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This manual describes how you can use PCDocs to share and manage SSA Baan Development documentation.

Chapter 1, "Introduction," provides a brief introduction to PowerDOCS and CyberDOCS.

Chapter 2, "To use PowerDOCS," describes several basic PowerDOCS functions to manage and share SSA Baan Development Documentation.

Chapter 3, "To use CyberDOCS," describes several basic CyberDOCS functions to manage and share SSA Baan Development Documentation.

Send us your comments

We continually review and improve our documentation. Any remarks/requests for information concerning this document or topic are appreciated. Please e-mail your comments to kd@baan.com.

In your e-mail, refer to the document number and title. More specific information will enable us to process feedback efficiently.
Chapter 1
Introduction

PCDocs is the sole repository to store, manage, and share all official SSA Baan Development documentation in all phases of development. You can also use PCDocs to share information that does not have the classification of official Development documentation.

The PCDocs Document Management system provides:

- A central place to store all Development documentation.
- An alternative for the several Outlook folders, NT shares, Web sites, local disks, and so on.
- A single location to look for the most recent version of a document.
- An easy way to share documents with your colleagues.
- Full control over who has access to your documents.

You can approach the system in two ways: using a thick client called PowerDOCS or using a browser-enabled client called CyberDOCS.
PowerDOCS

PowerDOCS is the advanced Windows client for the document management environment. For PowerDOCS installation instructions refer to the IT Web site: http://intranet/

Some of the basic features of PowerDOCS include:

- Application integration to enable you to work online.
- Extensive search capabilities.
- Check-in/Check-out.
- Seven levels of security.
- Version control.
- Viewer.

Workstation requirements

The base requirements for PowerDOCS are as follows:

- Recommended processor: Pentium 200+.
- Recommended Memory: 128 MB.

**Note**

128 MB is the absolute minimum storage space required to run PowerDOCS, therefore, you must not install PowerDOCS with less than this amount of storage space available.

- Operating System: Microsoft Windows 98, Microsoft Windows 2000, or Microsoft Windows NT 4.0 Workstation with Service Pack 5.0 or higher.
CyberDOCS

CyberDOCS is a Web-enabled document management product that provides full document management over a corporate intranet, extranet, or the Internet.

Some of the basic features include:

- Web browser interface.
- Seven levels of security.
- Extensive search capabilities.
- Check-in/Check-out from a Web browser.

Workstation requirements

- Recommended processor: Pentium 200+.
- Recommended memory: 64 MB.
- Operating system: Microsoft Windows 98, Microsoft Windows 2000, or Microsoft Windows NT 4.0 Work Station with Service Pack 5.0 or later.
Chapter 2
To use PowerDOCS

To log on

If you have successfully installed PowerDOCS on your workstation, you can launch PowerDOCS in the following ways:

- Double-click the **PowerDOCS** icon on your desktop.
- Select the **PowerDOCS Explorer** in Windows NT Explorer.
- On the **Start** menu, click **Find ➔ PowerDOCS Documents**.
After you select your launch method, the **Login** screen appears, as shown in the following figure.

![Login Screen](image)

You must enter the following information:

- **PrimaryLibrary**: DOCSEMEA.
- **User Name**: Your NT user name.
- **Password**: Your NT password.
- **Network name**: This field is not mandatory.

If you cannot log on, your account might not be enabled. In that case, contact John Zaagman from the IT department.

**To enter a new document into the PowerDOCS library**

Using a drag-and-drop procedure in Windows NT Explorer is one of the most commonly used methods to enter a document into the PowerDOCS library. To use a drag-and-drop procedure to enter a document in the PowerDOCS library, take the following steps:

1. From the **Start** menu, select **Windows NT Explorer**.
2. Select **PowerDOCS explorer** and log on to the PowerDOCS system.
3 Double-click on **PowerDOCS explorer** and make sure that the DOCSEMEA library is visible.

4 Select the document that you want to enter in PowerDOCS and drag the document to the DOCSEMEA library. The following Development Document Profile appears.

A document profile is attached to every file or document that you create. The document profile is much like a library catalog card. Profiles provide the information necessary to search documents. The more detailed and accurate your profile, the easier you can find the document.

5 Enter the applicable information in the profile fields. Use the table lookup button, located beside the fields, and select the applicable information.

**Note**

If your document is an official Baan Development document, you must first obtain a document number from [http://documentregistration/intro.aspx](http://documentregistration/intro.aspx). You must enter this document number in the **Document ID** field.
6 To secure your document, click **Edit**. The Document Access screen appears, as shown in the following figure.

![Document Access Screen](image)

7 In the **Current Trustees** area, the Development group has read-only rights, by default.

8 From the **Available Trustees** area, select a group or person who can have access to your document and click the **Right Arrow** button to place these users into the **Current Trustees** area. You can then give these users the applicable access rights. To remove these users from the **Current Trustees** area, select the group or person and click the **Left Arrow** button.

9 Click **OK** to return to the document profile.

10 If you have entered all the necessary information in the document profile form, click **OK** to enter your document into the PowerDOCS library.

You can also save your document directly from an application. Simply select the file **Save As** function. If you are logged in to the PowerDOCS system, the document profile form will appear. Follow Steps 5 through 10 from the previous procedure.
To perform a profile search

1. Select **New Search** from the **Search** menu. These options can be buttons on the toolbar. In this case, just click the appropriate button. The **Select Search Form** dialog box appears, as shown in the following figure.

2. Select the Development QBE search form and click **OK**. The Development QBE search form appears.
When you enter information in the Development QBE search form, observe the following conventions and procedures:

- You can press TAB to move from one field to the next.
- Use the table lookup buttons, which are the buttons marked by ellipses (…) located beside the fields, and select the applicable information.
- The fields in the Development QBE search form are not case sensitive.
- Use the asterisk (*) as a wildcard. The asterisk can represent one or more characters. For example, if you are unsure about the document title, in the Document Title field, use *Title*.
- You can also use the question mark (?) as a wildcard character. The question mark represents only one character. Enter search criteria into any of the fields.

After you finish entering criteria, click OK to have PowerDOCS perform the search. The document search results will appear.
To customize the PowerDOCS columns

PowerDOCS enables you to customize the columns that appear in your document lists. To change your column settings, you must have a document or project list open.

To add or remove columns on a document list, take the following steps:

1. From the View menu, click Customize → Columns. The Customize Columns dialog box appears.
2. In the Available Columns pane, click the column you want to add and then click the Right Arrow. The column will appear in the Current Columns pane on the right.
3. To change the order of a column, click the Column Name in the Current Columns pane, then click the Up or Down arrows.
4. Click Close.

To check out a document

To work on a document while you are not connected to the network, or to temporarily prevent other users from editing a document, you can check out the document until your editing is completed.

To check out a document from PowerDOCS, take the following steps:

1. Use any of the PowerDOCS search methods to perform a search for a document, or select Recently Edited Documents, which lists the previous thirty documents you edited.
2. Select the document you want to check out and click Check out from the Document menu, or use the right mouse button.
The Check Out Document dialog box appears.

3 In the copy to specify the drive and path where you want to copy the document(s). Click the Lookup button to browse for the appropriate directory.

Warning: Documents are checked out with file names that PowerDOCS automatically selects. These names are based Document Number. Do NOT rename them. If you rename them, PowerDOCS cannot check the documents in. If you want to change a file name, you can make a copy of the document using the Document>Export command.

PowerDOCS enables you to chose whether or not the checked-out document will be available or locked on the network.

4 In the Check-Out Option box, you can select the following options:
   - Check out.
     Checks out the document and locks the file, which prevents others from opening the file. You must specify a copy-to location; otherwise, the file will just be locked.
   - Copy.
     If you chose copy, PowerDOCS places a copy in the location you specify. If you check out a document with Copy, you cannot use the Check in functionality to check the document back in.
   - Lock.
     If you choose to lock the documents without copying the documents to a check-out destination, leave the Copy To field blank and click OK to complete the check-out process.
5 In the **Return Date** box, enter the date you plan to return the document.

6 Click **OK**.

The following screen appears, which enables you to select the version that you want to check out.

![Select Version to Check-out - #6786 "User's Manual PowerDOCS"
Action

<table>
<thead>
<tr>
<th>Versions</th>
<th>Attachments</th>
</tr>
</thead>
<tbody>
<tr>
<td>Version</td>
<td>Last Edit Date</td>
</tr>
<tr>
<td>1</td>
<td>2/15/01</td>
</tr>
</tbody>
</table>

7 Click **OK**. Your document is now checked out to the specified directory.

**To check in a document**

After you finish editing your locked documents, you must check the documents in.

To check in documents, take the following steps:

1 From any document listing, select the documents you want to check in.

2 Select **Document→Check-in**, or use the Right mouse button.
The Unlock Document(s) dialog box appears.

3. Enter the editing time.
4. Select the directory from where your document must be copied.
5. Specify whether you want to replace the version, make a new version, or make a new sub-version.
6. Click OK and your document is checked in.

To use projects

Projects are collections of related documents. Projects enable you to group documents used for the same effort. You can include a single document in multiple projects. A project can even be included in a larger project, becoming a sub-project to the larger project.

Like Quick Search, Projects is a convenient feature that enables you to quickly obtain a list of documents. Unlike Quick Search, however, the Projects feature is not a search. Rather, the Projects feature is a static list of related documents. If you assign a document to a Project created with this feature, you will not change the path name or physical location of the document, but simply add the document to a logical grouping of documents.

Because the number of projects you have access to can grow enormously, you can drag the most frequently used projects to your favorite projects.
To create a Project in PowerDOCS, take the following steps:

1. Select **New** from the **Projects** menu, or right-click an existing project and click **Project** on the shortcut menu. The **Project - New Project** dialog box appears, as shown in the following figure.

   ![Project - New Project dialog box](image)

2. Fill out the fields as described in the following list:
   - **Name:** This field contains the project name.
   - **Iconized on Desktop:** If you check this box, the project is displayed under **All Projects** on the PowerDOCS Desktop.
   - **Access:** Specify the groups or individual persons who you want to share the project with.

   **Note**
   Do not share the project with groups or persons who have no particular use for the project.

To add a component to a project, take the following steps:

1. Click **Add** in the **Project** dialog box.
2. Select either **Document** or **Sub-Project**, depending on which you want to add, and click **OK**.
3 If you select **Document**, the Recently Edited Documents list is displayed in the **Search Results** dialog box.

4 To add any document to the project, double-click any document listed. To add documents not included on the **Recently Edited Documents** list, you can perform any search, for example, Quick Search, Profile Search, or Content Search, and add the documents to the project in this same manner.

5 If you select **Sub-Project** from the **Add to Project** dialog box, a list of all available projects appears. Select the project you want to add as a subproject, and click **OK**.

### Document mailing options

After you enter a document into the PowerDOCS library, you might want to notify certain people of the existence of the document.

To notify others of the existence of a document, take the following steps:

1 Select the document and click **Document** ➔ **Mail**. The Document Mailing Options screen appears.

2 Select one of the options. The most commonly used option is **Send Reference**.
3 Click **OK**. A new mail containing the document reference link opens in Outlook.

4 Fill in the name of the person you want to send your reference to and send your message.

5 If the recipient double-clicks a reference attachment, PowerDOCS will launch. A **Search** tab will display the document information and the original file can be opened.
To use PowerDOCS
CyberDOCS makes the DOCS Open enterprise document management capabilities available to remote users. Using either the Netscape Navigator or Microsoft Internet Explorer Web browsers, anyone who needs access to the information stored in knowledge repositories can now access DOCS Open documents using CyberDOCS.
To log on

When you launch CyberDOCS, the following logon screen appears.

The user must enter the following information:

- **User Name**: Your NT user name.
- **Password**: Your NT password.
- **Library**: DOCSEMEA.

Click **Login**.

If you cannot log on, the problem can be that your account is not enabled. In that case, contact John Zaagman from the IT department.
To enter a new document into CyberDOCS

To enter a new document into CyberDOCS, take the following steps:

1. Click on the **New Document** icon. The following document profile page appears.

   A document profile is attached to every file or document that you create. The document profile is much like a library catalog card. Profiles provide the information necessary to search documents. The more detailed and accurate your profile, the easier you can find the document.

   **Note**
   
   If your document is an official Baan Development document, you must first obtain a document number from [http://documentregistration/intro.aspx](http://documentregistration/intro.aspx).

   You must enter this document number in the **Document ID** field.

2. Enter the applicable information in the profile fields. Use the table lookup button, located beside the fields, and select the applicable information.
To limit access to the document, click the **Secure Document** box. To designate document access, click the **Edit** button to view the **Security** dialog box, in which you determine who has access to the document and what type of access the users have.

3. **Click Create.** The Upload File page appears.

4. Use the **Browse** button to specify the file that must be uploaded.

5. Click **Upload.**
The **Document Details** page appears, which indicates that your document has been successfully transferred to CyberDOCS.
To use CyberDOCS

To perform a profile search

1. Click on Advanced on the CyberDOCS titlebar. The Development QBE Search Form appears, as shown in the following figure.

![Advanced Search Form](image)

In CyberDOCS, you can use the same search criteria as in PowerDOCS. For more information, refer to “To perform a profile search,” in Chapter 2, “To use PowerDOCS.”

2. After you finish entering criteria, click Search to have CyberDOCS perform the search. The document search results will be displayed.

To check out a document

To use CyberDOCS to check documents in and out, use the Check out option on the Document profile or Document Details page. You can check out any version of a document; however, only one user at a time can check out that version of the document.
Checking out and locking a document transfers a copy of the document to your workstation.

To check out a document using CyberDOCS:

1. Use any of the CyberDOCS search methods to perform a search for a document, or select **Recently Edited Documents** by means of the **Quick Search** icon on the CyberDOCS desktop.

2. Select the document you want to check out and choose **Check Out** from the **Document** Menu. The Check Out Documents page, appears.

3. Fill in the expected return date and any comments you have and click **Check Out and Lock**.
To use CyberDOCS

The following Down Load file page appears. Follow the instructions to download the file to the directory on your hard disk.

To check in a document

After you finish editing your document, you must check the document in.

To check in a document in CyberDOCS, take the following steps:

1. Click on the Quick searches icon, select Checked Out Documents, and click Search.

2. From the Checked Out Documents page, select the document you want to check in and click Check In. The Check In Documents page appears. You must select one of the following check boxes.
   - Replace checked-out version.
   - Create a new version.
   - Create a sub-version.

3. Click Check In and Unlock.
On the **Upload File** menu page use the **Browse** button to locate your file.

![Image of CyberDOCS interface]

4. Click **Upload**. The Document Details page appears, which indicates that your document is successfully transferred to CyberDOCS.

**To use projects**

Projects are collections of related documents. Projects enable you to group documents used for the same effort. A single document can be included in multiple projects. A project can even be included in a larger project, becoming a subproject to the larger one.

As in Quick Search, Projects is a convenient feature that enables you to quickly obtain a list of documents. Unlike Quick Search, however, the Projects feature is not a search. The Projects feature is, rather, a static list of related documents. Assigning a document to a Project created with this feature does not change the path name or physical location of the document. Instead, assigning a document to a project simply adds the document to a logical grouping of documents.
Note

Do not share the project with groups or persons who have no particular use for the project.

To create a project in CyberDOCS, take the following steps:

1. Select the **Projects** button on the toolbar. Select **New** the Project Properties page appears.

2. In the **Project Name** field, enter the new project name.

3. To modify security levels and/or set trustees for the project being created, select the **Edit Security** button to launch the Security Java applet.

4. Select the **Save** button, CyberDOCS will automatically return to the Projects Page.