enaio ®

COS
OPTIMAL SYSTEMS

Software Documentation
enaio® office-utilities

Version 9.10

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Contents

Introduction

About enaio® office-utilities

enaio® office-utilities gives you access to features which facilitate your work with W-Documents. The features are integrated in MS Office products via the **ENAIO** ribbon tab.

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

enaio® office-utilities make checking W-Documents in and out easier and allow direct access to enaio® features 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

- Tablets – enaio® office-utilities cannot be installed in the Microsoft Office tablet version.

- Smartphones – same as tablets

- Office on Demand – office-utilities cannot be installed into the streamed Office on Demand version from Microsoft Office

The enaio® office-utilities functions are only available when enaio® client is installed at the workstation and has been started.

At your workstation, the administrator will provide only the functions which you can use at your workstation via the **ENAIO®** tab.

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

enaio® office-utilities is not suitable for workstations where automated processes are running in which Office applications are integrated. In order to use the enaio® office-utilities add-in, user input is required in some places. This may lead to an interruption of automated processes.

enaio® Office add-in

As an alternative to enaio® office-utilities, the enaio® Office add-in can be installed with a few, but central features in workstations that do not support the complex and extensive enaio® office-utilities need. This add-in can be found in the installation data in the directory `components`. Installation is carried out via an MSI package.

The enaio® Office add-in is integrated into Microsoft Word, Excel, and PowerPoint. enaio® office-utilities will automatically turn off when the enaio® Office add-in is activated.

enaio® office-utilities

Overview

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

ENAIO Tab

You can find the following functions on the **ENAIO** tab:

Data

Button	Function	Applications
	Data Transfer from enaio®	
	Start enaio® data transfer. The transfer fields in the document are replaced by data from enaio®.	
	enaio® editor-for-office	
	The field editor for Word assists you in creating transfer fields. To start the field editor click on 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.	
	Check in and open	
	Use this function to allow other members of staff to access the most recent version of the W-Document, while the W-Document remains open for editing in your Office application.	
	Enable read-only mode	
	The current W-Document will open in read-only mode.	
	Disable read-only mode	
	The current read-only version of the W-Document will open for editing.	
	Reset	

Button	Function	Applications
	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® using the PDF add-in. This function is only available if the Microsoft add-in **Save as PDF or XPS** has been installed.	
	XPS (with XPS add-in) The currently open Word document will be saved in enaio® using the XPS add-in. This function is only available if the Microsoft add-in **Save as PDF or XPS** has been installed.	
	Color, Grayscale, Black-and-White Document The currently open Word document will be saved in enaio® using archive print.	
	PDF The currently open Word document will be saved as a W-Document in enaio®. The PDF document is generated via the corresponding server interface. Adobe Acrobat does not need to be installed.	
	Specify compression factor Click on the dialog box launcher in the **Variant** group to open the **Specify compression factor** dialog box, which is used to configure the compression factor.	

E-mail

Button	Function	Applications
	As a link (.os)	

Button	Function	Applications
	A link to the current W-Document will be created and attached to a presented e-mail form.	
	As an attachment An e-mail form will open and the W-Document will be attached to it. You can choose in which format the W-Document will be sent (the application's format, TIFF, or PDF).	W X P P
	As a zip archive An e-mail form will open and the W-Document will be attached to it. You can choose in which format the W-Document will be sent (the application's format, TIFF, or PDF). Before sending the document file is compressed.	W X P P

Variant

Button	Function	Applications
	New variant First a format selection dialog box and then the variant administration for the W-Document will open.	W X P P
	PDF (with PDF add-in) A new variant of the W-Document will be saved using the PDF add-in. This function is only available if the Microsoft add-in **Save as PDF or XPS** has been installed.	W X P
	XPS (with XPS add-in) A new variant of the W-Document will be saved using the XPS add-in. This function is only available if the Microsoft add-in **Save as PDF or XPS** has been installed.	W X P
	PDF The currently open Word document will be saved as a W-Document in enaio® as a new variant. The PDF document is generated via the corresponding server interface. Adobe Acrobat does not need to be installed.	W X P
	Color, grayscale, black-and-white document A new variant of the W-Document is saved using the archive print.	W X P P

Button	Function	Applications
	Specify compression factor Click on the dialog box launcher in the **Variant** group to open the **Specify compression factor** dialog box, which is used to configure the compression factor.	W X P P

Collaboration

Button	Function	Applications
	Subscribe The **Subscribe** dialog for the W-Document will open in enaio® client.	W X P P
	Follow-Up A follow-up is set up for the document.	W X P P
	Follow-up in Outlook A link to the current W-Document will be created and entered into a new Outlook task form.	W X P P

Tools

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

Button	Function	Applications
	A dialog will open into which you can type text that will be added to the editing history of the W-Document 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.	W X P P
	New note The enaio® notes editor will open. It is used to add a note to the currently open W-Document.	W X P P
	Notes Open a dialog with the notes for the document.	W X P P
	New notes link A link to the current document will be created and added to the notes area of an archived object.	W X P P
	Insert archive link Link files, which are internal links to archive objects, will be inserted into the current document.	W X P P
	Create reference This function is used to create a reference copy or a cross-type reference.	W X P P
	Sign document A dialog for signing the W-Document will open.	W X P P
	Start workflow A workflow process will start which lets you pass the document to the workflow file.	W X P P
	Create Barcode A dialog box for barcode generation will open. The barcode will be inserted as a graphic at the current cursor position.	W

Queries

Button	Function	Applications
	Word File, Depending on the Office application in use, the function is called **Query Word file**, **Query PowerPoint file**, or **Query Excel file**.	W X P

Button	Function	Applications
	Click on this button to open a window where you can search for Word, PowerPoint, or Excel documents that are managed in enaio®.	
	Image A window will open where you can search for images of any object type that are managed in enaio® and insert them into the currently open document.	W X P P

SQL Queries

Button	Function	Applications
	Define A dialog will open where you can access saved searches with variables from enaio® client or to define new queries for enaio® office-utilities.	W X P P

Options

Function	Applications
Automatic Actions The automatic actions which you have activated are performed every time you open or close a document.	W X P P
Language Setting You can modify the display language of enaio® office-utilities.	W X P P
Document security You can define the settings for document security.	W X P P
Show job stack list You can view all jobstack entries in the **Jobstack** dialog.	W X P P
Info A list with the currently installed enaio® modules will open.	W X P P
Help The enaio® office-utilities help will open.	W X P P

Configure the automatic actions via the ⭐ icon in the **Options** group:

Automatic Actions	Applications
Auto check in The document will be checked in automatically.	W X P P

Automatic Actions	Applications
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.	W X P P
Check/Execute data transfer The data transfer will start automatically.	W X
enaio® document name in the Word title bar The name of the document type will appear in the Word title bar.	W X
index data of enaio® document in the Word title bar The document's index data will appear in the Word title bar.	W X
Auto show editing history The document's editing history will be displayed in a window.	W X P
Auto show variant administration 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.	W X P
Auto show index data The document's index data will be displayed in a window.	W X P
Do not add enaio® documents to Word file list The list of recently opened documents will not contain W-Documents.	W X
Save last position in enaio® document The current cursor position will be saved for the next time the document is opened.	W
Open properties dialog before saving The Office properties dialog of the document will open before it is saved.	W X P P
Preset index data with document properties When indexing, index fields can be preset with properties data of the document type.	W X P P
Automatic follow-up on creation If you choose this option, the **Automatic follow-up** dialog opens where you can set up a follow-up.	W X P 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.	W X P P
Notify if enaio® document was opened as read-only	W X
Create history for all recently edited enaio® documents The editing history will include a list of recently opened W-Documents.	W X P P
Add new document to enaio® New documents will be automatically saved into enaio®.	W X P P
Execute saved queries before creation This action allows you to have saved queries be carried out automatically before the document is inserted into the database.	W
Initialize as speech recognition workstation Activate this action to enable speech recognition.	W
Close enaio® document and launch enaio® Once a W-Document is closed enaio® client will be activated automatically.	W X P P
Control startup behavior A dialog box will open where you can configure document security and automatic action settings, which will improve or reduce the loading speed of enaio® office-utilities.	W X P P

Using the **Language settings** function in the **Options** group, select **German**, **English**, or **French** as the Language Setting.

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.	W X P P
Buffer index data Activate this function to query enaio® data and have them cached.	W X P P
Check link integrity This function is used to check the integrity of existing links, which refer to other enaio® documents, when opening documents.	W X P

Document Security	Applications
Check related style sheet This function is used to have Word styles which are assigned to the current Word document automatically checked.	W
Check instances This function is used to automatically check whether a Word instance is already run by third-party applications.	W
Check all style sheets It is not only assigned Word style sheets that are checked, but the Word standard sheet `Normal.dot` too.	W
Check/Create data transfer macro The data transfer, which is realized by accessing a macro in document templates, will only be available in program versions 5.20 SP II or greater if this action is activated.	W
Keep the connection to enaio® open during the entire session	W X P P
Settings for the utilities ribbon for Word This section offers more settings for the enaio® office-utilities ribbon in Word.	W X P
Additionally show enaio® utilities toolbar for Word 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.	W X P
Settings for the utilities toolbar for Word	W X P
Customize enaio® utilities This function is used to specify which default buttons and menus are displayed for the Office applications. You can customize the tabs so that only the functions which you need are displayed.	W X P P
Indicate password to unprotect form The function enables you to import data to Word documents with form protection.	W

Microsoft Office – Version Notes

enaio® office-utilities are integrated into Microsoft Office versions prior to 2007 via the menu and toolbar, or via the **ENAIO®** tab on the ribbon for versions after 2007.

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 requires additional time for starting the application and can therefore be turned on and off via the **Use Word icons** setting (cf. 'Use Word icons')

Functions, which are displayed on the registers of the ribbon, can be adjusted to the respective document's Office program version. This dynamic adjustment also requires time and can be turned off and on via the **Match ribbon status to document** setting (cf. 'Match ribbon status to this document').

The toolbar from Office versions prior to 2007 can be integrated on an additional tab via the **Also display enaio® Utilities toolbar for Word** (cf. 'Additionally show enaio® utilities toolbar for Word'). In this manual, only the enaio® office-utilities for Office 2007 is described, as the description of the toolbar in earlier Office versions can be found in older versions of the manual.

Configuration of Confirmation Dialogs

You can configure confirmation dialogs to be presented before any action is carried out by enaio® office-utilities.

The following registry key is used to enable or disable 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. The values `true` and `false` (true = 1, false = 0) switch the confirmation dialog on and off for the each function.

Changes are applied instantly.

Data

Data Transfer from enaio®

Start enaio® data transfer. The transfer fields in the document are replaced by data from enaio®.

You can start data transfer automatically after opening a document (cf. '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 from which you want data to be transferred, or images that you want to import.

Example of an image transfer from documents:

| Transfer field	Meaning

`%%ttR_Bild°°°°°°16**`
`%%fdBild°°°°5**`
`%%tt°°°°°°**`
	The document type field switches to document type 'R_image'. Option '16' means that document data can be displayed and transferred.
	
	Selected pictures are scaled to a height of 5 cm, and the width scaled proportionally.

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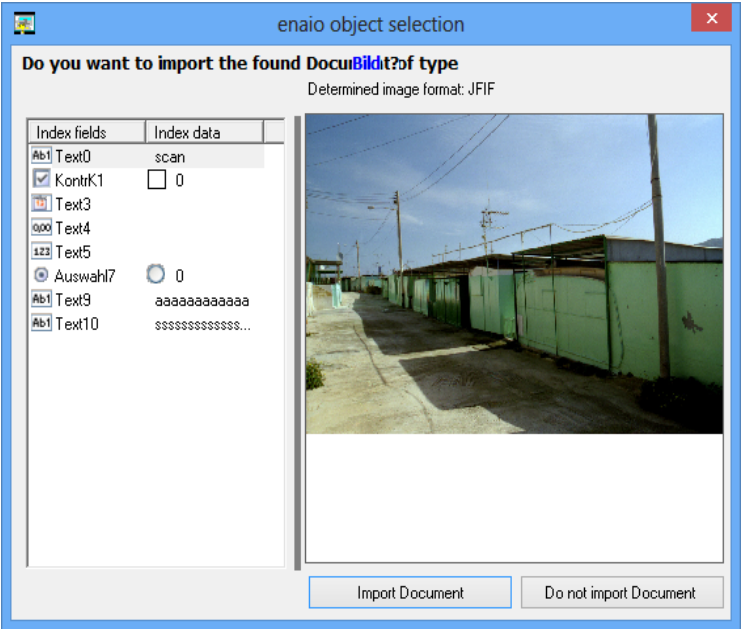
After starting the process, the data of the first found document are displayed.

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 an image, click the **Do not import document** button.

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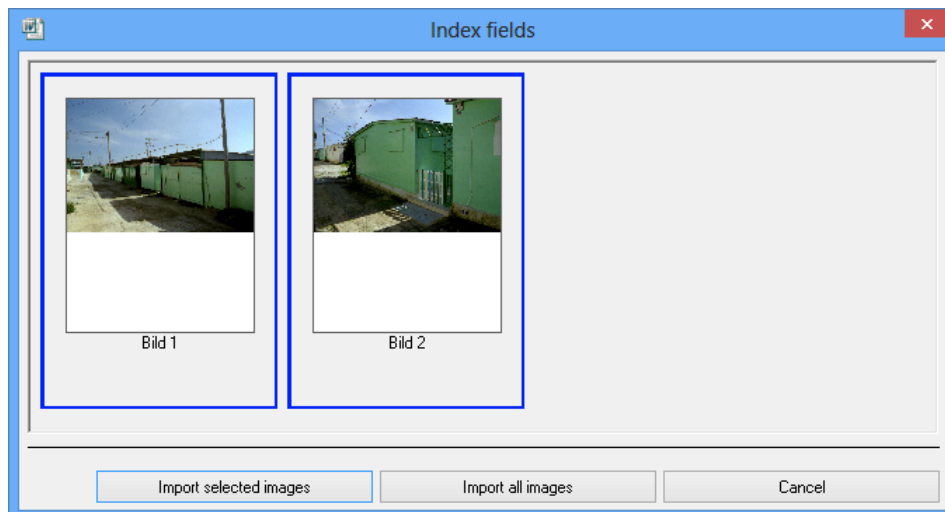
The image selection dialog shows previews of all images in the document. Right-click on an image to display it in its original size.

If you want to transfer all images, click the **Import all images** button. If you do not want to transfer all images, select a single image by clicking on it or select several images by clicking on them while pressing **Shift** or **Ctrl**.

Selected images are displayed with a blue frame.

Use the **Import selected images** button to add the selected images to the document.

Then the data of the next found document are displayed.

enaio® editor-for-office

The field editor enaio® editor-for-office for Word assists you in creating transfer fields. To start the field editor click on the dialog box launcher in the **Data** group.
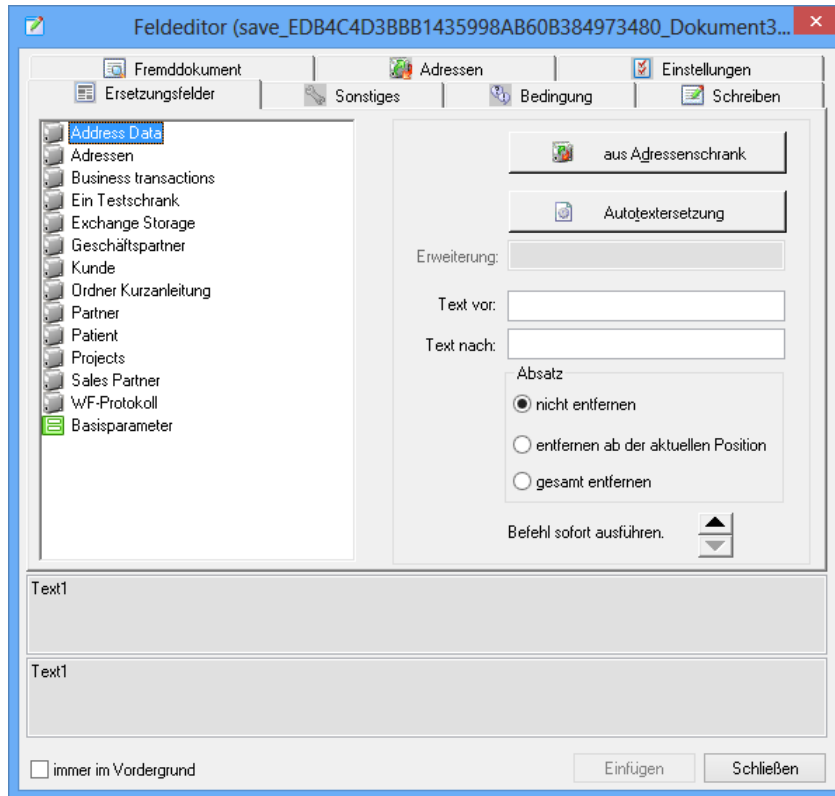
Further information on the field editor can be found in the 'enaio® data-transfer' handbook.

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

Changes

Check in

If you open a document for editing in the W-application, you must save it under the given name, close it, and check it back in to enaio® client. All these work items are performed just by clicking this button.

The W-application stays activated. You can enable the automatic action **Close enaio® document and activate enaio®** if enaio® client needs to be activated.

Check in and open

When you open a document for editing, it is checked out and marked as such. Other users can only open 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 work items are performed just by clicking this button.

Enable read-only mode

When opening a W-Document for editing, other users can only open a read-only copy. If you want to make it possible for 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 work items 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.

Disable 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 work items 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

Specify compression factor

Click on the dialog box launcher in the **Document** group to open the **Specify compression factor** dialog box, which is used to define 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.
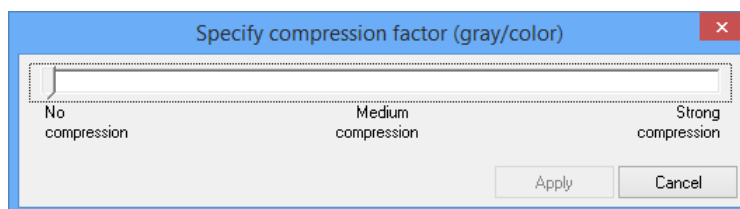
New

Word documents that have been created without using enaio® can be archived – either to the filing tray, an open folder, or a 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** section of the enaio® client settings area and activate the function **Use folders in desktop area as default folder**.

Click this button to open the destination folder selection dialog.
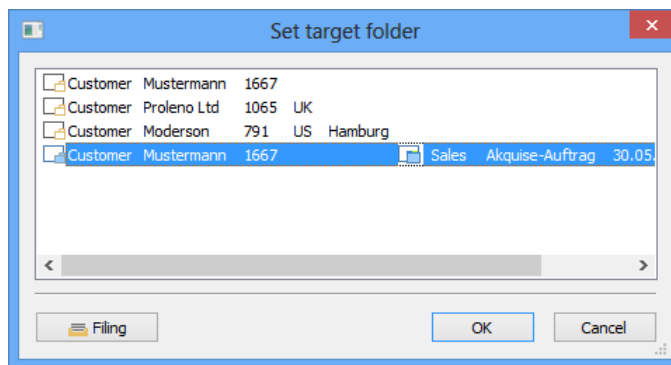
Folders currently open in enaio® client and the default folders are listed.

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

> It is possible to configure SQL queries with variables to automatically have a location determined and opened. A simple query can be performed using the configuration file.

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

Then use the type-specific index form to index the document.

The document is created in enaio®, checked in, 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.

> Before a document is inserted into enaio®, it must be closed by 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 you manage independently of enaio® contains the editing status you have recently saved.

In addition to inserting new Office documents, you can also add a copy of an existing enaio® document to the archive. To do this, open an enaio® document and click on 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.
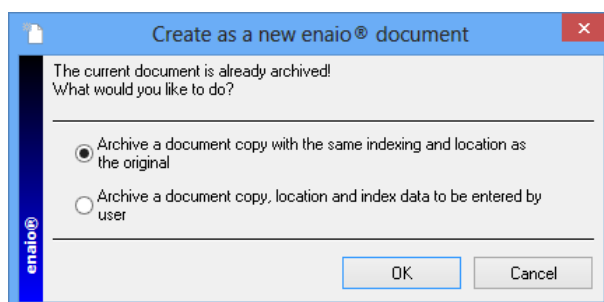
If you choose to create a copy with the same indexing as the original document, the system will verify whether the original's index form contains key fields. If this is the case, you will be prompted to change the key field values for the copy. If you do not change the key field values they will be automatically deleted. This guarantees that there are not several documents with the same key field values. If there are no key fields on the index form of the original document, the copy will be filed next to the original and can be immediately opened for editing.

Inserting a copy without the indexing and location of the original equates to inserting a new enaio® document.

Configure Insertion Options

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

To facilitate this process, you can create configurations to query the filing location or preset the indexing.

Preset the Indexing

If you activate the automatic action 'Preset index data with document properties', the index fields are preset with the data from the document properties.

This additionally requires assigning the document's property fields to index fields through registry entries (cf. '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 require a configuration file named `osutilinsertfilelist.xml` located 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 the configuration file `osutilinsertfilelist.xml` is copied to the `..\client32` directory. You can adapt this file using an editor and save it there or in the `..\etc` directory of the data directory.

The Configuration File

Content of the `osutilinsertfilelist.xml` file:

```
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. Cabinet, folder, register, and fields can be specified via the internal name (`internal_name`) or by the name (`name`) in the case of single language installations. Type the folder 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
<	<
<=	<=
=	=
!=	!=
>	>
>=	>=

> Operators must be entered in an XML-compliant format.

You specify a text via the attribute `utilquestion` and this text informs the user for example about the query being executed. The value of line 8 – here the wildcard `'*'` – is preset in the dialog's text box and stands, just like in enaio® client, for any number of any character.
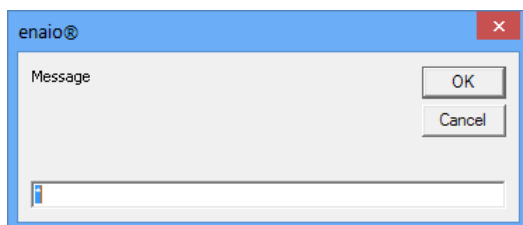
In the same way, a dialog for register queries is configured in the lines 11 to 15. As both dialogs look identical a significant user note is recommended.

Criteria for 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 you specify two fields (`FieldCondition`) for an object within a query (`ConditionObject`), 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.

The attribute `field_schema` and the value `ALL` in line 17 specifies that all folder fields are displayed in the hit list. Alternatively, you can define the fields.

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 fields for sorting. The field `folder field 1` has highest priority (`sortpos="1"`) and is sorted in descending order (`sortorder="DESC"`), the field `folder field 2` 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 identified and displayed.

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

> If no child objects are identified by the query, objects are flagged by a question mark ⁉. By clicking on an object, the user can issue a new query to identify and display child objects.

Use the child objects attribute `child_schema` to specify that all register types are identified. Specify `REGISTER` as the value.

Alternatively, in line 22 you can specify the desired register and the fields to be displayed (line 23). Fields are specified as above for the folder hit list.

If you use the `child_schema` attribute to specify that all registers are displayed, you can also use the value `ALL` via the field attribute `field_schema` to display all fields for 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 displayed.
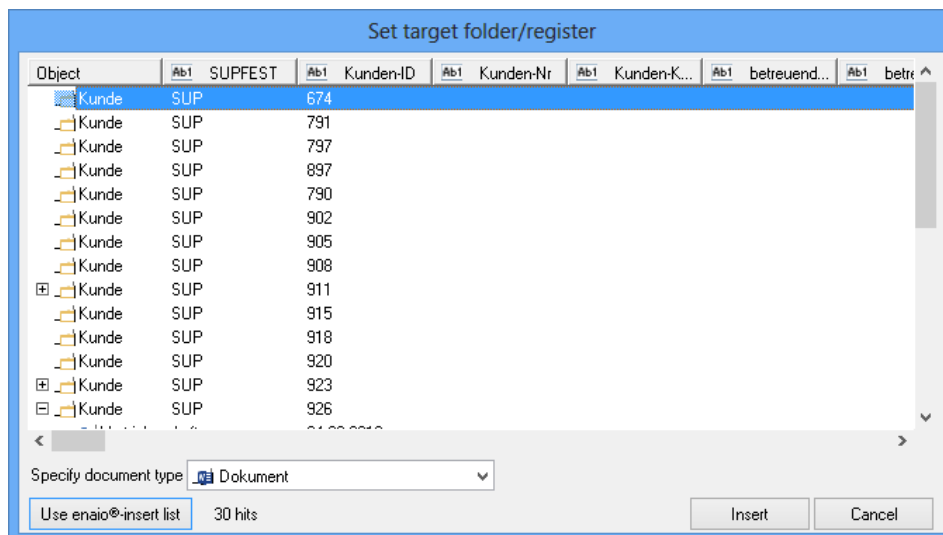
You can open folders and registers and select a location.

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

To determine the document type, open the index dialog, and save the document at the selected location, click the **Insert** button.

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

PDF (with PDF add-in)

This function corresponds to the **New** function, with the difference that the W-Document is converted into a PDF document via a Microsoft add-in.

This function is only available if the Microsoft add-in **Save as PDF or XPS** has been 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\'User'\ExportAsFixedFormatSettings
```

Set the value of the string `UseISO19005_1` to '0', activate PDF creation. PDF/A documents will be created by default.

Further strings that can be configured using this registry key are listed in the annex (see 'Configuration of the PDF Add-In').

XPS (with XPS add-in)

This function corresponds to the **New** function, with the difference that the W-Document is converted into an XPS document via a Microsoft add-in.

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

Color, Grayscale, Black-and-White Document

This function corresponds to the **New** function, with the difference that you create the document as an image document via enaio® archive print.

PDF Archive Print
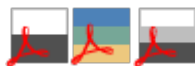
This function corresponds to the **New** function, with the difference that you create the document as a color, grayscale, or black-and-white document in PDF format via enaio® archive print.

PDF Servers

This feature corresponds to the **New** function, with the difference that you insert the latest document as a PDF document in enaio®.

The PDF document is generated via the corresponding 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 a reference (.os)

  A link to the document is created and inserted into an e-mail form of your default e-mail program.

- As an attachment

The document is inserted either in the application's format, as a TIFF file, or as a PDF as an attachment to an e-mail form of your default e-mail program.

- As a Zip archive

  The document will be additionally compressed.

As a link (.os)

When sending a W-Document to internal recipients, a link to the document is created and attached to an e-mail form of your default e-mail program.

The recipient can call up the document via the link if enaio® is installed on the workstation.

What is more, the dialog allows you to specify the document data you want to be inserted into the subject line of the e-mail:
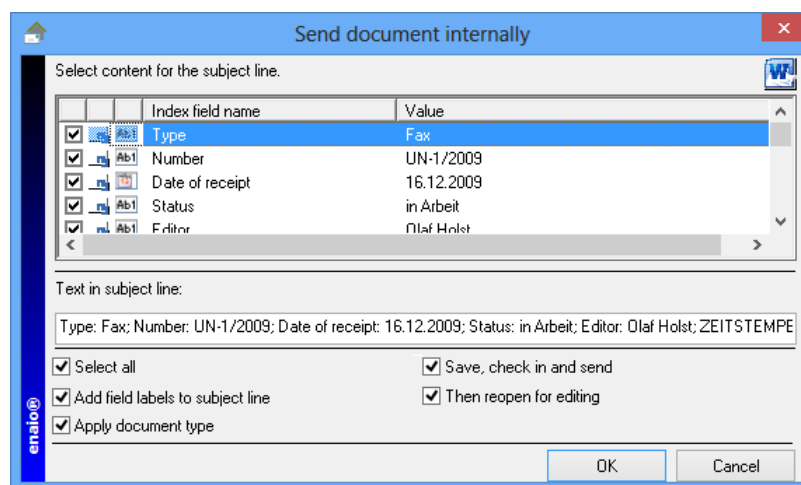
Select the index data to be added to the subject line or activate the **Select all** option. Use semicolons to separate multiple index data elements.

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

You can **Save, check in, and send** the document and **Then open for editing**. The document the user opens by clicking the link is the current version of the document saved in enaio®.

As an attachment

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

When **TIFF file** is selected as the sending format, enaio® printer will create a black-and-white image of each document page and attach it in TIFFG4 file format in the e-mail form of your default e-mail program. Rather than creating a batch of files containing only single pages you can also generate a multi-page TIFF file.

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

Depending on the installed printer drivers, other formats may be available.
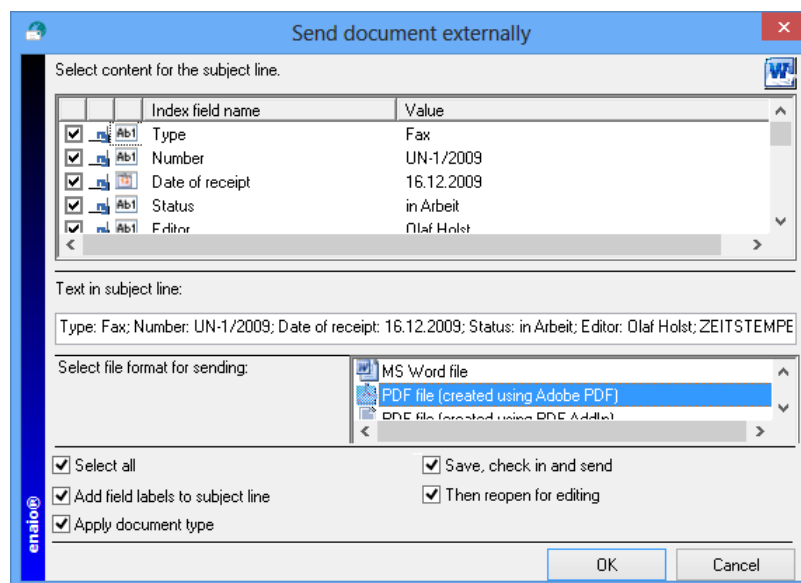
Select the index data to be added to the subject line or activate the **Select all** option. Use semicolons to separate multiple index data elements. This includes basic parameters.

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

You can **Save, check in, and send** the document and **Then open 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 a zip archive

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

When sending documents externally, 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 e-mail form of your default e-mail program.

Variant

Specify compression factor

Click on the dialog box launcher in the **Variant administration** group to open the **Specify compression factor** dialog box, which is used to define 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.
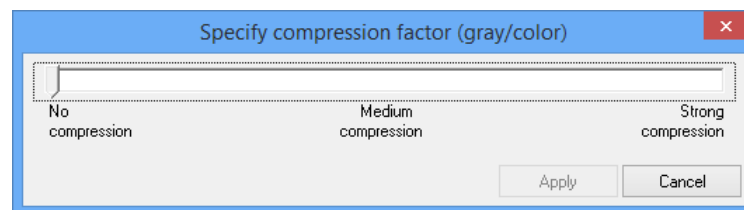
## New variant

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

Click on the **New variant** button to open the format selection and select which format – an image or PDF file – the W-Document will be converted into, and specify a compression factor, or simply save it as a new W-variant.

After choosing the format the variant administration will appear.
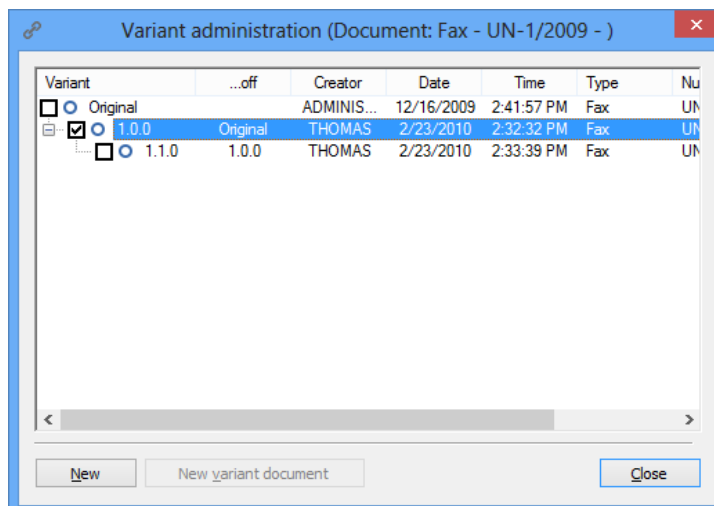
Click the **New** button to set the variant type.

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, activate the automatic action **Auto assign variant number**. The **Variant administration** dialog will not then open.

You can attach an Office document, which has not yet been filed in enaio®, as a variant of an opened enaio® document. To do so, activate the **Auto assign variant number** action. If you press the **New variant** button, a selection dialog opens which displays all currently opened W-Documents with the same format as the Office document you want to insert. You can therefore only add a Word document as a variant of a W-Document (as doc or docx), an Excel document as a variant of an Excel document (as xls or xlsx), etc. Select the W-Document to which you want to add the new variant and click **OK**.
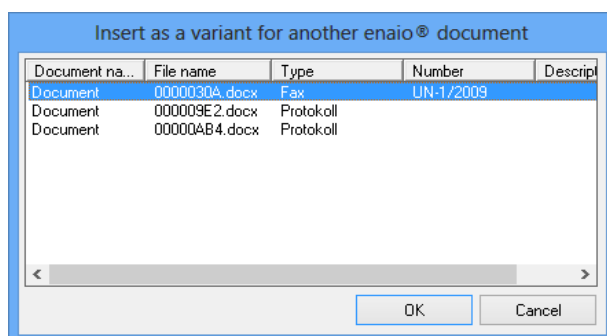
The variant is then automatically saved as the next free subvariant.

If no enaio® document is open, the selection dialog will not be displayed 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 corresponds to the **New variant** function, with the difference that the W-Document is converted into a PDF document via a Microsoft add-in.

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

XPS (with XPS add-in)

This function corresponds to the **New variant** function, with the difference that the W-Document is converted into an XPS document via a Microsoft add-in.

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

Color, grayscale, black-and-white document

This function corresponds to the **New variant** function, with the difference that you create the document as an image document via enaio® archive print.

PDF

This function corresponds to the **New variant** function, with the difference that you create a new variant of the document via enaio® archive print.

PDF (Server)

This feature corresponds to the **New variant** function, with the difference that you insert the latest document as a PDF document in enaio®.

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

Collaboration

Subscribe

You set up a subscription for the enaio® document in enaio® client.

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

Follow-Up

You set up a follow-up for the follow-up folder in enaio® client for the enaio® document.

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

Follow-up in Outlook

Provided that you are working with Microsoft Outlook, this function is used to create a link to the enaio® document and is inserted as an attachment to a new task form of Microsoft Outlook.

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

Tools

Location

Using this function you can switch to enaio® and open the folder where 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

Using this function you switch to enaio® and open the data sheet of the W-Document. 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.

Show index data

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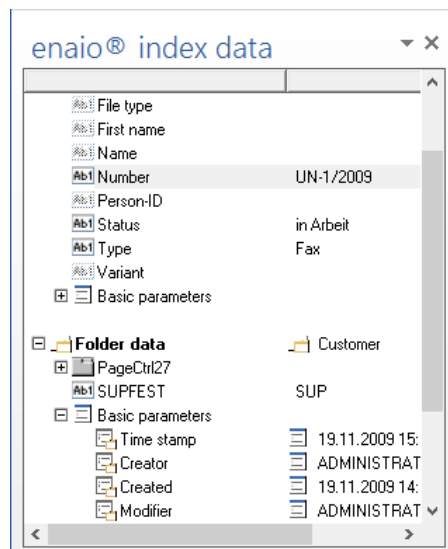
From this window you can drag index data line-by-line into your document. When dragging index data into the document, only these will be dropped. If an index field is dropped into the document, its field label and the index data value will be dropped, separated by a tabulator.

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 displayed as soon as an enaio® document is opened, activate the automatic action **Auto show index data**.
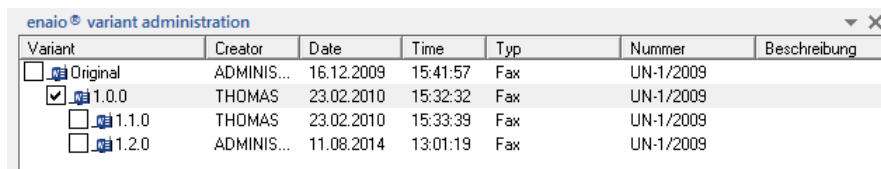
Variants

The **Variants** function enables you to compare an open enaio® document with one of its variants in the same format.

If you click this function, variant administration of the enaio® document opens in a window directly in the Office application. All main and subvariants of the enaio® document are displayed 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 by selecting the **Open variant** entry in the context menu.

Variant	Creator	Date	Time	Typ	Nummer	Beschreibung
Original	ADMINIS...	16.12.2009	15:41:57	Fax	UN-1/2009	
✓ 1.0.0	THOMAS	23.02.2010	15:32:32	Fax	UN-1/2009	
1.1.0	THOMAS	23.02.2010	15:33:39	Fax	UN-1/2009	
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 required variant with the **Compare document** entry in the context menu.

In Word, enaio® documents can only be compared with the format doc or docx; in Excel only with the format xls or xlsx. 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 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 blue-highlighted cell. You can make changes and save them, or insert 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 subvariant.

If you activate the **Auto show variant administration** action, the variant administration window is automatically displayed when a W-Document is opened.

You can use the 'Variants' function to display the variant administration in PowerPoint too, but comparing two variants is not possible.

Retention Times

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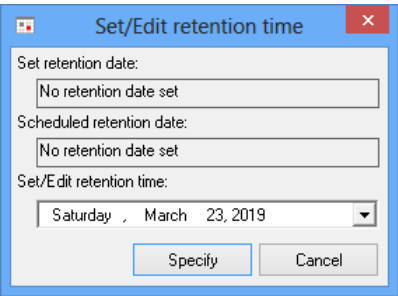
Create history entry

A dialog will open allowing you to type a text which will be added to the document's editing history.
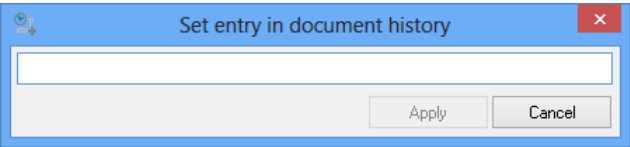
In enaio® client, this entry will be shown in the document's editing history.

History

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

You can drag and drop the content of history entries into the document line by line.

Editing history can be automatically displayed when opening an enaio® document using 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 you to type note text.
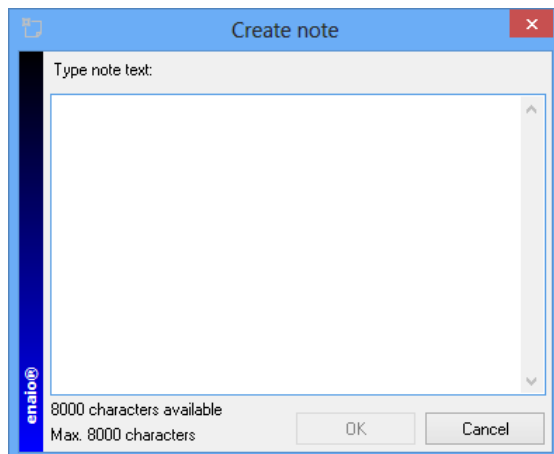
The document will then be flagged with the note icon in enaio®. During configuration, the document remains open in the W-application.

Notes

You can display the notes 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.

The notes area can be opened automatically when a document is opened using the automatic action **Auto show note area**.

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 notes area of an archive object.

Click on the button, select the desired archive objects in enaio®, and confirm the dialog.
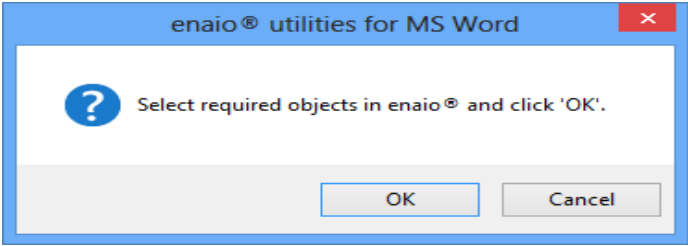
The selected archive objects will be linked with the current document.

Insert archive link

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

Click on the button, select the desired archive objects in enaio®, and confirm the dialog.
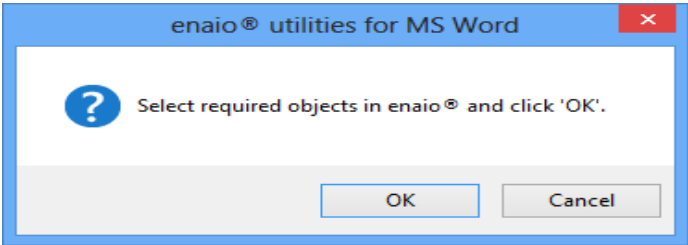
Respective links will be then inserted into the document.

Create Barcode

This function will open a dialog which is used to generate a barcode and add it to the W-Document at the current cursor position.
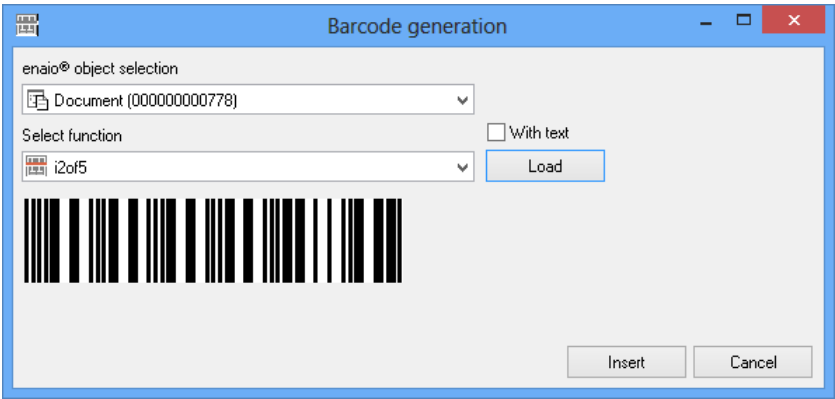
To do so, select the required document, register, or folder ID from the **enaio® Object selection** and then the desired barcode type from the **Function selection** area. You can use the checkbox **With text** beneath the barcode to display the associated text.

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

Insert the generated barcode as a graphic at the current cursor position in the W-Document by clicking the **Insert** button.

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.
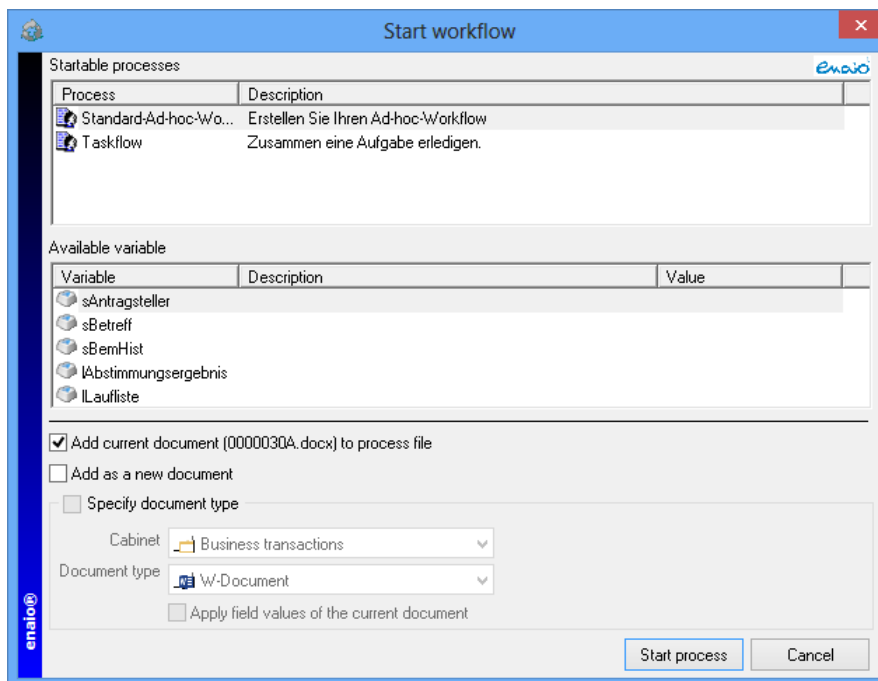
Favorites

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 File,Excel File, PowerPoint File

This feature enables you to 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 pages or other parts of them into your new Word document.

The name of the feature is adapted in each case to the Office application used: **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 execute the full text search. Which searches and combinations are possible depends on the indexing service which was integrated during the configuration of enaio® fulltext. Information about search options can be found in the 'Full Text Indexing' handbook.

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

The documents are displayed 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.
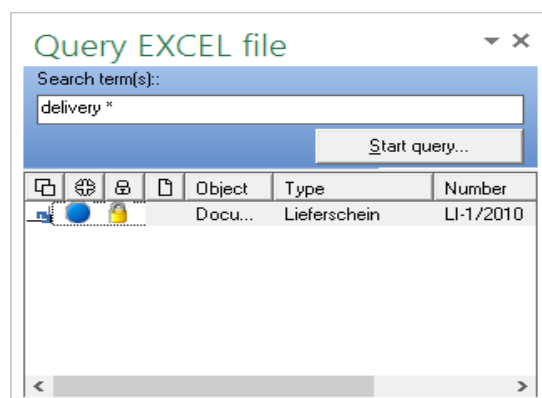
Double-clicking a hit list entry will open a preview of the selected document, from which you can select each previewed page.
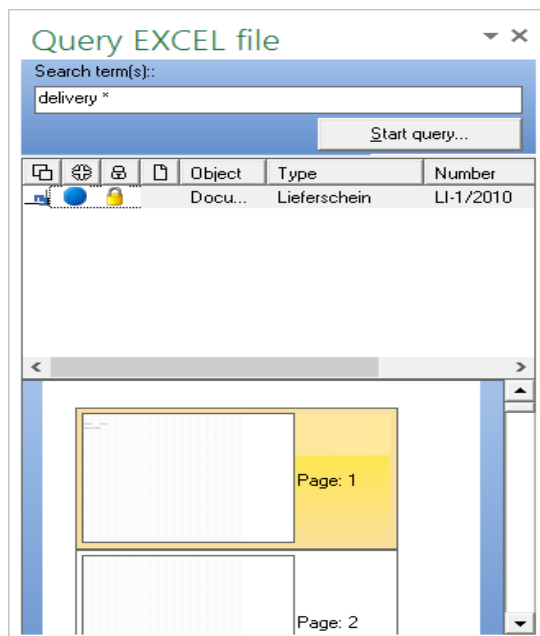
Hovering the mouse pointer over a previewed page will enlarge it, thus providing a better view of the page. Additionally press the plus or minus keys (**+**, **-**) to zoom in or out of the previewed page. Press **1** to maximize the preview window, and press **0** to reset the preview to its original size.

The **Show information** context menu entry in the preview can be used to additionally display the document's technical data, such as the number of pages.

Various options for inserting W-Document contents are available in the different Office applications:

Word Each page of a Word document administered in enaio® can be inserted as a text, as a document page, or as an image. Double-clicking inserts the pages with the **Text from file...** function as in Word. However, this function may cause formatting loss in the text, the header, or the footer. To avoid these formatting 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 By double-clicking, a worksheet of an Excel document administered in enaio® can be inserted as a normal worksheet. In case worksheets include diagrams, you must check these after insertion, as diagram data may have been adapted to the current worksheet. Alternatively, you can also insert a diagram as an image through the context menu.

PowerPoint By double-clicking, each slide of a PowerPoint presentation administered in enaio® can be inserted as a normal slide. Through

the context menu, you can also insert a slide as an image. When inserting a slide you can select 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 from Word documents, slides from PowerPoint presentations, or worksheets from Excel documents will be inserted through this function.

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

Image

This feature enables you to start a full-text search with enaio® office-utilities in order to transfer data from image documents, whatever their format.

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

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

The image documents found are displayed 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.
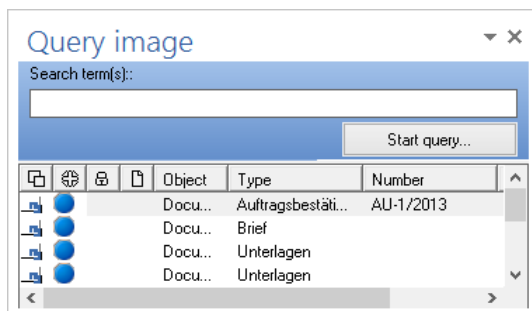
Double-clicking a hit list entry will open a preview of the selected image document, from which you can select each previewed page.
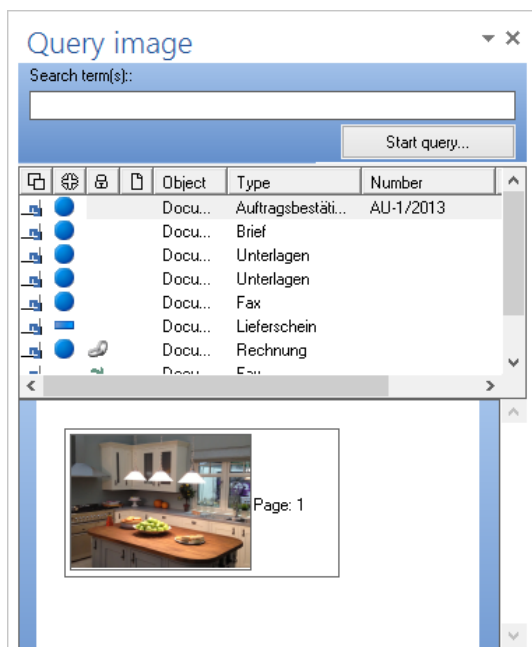
Hovering the mouse pointer over a previewed page will enlarge it, thus providing a better view of the page. Additionally press the plus or minus keys (**+**, **-**) to zoom in or out of the previewed page. Press **1** to maximize the preview and press **0** to return to the original preview size.

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

The selected image can be inserted into the document and moved to the desired place with the **Insert as image** entry from the context menu of the preview.

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

## The Configuration File 'osutilressourcendef.xml'

The full text search for image documents or W-Documents in enaio® can be limited to specific document types.

An XML file with the name `osutilressourcendef.xml` has to be created to do so.

> Please note that without the `osutilressourcendef.xml` configuration file, the functions Query Word file, Query Excel file, Query PowerPoint file, and Query image file are not available.

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

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

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

The possible structure of the XML file is described below:

```xml
<?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>
```

There are two types of resources 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='Objekttyp-ID'`) either globally for all applications (under the section `application='office'`) or individually for each application (e.g. `application='PowerPoint'`).

The object type IDs can be found out in enaio® client with the **Object information** context menu entry (bracketed value in 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 during full text searches.
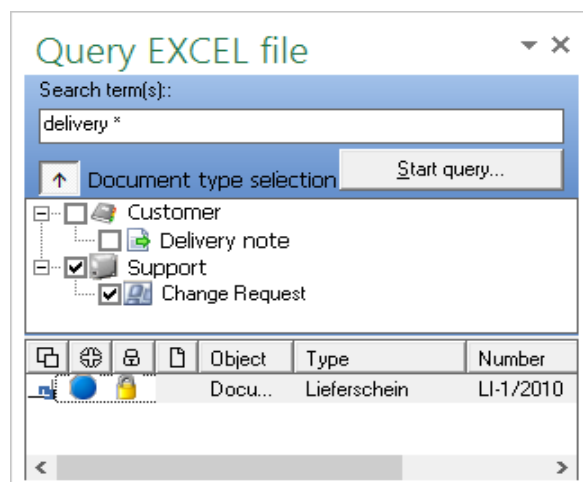
SQL Queries

Define

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

These queries can be integrated into the Office application via enaio® office-utilities and launched directly from 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.

You can also create queries for opening a folder which are executed automatically according to the **New** function, and therefore specify the location for this new document.

The **Define** button opens the configuration dialog with which you can create 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.
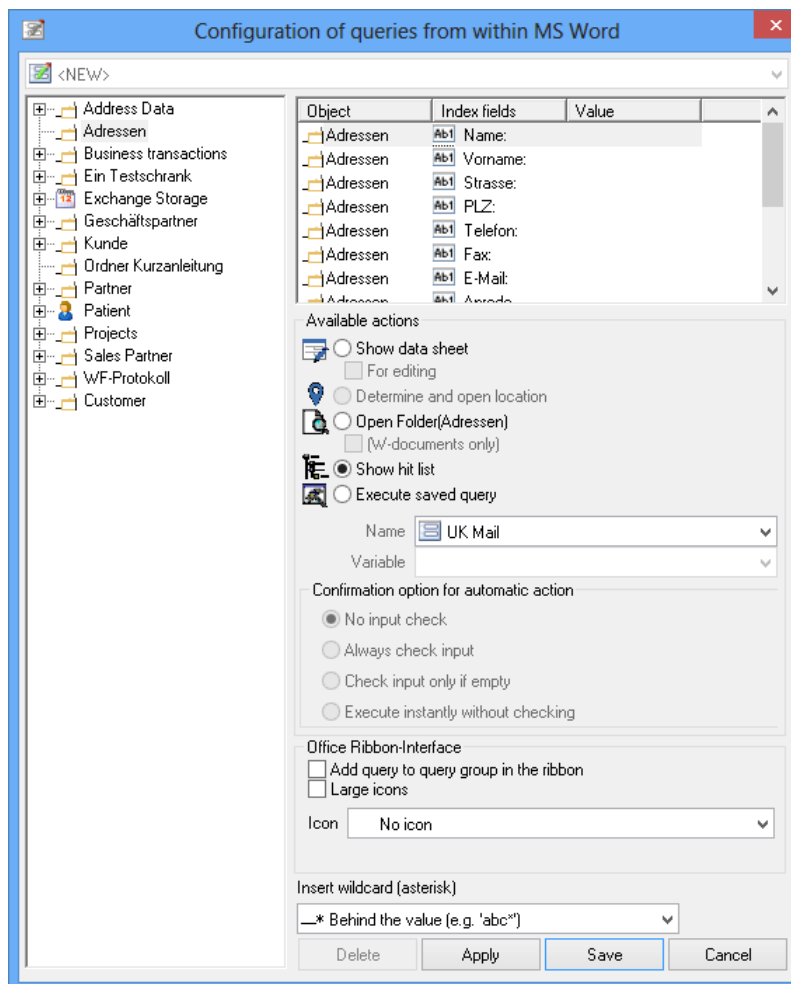
The left side of the configuration dialog lists all folder, register, and document types.

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.

When **Saving** the configuration you must specify a configuration name; the configuration dialog is closed. Clicking the **Apply** button will also save the configuration but the dialog will remain open.

Saved Queries with Variables Created in enaio® client

If you want to use queries with variables that have been saved in enaio® client, activate the **Execute saved query** option 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 to when performing a query.

You must specify a configuration name before you can **Save** the configuration.

Execute the query by opening the **SQL queries** list with all available queries with variables and by clicking on the required entry. If you have selected any text in the document, it will be assigned to the configured variable.

Create SQL Queries with Variables

The configuration dialog for SQL queries with variables is opened using the **Define query** entry 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	The document location is opened.
Open object	A folder or register will open showing their contents, whereas W-Documents will open for editing.
	Select the option **No input check** for opening a folder if you do not want the query automatically linked with the **New** function.
Show hit list	The hit list will open.

Also use the field **Insert placeholder (asterisk)** to specify whether and how the placeholder '*' is used.

You must specify a configuration name before you can **Save** the configuration.

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.

Folder queries are linked with the **New** function if you select one of the following confirmation options at configuration:

▪ **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 on 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 from version 2000.

Auto check in

Every time a W-Document is opened, it is checked out of the enaio® archive. 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 only open a copy of the document.

The automatic action **Auto check in** checks W-Documents in 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. The transfer fields in the Word document are replaced by 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 from 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

If you open enaio® documents in an application, for administrative purposes in the archive they are named with an ID. This name is also displayed in the title bar of the application. If you have opened multiple enaio® documents, they are difficult to identify using the ID. Therefore activate this automatic action to have the name of the document type and the ID shown in the title bar.

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

If you have opened multiple enaio® documents of the same document type, they are easier to differentiate if you show the index data in the title bar.

Auto show editing history

For each enaio® document, a document history is created automatically. 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 Word file list

You can find a list of recently opened files in the **File** menu of the Office application. enaio® documents are also listed here. But, after checking these documents in you cannot open them through this list. Therefore, it is 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 where the cursor jumps to when the document is reopened.

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 managed using 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 the document's properties fields to be assigned 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 preset with the content of a property field, you must assign the label of the index field as a value to the string of the property field.

Example:

Assign the `Editor` value to the **Author** string.

Each index field with the **Editor** label – irrespective of the selected document type – will then be preset with the relevant **Author** entry from the document properties.
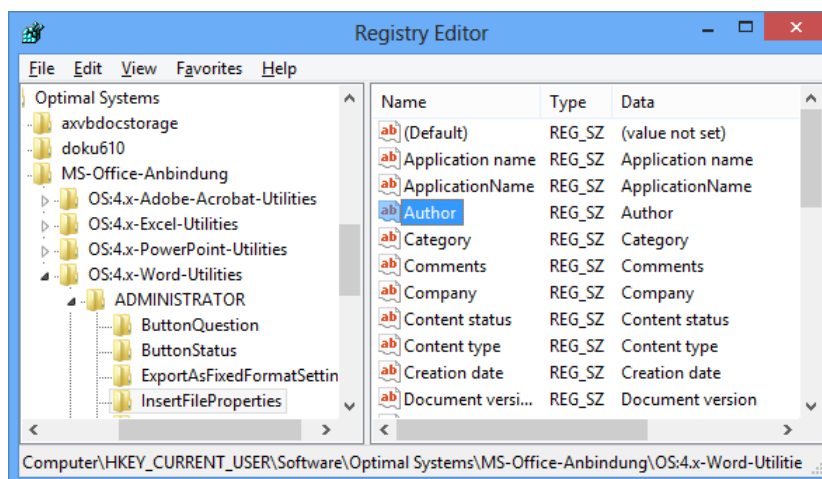
Automatic follow-up on creation

Archive documents created with enaio® office-utilities can simultaneously be set up as follow-ups.

If you activate this option, the follow-up configuration dialog box will open.
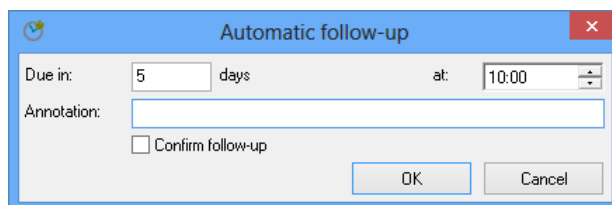
Enter the time when you want the document to be presented, optionally type an annotation, and specify if the follow-up data must be confirmed.

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

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

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 then open.

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 used files. It can be used to open the files from within the W-application.

> 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.

The Windows system tray offers another editing history. This one contains a list of all W-Documents from all W-applications for which you enabled the editing history.

Add new document to enaio®

Documents you create independently of enaio® in the W-application are immediately transferred to the archive by this automatic action.

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

Execute saved queries before 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. As it reduces the speed of enaio® office-utilities, we recommend deactivating speech recognition if it is not needed.

Close enaio® document and launch enaio®

When you close an enaio® document, the application you used to edit the document stays open. If you want to continue working with enaio®, you must activate enaio®. This function activates enaio® automatically after you have closed an enaio® document.

Control startup behavior

The loading speed of enaio® office-utilities depends on activated automatic actions and document security settings. Click on this action to open the **Control startup behavior** dialog box offering two vertical slider controls which are used to configure the document security and automatic action settings, directly affecting the loading speed of enaio® office-utilities. The two horizontal slide controls display the current and the new (estimated) loading speed.
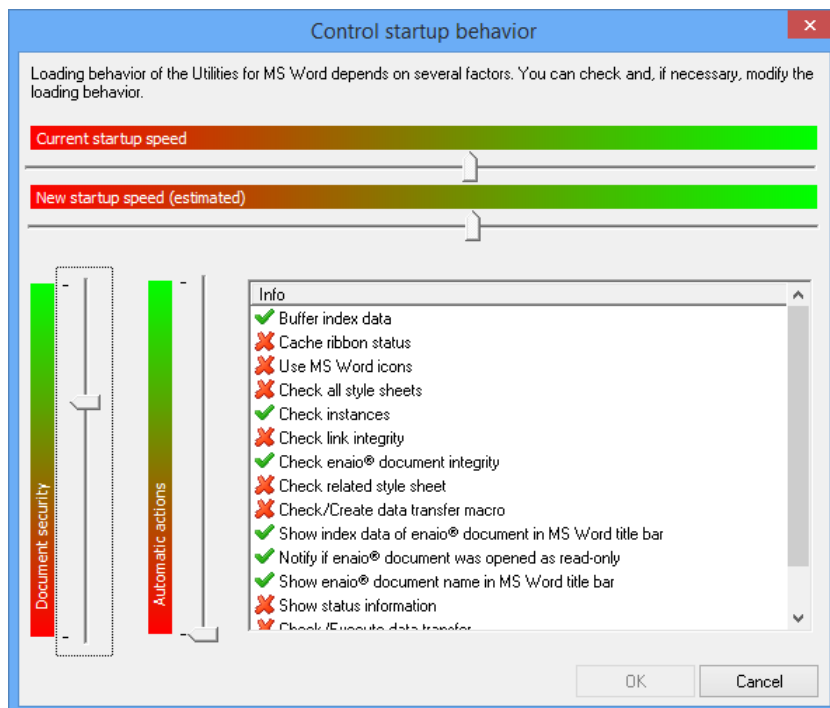
Language Setting

The required language is selected by clicking the 🌐▾ icon in the **Options** group.

German, English, and French are available.

Document security

You can define the settings for document security here.

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. If these links are found, you can choose to remove these links from the documents.

Buffer index data

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

Check link integrity

You can insert links to other enaio ®documents into the documents in the shape of files. Due to this function, such links will be checked when a document is opened. If a link 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 comparable to the **Check related style sheet** function, with the difference that not only assigned Word styles but also the Word default template `Normal.dot` are checked.

Check/Create data transfer macro

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

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

Keep the connection to enaio® open during the entire session

To enable data and document transfer to the enaio® system without any delay, the permanent connection to enaio® client can be kept open during the entire session.

Close the program 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 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.

Use 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

Activate this option to have the enaio® tabs be shown automatically on the ribbon as soon as an enaio® document is opened.

Additionally show enaio® utilities toolbar for Word

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.

Settings for the utilities toolbar for Word

This function offers the following settings for the utilities toolbar in Word. You activate the toolbar via the menu entry **Also show enaio® utilities toolbar for Word** in the document security group.

Use 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 utilities toolbar for Word.

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

Activate this option 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

When starting Word, the enaio® macro integrity is checked and, if necessary, the toolbar is reloaded, thereby reducing the starting speed of enaio® office-utilities.

Customize enaio® utilities

Using the **Customize enaio utilities** function, you can customize the **ENAIO** tab of your Office applications so that only the functions you need are displayed.

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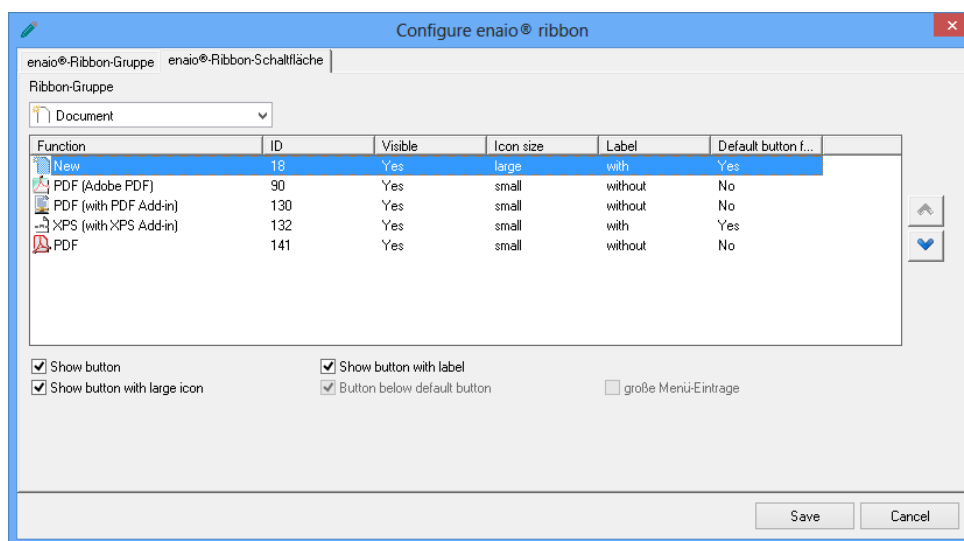
This function requires the system role 'Client: Save own settings' to be assigned to the user account and that enaio® client has been started before the Office application.

Indicate password to unprotect form

The **Indicate password to unprotect form** function enables you to execute data transfer to Word documents with form protection without disabling form protection before and enabling it again afterwards.

Before you import data into a Word document with form protection, open the **Indicate password to unprotect form** dialog by clicking on the function and enter the same password you used in order to enable form protection.
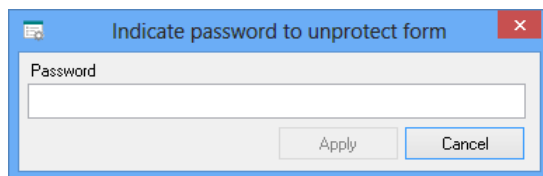
Click **Apply** to save the password. The password is encrypted in the custom properties of the Word document so it does not have to be entered again for the next data import.

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

As the form protection password is saved in an encrypted 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 **Jobstack** dialog provides you with detailed information on all actions that are carried out internally when a W-Document is opened and edited. This information may be of interest in case of errors or performance problems.
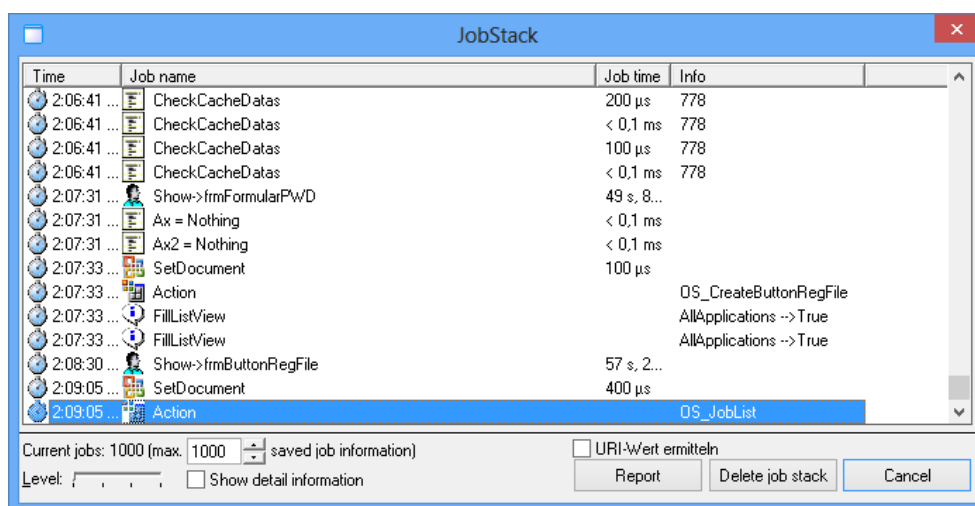
The last 1000 entries are displayed by default, older ones are deleted. To modify this number, type the desired amount of entries in the **Saved job info** text field.

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

To receive more detailed information, activate the **Show detailed information** checkbox.

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

The **Report** button writes the jobstack entries into a text file and opens them in your default text editor.

To delete the jobstack entries, 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.
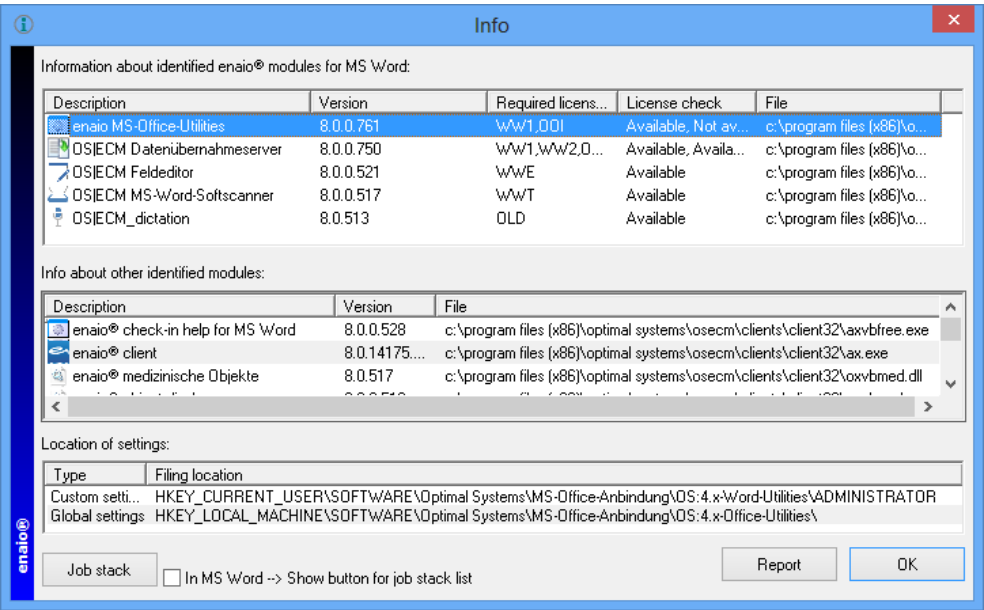
Help

The enaio® office-utilities help will open.

Keyboard Shortcuts

With only a few keystrokes you can easily run the enaio® office-utilities functions using keyboard shortcuts without the need for the mouse.

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

Data

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

Changes

Command	Combination
Check in	FDC
Check in and open	FD1
Reset	USR
Discard	USC
Enable read-only mode	LP
Disable read-only mode	LUP

Variant

Command	Combination
New variant	VAR
PDF (with PDF add-in)	VPI
XPS (with XPS add-in)	VXP
PDF	VSE
Specify compression factor	VCF

E-mail

Command	Combination
As a link (.os)	SIT
As an attachment	SET
As a zip archive	SZI

Document

Command	Combination
New	INS
PDF (with PDF add-in)	IPI

Command	Combination
XPS (with XPS add-in)	IXP
PDF	ISE
Specify 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
Show index data	SID
Variant administration	SVA
Retention times	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 add 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 Installation handbook.

The OPTIMAL SYSTEMS Toolbar

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

Button	Function
	Check in and open Use this function to allow other members of staff to access the most recent version of the W-Document, while 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
	Follow-Up A follow-up is set up for the document.
	Subscribe The **Subscribe** dialog for the document will open in enaio® client.
	Create history entry 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.
	New note The enaio® notes editor will open. It is used to add a note to the currently open W-Document.
	Notes If notes or links are assigned to the document, the note area is opened.
	New notes link A link to the current document will be created and added to the notes area of an archived object.
	Variants:
	New variant First a format selection dialog box and then the variant administration for the document will open.
	Insert as a new black and white variant First a format selection dialog box and then the variant administration for the document will open.
	Insert as a new grayscale variant First a format selection dialog box and then the variant administration for the document will open.
	Insert as a new color variant First a format selection dialog box and then the variant administration for the document will open.
	Specify compression factor Click on the dialog box launcher in the **Variant administration** group to open the **Specify compression factor** dialog box which is used to set the compression factor.
	enaio® archive print
	Create new enaio® document in black and white Using the enaio® archive print feature you insert the document as a black and white image document into enaio®.

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

Attachment

Configuration of 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	Specifies whether to open the file after exporting the contents. The default value is '0', i.e. the file will not be opened after export.
	OptimizeFor	Specifies 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. Set the value to '2' in order to create a bookmark in the exported document for each Word bookmark, which includes all

Application	String	Function
		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 into a PDF document or the 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 value is '1', i.e. any print areas set will be ignored when publishing.

Application	String	Function
	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 and its quality is suitable for this purpose. Set the value to '1' if the file is only needed for viewing on the screen.
	HandoutOrder	Specifies the order in which the handout is to be printed. The default value is '1', i.e. handouts will be printed displayed vertically. Set the value to '2' in order to print handouts displayed horizontally.
	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 information rights management (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 font is referenced, and the viewer's computer substitutes an appropriate font if the authored one is not available. The

Application	String	Function
		default value is '1', i.e. a bitmap will be included.
	UseISO19005_1	Specifies whether to either convert the W-Document into a PDF document or the 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 needed for viewing 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 into a PDF document or the PDF/A document. The default value is '1', i.e. PDF/A document will be created.
Publisher	Intent	Specifies the output quality of the exported file. The default value is '3', i.e. the publication is intended to be printed on a standard printer. '1'=smallest file size for on-screen viewing scenario, '2'=on-screen or printed from a desktop printer, '4'=submit the publication to a commercial press
	IncludeDocumentProperties	Specifies whether to include document properties in the exported file. The default value is '1' (enabled).

Application	String	Function
	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 into a PDF document or the 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 the Integration through 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 starting enaio® office-utilities is to be controlled through access rights on registry keys, it may be useful to change the default value in order 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_MASCHINE\SOFTWARE\OPTIMAL SYSTEMS\MS-Office-Anbindung`

Add the string `InstallDefaultValue` and set its value to '0' so that enaio® office-utilities is not launched if users do not have access rights to the strings of the registry key `install`.