Professional as well as in OpenOffice applications. Please note that the freely available Adobe Reader is not supported.

enaio® office-utilities is not suitable for workstations where Office applications have been integrated with automated processes. In order to use the enaio® office-utilities add-in, user input is required in some places, which may interrupt the automated process.

enaio® Office Add-In

The enaio® Office add-in can be installed as an alternative to enaio® office-utilities. This provides a small number of essential functions and is suitable for workstations that do not require the complex and extensive enaio® office-utilities. This add-in is located in the installation data in the `components` directory. The installation takes place via an MSI package.

The enaio® Office add-in is integrated with Microsoft Word, Excel, and PowerPoint. enaio® office-utilities is automatically disabled when the enaio® Office add-in is enabled.

enaio® Office add-in functions:

Open location / Create new / Save and check in / Cancel editing / Data transfer.

enaio® office-utilities




Overview

enaio® office-utilities adds the **ENAIO** tab to the ribbon of the relevant Office application.









ENAIO Tab





The **ENAIO** tab offers the following functions:

Data












Button	Function	Applications
	Data Transfer from enaio® The enaio® data transfer component will start. It will replace all transfer fields in the document with respective data from enaio®.	
	enaio® editor-for-office The field editor for Word assists you in creating transfer fields. To launch the field editor, click the dialog box launcher in the Data group.	

Changes







Button	Function	Applications
	Check in The currently opened W-document will be saved under the given name, closed in Word and checked in to enaio® client.	
	Checking In and Opening Use this function to allow other members of staff to access the most recent version of the W-document, but the W-document remains open for editing in your Office application.	
	Enabling Read-Only Mode The current W-document will open in read-only mode.	
	Disabling Read-Only Mode The current read-only version of the W-document will open for editing.	

Button	Function	Applications
	Reset Changes will be discarded, the W-document closed and the document version saved in the DMS will open again.	
	Discard The W-Document will close and the checkout will be undone.	











Document


Button	Function	Applications
	New The currently open Word document will be saved as a W-document in enaio®.	
	PDF (with PDF Add-in) The currently open Word document will be saved in enaio® through the PDF add-in. This function is only available if the Save as PDF or XPS add-in from Microsoft is installed.	
	XPS (with XPS Add-in) The currently open Word document will be saved in enaio® through the XPS add-in. This function is only available if the Save as PDF or XPS add-in from Microsoft is installed.	
	Color, Grayscale, Black-and-White Document The currently open Word document will be saved in enaio® through the XPS add-in.	
	PDF The currently open Word document will be saved as a PDF document in enaio®. The PDF document is created via the relevant server interface. Adobe Acrobat does not need to be installed.	
	Specifying the Compression Factor Click the dialog box launcher in the Variant group to open the Specify compression factor dialog box, which is used to set compression details.	

E-mail







Button	Function	Applications
	<p>as Reference (.os)</p> <p>A link to the current W-document will be created and attached to a presented e-mail form.</p>	
	<p>as Attachment</p> <p>An e-mail form will open and the W-document will be attached to it. You can choose in which format the document will be sent (the application's format, TIFF or PDF).</p>	
	<p>as Zip Archive</p> <p>An e-mail form will open and the W-document will be attached to it. You can choose in which format the document will be sent (the application's format, TIFF or PDF). Before sending the file is compressed.</p>	

Variant













Button	Function	Applications
	<p>New Variant</p> <p>First a format selection dialog box and then the variant administration for the W-document will open.</p>	
	<p>PDF (with PDF Add-in)</p> <p>A new variant of the W-document will be saved using the PDF add-in.</p> <p>This function is only available if the Save as PDF or XPS add-in from Microsoft is installed.</p>	
	<p>XPS (with XPS Add-in)</p> <p>A new variant of the W-document will be saved using the XPS add-in.</p> <p>This function is only available if the Save as PDF or XPS add-in from Microsoft is installed.</p>	
	<p>PDF</p> <p>The currently open Word document will be saved as a PDF document as a new variant in enaio®.</p> <p>The PDF document is created via the relevant server interface. Adobe Acrobat does not need to be installed.</p>	
	<p>Color, Grayscale, Black-and-White Document</p> <p>A new variant of the W-document is saved using the archive print.</p>	



















Button	Function	Applications
	<p>Specifying the Compression Factor</p> <p>Click the dialog box launcher in the Variant group to open the Specify compression factor dialog box, which is used to set compression details.</p>	

Collaboration



Button	Function	Applications
	<p>Subscribe</p> <p>The Subscription dialog for the W-Document will open in enaio® client.</p>	
	<p>Follow-up</p> <p>You can subscribe to the document.</p>	
	<p>Follow-Up in Outlook</p> <p>A link to the current W-document will be created and entered into a new Outlook task form.</p>	



Tools

Button	Function	Applications
	<p>Location</p> <p>The folder window of the current W-document will open in enaio® client.</p>	
	<p>Editing Index Data</p> <p>The data sheet of the current W-document will open in enaio® client.</p>	
	<p>Showing Index Data</p> <p>The index data of the W-document are displayed in a window. Data can be dragged and dropped from it into the W-document.</p> <p>In Office Word versions earlier than 2007 this function is called Apply index data.</p>	
	<p>Variants</p> <p>The enables you to compare an open enaio® document to one of its variants with the same format.</p>	
	<p>Retention Time</p> <p>It is possible to define or edit the scheduled retention time for a document to be archived.</p>	
	<p>Create history entry</p> <p>A dialog will open into which you can type a text that will</p>	



Button	Function	Applications
	be added to the editing history and can be viewed in enaio® client.	
	History The W-document's editing history will be displayed in a window. Data can be dragged and dropped from it into the W-document.	
	New Note The enaio® notes editor will open. It is used to add a note to the currently open W-Document.	
	notes tab Open a dialog with the notes for the document.	
	New Notes Link A link to the current document will be created and added to the notes area of an archived object.	
	Insert archive link Link files, which are internal links to archive objects, will be inserted into the current document.	
	Create Reference This function is used to create a reference copy or a cross-type reference.	
	Sign Document A dialog for signing the W-document will open.	
	Start Workflow Use this function to start a workflow process and pass the document to the workflow file.	
	Create Barcode A dialog box for barcode generation will open. At the current cursor position, generated barcodes will be inserted as graphics into the document.	

Queries







Button	Function	Applications
	Word Files Depending on the Office application in use, the function is called Query Word file , Query PowerPoint file , or Query Excel file . Click on this button to open a window offering to search for Word, PowerPoint or Excel documents that are	

Button	Function	Applications
	managed in enaio®.	
	Image A window will open offering to search for image documents of any object type that are managed in enaio® and to insert them into the currently open document.	


SQL Queries













Button	Function	Applications
	Define This lets you access saved queries with variables from enaio® client or define new queries for enaio® office-utilities.	









Options

Function	Applications
Automatic Actions The automatic actions which you have activated are performed every time you open or close a document.	
Language Settings A list with available languages will open, and you can select the display language of enaio® office-utilities.	
Document Security A list presenting document security features, which are activated by selecting each one, will open.	
Show job stack list The Job stack dialog will open, showing all job stack entries.	
Info A list with the currently installed enaio® modules will open.	
Help The enaio® office-utilities help will open.	

Click the  icon in the **Options** group to configure automatic actions:




Automatic Actions	Applications
Auto checkin The document will be checked in automatically.	











Automatic Actions	Applications
<p>Check whether the enaio® document must be updated when checking in</p> <p>When you close a checked-out document, this function checks whether the document has been changed. If this is not the case, instead of checking the document back in, the checkout will be undone.</p>	
<p>Check/Execute data transfer</p> <p>The data transfer will start automatically.</p>	
<p>enaio® document name in the Word title bar</p> <p>The name of the document type will appear in the Word title bar.</p>	
<p>index data of enaio® document in the Word title bar</p> <p>The document's indexing will appear in the Word title bar.</p>	
<p>Auto show editing history</p> <p>The document's editing history will be displayed in a window.</p>	
<p>Auto show variant administration</p> <p>All variants of the document will be displayed in a window. It allows you to additionally open non-active variants and to compare two variants.</p>	
<p>Auto show index data</p> <p>The index data of the document are shown in a window.</p>	
<p>Do not add enaio® documents to the Word file list</p> <p>The MS Word list of recent documents will not contain W-documents.</p>	
<p>Save last position in enaio® document</p> <p>The current cursor position will be saved for the next time the document is opened.</p>	
<p>Open properties dialog before saving</p> <p>The Office properties dialog of the document will open before it is saved.</p>	
<p>Preset index data with document properties</p> <p>When indexing, index fields can be preset with properties data of the document type.</p>	
<p>Automatic follow-up on creation</p> <p>If this option is selected, the Automatic follow-up dialog will open, letting you set up a follow-up.</p>	

Automatic Actions	Applications
Auto assign variant number When saving a document as a variant, the variant will be automatically saved as the next available subvariant.	
Notify if enaio® document was opened as read-only	
Create history for all recently edited enaio® documents The editing history will include a list of recent W-documents.	
Add new document to enaio® New documents will be automatically saved into enaio®.	
Perform saved queries before new document creation This action allows you to have saved queries be carried out automatically before the document is inserted into the database.	
Initialize as speech recognition workstation Activate this action to enable speech recognition.	
Close enaio® document and launch enaio® Once a W-document is closed enaio® client will be activated automatically.	
Control startup behavior A dialog box will open offering to configure document security and automatic action settings, which will improve or reduce the loading speed of enaio® office-utilities.	

Using the **Language settings** function in the **Options** group, set the Language Settings to **German**, **English**, or **French**.

Specify the settings for document security using the **Document security** function in the **Options** group:

Document Security	Applications
Check enaio® document integrity Activate this function to have documents searched for broken links to VBA projects when opening.	
Buffer index data Activate this function to query enaio® data and have them cached.	
Check reference integrity This function is used to check the integrity of existing links, which refer to other enaio® documents, when opening documents.	

Document Security	Applications
<p>Check related style sheet</p> <p>This function is used to have Word styles which are assigned to the current Word document automatically checked.</p>	
<p>Check instances</p> <p>This function is used to automatically check whether a Word instance is already run by third-party applications.</p>	
<p>Check all style sheets</p> <p>Not only assigned Word styles will be checked, but also the Word default template (<code>normal.dot</code>).</p>	
<p>Check/Create data transfer macro</p> <p>The data transfer, which is realized by accessing a macro in document templates, will only be available in program versions since 5.20 SP II or greater if this action is activated.</p>	
<p>Keep the connection to enaio® alive during the entire session</p>	
<p>Settings for the Utilities ribbon for Word</p> <p>This section offers more settings for the enaio® office-utilities ribbon in Word.</p>	
<p>Also Show enaio® Utilities Toolbar for Word</p> <p>The enaio® toolbar will be displayed on the additional Add-Ins tab. Its buttons show icons which have been used in enaio® versions earlier than 6.0.</p>	
<p>Settings for the Utilities Toolbar for Word</p>	
<p>Customize enaio® Utilities</p> <p>This function is used to specify which buttons and menus are shown by default in Office applications. You can customize the tabs so that only the functions which you need are displayed.</p>	
<p>Indicate password to unprotect form</p> <p>The function enables you to import data to Word documents with form protection.</p>	

Microsoft Office – Version Notes

enaio® office-utilities is integrated with the menu and the toolbar in Microsoft Office versions earlier than 2007. In versions later than 2007, it is found on the **ENAIO®** tab on the ribbon.

From Office Version 2007, the user can specify whether OS icons or Office 2007 icons will be displayed on the tab. Loading the OS icons will require additional time at application start and can therefore be avoided by turning this function off with the **Use Word icons** setting (see 'Using Word Icons').

Functions, which are displayed on the tabs of the ribbon, can be adjusted to the respective document's Office program version. However, dynamic adjustment will also require more time and can be turned off and on with the **Match ribbon status to this document** setting (see 'Match ribbon status to this document').

Enable the **Also show enaio® utilities toolbar for Word** option (see 'Also Show enaio® Utilities Toolbar for Word') to show the toolbar from Office versions earlier than 2007 on an additional ribbon tab. Only enaio® office-utilities for Office 2007 is described in this manual. A description of the toolbar in earlier Office versions can be found in older versions of the manual.

Configuration of Confirmation Dialogs

You can enable confirmation dialogs for any action carried out by enaio® office-utilities.

The following registry key is used to enable or disable the presentation of confirmation dialogs:

```
HKEY_CURRENT_USER\Software\Optimal Systems\MS-Office-
Anbindung\OS:4.x-Word Utilities\'User'\ButtonQuestion
```

There is a string available for each function. Enable or disable confirmation dialogs for each function by setting the values to `true` or `false` (`true` = 1, `false` = 0) respectively.

Changes are applied instantly.

Data

Data Transfer from enaio®



Start the enaio® data transfer. The transfer fields in the document will be replaced with data from enaio®.

You can set the data transfer component to launch automatically when opening a document (see Check/Execute data transfer'). An entry in the document properties also allows you to configure it to auto start.

To enable successive data transfer, add the '!' control character to the transfer fields. An '!' is removed each time the transfer is run. The transfer fields will not be replaced with data until the last '!' is removed.

Some transfer functions will open a data selection dialog box. From it you can select, for example, documents of which you want data to be transferred, or images that you want to import.

Example of an image transfer from documents:

Transfer field

Description

```
%%tR_Bild*****16**
```

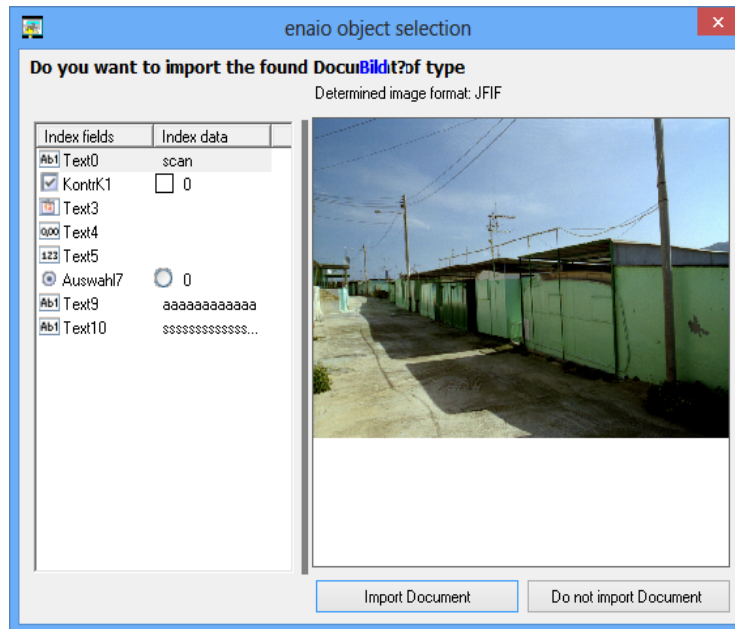
```
%%fdBild*****5**
```

```
%%t*****
```

The document type field switches to document type 'R_image'. Option '16' means that document data can be displayed and passed.

Selected pictures are scaled to a height of 5 cm, and the width scaled proportionally.

Transfer procedure



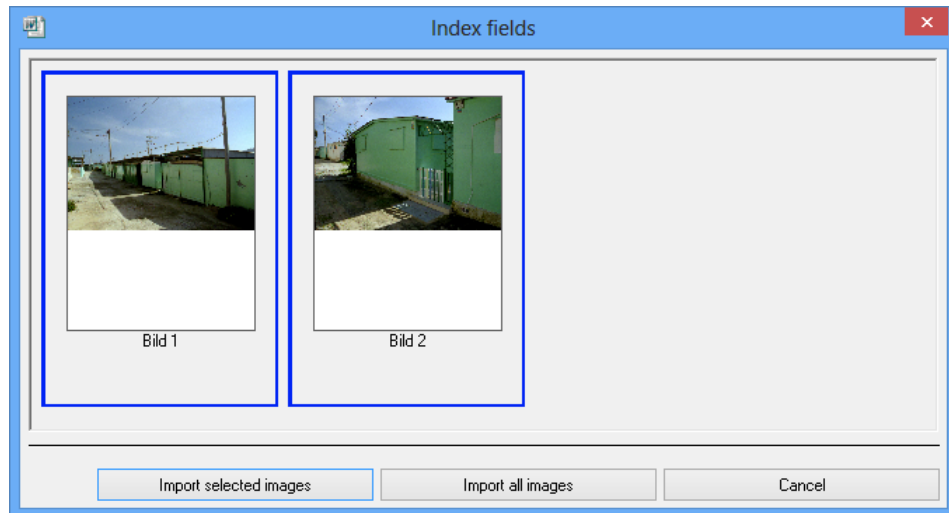
After starting the process, the data of the first found document are displayed.

On the left side you will find the index data, on the right side the first image.

If you want to transfer all images, click the **Import document** button.

If you do not want to transfer any images, click the **Do not import document** button.

If you click the displayed image, the image selection dialog will open.



The image selection dialog shows previews of all images in the document. Right-click on an image to display it in its original size.

If you want to transfer all images, click the **Import all images** button. If you do not want to transfer all images, select one image by clicking on it, or several images by clicking while holding down the **Shift** or **Ctrl** key.

Selected images are framed by a line.

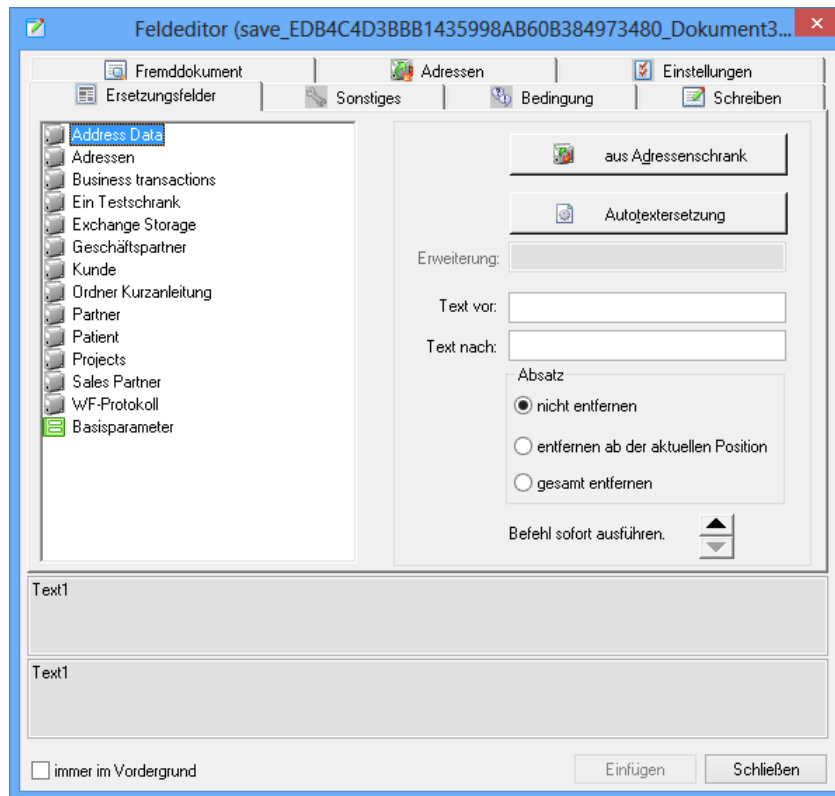
To add the selected images to your document, click the **Import selected images** button.

Then the data of the next found document are displayed.

enaio® editor-for-office



The enaio® editor-for-office field editor for Word helps you create transfer fields. To launch the field editor, click the dialog box launcher in the **Data** group.



Further information on the field editor can be found in the 'enaio® data-transfer' manual.

The field editor is currently available for Microsoft Office Word only.

Changes

Check in



If you open documents and edited them in W-applications, you must save it under the given name, close it and checked it back in to enaio® client. All these steps are performed just by clicking this button.

The W-application stays activated. If you want to automatically switch to enaio® client, enable the automatic action **Close enaio® document and launch enaio® client**.

Checking In and Opening



When you edit a document, it is checked out and marked as such. Other users can open only a read-only copy. If you want other users to access the current version of the document you are editing, you have to save it, check it in and open it again. All these steps are performed just by clicking this button.

Enabling Read-Only Mode



When opening a W-document for editing other users can open only a read-only copy. If you want to enable other users to open the W-document for editing, you have to close it in the W-application and open the read-only version in enaio® client. All these steps are performed just by clicking this button.

In case you made changes to the document, you will be notified and will be able to save changes.

Disabling Read-Only Mode



If you have opened a read-only version of a document but now want to edit it, you have to close it in the W-application and open it again in enaio® client. All these steps are performed just by clicking this button.

Documents that are checked out by other users cannot be opened for editing.

Reset



If you have opened and edited a W-Document but do not want to save your changes, click on this button to close the document and re-open the unedited version.

Discard



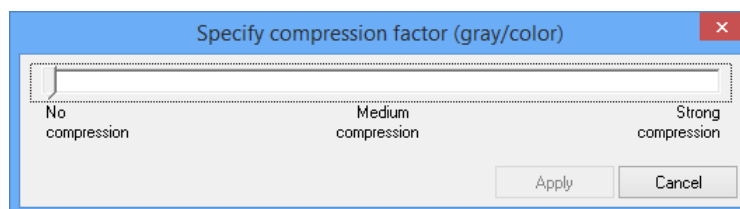
If you have opened and edited a W-document but do not want to save your changes, click on this button to close the document. It will not be saved and its checkout will be undone.

Document

Specifying the Compression Factor



Click the dialog box launcher in the **Document** group to open the **Specify compression factor** dialog box, which lets you set the compression factor by moving the slider. The setting defined here is applied to all image formats when inserting as a new enaio® document as well as when inserting a document as a new variant.

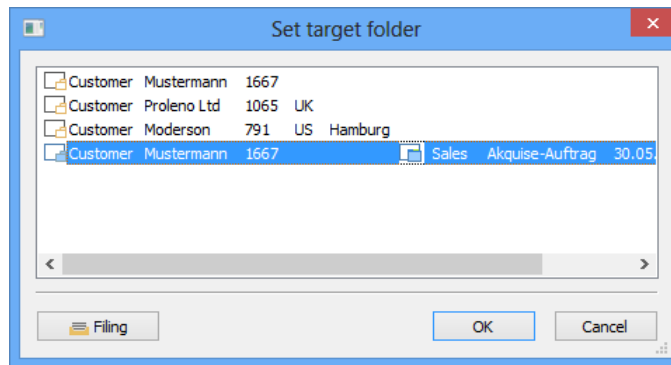


New



Word documents that have been created without using enaio® can be archived to various places: the filing tray, any currently open folder, or any default folder. Default folders are defined by creating a link to a folder and saving it into the archive area. To have these folders offered as destination folders, navigate to the **More** area of enaio® client settings and enable the **Use folders in desktop area as default folders** option.

Click this button to open the destination folder selection dialog.



Folders currently open in enaio® client and the default folders are listed.

Select a folder by double-clicking or choose the **Filing tray**.

You can set up SQL queries with variables, which will determine and open a location automatically. A simple query can be performed using the configuration file.

Assign a W-Document type to the document by selecting one of the preset document types.

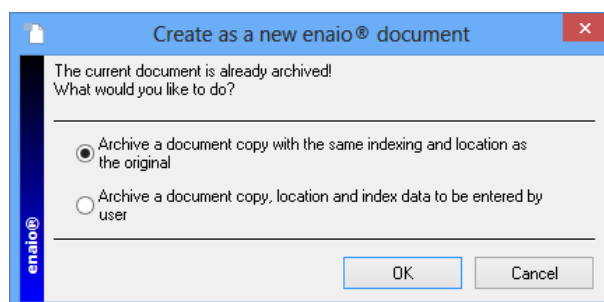
Then use the index form to index the document.

The document will be created, checked in to enaio®, and closed in the W-application. You will be presented with a message box asking whether to re-open the document as a W-document for editing.

The document must be closed before it is inserted via enaio® office-utilities. The document itself will not be saved but a backup copy is created. In case you cancel the insertion process, you will be presented with an error message allowing you to open this backup copy.

The backup copy contains the most recent changes. The document which you administer independently of enaio® contains the last saved version.

In addition to inserting new Office documents, you can also add copies of existing enaio® documents to the archive. To do so, open an enaio® document and click the **Insert into enaio®** button. A dialog will open from which you can choose whether to create either a copy with the same indexing and location as the original document or a copy for which the indexing must be entered and the location selected.



If you choose to create a copy with the same indexing as the original document, the system will verify whether the original's indexing form contains key fields. If this is the case, you will be prompted to change the key field values for the copy. If you do not change the key field values they will be automatically deleted. This guarantees that there are not several documents with the same key field values. If there are no key fields on the indexing form of the original document, the copy will be filed next to the original and can be immediately opened for editing.

Inserting a copy with different indexing and a different location to the original document is carried out in the same way as inserting a new enaio® document.

Configuring Insertion Options

When adding a document, which was created in Office applications, to the archive, you must select a location, choose a document type and enter the index data.

To facilitate this process, you can configure enaio® office-utilities to query the filing location or preset the indexing.

Presetting the Indexing

Enable the automatic action 'Preset index data with document properties' to have the document's properties data automatically entered into the index fields.

This requires you to assign the document's properties fields to index fields via registry entries (see 'Preset index data with document properties').

Select a Location

You can select several locations as the filing location: any folder currently open in enaio® client, any default folder or the filing tray.

It is also possible to find folders or registers by running an integrated query.

To integrate a query, you need a configuration file named `osutilinsertfilelist.xml` in the central `..\etc` directory of the data directory or in the `..\clients\client32` directory. The configuration file in the `..\etc` directory takes precedence.

During installation, an `osutilinsertfilelist.xml` configuration file will be copied to the `..\client32` directory. You can use an editor to make changes to this file, and save it either there or in the `..\etc` directory of the data directory.

The configuration file

Contents of the file `osutilinsertfilelist.xml`:

```
1 <?xml version="1.0" encoding="UTF-8"?>
2 <DMSQuery registercontext="0" maxhits="30" defaultobjectname="">
3 <Archive internal_name="cabinet">
4 <ObjectType internal_name="folder">
5 <Conditions>
6 <ConditionObject internal_name="folder">
```

```

7  <FieldCondition internal_name="folder field 1" operator="="
   utilquestion="message">
8  <Value>*</Value>
9  </FieldCondition>
10 </ConditionObject>
11 <ConditionObject internal_name="register">
12 <FieldCondition internal_name="register field 1" operator="="
   utilquestion="message">
13 <Value>*</Value>
14 </FieldCondition>
15 </ConditionObject>
16 </Conditions>
17 <Fields field_schema="ALL">
18 <Field internal_name="folder field 1" sortpos="1"
   sortorder="DESC"/>
19 <Field internal_name="folder field 2" sortpos="2"
   sortorder="ASC"/>
20 </Fields>
21 <ChildObjects export_depth="-1">
22 <SubObjectType internal_name="register">
23 <Fields fields_schema="ALL"/>
24 </SubObjectType>
25 </ChildObjects>
26 </ObjectType>
27 </Archive>
28 </DMSQuery>

```

When applying this configuration file, first a dialog with a folder query field and then a dialog with a register query field will open.

Several search entries are combined with the logical AND operator. The hit list presents all folders and registers which are indexed accordingly.

The hit list is configured to show only required columns and hits in a specified order.

Folders are configured to show only required register types.

Details:

In line 2 the following query attributes are specified:

§ registercontext

Like in enaio® client, when querying with folder and register criteria you can specify whether the hit list will also include folders that do not contain registers. If you do not want to have folders without registers included in hit lists, set this value to '0'.

§ `maxhits`

Enter the maximum number of hits you want to be displayed. It is recommended to keep the number low since the hit list cannot be sorted.

§ `defaultobjectname`

Enter the document type that will be preselected in the hit list and is used by default for inserting the document.

Type the cabinet name into the third line. Cabinets, folders, registers, and fields are specified via their internal name (`internal_name`). If the system is used in one language only, the name (`name`) can also be used. Type the cabinet name into the fourth line.

Lines 6 to 10 are meant to configure the dialog for folder queries.

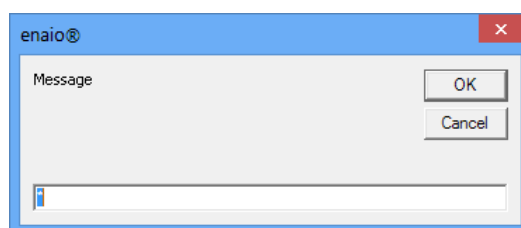
Type the folder type name into the 6th line. Into line 7 insert the name of the index field to be queried and the operator used to compare indexing and query criteria.

The following operators are available:

Operator	XML-compliant format
<	<
<=	<=
=	=
!=	!=
<<New configuration name>>	>
>=	>=

Operators must be entered in an XML-compliant format.

You can enter text in the `utilquestion` attribute which will be shown to users, for example to tell them which search is running. The value of line 8 – here the wildcard `'*'` – is preset into the dialog's text box and stands, just like in enaio® client, for any number of any character.



In the same way a dialog for register queries is configured in the lines 11 to 15. As both dialogs look identical a significant user note is recommended.

Criteria of folder and register queries are always combined with the logical AND operator. If you configure another register query (`ConditionObject`), the criteria of the register query will be combined with the logical OR operator.

If two fields (`FieldCondition`) are specified within a query (`ConditionObject`) for an object, these query criteria are combined with the logical AND operator.

Example:

```
<ConditionObject internal_name="folder">
  <FieldCondition internal_name="folder field 1" operator="="
    utilquestion="message folder field 1">
    <Value>*</Value>
  </FieldCondition>
  <FieldCondition internal_name="folder field 2" operator="="
    utilquestion="message folder field 2">
    <Value>*</Value>
  </FieldCondition>
</ConditionObject>
```

To combine two fields with the logical OR operator for one object, specify the object again for each field.

Example:

```
<ConditionObject internal_name="folder">
  <FieldCondition internal_name="folder field 1" operator="="
    utilquestion="message folder field 1">
    <Value>*</Value>
  </FieldCondition>
</ConditionObject>
<ConditionObject internal_name="folder">
  <FieldCondition internal_name="folder field 2" operator="="
    utilquestion="message folder field 2">
    <Value>*</Value>
  </FieldCondition>
</ConditionObject>
```

Regardless of the logical operators used, each field is queried in a separate dialog.

The following lines are meant to configure the hit list.

If the `field_schema` attribute in line 17 is set to `ALL`, the hit list will contain all folder fields. Instead of the `ALL` value, specify the fields you want to be shown.

Example:


```
<Fields field_schema="DEF">
  <Field name="field 1"/>
  <Field name="field 2"/>
</Fields>
```

You can set the sorting priority for fields and choose between ascending and descending sorting.

The lines 18 and 19 are meant to configure the field sorting. The `folder field 1` field has highest priority (`sortpos="1"`) and is sorted in descending order (`sortorder="DESC"`), the `folder field 2` field has second highest priority (`sortpos="2"`) and is sorted in ascending order (`sortorder="ASC"`).

Specify for the hits which child objects – like registers of folders – are determined and displayed.

The `export_depth` attribute in line 21 is used to specify the depth to which child objects are determined. Set the value to `'-1'` to not have any child object determined, or set the value to `'0'` to have the child objects of the next level determined.

If no child objects can be determined by the query, objects will be flagged by a question mark . By clicking on an object, the user can issue a new query to determine and display child objects.

The `ChildObjects` attribute `child_schema` defines whether all register types are determined. If you want to determine register types, enter the value `REGISTER`.

Apart from that, in line 22 you can specify the desired register and the fields to be displayed (line 23). Fields are specified like it is done above for the folder hit list.

If you use the `child_schema` attribute to specify that all registers are shown, you can also set the `field_schema` fields attribute to `ALL` to show all of the fields belonging to the registers.

Example:

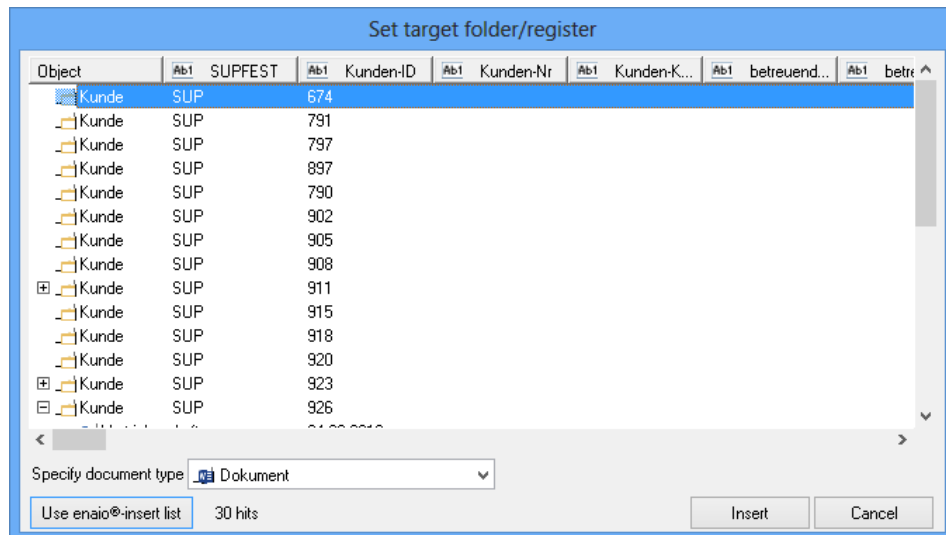
```
<ChildObjects export_depth="0" child_schema="REGISTER"/>
<Fields field_schema="ALL"/>
```

Location selection process

The configuration is accessed every time a document is inserted into the archive.

First, the folder query dialog is opened, then the register query dialog.

The folder query is performed and the hit list shown.



You can open folders and registers and select a location.

The document type is also chosen from the drop-down list.

Click the **Insert** button to specify the document type, open the indexing dialog, and save the document to the selected location.

If you do not want to use the configuration, click the **Use enaio® insert list** button. Similar to a process without configuration, you first select the target folder and then the document type.

PDF (with PDF Add-in)



This function is similar to the **New** function, but the W-Document is converted to a PDF document using a Microsoft add-in.

This function is only available if the **Save as PDF or XPS** add-in from Microsoft is installed.

The following registry key can be used to specify whether W-documents will be either converted to PDF documents or to ISO19005_1 compliant PDF/A documents:

```
[HKEY_CURRENT_USER\Software\Optimal Systems\MS-Office-
Anbindung\OS:4.x-Word-
Utilities\'Benutzer'\ExportAsFixedFormatSettings
```

To create documents as PDF, set the value of the `UseISO19005_1` string to '0'. PDF/A documents will be created by default.

Further strings that can be configured via this registry key are listed in the appendix (see 'Configuring the PDF Add-In').

XPS (with XPS Add-in)



This function is similar to the **New** function, but the W-Document is converted to an XPS document using a Microsoft add-in.

This function is only available if the **Save as PDF or XPS** add-in from Microsoft is installed.

Color, Grayscale, Black-and-White Document



This function is similar to the **New** function, but you create the document as an image document using enaio® archive print.

PDF



This function is similar to the **New** function, but you create the document as a color, grayscale, or black-and-white document in a PDF format using enaio® archive print.

PDF



This function is similar to the **New** function, but you save the current document to enaio® as a PDF document.

The PDF document is created via the relevant server interface. Adobe Acrobat does not need to be installed.

E-mail

The following ways of sending can be used to send the currently open document:

§ as Reference (.os)

When sending a document to internal recipients, a link to the document is created and attached to a presented e-mail form of your default e-mail application.

§ as Attachment

When sending documents to external recipients, you first choose the sending format (the application's format, as TIFF or PDF) and then the document will be attached to a presented e-mail form of your default e-mail program.

§ as Zip Archive

The document will be additionally compressed.

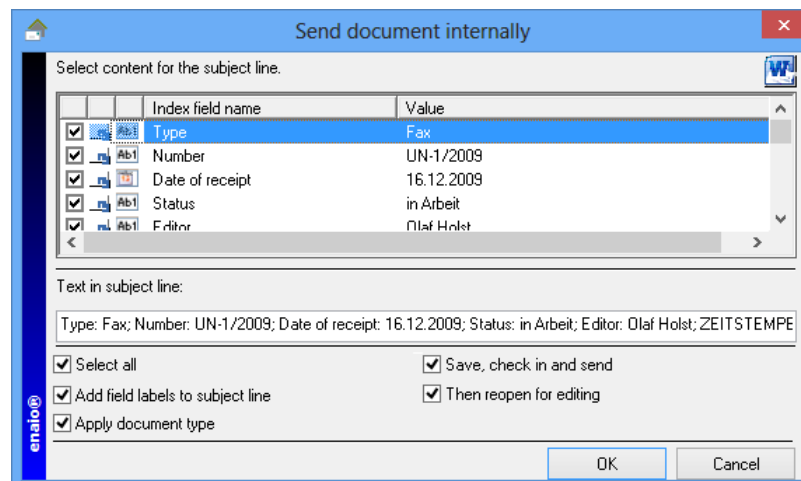
as Reference (.os)



When sending a document to internal recipients, a link to the document is created and attached to a presented e-mail form of your default e-mail application.

Provided that enaio® is installed on the recipient's workstation, the recipient just needs to click the reference to open the document in enaio®.

What is more, the presented dialog allows you to specify the document data you want to be inserted into the subject line of the e-mail:



Select the index data to be added to the subject line or enable the **Select all** option. Use semicolons to separate multiple indexing elements.

In addition to the index data, you can also **add field labels to the subject line** and **transfer the document type**. Both field labels and the document type will be put at the beginning of the subject line.

You can also set the document to be **saved, checked in, and sent**, and then **re-opened for editing**. The document the user opens by clicking the link is the current version of the document saved in enaio®.

as Attachment

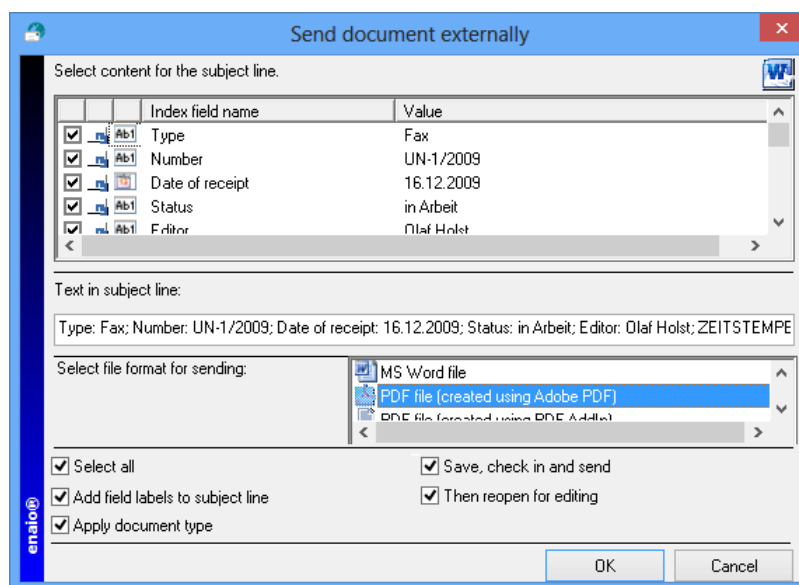


When sending documents to external recipients, you can set the document format of your choice: in the application's format, as TIFF or PDF.

If **TIFF file** is selected as the sending format, enaio® printer will create a black-and-white image of each document page, and attach it to the e-mail form of your default e-mail application in TIFF G4 format. Rather than creating a batch of files containing only single pages you can also select Multi-page file (Tiff) as the sending format.

If **PDF file** is selected as the sending format, enaio® printer will create an image of each document page and attach it to the e-mail form of your default e-mail application in PDF format. Rather than creating a batch of files containing only single pages you can also select Multi-page file (PDF) as the sending format.

Depending on the installed printer drivers, other formats may be available.



Select the index data to be added to the subject line or enable the **Select all** option. Use semicolons to separate multiple indexing elements. This includes basic parameters.

In addition to the index data, you can also **add field labels to the subject line** and **transfer the document type**. Both field labels and the document type will be put at the beginning of the subject line.

You can also set the document to be **saved, checked in, and sent**, and then **re-opened for editing**. The document the user opens by clicking the link is the current version of the document saved in enaio®.

Documents which you want to send in TIFF or PDF format do not have to be saved or checked in before sending.

as Zip Archive



If you send documents externally, you may also choose to have the files compressed.

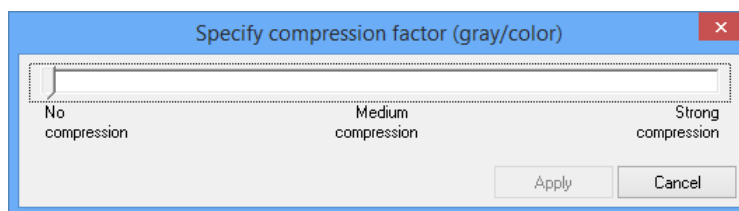
When sending documents to external recipients, you must select the sending format and data for the subject line. The document will then be compressed in a ZIP file and attached to the presented e-mail form of your default e-mail application.

Variant

Specifying the Compression Factor



Click the dialog box launcher in the **Variant administration** group to open the **Specify compression factor** dialog box, which lets you set the compression factor by moving the slider. The setting defined here is applied to all image formats when inserting as a new enaio® document as well as when inserting a document as a new variant.



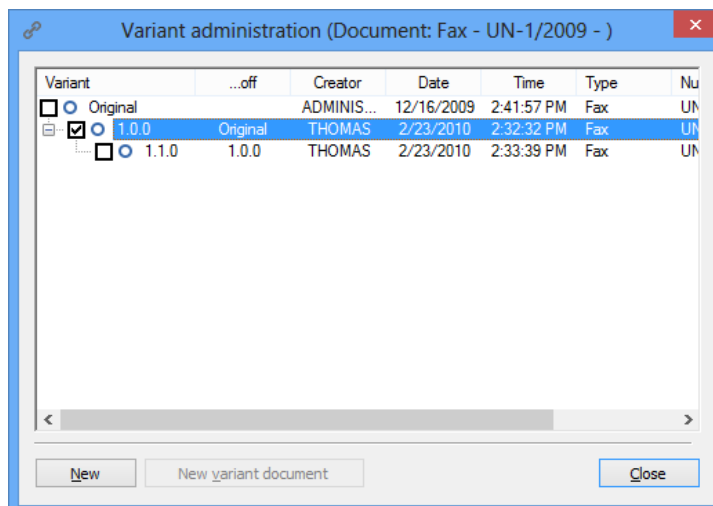
New Variant



It is possible to edit an open W-document and save it as a variant of the original document.

Click the **New variant** button to open the format selection. You can choose whether to convert the W-Document to an image or PDF format, specifying a compression factor, or to simply save it as a new W variant.

After choosing the format the variant administration will appear.

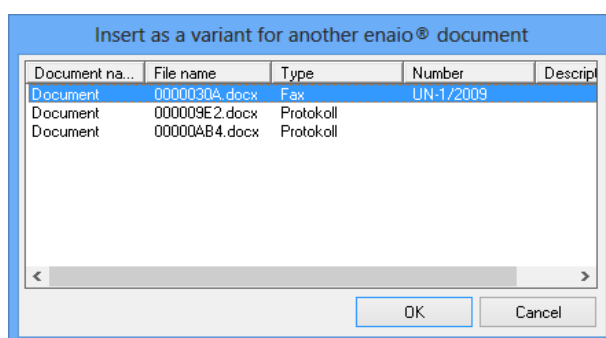


Click the **New** button to set the variant type.

You can also specify whether the new variant is set to be the active variant.

If you want the variant to be saved automatically as the next possible subvariant, enable the automatic action **Auto assign variant number**. The **Variant administration** dialog will not open in this case.

You can attach an Office document that has not yet been filed in enaio® as a variant of an opened enaio® document. To do so, enable the **Auto assign variant number** automatic action. If you then press the **New variant** button, a selection dialog will open, showing all currently opened W-Documents with the same format as the Office document you would like to insert. So you can only add a Word document as a variant to a W-document (doc or docx), an Excel document to an Excel document (xls orxlsx) etc. Select the W-Document that you want to add a new variant to and click **OK**.



The variant is then automatically saved as the next free subvariant.

If no enaio® document is open, the selection dialog will not be shown, and you cannot insert the Office document as a variant.

This function will be available regardless of the insertion format (black and white, grayscale, color).

PDF (with PDF Add-in)



This function is similar to the **New variant** function, but the W-Document is converted into a PDF document via a Microsoft add-in.

This function is only available if the **Save as PDF or XPS** add-in from Microsoft is installed.

XPS (with XPS Add-in)



This function is similar to the **New variant** function, but the W-Document is converted into an XPS document via a Microsoft add-in.

This function is only available if the **Save as PDF or XPS** add-in from Microsoft is installed.

Color, Grayscale, Black-and-White Document



This function is similar to the **New variant** function, but you create the document as an image document using enaio® archive print.

PDF



This function is similar to the **New variant** function, but you save a new variant of the document using enaio® archive print.

PDF



This function is similar to the **New variant** function, but you save the current document to enaio® as a PDF document.

The PDF document is created via the relevant server interface. Adobe Acrobat does not need to be installed.

Collaboration

Subscribe



Use this function to set up an enaio® client subscription for the enaio® document.
During configuration, the document remains open in the W-application.

Follow-up



Use this function to set up an enaio® client follow-up for the enaio® document.
During configuration, the document remains open in the W-application.

Follow-Up in Outlook



If you are working with Microsoft Outlook, use this function to create a reference to the enaio® document and attach it to a new Microsoft Outlook task form.
During configuration, the document remains open in the W-application.

Tools

Location



Use this function to switch to enaio® and open the folder in which the W-Document is managed.

If the document is located in a register, the folder window displaying the register contents will open.

During configuration, the document remains open in the W-application.

Editing Index Data



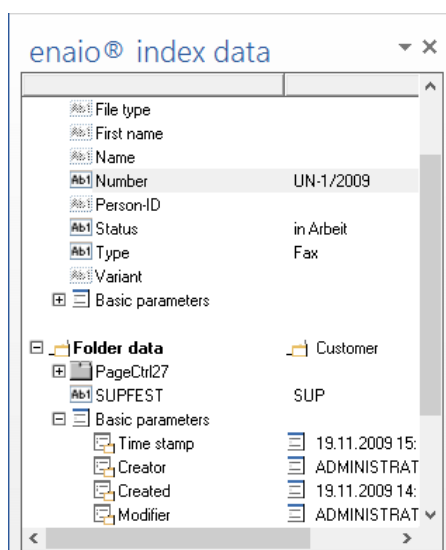
This function switches to enaio® and opens the W-Document's data sheet. The data sheet will show the indexing of the document which you can edit manually.

During configuration, the document remains open in the W-application.

Showing Index Data



This function opens a window showing the index data of the W-document.



From this window you can drag index data line-by-line into your document. When dragging index data into the document, only these will be dropped. If an index field is dropped into the document, its field label and the index data value will be dropped, separated by a tabulator.

Index data of an index table can either be dragged and dropped line-by-line or all together by selecting the first line of the table.

If you want the index data to be shown as soon as an enaio® document is opened, enable the automatic action **Auto show index data**.

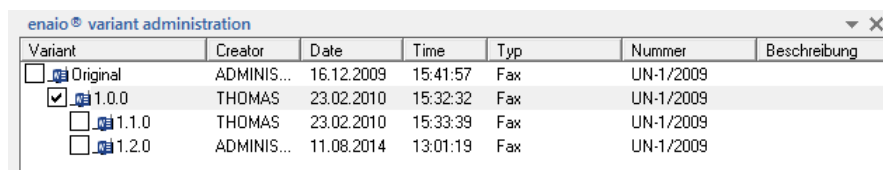
Variants



The **Variants** function lets you compare an open enaio® document with one of its variants that has the same format.

If you click this function, a variant administration window for the enaio® document will be opened directly in the Office application. All main variants and sub-variants of the enaio® document are shown in the window. The open variant is preselected. The currently active variant is flagged with a green checkmark.

The variants can be opened from this window via the context menu entry **Open variant**.



Variant	Creator	Date	Time	Typ	Nummer	Beschreibung
<input type="checkbox"/> Original	ADMINIS...	16.12.2009	15:41:57	Fax	UN-1/2009	
<input checked="" type="checkbox"/> 1.0.0	THOMAS	23.02.2010	15:32:32	Fax	UN-1/2009	
<input type="checkbox"/> 1.1.0	THOMAS	23.02.2010	15:33:39	Fax	UN-1/2009	
<input type="checkbox"/> 1.2.0	ADMINIS...	11.08.2014	13:01:19	Fax	UN-1/2009	

In order to compare the open enaio® document with a variant, open the desired variant with the context menu entry **Compare document**.

In Word, only enaio® documents in doc or docx format can be compared with each other. In Excel, only enaio® documents in xls orxlsx format can be compared. If a variant has another format, e.g. PDF, you can open the variant, however it is not possible to compare it with a Word or Excel document.

As the compare function provided by MS Office Word is used to compare Word documents, a new document is opened where both versions are compared to each other. All differences are highlighted. You can make changes to this document and also insert the document into enaio®. The new variant will be displayed in the variant administration after it has been closed and reopened.

When Excel documents are compared, a new document is also opened, displaying the two variants side by side. All differences are highlighted in color: deleted data are red, added data are green, and modified data are blue. When data are changed, both the old and the new value are written into the-highlighted cell. You can make changes and save them, or insert them as a new variant. If you save changes, they will be merged into the original document. To continue to compare the two documents, open the variant administration window and compare both variants again. If you insert changes as a new variant, the new variant automatically becomes the next sub variant.

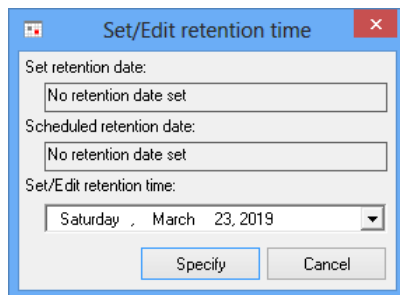
If you enable the **Auto show variant administration** action, the variant administration window will be shown automatically when a W-Document is opened.

The 'Variants' function also lets you show the variant administration in PowerPoint, but it is not possible to compare two variants here.

Retention Time



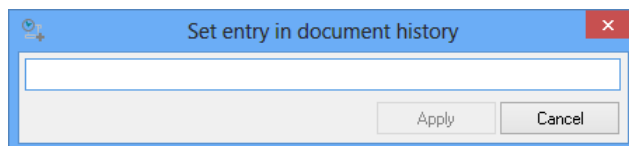
This function will open a dialog in which you can define or modify the scheduled retention time of a document to be archived.



Create history entry



A dialog will open allowing you to type a text which will be added to the editing history.



In enaio® client, this entry will be shown in the document's editing history.

History



The document's editing history will be displayed in a window.

Time	Action	User	Info
8/11/2014 1:11:33 PM	Document output	ADMINISTRATOR	The document was opened for editing.
8/11/2014 12:25:55 PM	Document output	ADMINISTRATOR	The document was opened for editing.
8/11/2014 12:17:17 PM	Document output	ADMINISTRATOR	The document was opened for editing.
8/11/2014 12:16:33 PM	Document output	ADMINISTRATOR	The document was opened for editing.
8/11/2014 12:16:28 PM	Object information	ADMINISTRATOR	Variante erzeugt (ID: 2729)
8/11/2014 12:14:19 PM	Document output	ADMINISTRATOR	The document was opened for editing.

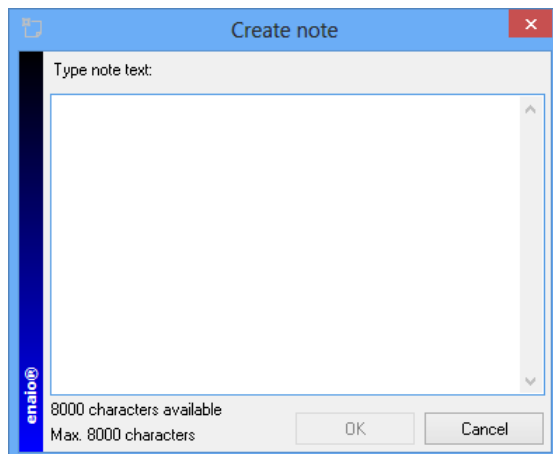
Line-by-line you can drag and drop the content of history entries into the document.

If you want the editing history to be shown as soon as an enaio® document is opened, enable the automatic action **Auto show editing history**.

New Note



You can add notes to enaio® documents. This function is used to open the notes editor which allows typing note text.



The document will then be flagged with the note icon in enaio®. During configuration, the document remains open in the W-application.

notes tab



You can show the note area. The notes and links to other objects are displayed here.

You can copy the content of notes to the clipboard using the context menu. You can display the data sheet of linked objects in enaio® client.

If the automatic action **Auto show note area** is enabled, the note area will be opened automatically when a document is opened.

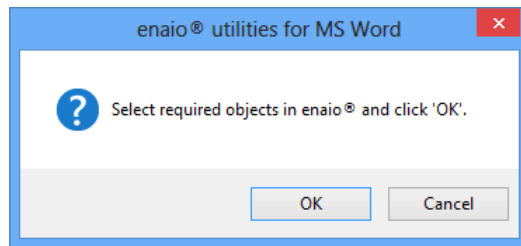
New Notes Link



In enaio® client, you can add links to documents, registers, folders, and portfolios. Links are cross-references to other documents, registers, folders, or portfolios.

Links and notes are administered together in the note area of an archive object.

Click the button, select the desired archive objects in enaio®, and confirm the dialog.



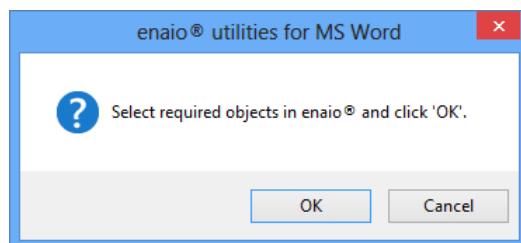
The selected archive objects will be linked with the current document.

Insert archive link



It is possible to insert link files, i.e. internal references to documents, registers, folders or portfolios, into documents.

Click the button, select the desired archive objects in enaio®, and confirm the dialog.

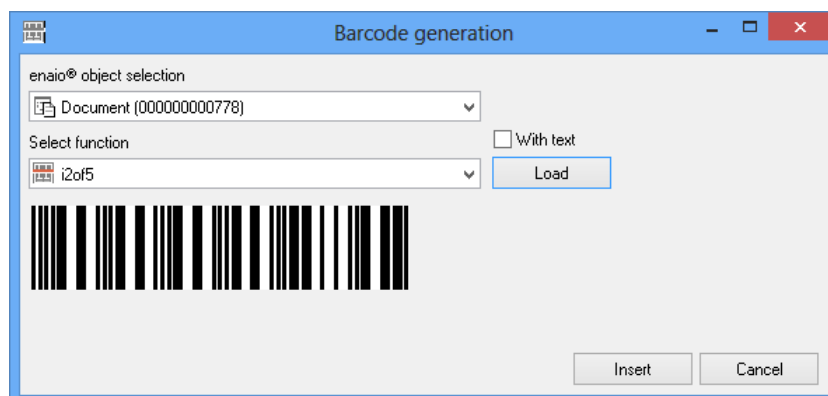


Respective links will be then inserted into the document.

Create Barcode



This function will open a dialog which is used to generate a barcode and add it at the current cursor position to the W-document.



Select the required document, register, or folder ID from the **enaio® object selection** section, and then select the desired barcode type in the **Select function** section. If you want all text belonging to a barcode to be displayed underneath it, select the **With text** checkbox.

Click the **Load** button to show a preview of the barcode in the dialog.

Click the **Insert** button to add the generated barcode to the W-Document as a graphic at the current cursor position.

Create Reference



This function is used to create a reference copy or a cross-type reference.

To do so, select a folder or a register from a hit list in enaio® client and decide whether to create a reference copy or a cross-type reference.

If you want to create a cross-type reference, you must select the required document type and index the document.

Sign Document



This function is used to open a PDF version of the current document in the signature mode of Adobe Reader.

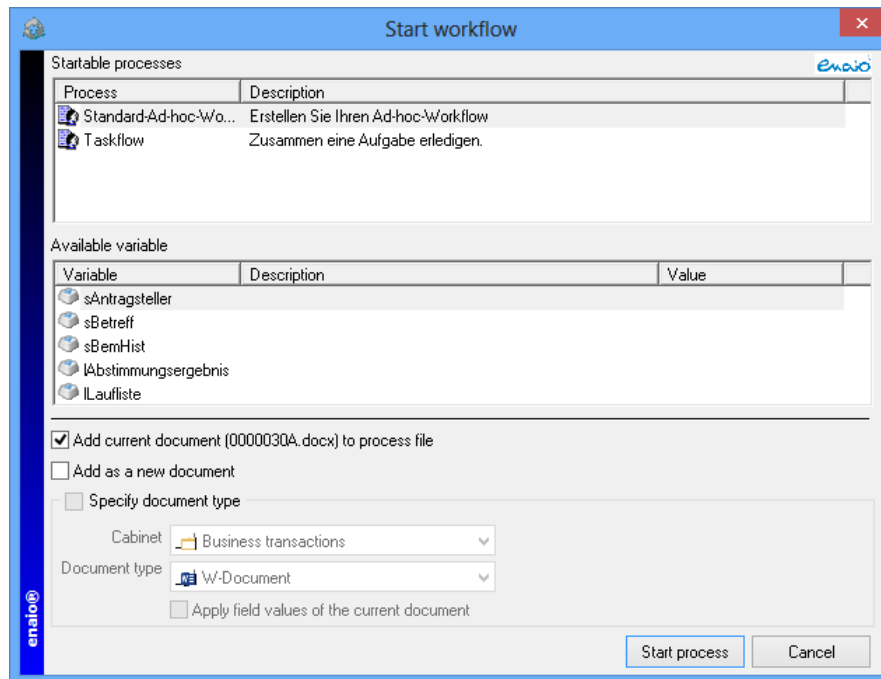
You can then sign the document.

Start Workflow



Use this function to start a workflow process and pass the current document to the process file.

In doing so, you can add either the existing archive document to the file or add the archive document or another document and select the document type.



Favorites



Open a window with the favorites from enaio® client.

The objects can be opened, you can open the location and view the index data.

Insert Object via URL



You can insert a link to an object from enaio® client into the document.

A link to the preview that opens in ContentViewer is inserted.

Select this function, highlight one or more objects in enaio® client, and then confirm with OK.

Queries

Word Files, Excel Files, PowerPoint Files



This function lets you start a full text search with enaio® office-utilities in order to transfer data from documents with the same format.

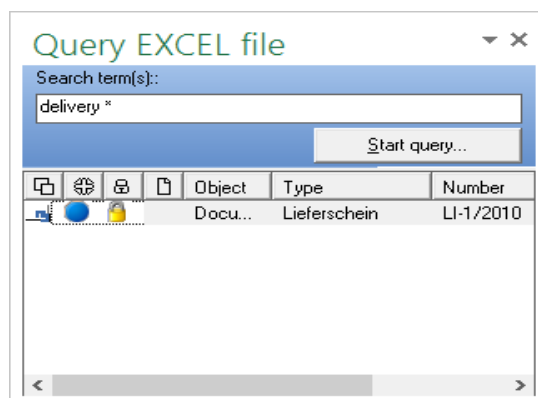
For example, if you create a new Word document, you can use this function to search for Word documents filed in enaio® and insert some or all of their pages into your new Word document.

The name of the function corresponds to the Office application in use: **Word file**, **Excel file**, or **PowerPoint file**.

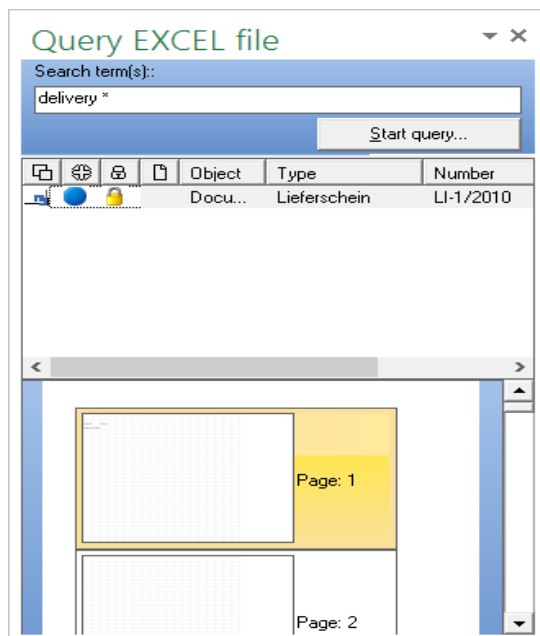
This function opens a window where you can enter one or more search terms. Then, press the **Start query...** button to start the full text search. Which searches and combinations are possible depends on the indexing service which has been integrated during the configuration of enaio® fulltext. Information about search possibilities can be found in the 'Full text indexing' handbook.

The data area that will be searched in depends on the document types defined in the `osutilressourendef.xml` configuration file, and also on the Office application used, as the application specifies which file extensions are searched for. Accordingly, only Word documents can be queried in Word, only Excel documents can be queried in Excel and only PowerPoint documents can be queried in PowerPoint.

The documents are shown in a hit list which by default contains a maximum number of 200 hits per document type. The hits are sorted based on the object ID so that recently created documents are at the beginning of the list. The setting for the displayed hit list columns is taken from enaio® client and can also be adjusted there. How to specify which columns will be displayed in the hit lists, can be found in the 'enaio® client' handbook.



Double-clicking a hit list entry will open a preview of the selected document from which you can select each previewed page.



Hovering the mouse pointer over a previewed page will enlarge it, thus enabling better view of the page. You can also press the plus or minus keys (+, -) to zoom in or out on the preview. Press the **1** key to maximize the preview size in the window, and press **0** to return the preview size to normal.

The context menu item **Show information** can be used to additionally display the document's technical data, such as the total page number, during the preview.

Various options for inserting W-document contents are available in the different Office applications.

Word Each page of a Word document managed in enaio® can be inserted either as text, as a document page, or as an image. Double-click to insert pages using the familiar Word function **Text from file...** However, this function may cause formatting loss in the text, the header or the footer. To avoid such losses, use the preview's context menu to embed pages into the current Word document using the **Create from file...** function. Alternatively, you can also insert a page as an image through the context menu.

Please note that tables on Word document pages must not contain table cells crossing pages since these cells will not be inserted through this function.

Excel Double-click a worksheet of an Excel document that is managed in enaio® to insert it as an ordinary worksheet. In case worksheets include diagrams, you must check these after inserting as diagram data may adapt to the current worksheet. Alternatively, you can also insert a diagram as an image through the context menu.

PowerPoint Double-click a slide of a PowerPoint presentation that is managed in enaio® to insert it as an ordinary slide. Through the context menu,

you can also insert a slide as an image. When inserting as a slide, you can choose whether to keep the original formatting from the enaio® document, or to adapt it to the formatting of the slide currently selected in PowerPoint.



Please note that neither links to other pages, slides, worksheets or other elements, nor embedded files in pages of Word documents, slides of PowerPoint presentations or worksheets of Excel document will be inserted through this function.

Note that this function is only available if the `osutilressourcendef.xml` XML file is saved either globally to the `etc` folder of the data directory, or locally to the `client32` application directory. The possible structure of the XML file is described in the chapter 'The Configuration File 'osutilressourcendef.xml'.

Image

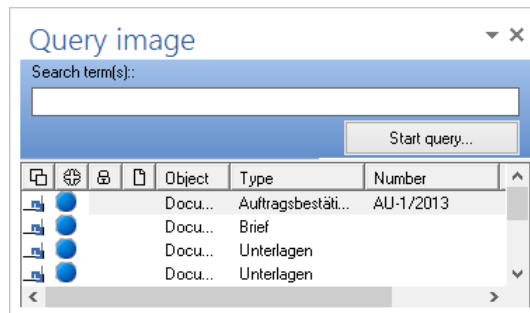


This function lets you start a full text search with enaio® office-utilities in order to transfer data from image documents, regardless of their format.

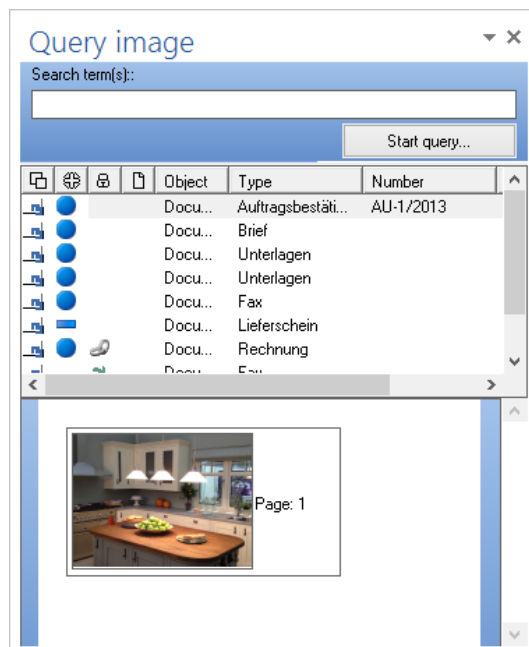
This function opens a window where you can enter one or more search terms. Then, press the **Start query...** button to start the full text search. Which searches and combinations of search terms are possible depends on the indexing service which has been integrated during the configuration of enaio® fulltext. Information about search possibilities can be found in the 'Full text indexing' handbook.

The data area that will be searched in depends on the document types defined in the `osutilressourcendef.xml` configuration file.

The found image documents are shown in a hit list which by default contains a maximum number of 200 hits per document type. The hits are sorted based on the object ID so that recently created image documents are at the beginning of the list. The setting for the displayed hit list columns is taken from enaio® client and can also be adjusted there. How to specify which columns will be displayed in the hit lists, can be found in the 'enaio® client' handbook.



Double-clicking a hit list entry will open a preview of the selected image document from which you can select each previewed page.



Hovering the mouse pointer over a previewed page will enlarge it, thus enabling better view of the page. You can also press the plus or minus keys (+, -) to zoom in or out on the preview. Press the **1** key to maximize the preview size, and press **0** to return the preview size to normal.

The context menu item **Show information** can be used to additionally show the technical data of the image document, such as height, width, format, resolution, etc.

The selected image can be inserted into the document and moved to the desired position using the **Insert as image** context menu item on the preview.

Note that this function is only available if the `osutilressourcendef.xml` XML file is saved either globally to the `etc` folder of the data directory, or locally to the `client32` application directory. The possible structure of the XML file is described in the chapter 'The Configuration File 'osutilressourcendef.xml'.

The Configuration File 'osutilressourcendef.xml'

Full text search for image documents or W-Documents in enaio® can be limited to certain document types.

To do this, an XML file with the name `osutilressourcendef.xml` must be created.

Please note that the functions Query Word file, Query Excel file, Query PowerPoint file, and Query image file will not be available if the `osutilressourcendef.xml` configuration file is not present.

If you create the configuration file and save it locally in your `client32` application directory, only the document types defined in the file will be searched for on your workstation.

If the administrator creates the configuration file and saves it globally in the `etc` server directory, only the document types defined in the file will be searched for on all workstations.

The configuration file in the `etc` server directory has priority.

The possible structure of the XML file is described below:

```
<?xml version='1.0' encoding='UTF-8'?>
<utilressourcen>
  <ressourcen type='Pictures' application='office'>
    <objecttype id='262144' />
    <objecttype id='196609' />
    <objecttype id='262208' />
  </ressourcen>
  <ressourcen type='Templates' application='office'>
    <objecttype id='262208' />
  </ressourcen>
  <ressourcen type='Templates' application='Word'>
    <objecttype id='262144' />
  </ressourcen>
  <ressourcen type='Templates' application='Excel'>
    <objecttype id='262144' />
  </ressourcen>
</utilressourcen>
```

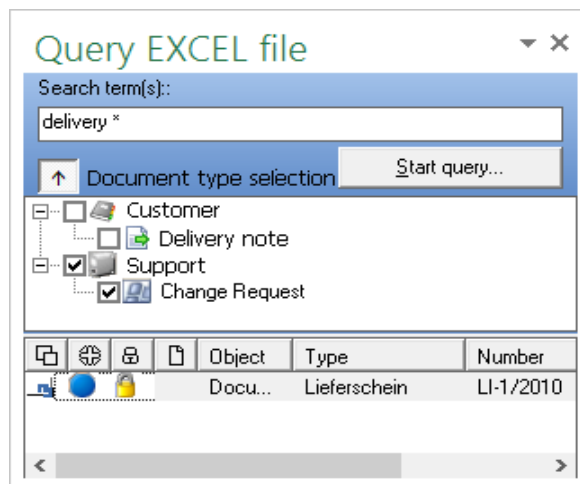
Two types of resources are managed in enaio®: `Pictures` and `Templates` (Word, PowerPoint, and Excel files).

To restrict a query to specific document types, specify the object type IDs (`objecttype id='Objecttype-ID'`) either globally for all applications (under the `application='office'` section) or individually for each application, e.g. `application='PowerPoint'`.

The object type ID can be determined either in enaio® client via the context menu item **Object information** (the value in brackets on the **Type** line), or via enaio® editor.

Note that when specifying the applications individually, the Office program names are case-sensitive.

If several document types are entered in the configuration file, you can choose whether all or only certain document types will be searched with full text search.



SQL Queries

Define



In enaio® client, you can create saved queries with variables.

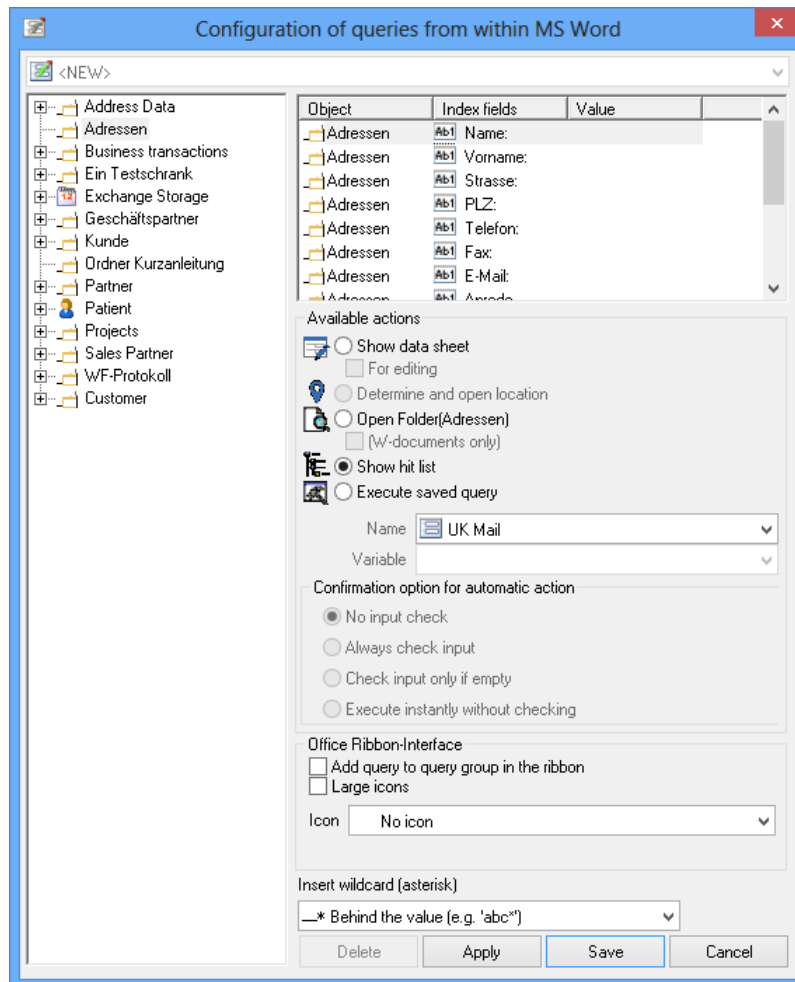
Such queries can be integrated into enaio® office-utilities and launched directly from within the Office application. It is additionally possible to assign text that is selected in the Office application to a variable.

You can also create and save new queries.

In addition, you can create queries to open a folder, which will be run automatically after the **New** function and will specify the location of this new document.

Press the **Define** button to open the configuration dialog, which is used to create new queries.

If you click on the list of **SQL queries**, you will be presented with a selection of all queries with variables that have already been integrated or created using enaio® office-utilities.



The left side of the configuration dialog lists all folder, register and document types.

Once you select an object in this section, the fields assigned to the selected objects will be shown on the right. All of the available actions will be listed below.

In order to **Save** the configuration, you must enter a configuration name, and the configuration dialog will close. Clicking the **Apply** button instead will also save the configuration, but the dialog will remain open.

Saved Queries with Variables Created in enaio® client

If queries with variables have been saved in enaio® client, you can enable the **Execute saved query** option in the configuration dialog and select a query from the list.

All variables assigned to the saved query will be listed in the **Variables** field. You can select a variable to assign the text selected in the document when performing a query.

In order to **Save** the configuration, you must enter a configuration name.

A query is run by clicking the **SQL queries** button, which will open a list of all available queries with variables, and selecting the desired query. If you have selected any text in the document, it will be assigned to the configured variable.

Creating SQL Queries with Variables

The configuration dialog for SQL queries with variables can be opened by clicking the **Define query** button in the **SQL queries** group.

Once you select a query object, all assigned index fields will be displayed on the right side of the dialog.

You can assign a value to each query field:

Selected text Text selected in the document

#NULL# non-indexed field

#User# name of the current user

Fixed text constant fixed text, which is entered in a dialog

Then define an action:

Show data sheet The data sheet can be opened in read-only mode or for editing.

Determine and open location When choosing document types, the document location will be opened.

Open object Folders or register will open showing their contents, whereas W-documents will open for editing.

When opening folders, enable the **No input check** option if you do not want the query to be run automatically every time the **New** function is used.

Show hit list The hit list will open.

To additionally define whether and how the placeholder '*' is used, specify the relevant option in the **Insert placeholder (asterisk)** field.

In order to **Save** the configuration, you must enter a configuration name.

Queries with Variables as Automatic Actions

Folder queries can be linked with the **New** function. If you do so, a folder query is run automatically with the selected text as its variable as soon as you use the mentioned function to insert an edited document as a new document. The hit list opens and offers its hits as possible filing locations for the new document.

If you have configured more than one folder query in the Office application in use, you must first select the desired query from the list.

To link folder queries with the **New** function, choose one of the following confirmation options:

§ Always check input

A dialog will always open in which query values can be viewed and edited.

§ Check input only if empty

A dialog will open only if no text was selected in the document and no value predefined.


§ Execute instantly without checking

The dialog will not open, and the query will be executed instantly.

Options

Automatic Actions

The automatic actions which you have activated are performed every time you open or close a document.

To open the list of automatic actions, click the  icon in the **Options** group. An automatic action is activated by clicking on it, and it is deactivated by a second click on it.

The automatic actions are available for Office applications version 2000 or greater.

Auto checkin



A W-Document which you have opened for editing is checked out. Even if you have not changed the document it must be checked back in. As long as it is not checked in, other users can open only a copy of the document.

The automatic action **Auto checkin** checks in W-Documents as soon as they are closed.

Check whether the enaio® document must be updated when checking in



When you close a checked-out document, this function checks whether the document has been changed. If this is not the case, instead of checking the document back in, the checkout will be undone.

Like modified documents, unmodified documents that are checked in are passed to the server and saved automatically as new versions. Documents for which the checkout is undone will neither be passed to the server nor saved as new versions.

Check/Execute data transfer



The automatic action **Check/Execute data transfer** is run as soon as you open a W-Document. It will replace all transfer fields in the Word document with data from enaio®.

To enable successive data transfer, add the '!' control character to the transfer fields. An '!' is removed each time the transfer is run. The transfer fields will not be replaced with data until the last '!' is removed.

Some transfer functions will open a data selection dialog box. From it you can select, for example, documents of which you want data to be transferred, or images that you want to import.

If the Office feature 'Protect document' of an archived Word document is activated, automatic data transfer may not be run correctly and in such a case must be repeated manually.

Show enaio® document name in the Word title bar



enaio® documents opened in an application will be named according to the ID with which they are managed in the archive. This name is also displayed in the title bar of the application. If multiple enaio® documents are open at the same time, it is quite difficult to identify each one by its ID. Therefore activate this automatic action to have the name of the document type and the ID be shown in the title bar.

Show index data of enaio® document in the Word title bar



If multiple enaio® documents of the same document type are open at the same time, it is easier to identify them if you display the index data in the title bar.

Auto show editing history



An editing history is created automatically for each enaio® document. This can be configured to be shown by default. Data can be dragged and dropped from it into the W-document.

Auto show variant administration



This function will open a window offering all of the document's variants. It allows you to additionally open other variants and to compare two variants.

Auto show notes



When a document with notes is opened, the note area is opened automatically.

Auto show index data



The index data are displayed in a window. Data can be dragged and dropped from it into the W-document.

Do not add enaio® documents to the Word file list



The **File** menu in Office applications contains a list of recently opened files. enaio® documents are also listed here. But, after checking these documents in you cannot open them through this list. It is therefore not useful to manage enaio® documents in this list.

Save last position in enaio® document



enaio® office-utilities will create a bookmark at the current cursor position, and the cursor will return to this position the next time the document is opened.

Open properties dialog before saving



The Microsoft Office properties dialog of the document will open before it is saved. You can enter data into it.

For example, information on indexing and data transfer can be entered in the document properties.

Preset index data with document properties



Documents which are passed to the archive from within an Office application must be indexed. To do so, you can have the index fields be preset with the document type properties data.

This additionally requires assigning the document's properties fields to index fields through registry entries.

All property fields are listed as strings under the following registry key:

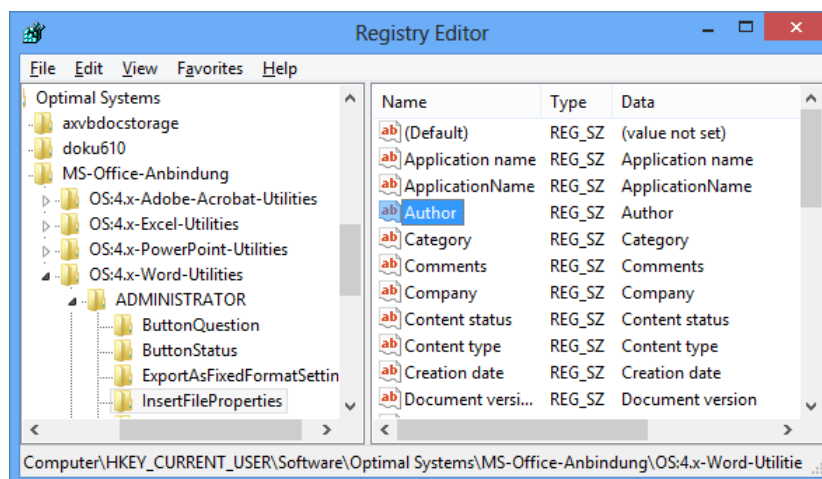
HKEY_CURRENT_USER\Software\optimal systems\MS-Office-Anbindung\OS:4.x-Word Utilities\'User'\InsertFileProperties

To have an index field to be preset with the content of a property field, you must assign the label of the index field as value to the string of the property field.

Example:

The **Editor** value is assigned to the **Author** string.

Each index field with the **Editor** label will then be filled with the respective **Author** item from the document properties by default, regardless of the selected document type.

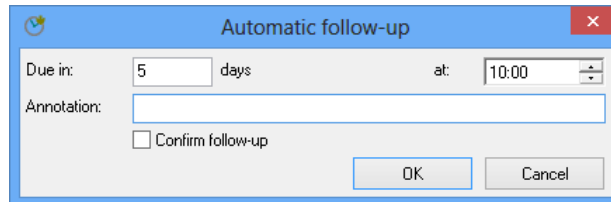


Automatic follow-up on creation



Archive documents which are created with enaio® office-utilities can be set up as follow-ups at the same time.

If you activate this option, the follow-up configuration dialog box will open.



Enter the time when you want the document to be presented, optionally type an annotation, and specify if the follow-up data must be confirmed.

Through the confirmation dialog you can change the time and the annotation.

Press **OK** to confirm and save the settings.

If you want to change the settings, switch the automatic action off and on again. The follow-up configuration dialog box will then open again.

Auto assign variant number



If you activate this function, a document which is inserted as a new variant will be saved automatically as the next available subvariant. The **Variant administration** dialog will not open in this case.

Notify if enaio® document was opened as read-only



Through this function you will be notified if the opened document is write-protected.


Create history for all recently edited enaio® documents



This editing history is a list of the most recently opened files. It can be used to open the files from within the W-application.

Though, the list of most recently used documents which is provided by the W-application itself does not support opening checked-in W-documents.

For each W-application you can decide to enable or disable this automatic action.

Another editing history  can be found in the Windows system tray. This one contains a list of all W-documents of all W-applications for which you enabled the automatic action.

Add new document to enaio®



This automatic action will transfer documents created in a W-application independently of enaio® to the archive automatically.

As with the **New** function, you must choose an open folder or the filing tray as target, then choose a W-Document type, and finally index the document. You can then edit the document.

Perform saved queries before new document creation



This action allows you to have saved queries be carried out automatically before the document is inserted into the database, thus the queries do not need to be run manually.

Initialize as speech recognition workstation



If you want to use speech recognition in this W-document, activate this automatic action. It is recommended to disable speech recognition if it is not required, as it adversely effects the performance of enaio® office-utilities.

Close enaio® document and launch enaio®

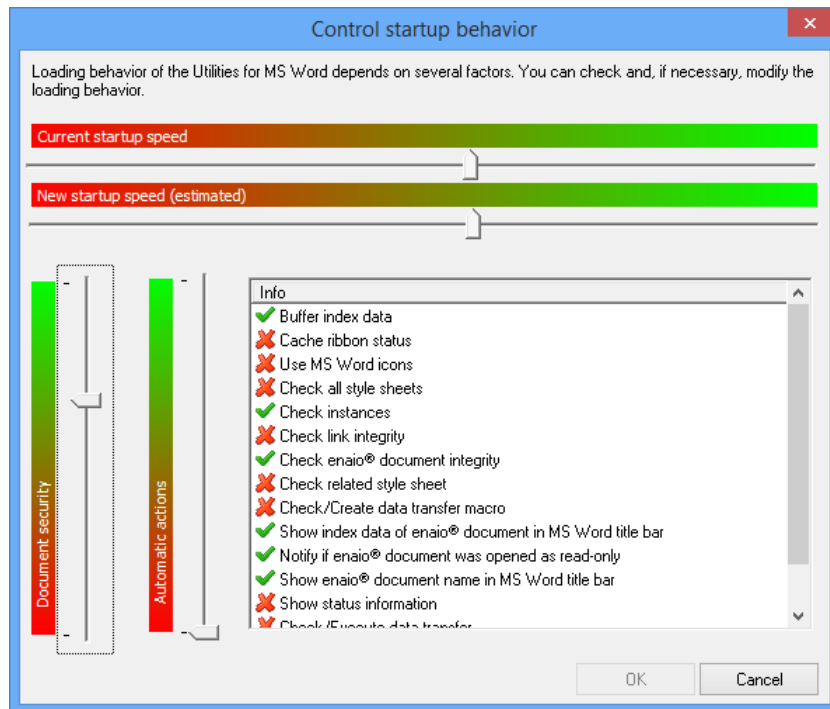


When you close an enaio® document, the application you were using to edit the document will remain open. If you want to continue working with enaio®, you normally have to start enaio® manually. This function launches enaio® automatically after an enaio® document has been closed.

Control startup behavior



The loading speed of enaio® office-utilities depends on which automatic actions are enabled, and also on the document security settings. Click this action to open the **Control startup behavior** dialog box, where you can configure document security and automatic action settings using two vertical sliders, directly affecting the loading speed of enaio® office-utilities. The two horizontal slide controls display the current and the new (estimated) loading speed.



Language Settings

Select the required language by clicking the  icon in the **Options** group.

German, English, and French are available.

Document Security

A list presenting document security features, which are activated by selecting each one, will open.

Check enaio® document integrity



Office documents may contain links to VBA projects. If you have imported such documents, the links will point nowhere and will cause errors when transferring data.

Activate this function to have documents searched for broken links to VBA projects when opening. You can then choose to remove these links from the documents.

Buffer index data



Enable this function to query and cache enaio® data. After 30 seconds the files will be updated again, but only if data is queried. Provided that the document's nesting structure is not too deep, loading speed may become faster.

Check reference integrity



In documents, you can insert references to other enaio® documents in the form of files. Due to this function, such links will be checked when a document is opened. If a reference target no longer exists, you will be notified.

Check related style sheet



This function is used to have Word styles which are assigned to the current Word document automatically checked. This may be important if read-only styles that the document refers to are located on a network drive. If you activate this option, Word will not check whether style changes must be saved and the corresponding confirmation dialog will be omitted.

Check instances



This function is used to automatically check whether a Word instance is already run by third-party applications. If this is the case, the enaio® office-utilities features will not be available, and the Word template file `Normal.dot` will open in read-only mode.

Check all style sheets



This function is similar to the **Check related style sheet** function, but the default Word template `Normal.dot` will be checked in addition to the assigned Word style sheets.

Check/Create data transfer macro



In document templates which were created for enaio® office-utilities in enaio® version 5.20 SP II or earlier, the data transfer component was integrated by accessing a macro.

Since enaio® office-utilities were modified to allow integration as a COM add-in, this access will now only work if you enable the **Check/Create data transfer macro** function.

Keep the connection to enaio® alive during the entire session



This function keeps a permanent connection to enaio® client open for the duration of the session, letting you transfer data and documents to enaio® without delays.

Close the application automatically



The program will be closed automatically after closing the last document.

Settings for the Utilities ribbon for Word



This menu section offers more settings for the utilities ribbon in Word.

Match ribbon status to this document



All functions on the ribbon tab will be adapted to the current document.

Cache ribbon status



This option, if activated, may reduce the loading time of the Office application as information regarding design and extent of the ribbon is cached. The check for ribbon changes, which would otherwise be carried out, is omitted.

Using Word Icons



You can decide whether to display the icons provided by OPTIMAL SYSTEMS or the Office 2007 icons. When activating or deactivating this option, you must restart the Office 2007 program before your changes will become effective.

Activate the Utilities ribbon for Word



If this option is enabled, the enaio® tabs will be shown in the ribbon automatically when an enaio® document is opened.

Also Show enaio® Utilities Toolbar for Word



The enaio® toolbar will be shown on the additional **Add-Ins** tab. Its buttons are labeled with icons that were used in enaio® versions earlier than 6.0.

Settings for the Utilities Toolbar for Word



This menu section offers more settings for the enaio® office-utilities toolbar in MS Word. To show the toolbar, enable the **Also show enaio® utilities toolbar for MS Word** option in the document security group.

Using Word Icons

You can decide whether to display the icons provided by OPTIMAL SYSTEMS or the Office icons in the utilities toolbar.

Integrate menu into toolbar

Use this function to show or hide additional menu items in the toolbar for Word.

Apply changes to utilities in document template 'normal.dot'

Enable this function to save changes to enaio® office-utilities in the Word document template 'normal.dot'.

Do not file menu/toolbar in the 'normal.dot' document template

Activate this option to not save menu/toolbar settings in the Word document template 'normal.dot'.

Fully initialize enaio® macros

enaio® macro integrity is checked when Word is launched, and the toolbar is reloaded if necessary, which can reduce the starting speed of enaio® office-utilities.

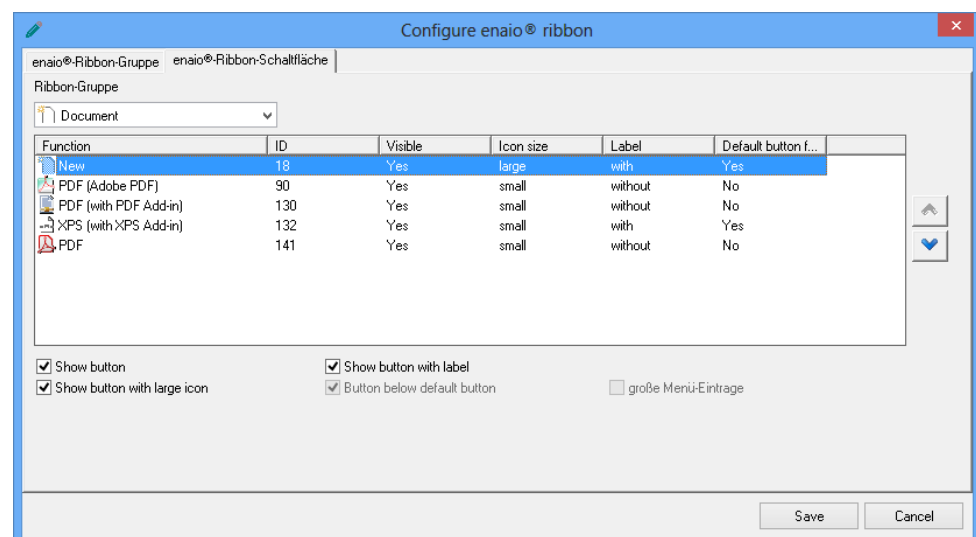
Customize enaio® Utilities



The **Customize enaio utilities** function lets you customize the **ENAIO** tab of your Office applications, so that only the functions you need are shown.

The dialog box lists all available groups and buttons for the functions, even if they are disabled or not available due to missing permissions.

You can manage both the groups and the individual buttons for the functions.



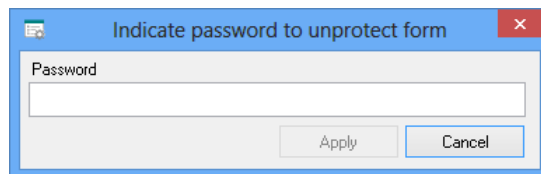
This function requires the system role 'Client: Save own settings' to be assigned to the user account and enaio® client to be started before the Office application.

Indicate password to unprotect form



The **Indicate password to unprotect form** function lets you import data into Word documents with form protection, without having to disable the form protection first and re-enable it afterwards.

Before you import data into a Word document with form protection, open the **Indicate password to unprotect form** dialog by clicking the function and enter the same password used to enable form protection.



Click **Apply** to save the password. The password is encrypted in the custom properties of the Word document. So it does not have to be entered again for the next data import.

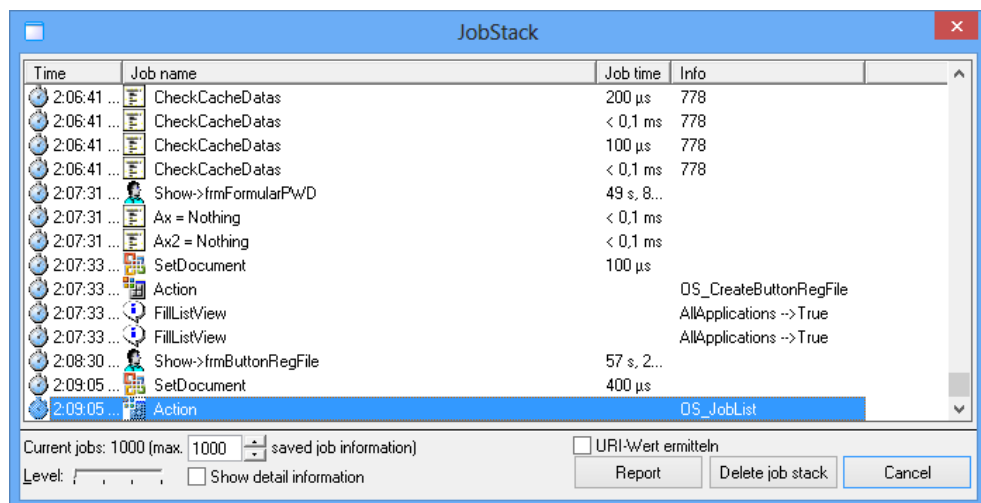
Afterwards, you can carry out the data import as usual.

As the form protection password is saved in an encoded format, it can only be changed if you reset the changed password for the function. In order to delete the password, remove it from the custom properties of the Word document.

This function requires the system role 'Administrator: Configure W-templates' to be assigned to the user account and that enaio® client has been started before the Office application.

Show job stack list

The **Job stack** dialog provides you with detailed information on all actions carried out when a W-Document is opened and edited. This information may be of interest in case of errors or performance problems.



The last 1000 entries are displayed by default, older ones are deleted. To display more or fewer entries, change the number in the **saved job information** text box accordingly.

You can set the logging level with the **Level** slider.

To receive more detailed information, select the **Show detail information** checkbox.

Changes to these settings will not become effective until you close and re-open the dialog box.

Click the **Report** button to write the job stack entries to a text file and open it in your default text editor.

To delete the entries of the job stack list, click the **Delete job stack** button.

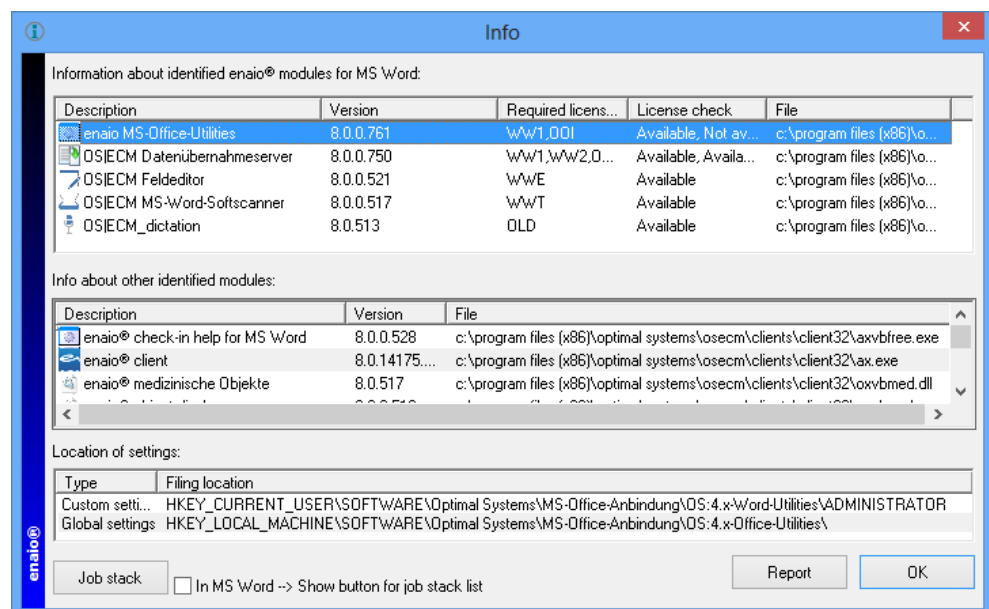
Info



The information window displays a list of the currently installed enaio® modules.

Which license keys are required, and whether they are available, is displayed next to the application-specific enaio® modules.

If the amount of available license keys, e.g. for floating licenses, is limited, it may occur that due to other users using the license keys, no key will be currently available for you.



Help



The enaio® office-utilities help will open.

Key combinations

Keyboard shortcuts let you access enaio® office-utilities functions quickly in just a few keystrokes, without having to use the mouse.

First press ALT+Y1 to open the enaio® tab or ALT+Y2 to open the enaio® extension tab, and then press the shortcut for the desired command.

Data

Command	Combination
Data exchange	D
enaio® editor-for-office	EDI

Changes

Command	Combination
Check in	FDC
Checking In and Opening	FD1
Reset	USR
Discard	USC
Enabling Read-Only Mode	LP
Disabling Read-Only Mode	LUP

Variant

Command	Combination
New Variant	VAR
PDF (with PDF Add-in)	VPI
XPS (with XPS Add-in)	VXP
PDF	VSE
Specifying the Compression Factor	VCF

E-mail

Command	Combination
as Reference (.os)	SIT
as Attachment	SET
as Zip Archive	SZI

Document

Command	Combination
New	INS
PDF (with PDF Add-in)	IPi
XPS (with XPS Add-in)	IXP
PDF	ISE
Specifying the Compression Factor	PCF

Collaboration

Command	Combination
Subscribe	ABO
Follow-up	WOS
Follow-Up in Outlook	WOU

Tools

Command	Combination
Location	SF
Editing Index Data	MD
Showing Index Data	SID
Variant administration	SVA
Retention periods	SRE
Create history entry	HIS
History	SHI
New Note	NOT
New Notes Link	IL
Insert archive link	OSL
Create Reference	LOS
Sign	SIG
Start Workflow	WF
Create barcode	BAR

Resources

Command	Combination
Word file	STE
Image	SPI

SQL Queries

Command	Combination
Define	CRQ

Options

Command	Combination
Automatic Actions	AUT
Language	LAN
Settings	SIC
Calls	JOB
Info	INF
Help	HLP

link-for-dictation

Command	Combination
enaio® link-for-dictation	DDS

enaio® Adobe Acrobat Utilities









Overview















enaio® Adobe Acrobat Utilities adds the **OPTIMAL SYSTEMS** toolbar to the Adobe Acrobat (Standard/Professional) application. Please note that the freely available Adobe Reader is not supported.



Detailed information about the installation can be found in the 'OS Installation' handbook.

The OPTIMAL SYSTEMS Toolbar

The **OPTIMAL SYSTEMS** toolbar offers the following functions:

Button	Function
	Checking In and Opening Use this function to allow other members of staff to access the most recent version of the W-document, but the W-document remains open for editing in your Office application.
	Check in The currently opened W-document will be saved under the given name, closed in Word and checked in to enaio® client.
	Reset The document will be closed and will reopen in the DMS version.
	Discard The document will close and the checkout will be undone.
	New The currently open Word document will be saved as a W-document in enaio®.
	Location The folder window of the current W-document will open in enaio® client.
	Editing Index Data The data sheet of the current W-document will open in enaio® client.
	Follow-Up in Outlook A link to the current W-document will be created and entered into a new Outlook task form.

Button	Function
	<p>Follow-up</p> <p>You can subscribe to the document.</p>
	<p>Subscribe</p> <p>The Subscription dialog for the document will open in enaio® client.</p>
	<p>Create history entry</p> <p>A dialog will open into which you can type a text that will be added to the editing history and can be viewed in enaio® client.</p>
	<p>New Note</p> <p>The enaio® notes editor will open. It is used to add a note to the currently open W-Document.</p>
	<p>notes tab</p> <p>If notes or links are assigned to the document, the note area is opened.</p>
	<p>New Notes Link</p> <p>A link to the current document will be created and added to the notes area of an archived object.</p>
	<p>Variants:</p>
	<p>New Variant</p> <p>First a format selection dialog box and then the variant administration for the document will open.</p>
	<p>Insert as a new black and white variant</p> <p>First a format selection dialog box and then the variant administration for the document will open.</p>
	<p>Insert as a new grayscale variant</p> <p>First a format selection dialog box and then the variant administration for the document will open.</p>
	<p>Insert as a new color variant</p> <p>First a format selection dialog box and then the variant administration for the document will open.</p>
	<p>Specifying the Compression Factor</p> <p>Click the dialog box launcher in the Variant administration group to open the Specify compression factor dialog box, which is used to adjust compression settings.</p>
	<p>enaio® archive print:</p>
	<p>Create new enaio® document in black and white</p> <p>With the enaio® archive print feature you insert the document as black and white image document into enaio®.</p>

Button	Function
	Create new enaio® document in grayscale With the enaio® archive print feature you insert the document as grayscale image document into enaio®.
	Create new document to enaio® in color With the enaio® archive print feature you insert the document as color image document into enaio®.

Attachment

Configuring the PDF Add-In

The registry editor can be used to configure how the Microsoft add-in for PDF creation is meant to be carried out. To do so, some strings of the add-in are made available and can be configured through the following registry key:

```
HKEY_CURRENT_USER\Software\Optimal Systems\MS-Office-
Anbindung\OS:4.x-'Office application'-
Utilities\'User'\ExportAsFixedFormatSettings
```

Application	String	Function
Word	OpenAfterExport	Whether to open the new file after exporting the contents. The default value is '0', i.e. the file will not be opened after export.
	OptimizeFor	Whether to optimize for screen or print. The default value is '1', i.e. the file is exported for display on screen, which is a lower quality and results in a smaller file size. Set the value to '0' in order to export for print, which is higher quality and results in a larger file size.
	KeepIRM	Specifies whether to copy IRM permissions to an XPS document if the source document has IRM protections. The default value is '1' (enabled).
	CreateBookmarks	Specifies whether to export bookmarks and the type of bookmarks to export. The default value is '0', i.e. bookmarks will not be created in the exported document. Set the value to '1' in order to create a bookmark in the exported document for each Microsoft Office Word heading, which includes only headings within the main document and text boxes not within headers, footers, endnotes, footnotes, or comments. Set the value to '2' in order to create a

Application	String	Function
		bookmark in the exported document for each Word bookmark, which includes all bookmarks except those contained within headers and footers.
	DocStructureTags	Specifies whether to include extra data to help screen readers, for example information about the flow and logical organization of the content. The default value is '1' (enabled).
	BitmapMissingFonts	Specifies whether to include a bitmap of the text. Set this parameter to '1' when font licenses do not permit a font to be embedded in the PDF file. If set to '0', the font is referenced, and the viewer's computer substitutes an appropriate font if the authored one is not available. The default value is '1', i.e. a bitmap will be included.
	IncludeDocProps	Specifies whether to include document properties in the newly exported file. The default value is '0', i.e. document properties will not be exported.
	UseISO19005_1	Specifies whether to either convert the W-Document to a PDF document or the PDF subset standardized as ISO 19005-1 (PDF/A document). The default value is '1', i.e. PDF/A document will be created.
	Item	Specifies whether the export process includes text only or includes text with markup. The default value is '0', i.e. text will be exported only.
Excel	Quality	Specifies in which quality new files will be saved. The default value is '0', i.e. new Excel file will be saved in standard quality. Set the value to '1' in order to save the file with less quality.
	IncludeDocProperties	Specifies whether to include document properties in the newly exported file. The default value is '0', i.e. document properties will not be exported.
	IgnorePrintAreas	Specifies whether to ignore or use print areas set when publishing. The default

Application	String	Function
		value is '1', i.e. any print areas set will be ignored when publishing.
	OpenAfterPublish	Specifies whether to display the file in viewer after it is published. The default value is '0', i.e. the file is published but not displayed.
PowerPoint	Intent	Specifies the purpose of the export. The default value is '2', i.e. the exported file is intended to be printed. Set the value to '1' if the file is intended to be published online.
	HandoutOrder	Specifies the order in which the handout is to be printed. The default value is '1', i.e. handouts will be printed with consecutive slides displayed horizontally first (in horizontal rows). Set the value to '2' in order to print handouts with consecutive slides displayed vertically first (in vertical columns).
	OutputType	Specifies the type of the output file. The default value is '1', i.e. slides will be printed. '2'=two slide handouts, '3'=three slide handouts, '4'=six slide handouts, '5'=notes pages, '6'=outline, '7'=build slides, '8'=four slide handouts, '9'=nine slide handouts, '10'=single slide handouts
	IncludeDocProperties	Specifies whether to include document properties in the newly exported file. The default value is '1' (enabled).
	KeepIRMSettings	Specifies whether the IRM settings will also be exported. The default value is '1' (enabled).
	DocStructureTags	Specifies whether to include extra data to help screen readers, for example information about the flow and logical organization of the content. The default value is '1' (enabled).
	BitmapMissingFonts	Specifies whether to include a bitmap of the text. Set this parameter to '1' when font licenses do not permit a font to be embedded in the PDF file. If set to '0', the

Application	String	Function
		font is referenced, and the viewer's computer substitutes an appropriate font if the authored one is not available. The default value is '1', i.e. a bitmap will be included.
	UseISO19005_1	Specifies whether to either convert the W-Document to a PDF document or the PDF subset standardized as ISO 19005-1 (PDF/A document). The default value is '1', i.e. PDF/A document will be created.
Visio	Intent	Specifies the purpose of the export. The default value is '1', i.e. the file is intended to be published online and printed. Set the value to '0' if the file is only intended to be displayed on the screen.
	ColorAsBlack	Specifies whether to render all colors as black. Set the value to '1' to ensure that all shapes are visible in the exported drawing. The default value is '0', i.e. colors will be rendered normally.
	IncludeBackground	Specifies whether to include background pages in the exported file. The default value is '1' (enabled).
	IncludeDocumentProperties	Specifies whether to include document properties in the exported file. The default value is '1' (enabled).
	IncludeStructureTags	Specifies whether to include document structure tags to improve document accessibility. The default value is '1' (enabled).
	UseISO19005_1	Specifies whether to either convert the W-Document to a PDF document or the PDF subset standardized as ISO 19005-1 (PDF/A document). The default value is '1', i.e. PDF/A document will be created.
Publisher	Intent	Specifies the output quality. The default value is '3', i.e. the publication is intended to be printed on a desktop printer or at a copy store. '1'=smallest file size for on-screen viewing scenario, '2'=on-screen or printed from a desktop printer, '4'=submit the publication

Application	String	Function
		to a commercial press
	IncludeDocumentProperties	Specifies whether to include document properties in the exported file. The default value is '1' (enabled).
	DocStructureTags	Specifies whether to include extra data to help screen readers, for example information about the flow and logical organization of the content. The default value is '1' (enabled).
	BitmapMissingFonts	Specifies whether to include a bitmap of the text. Set this parameter to '1' when font licenses do not permit a font to be embedded in the PDF file. If set to '0', the font is referenced, and the viewer's computer substitutes an appropriate font if the authored one is not available. The default value is '1', i.e. a bitmap will be included.
	UseISO19005_1	Specifies whether to either convert the W-Document to a PDF document or the PDF subset standardized as ISO 19005-1 (PDF/A document). The default value is '1', i.e. PDF/A document will be created.
	PrintStyle	Specifies the style in which to print the exported file. The default value is '0', i.e. the file will be printed in standard format.

Controlling Integration via Registry Entries

The integration of enaio® office-utilities can be controlled using registry keys:

HKEY_LOCAL_MACHINE\SOFTWARE\Optimal Systems\MS-Office-Anbindung\install

If the value of the string `oswwutil` is set to '1', enaio® office-utilities will be launched. The default value is '1.' If you set the value to '0,' enaio® office-utilities will not be launched.

Particularly in environments with terminal servers, where the launch of enaio® office-utilities is controlled using access rights to registry keys, it may be useful to change the default value so that enaio® office-utilities is not launched for users without access rights.

This can be done by changing the value of the following registry key:

HKEY_LOCAL_MACHINE\SOFTWARE\OPTIMAL SYSTEMS\MS-Office-Anbindung

Add the string `InstallDefaultValue` and set its value to '0' to stop enaio® office-utilities from being launched if users do not have access rights to the strings in the registry key `install`.