

Please note:

This is an abridged version of the Digital Paper Enterprise
User and Publisher's Guide



Enterprise User and Publisher's Guide

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Interface Overview

The DigitalPaper XE browser-based interface is intuitive and easy to navigate. This section describes the DigitalPaper XE interface used to perform the tasks described in the sections above.

Page Layout

All pages have a primary navigation bar for site-level navigation. The navigational elements in the top bar are dependent on your role in the system as determined by the system administrator. Most, but not all pages, have a page bar directly below the primary navigation bar and an option bar followed by the content area. The figure below provides a sample of DigitalPaper XE's general site layout.

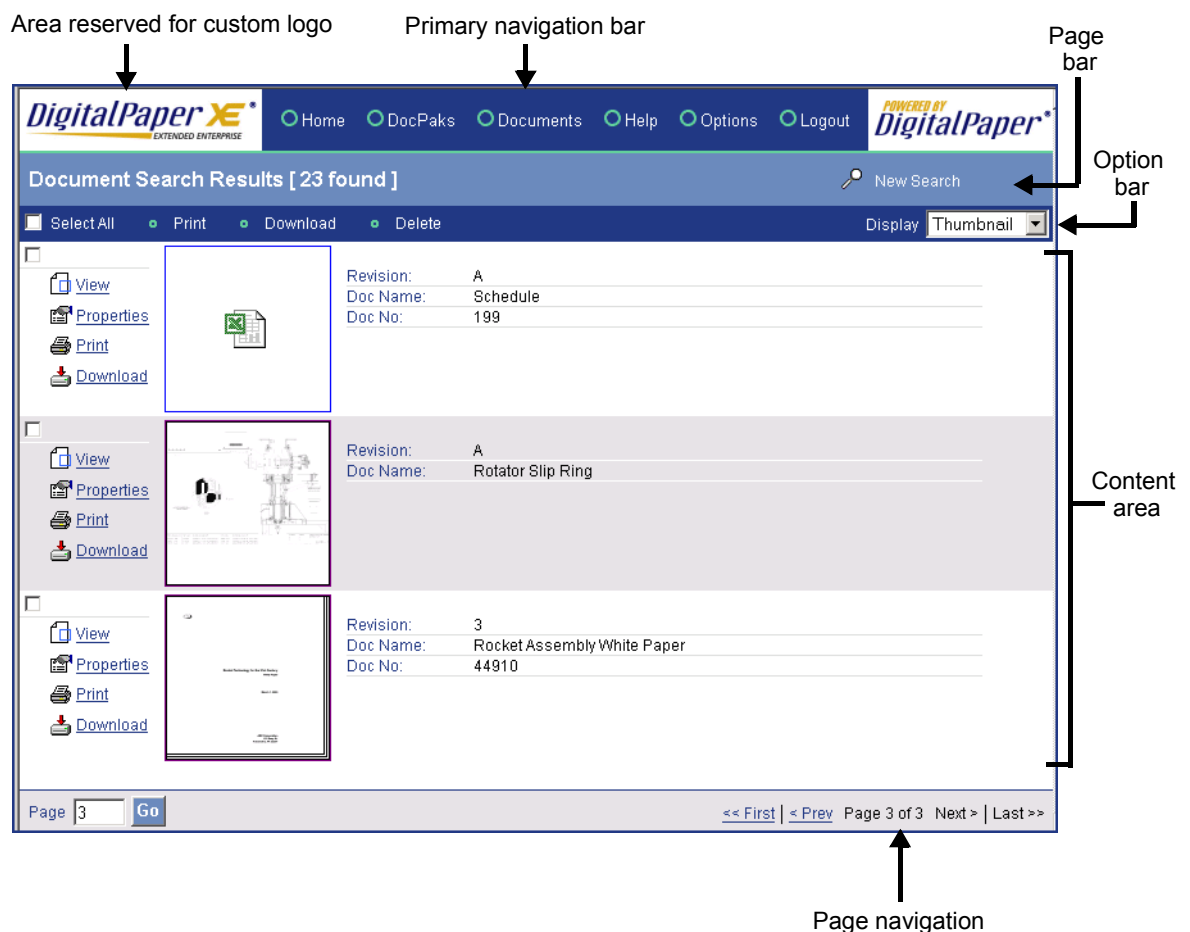


Figure 2-5: General page layout

Primary Navigation Bar

The top of every page in the application contains a navigation bar which is used to locate the functions you are interested in performing.



Figure 2-6: Primary navigation bar

The default options available to Enterprise Users are as follows:

- **Home**—Displays the DigitalPaper XE home page with the DigitalPaper XE logo (or your company’s logo), and copyright information. With the exception of the navigation bar, the remainder of the home page can be customized by the system administrator.
- **DocPaks**—Displays “My DocPaks” page (by default) with all the DocPaks you have created, or the “Received DocPaks” page if that was the most recent DocPak page you had displayed during the session. For more information, see [“Assembling and Receiving Business Packages”](#) on page 77.
- **Documents**—Displays the “Search for Documents” page described in [“Search for Documents”](#) on page 36.
- **Help**—Displays the *Enterprise User and Publisher’s Guide* in PDF format which is searchable by topic.
- **Options**—Allows you to update your account information, check a print job status, or download a print helper application.
 - **My Profile**—Displays a page that allows you to update your own account information, including password, name, and e-mail address. For more information, see [“Update Your Profile”](#) on page 33.
 - **Print Job Status**—Displays the status of all pending print jobs. For more information, see [“Check Print Job Status”](#) on page 74.
 - **Download DPPrint Setup**—Starts the download of the DPPrint Help application described in [“About DPPrint”](#) on page 196.
- **Logout**—Closes the current session and returns you to the User Login page. To enter the system, you must log in again.

Page Bar

Some DigitalPaper XE pages contain a page bar containing page-specific labels, navigational elements, and controls. An example of a page bar is displayed below.

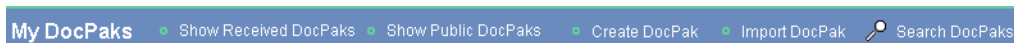


Figure 2-7: My DocPaks page bar example

The options available on the page bar are addressed in the [“Reference”](#) chapters that describe each applicable page.

Option Bar

Some DigitalPaper XE pages that display lists of items such as documents and DocPaks contain an option bar that allows for selection of all list items, as well as to perform actions such as print, download, or delete a selected item.



Figure 2-8: Sample option bar

The choices available in the option bar vary between pages and are addressed in the “Reference” chapters that describe each applicable page.

Note

The “Select All” option applies to the currently displayed content area, not to any subsequent page (if more than one).

Content Area

This area displays document search results, DocPak lists, forms, or the contents of a selected object (e.g., document properties, DocPak contents). The example below displays documents search results in “Condensed” mode (as opposed to the “Thumbnail” mode displayed in “General page layout” on page 25)

Document Search Results [183 found]						New Search	
<input type="checkbox"/> Select All <input type="checkbox"/> Print <input type="checkbox"/> Download <input type="checkbox"/> Delete						Display Condensed	
Document Attributes	Revision	Action					
<input type="checkbox"/> DOCNO: 25671 SHEET: 1 TITLE: BT60 Body Tube TYPE: Manufacturing MODEL: Nike Smoke	A						
<input type="checkbox"/> DOCNO: 25675 SHEET: 1 TITLE: Engine Hook TYPE: Manufacturing MODEL: Nike Smoke	A						
<input type="checkbox"/> DOCNO: 25676 SHEET: 1 TITLE: Decal (United States) TYPE: Manufacturing MODEL: Nike Smoke	A						
<input type="checkbox"/> DOCNO: 25677 SHEET: 1 TITLE: Decal (Access Panel) TYPE: Manufacturing MODEL: Nike Smoke	A						
<input type="checkbox"/> DOCNO: 25678 SHEET: 1 TITLE: BT60 Nose Cone TYPE: Manufacturing MODEL: Nike Smoke	A						
<input type="checkbox"/> DOCNO: 25679 SHEET: 1 TITLE: Med Eye Screw TYPE: Manufacturing MODEL: Sentry	A						

Content area

Figure 2-9: Content area example

The content area of an individual DocPak is displayed in resizable frames. The left pane contains links used to locate DocPak content and update information. When a link is selected from the left pane, the right pane displays the contents of the category selected.

The screenshot shows the 'My DocPaks' interface. At the top, there are navigation links: Print DocPak, Download DocPak, Copy DocPak, Activate DocPak, and Back to Search Results. Below this is a header for 'Proposal 339.B1' with a '5' in a box and a link to 'Add documents to DocPak from: Cabinet'. The main content area is divided into 'Header' and 'Documents' tabs. The 'Header' tab is active and contains the following form fields:

- * Name:** Proposal 339.B1
- Description:** Proposal to develop functionality extensions to Rotator Wing module
- Start Date:** 06/06/2003
- Expiration Date:** 08/29/2003 (with a radio button for 'Never Expire')
- Status:** Pending
- Public:**
- Change Notification:** Approve changes before notifying recipients; Automatically notify recipients after a change has been made
- Receive Email Notification:**

At the bottom of the form are 'Save' and 'Reset' buttons.

Figure 2-10: Framed content area (DocPaks page)

Page Navigation Options

Since a content area may contain large lists that require more than one page (e.g., documents, DocPaks, DocPak recipients), the “Go” button and links at the bottom of the page allow you to traverse to additional pages.

The screenshot shows a page navigation bar with the following elements:

- A text field containing 'Page 1' and a 'GO!' button.
- Navigation links: '<< First', '< Prev', 'Page 1 of 2', 'Next >', and 'Last >>'.

Figure 2-11: Page navigation options

The options available are as follows:

- GO!
 - **Page and Go**—Enter the page number in the text field then click the **Go** button to display the selected list for that page.
 - **First**—Displays page 1 of the list.
 - **Prev** —Displays the previous page of the list.
 - **Next**—Displays the next page of the list.
 - **Last**—Displays the last page of the list.

The page currently displayed and the total number of pages available are displayed at all times (e.g., 3 of 6 displayed) indicates you are currently viewing page 3 out of 6.

What’s Next?

This concludes the introduction to DigitalPaper XE. Go to [Chapter 3: “Getting Started”](#) to begin the “Quick Tour” chapters that provide the procedures for performing the tasks described in this chapter.

Enterprise User/Publisher Home Page

Once you have logged in (if applicable), your home page appears as shown below.



Figure 3-2: DigitalPaper XE home page

1. You have the following options from this page:
 - **Search the Document Repository**—Perform a simple search by attribute label, or an advanced search of the entire DigitalPaper XE document repository by cabinet, document number, revision level, or any other document attribute. Once found, document(s) can be reviewed, marked up, sent to other DigitalPaper XE users, printed, or downloaded. For instructions on searching for documents, go to [“Working with Documents”](#) on page 35.
 - **Create, View, and Search for Saved Document Packages**—Search for and view the contents of saved DocPaks, create new ones, publish them for viewing by other DigitalPaper XE users, receive DocPaks, or delete them. The documents referenced within DocPaks can be reviewed, marked up, sent to other users, printed or downloaded. For instructions on how to perform these tasks, see [“Assembling and Receiving Business Packages”](#) on page 77.
 - **Update Your Profile or View a Print Job Status**—Go to [“Update Your Profile”](#) on page 33 to modify your account information.

Download the DP Print Helper Application (Netscape Users Only)

If you are using Netscape Navigator 6 or 7, you must download the DP Print Helper application from the User Options page, then run the downloaded executable. If you do not, you will not be able to perform client-side printing, copy documents to the clipboard, or print a selected area from the Viewer as described in [Chapter 4: “Working with Documents”](#).

If you are using Internet Explorer, the system will automatically perform the download the first time you attempt to perform the procedures listed above.

For more information, see [“Downloading DP Print”](#) on page 196.

Search for Documents

Documents stored in the DigitalPaper XE repository are indexed so you can perform searches based on each document's attributes. If you do not know the document's attributes, you can search one or all cabinets within the repository, search by a partial list of known attributes, or search using wildcards.

To search for one or more documents in the DigitalPaper XE repository, perform any of the search methods presented in the sections that follow.

Method 1: Perform a Simple Search

Perform a simple search of the DigitalPaper XE document repository from the Home page by doing the following:

1. If the Home page is not currently displayed, click the **Home** link from the Navigation bar at the top of the window.

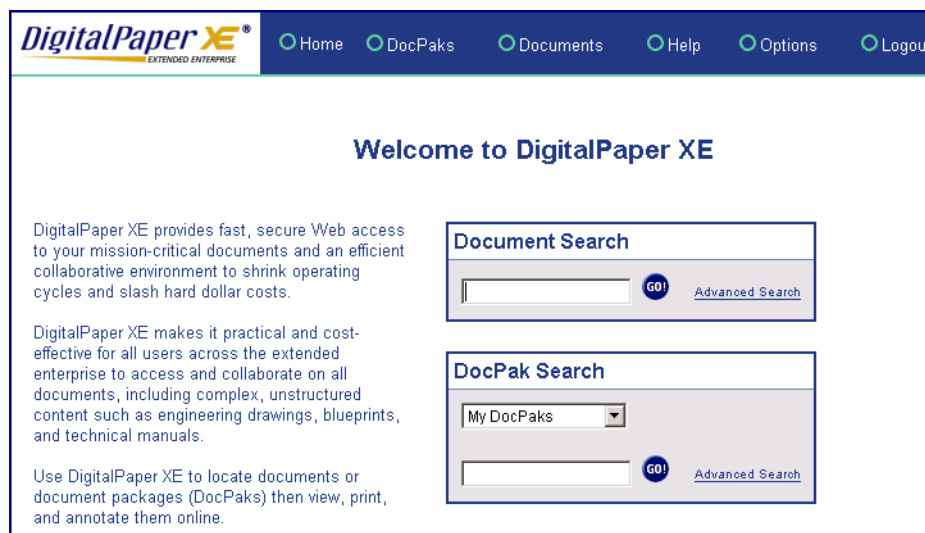


Figure 4-1: DigitalPaper XE home page

- In the Document Search text field, enter the value of the primary attribute assigned to the document for which you are searching (e.g., if searching for a document number, you would enter that number).

Tip

Utilize the search operators (e.g., * ? | < > <= => -) described in “[Search Options](#)” on page 131 to perform searches on attributes based on a partial entries, perform OR searches, search for a range of values, or search for values that are greater than, less than, or equal to the entered value.

- Click the **Go** button.
2. If one document is found, it will be displayed in the Viewer as described in “[View a Document's Image](#)” on page 41. If multiple documents are found, they will be displayed in the Search Results page as described in “[View Search Results](#)” on page 39.

Method 2: Perform an Advanced Search

There are two ways to access the Search for Documents page that lets you perform an advanced search.

1. Do one of the following:
 - A. From the Home page, click the **Advanced Search** link located in the Document Search area.

OR

- B. Click **Documents** from the Navigation bar at the top of the window.
2. The Search for Documents page appears. Note that the figure below shows the minimum number of search criteria (e.g., Document Revision and Revision) that will appear on this form. Other search criteria—such as Document Name, Document Number, Model, etc.—may appear depending on how the DigitalPaper XE system was configured by the administrator.

Figure 4-2: Search for Documents

3. Conduct your search by completing the Search for Documents form with as much information as possible.
4. See “[Search Examples](#)” below for examples on how to conduct a search.

Search Examples

Below are sample methods for performing both general searches as well as refined searches.

Method 1: Search for all Documents

1. Select **All** (to search the entire repository) or select a specific cabinet (e.g., Engineering, Manufacturing, Transportation, Utilities) from the Select Cabinet pull-down menu.
2. Skip the section labeled: “Fill in one or more of the following fields.”

3. Disregard the “Type of search” options since no fields were completed.
4. If desired, set any of the following optional display settings (please note the settings which are recommended below). Otherwise, go to the next step.
 - Enter the number of results you want the system to display on the Search Results page.
 - **(Recommended)** Since you are searching for all documents within a repository or cabinet, for performance reasons, set “Display results list as” to **Condensed**. The results will be displayed without a preview image of the document, thus search results for a large number of documents will be returned faster.
 - **(Recommended)** Since this type of search may return a large number of documents, deselect the “Include archived documents” checkbox to view only the most current documents.
 - Ignore the “Automatically view if only one result is found” since in most cases there will be more than one document returned for this type of search.
5. Click **Search**. The Search Results page will appear with the collection of documents for the entire repository or the selected cabinet. For more information, see “[View Search Results](#)” on page 39.

Method 2: Perform a Refined Search

1. From the Search for Documents page, select the desired cabinet (e.g., Engineering, Manufacturing, Transportation, Utilities) from the “Select Search Cabinet” pull-down menu.
2. In the “Fill in one or more of the following fields” section, enter as much information as possible about the document’s attributes in the fields provided.

The screenshot shows the 'Search For Documents' form. At the top right, there is a 'Select Cabinet:' dropdown menu with 'Engineering' selected. Below this is a section titled 'Fill in one or more of the following fields:' with a hint: 'Hint: 123* finds all documents starting with 123'. The form contains several input fields: 'Drawing Number' with the value '25*', 'Revision' with the value 'A', 'Title' (empty), and 'Sheet' with the value '1'. Below the input fields are radio buttons for 'Type of search' (Match Any Field and Match All Fields, with Match All Fields selected) and 'Display results as' (Condensed and Thumbnail, with Condensed selected). There is a text input for 'Number of results per page' with the value '10'. At the bottom, there are two checkboxes: 'Include archived documents' (unchecked) and 'Automatically view if only one result is found' (checked). A 'Search' button is located at the bottom center of the form.

Figure 4-3: Search Results page with search criteria entered

Tip

Utilize the search operators (e.g., * ? | < > <= => -) described in “[Search Options](#)” on page 131 to perform searches on attributes based on a partial entries, perform OR searches, search for a range of values, or search for values that are greater than, less than, or equal to the entered value.

3. Select one of the following:

- **Match Any Field** to return all documents that match any of the criteria entered in the attribute fields.

or

 - **Match All Fields** to return documents that exactly match the criteria entered in all attribute fields,
4. If desired, set any of the following optional display settings. Otherwise, go to the next step.
 - Enter the number of results displayed in the Search Results page.
 - Select the display results as either **Thumbnail** to display a preview of the image with the search results or **Condensed** to display the results without the preview image. If you believe a large number of documents may be returned, the latter selection is recommended.
 - Select the “Include archived documents” checkbox if you are interested in viewing all document versions; if you are only interested in the most current version of a document, it is recommended you deselect this checkbox.
 - If you are searching for a single document and you wish to bypass the Search Results page to view its contents with DigitalPaper XE’s viewing tool, select “Automatically view if only one result is found.” For more information on how to use the viewing tool, see [“View a Document’s Image”](#) on page 41.
 5. Click **Search**. The Search Results page described below will appear.

View Search Results

The Document Search Results page displays one or more documents which match your search criteria.

Note

Depending on how the system was configured, some attributes associated with a document may not be displayed in the Document Search Results page. To view additional attributes (if any), see [“View Document Properties”](#) on page 68.

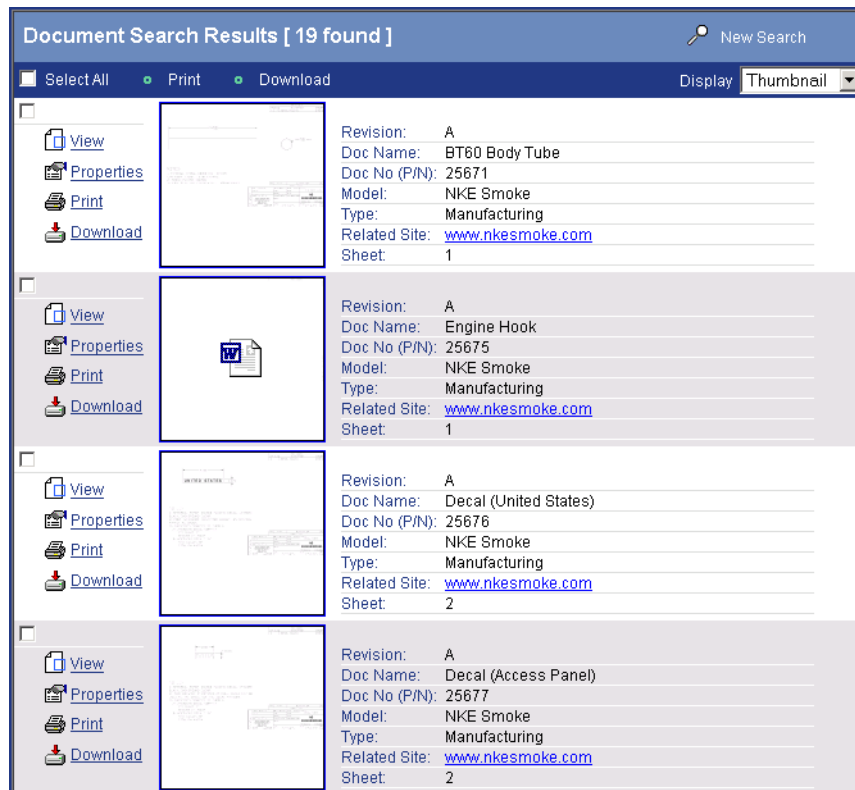


Figure 4-4: Search Results (Thumbnail view)

Note

If the document was imported as a non-native format, the icon associated with the file's MIME type will appear in the area reserved for the thumbnail image (e.g., Microsoft Visio icon).

- To further refine your search, click the **New Search** link in the Document Search Results page bar, then repeat the steps listed in this section.
- If satisfied with the search results, go to [“Options from the Search Results Page”](#) below.

Options from the Search Results Page

When satisfied with the search results, you have the following options from the Search Results page:

- View a document's image.** For more information, see [“View a Document's Image”](#) on page 41.
- Mark up a document with text and graphics.** For more information, see [“Annotate a Document”](#) on page 48.
- View a document's properties (attributes, revision history, saved annotations).** For more information, see [“View Document Properties”](#) on page 68.
- Print a document.** For more information, see [“Printing a Document”](#) on page 72.
- Download a document.** For more information, see [“Download a Document”](#) on page 75.

View a Document's Image

To view the image associated with a document, do the following:



1. Left-click the **View** link, icon, or the thumbnail image associated with the document (if displayed). Depending on the document's file type, one of the following will occur:
 - A. If the file was imported as a native file that is not supported by the Viewer, you will be prompted to download the file to your computer. For more information on file download, see ["Download a Document"](#) on page 75.
 - B. If the file type is supported, a **Loading...** message may appear, followed by the document being displayed in the Viewer.

Loading..

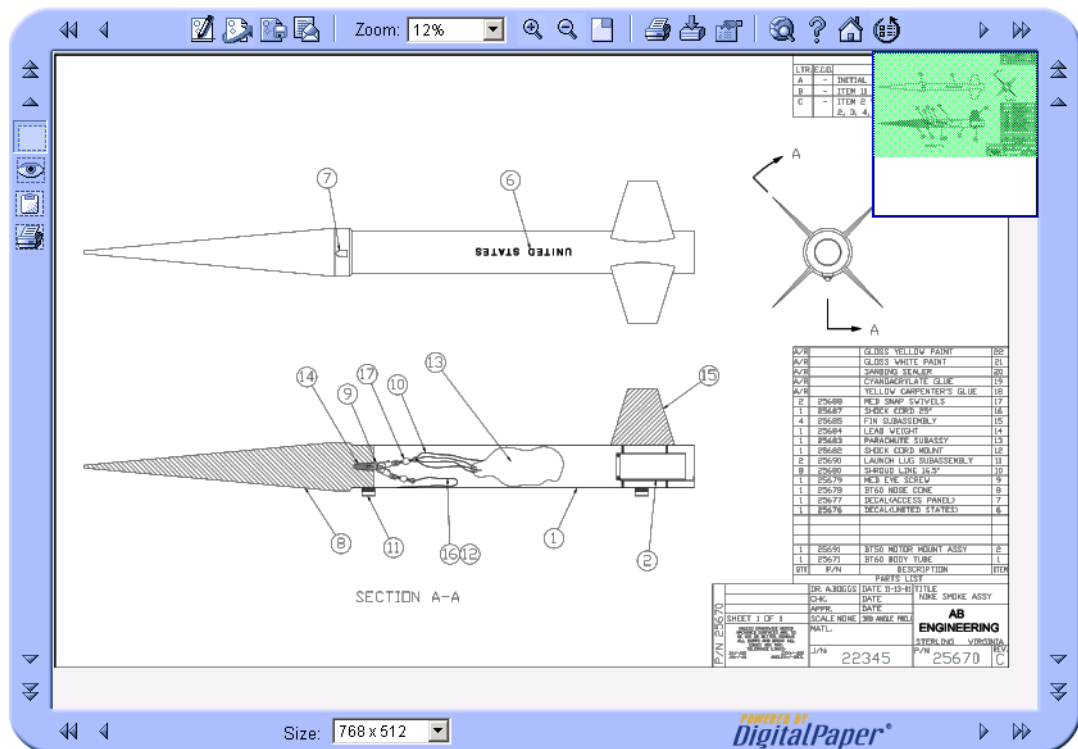


Figure 4-5: Viewer (single page document)

Note



If needed, use the Zoom menu or zoom buttons to achieve the desired magnification of the image.

- C. If the file imported is supported by the Viewer, and consists of multiple pages, a “table of contents” will appear in the left pane; the Viewer displaying the first page of the document will appear in the right pane.

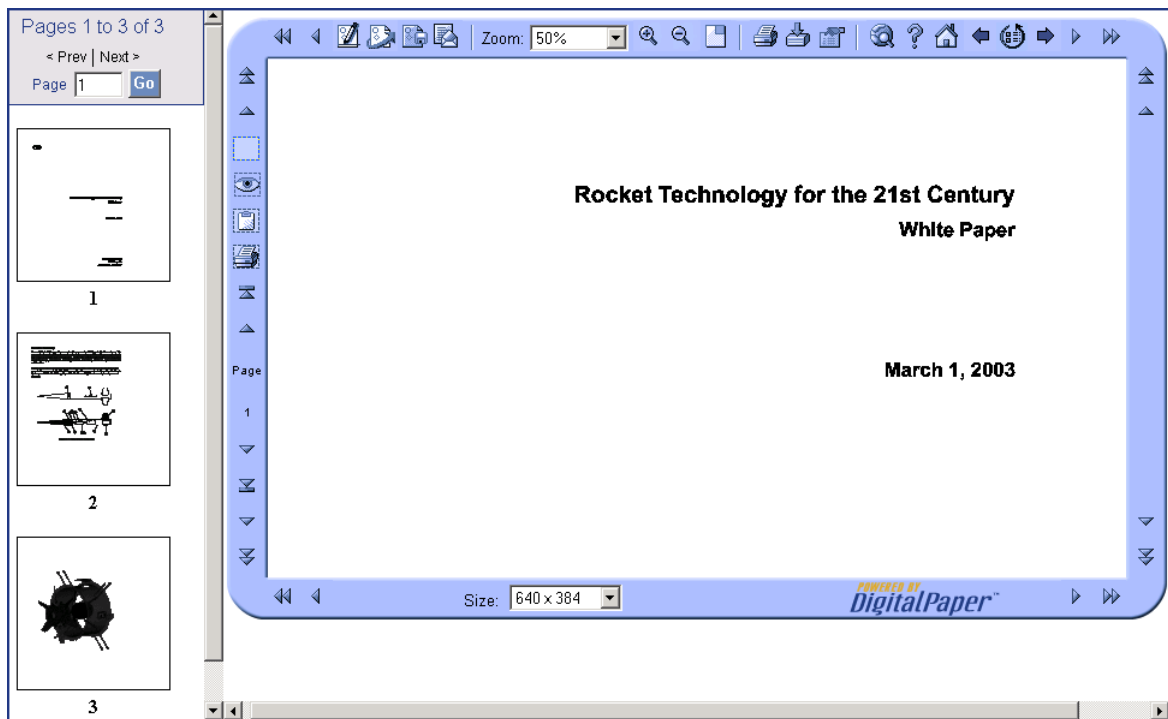


Figure 4-6: Multi-page document in the Viewer

- To display different pages of a multi-page document, scroll through the table of contents (or Page List) in the left frame then click a thumbnail to display that page. You can also enter a page number in the text box and click the **GO!** button to display the selected page. Note that the Prev and Next links in the Page list are for navigating through the set of thumbnails displayed, not each page of the document. The arrows that surround the displayed page number on the left edge of the blue Viewer frame may be used to navigate through the individual pages.
- 2. To resize the frame size of the Viewer, select a new option from the **Size** menu at the bottom center of the Viewer frame.

Navigate an Image in the Viewer

There are multiple options for navigating the image. This section describes the methods for panning the image as well as using the Bird's Eye View feature to view the areas of interest. With the document displayed in the Viewer, perform each of the following functions.

Panning

To move through the displayed document while maintaining the selected zoom level:

1. Click any of the single arrow buttons located on the corners of the Viewer to move the document 128 pixels (.853 inches) in the arrow's direction (i.e., up, down, left, right).



- Click any of the double arrow buttons located on the corners of the Viewer to move the image the distance equivalent to the size of the Viewer window (i.e., one frame) in the direction of the selected double arrow (i.e., up, down, left, right).
- Go to “Bird’s Eye View” below to utilize a different technique for navigating through an image.

Bird’s Eye View

The Bird’s Eye View lets you quickly navigate to different parts of the drawing by selecting an area of interest from a dynamic thumbnail image.



- If not enabled, click the **Bird’s Eye View** button to place a dynamic thumbnail image of the document within or around the Viewer frame.

Note

Although the Bird’s Eye View is displayed in the top-right area of the Viewer in this guide, the system administrator may configure the Bird’s Eye View to appear in one of several different locations that falls just inside or outside of the blue Viewer frame.

The green-shaded rectangle within the Bird’s Eye View thumbnail denotes the area of the document currently displayed and is therefore not selectable.

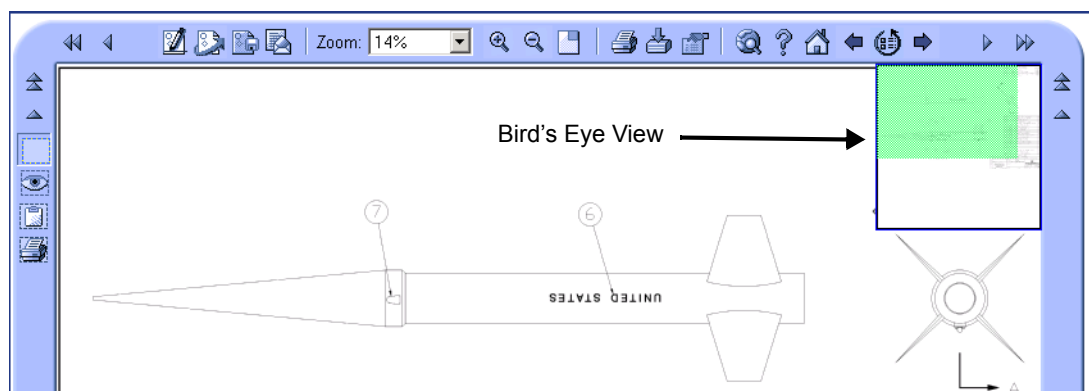


Figure 4-7: Bird’s Eye View

- With the cursor inside the Birds Eye View thumbnail but **outside** the shaded green rectangle, click the area of the document to be displayed. In this example, the area of the drawing that contains the document’s attributes (i.e., the lower right-hand corner) is selected for display.

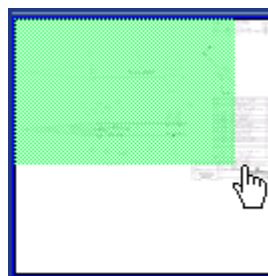


Figure 4-8: Click an area inside the Bird’s Eye View

The image redraws with the selected area displayed in the center of the Viewer. Notice in the Birds Eye View that the green rectangle covers the area currently displayed in the Viewer.

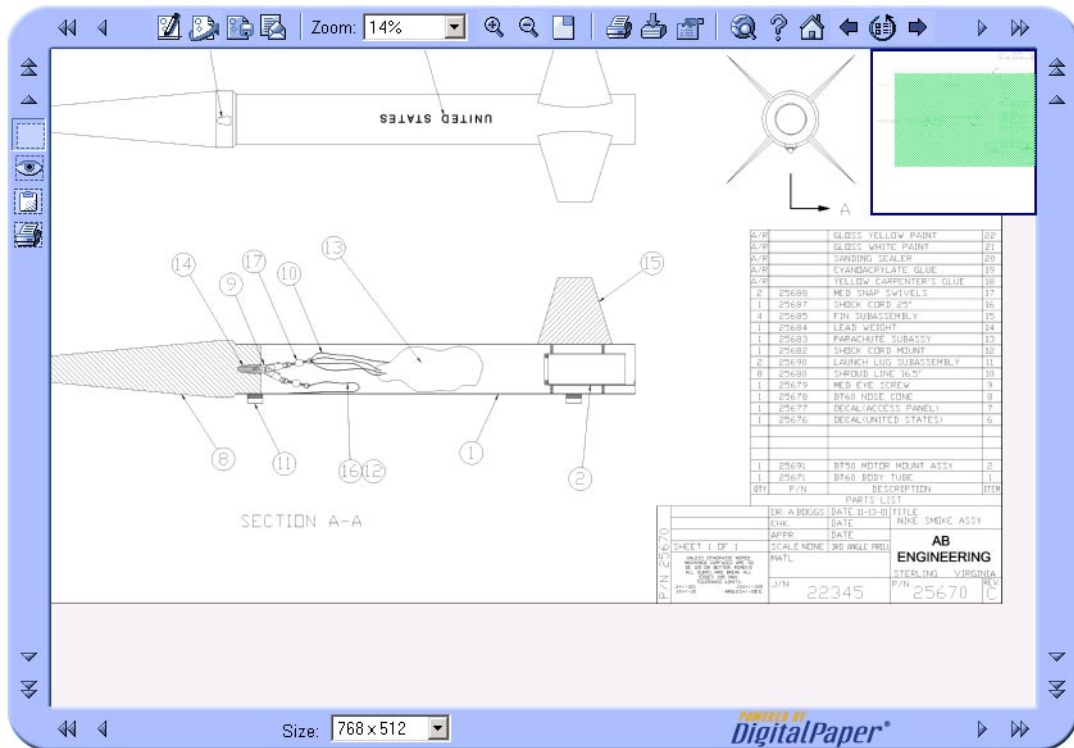


Figure 4-9: Image redrawn

Note

You may hide the Bird's Eye View at any time by clicking an enabled Bird's Eye View button.

Zoom to a Selected Area

To magnify an area of an image:



1. Click the **Define Area** button.

2. Move your cursor over the image. When you move your cursor over the image, the cursor turns into a green cross-hair. Click the mouse where you wish the selection area to begin, hold the left mouse key down and draw a selection box to encompass the entire area of interest.



3. Click the **View Area** button.

- The image will be redrawn with the selected (and magnified) area displayed within the Viewer. In this example, you can now easily read the legend associated with the document's image.

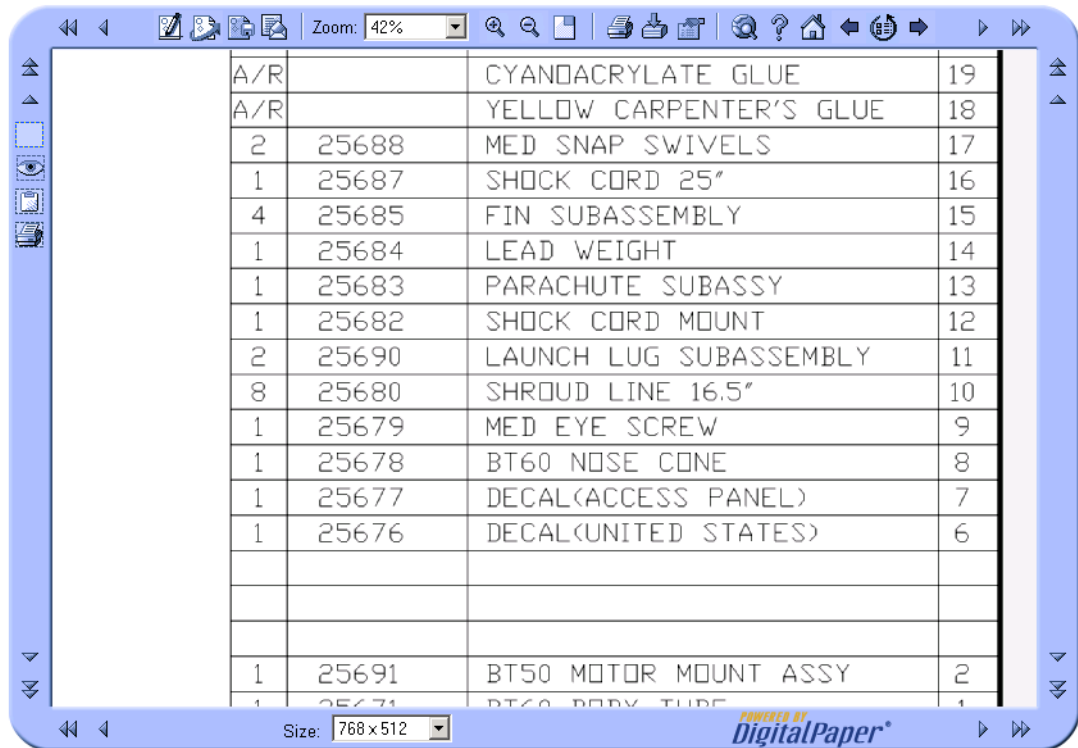


Figure 4-10: Zoom in on selected area using View Area tool

Copy a Portion of a Document to a File Outside of DigitalPaper XE

If you require a portion of a document's image to appear in another application that supports graphics (e.g., Microsoft Word or PowerPoint), follow the steps below.



- Click the **Copy Area to Clipboard** button.
- Move your cursor over the image. When you move your cursor over the image, it turns into a green cross-hair. Click the mouse where you wish the selection area to begin, hold the left mouse key down and draw a selection box to encompass the entire area of interest.
- When you release the mouse, a pop-up dialog appears with the message "Copying Clipped Area to Clipboard." Leave this dialog open; it will close by itself automatically.

Note

If a first time user, the DPPrint Application must be installed before you can copy. This process is different according to your browser type as described in "[Downloading DP Print](#)" on page 196.

- When the copy process has been completed, the following dialog appears.

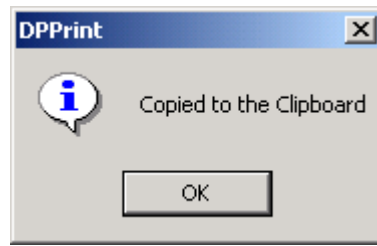


Figure 4-11: Copied to the Clipboard

- Click **OK** in the DPPrint dialog.
- Open a graphics program and use its paste command to create a new image of the selected area, or open the target document in a text editor that supports graphics, then use that application's paste command to place the selection as a TIFF image in the document.

Note

The size of the selected area being pasted is based upon the document's original size, not its level of magnification in the Viewer.

Print a Selected Area



- Click the **Print Area** button to print the selected area to your local printer.

Note

If you are a first time user, you will have to install the DPPrint Application before you can perform the steps that follow in this section. This process is different according to your browser type. For more information, see "[Downloading DP Print](#)" on page 196.

- Move your cursor over the image. When you move your cursor over the image, the cursor turns into a green cross-hair. Click the mouse where you wish the selection area to begin, hold the left mouse key down and draw a selection box to encompass the entire area of interest.
- The following DPPrint dialog appears.

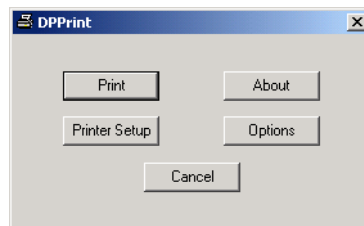


Figure 4-12: DPPrint dialog

- Click **Printer Setup** to launch the print setup page associated with your local printer, then click the Print button from that page, or simply click **Print** from the DPPrint dialog to submit the print job.

4. The following print dialog appears..

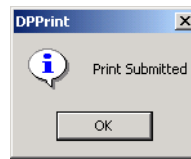


Figure 4-13: DPPrint feedback dialog

- Click **OK**.

Print the Entire Document

To print the entire document:



1. Click the **Print** button located on the top of the Viewer frame.
2. For more information on printing the entire document, see [“Printing a Document”](#) on page 72.

Download a Document

To download a document displayed in the Viewer as a TIFF file, do the following:



1. Click the **Download** button located on the top of the Viewer frame.
2. For more information, see [“Download a Document”](#) on page 75.

View Additional Documents

To view images of other documents listed in the Search Results page (or a DocPaks page) without having to close the Viewer and return to that page, do the following:



1. Click the right arrow from the top of the Viewer frame to view the image associated with the next document listed in the Search Results page (or a DocPaks page).



2. Click the left arrow from the top of the Viewer frame to view the image associated with the previous document listed in the Search Results page (or a DocPaks page).

What's Next?



If you have completed using the Viewer, click the **Close Viewer** button to return to the page where you selected the image to display. Proceed to [“Assembling and Receiving Business Packages”](#) on page 77.

If you wish to annotate the document and send your markups to another DigitalPaper XE user, go to [“Annotate a Document”](#) on page 48.

View Document Properties

In addition to viewing an image of the document as described in the previous sections of this chapter, you can also view all the properties associated with the document including its attributes, file properties, revision history and saved ViewMarks (if any). You can choose to view a document's properties from any of the following pages: Document Search Results page, Viewer, or DocPak (described in [“Assembling and Receiving Business Packages”](#) on page 77).



1. To view the document's properties, click the **Properties** button or link next to the document of interest.
2. The Document Properties page appears.

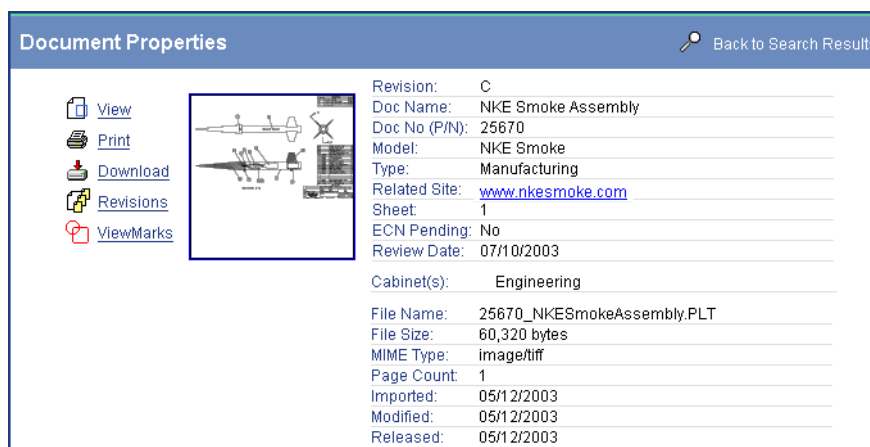


Figure 4-34: Document Properties page

The Document Properties page contains the document's complete set of attributes, plus file information such as file name, file size, MIME type, page count, when it was created, the last time it was modified, and when it was released to the repository. You can also view the document, print or download the document, view its revision history, and view saved ViewMarks (if any).

3. For more information on the options available from this page (and the pages that follow), go to the following:



- To display the document in the Viewer, click the **View** icon or link. For more information, see [“View a Document's Image”](#) on page 41. If you wish to annotate this document, see [“Annotate a Document”](#) on page 48.



- Click the **Print** icon or link to display the Print Options page as described in [“Printing a Document”](#) on page 72.



- To download the document, click the **Download** icon or link. For more information, see [“Download a Document”](#) on page 75.



- To view a document's revision history, click the **Revisions** icon or link. For more information, see [“View a Document's Revision History”](#) below.



- To view a document's ViewMark history, click the **ViewMarks** button or link. For more information, see [“Obtain a ViewMark History”](#) on page 70.

View a Document's Revision History

To view a document's revision history from the Document Properties page:



1. Click the **Revisions** icon.
2. The Document Revisions page appears.












Document Attributes		Revision	Action
<input type="checkbox"/>	Doc Name: NKE Smoke Assembly Doc No (P/N): 25670	C	  
<input type="checkbox"/>	Doc Name: NKE Smoke Assembly Doc No (P/N): 25670	A 	  
<input type="checkbox"/>	Doc Name: NKE Smoke Assembly Doc No (P/N): 25670	B 	  

Figure 4-35: Document Revisions page

This page provides a list of all versions of the document that have been imported into the system, including the attributes assigned as revision keys (these are the values required by the system's revisioning scheme to determine the uniqueness of each version of the document), and the revision number or character assigned to the document (old versions are marked with a red symbol that appears next to the revision).



3. If you wish to print, download, or view the document from this page, do the following:
 - To print the document, either mark the “Select All” checkbox or the individual document's checkbox, then click the **Print** link. For more information, see “[Printing a Document](#)” on page 72.
 - To download the document, either mark the “Select All” checkbox or the individual document's checkbox, then click the **Download** link. For more information, see “[Download a Document](#)” on page 75.
 - To display the document in the Viewer, click the **View** icon. For more information, see “[View a Document's Image](#)” on page 41. If you wish to annotate this document, see “[Annotate a Document](#)” on page 48.
4. To return to the Document Properties page, click the **Back to Document Properties** link.



Download a Document

Downloading images may be useful for tasks such as copying and pasting a drawing into a document or for distributing a machine-readable document via e-mail. Documents can be downloaded from multiple locations within the interface including the Document Search Results page, Viewer, Document Properties page, or from within DocPaks (DocPaks are described in [Chapter 5: “Assembling and Receiving Business Packages”](#)).

Documents converted to TIFF for display in the Viewer will be downloaded in the TIFF format. Files imported in their native format will be downloaded in their original format (e.g., Word, Excel, PDF). For more information on supported file types, please see [Chapter 9: “File Type Reference”](#).

To download a document do the following:



1. Click the **Download** button from any of the pages listed above.
2. A File Download dialog appears.

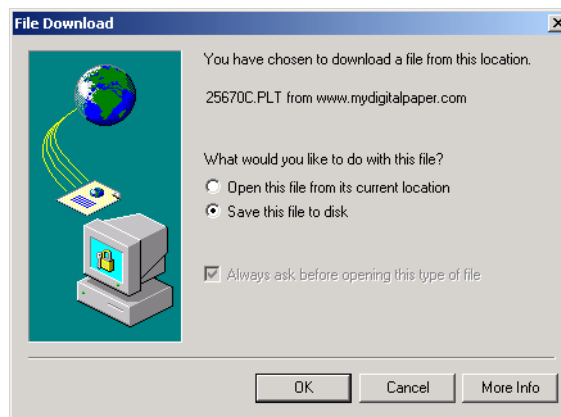


Figure 4-43: Download document

- Select “**Save this file to disk**”.
 - Click **OK**.
 - A Save As dialog appears. Navigate to the desired directory to store the file, name it, and click **Save**.
3. Documents downloaded from the Viewer will be downloaded in the TIFF format (if converted). Native documents will be downloaded in their respective format (e.g., Word, Excel, PDF).
 4. During the download, DigitalPaper XE sets the content-type (MIME type) to the corresponding setting for the selected document. As a result, the browser will honor the user's current browser configuration accordingly and launch the document into the appropriate application if set to do so in the browser.

Note

If a document contains ViewMark annotations (as described in [“Annotate a Document”](#) on page 48), the ViewMark objects will not be downloaded with the document.

5. If multiple files were selected for download, they will be compressed as a zip file. In this case, you must unzip the file in order to access the downloaded documents.

Document Search Tools

This section describes the search options for performing document searches, as well as the interfaces used to search for documents and view search results. For more information, see:

- “[Simple Search for Documents](#)” below.
- “[Search for Documents Page](#)” on page 129.
- “[Search Options](#)” on page 131.
- “[Document Search Results Page](#)” on page 132.

Simple Search for Documents

The DigitalPaper XE home page provides you the ability to perform an immediate search for a document based on its primary attribute.



Figure 6-1: DigitalPaper XE home page

- **Document Search**—Text field used to enter the primary text attribute of one or more documents of interest. Clicking the **Go** button will execute the search and the results of the search will be displayed in the Document Search Results page described in “[Document Search Results Page](#)” on page 132.
- **Advanced Search**—Click this link to display the page described in “[Search for Documents Page](#)” on page 129.

Search for Documents Page

The Search for Documents page, available by selecting **Documents** from the Navigation bar or **Advanced Search** link from the home page, lets you execute both general and specific searches of documents, with restricted searching based on the level of security set for the cabinets in which the documents are referenced. With the exception of cabinet selection and search criteria, the display options you select when conducting a search are retained for the remainder of the session.

Figure 6-2: Search for Documents example

Note

The Search for Documents page may appear different than the screen above. During DigitalPaper XE site configuration, this page may be modified to reflect a particular set of search requirements.

- **Select Search Cabinet**—Use the pulldown menu to select “all” cabinets to perform cross-cabinet searching of documents or select a specific cabinet to narrow the search.
- **Search Criteria**—When conducting a document search, you are searching based upon a subset of document attributes defined when the document was indexed into the system. The search criteria options may vary based upon your company’s custom search requirements. Search criteria entered in each text field are not case-sensitive. Sample search criteria may include:
 - **Document Name**—Search for one or more documents names as assigned when entered into the DigitalPaper XE repository through use of table lookups and wild card searching.
 - **Document Number or Doc No**—Search for one or more documents by its document number, as assigned when it was entered into the DigitalPaper XE repository.
 - **Sheet**—A page object that contains specific attributes about that page.
 - **Revision**—Search by a document’s revision label, if applicable by entering the exact label or * to search for all revisions. Sample revision labels include, but are not limited to:
 - Pure numeric revision levels (e.g., 1, 2, 3)

- Pure alpha revision levels (e.g., A, B, C)
- Mixed numeric and alpha revision levels (e.g., 2, A1, A2, B or R001-A, R002-B, R002-C, R009-D).

If this option is not available or you choose not to search by revision label, all documents returned will be the latest revision.

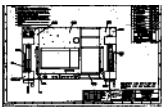
- **Release Date**—Perform a search based on the date a document was released into the system.

You can utilize a set of search operators when searching for values in these fields as described in [“Search Options”](#) on page 131.

- **Type of search:**

- **Match any field**—Return documents that match at least one text attribute field.
- **Match all fields**—Search results are returned based on the exact information as entered in each text field. For example, if you entered “phone” in the Document Name field, those documents with the name “telephone” would not be displayed, regardless of the other attribute fields. To correct this case, utilize the wildcard (*) as described in [“Search Options”](#) on page 131.

- **Display results lists as:**



- **Thumbnail**—Displays search results with a miniature preview of the first page of the document as well as the document’s attributes. If the documents found are not supported by the Viewer, the thumbnail will consist of icon associated with the file’s MIME type (e.g, a Word document will display a Microsoft Word icon).
- **Condensed**—Displays the document’s attributes without a preview image of the document. This option is set as the default when the DigitalPaper XE product is shipped, although this setting may be customized by your system administrator.

Note

If you are searching for a large number of documents, the **Condensed** option offers the best performance.

- **Number of results per page**—The number of documents to be displayed in each [“Document Search Results Page”](#).
- **Include archived documents**—Displays all versions of the same document.
- **Automatically view if only one document is found**—Bypasses the [“Document Search Results Page”](#) page and automatically displays the document’s contents in the [Document Viewer](#) (or prompts you to download the file if the file type is not supported by the Viewer).

Search Options

DigitalPaper XE's powerful search engine lets you search for all documents stored in the entire repository, refine your search by specifying a simple word, phrase, or number applicable to one or more of the document's attributes, or expand your search query by using wild-card characters and operators listed in the table below.

Search Option	Description	Example
Full text	Search is conducted on the exact description entered.	Document Name: Interface Cabling Diagram Returns all documents with the document name: "Interface Cabling Diagram".
*	Search to match zero, one, or more characters.	Document Name: *ing Returns documents with the following in the title: "Stamping", "Printing", "Cabling" or "Manufacturing"
?	Search to match any one character.	Document Name: ?ing Returns documents with the following in the title: "Ring" or "King"
	Separate items in an OR search.	Document No: 111 222 333* Returns documents numbered 111 or 222 or 333, 3331, 3332, 33345, etc.
>	Search for values that are greater than the number entered.	Document No: > 111 Returns all documents numbered 112 or greater (e.g., 112, 113, 114) Note - alpha characters cannot use this operator.
<	Search for values that are less than the number entered.	Document No: < 111 Returns all documents numbered 110 or less (e.g., 107, 108, 109 110) Note - alpha characters cannot use this operator.
=>	Search for values that are greater than or equal to the number entered.	Document No: => 1 Returns all documents with a numeric label of 1 or greater (e.g., 1, 2, 3, 4) Note - alpha characters cannot use this operator.
<=	Search for values that are less than or equal to the number entered	Document No: <= 3 Returns all documents with a numeric label of 3 or less (e.g., 1, 2, 3) Note - alpha characters cannot use this operator.
-	Search for a range of values.	Document No: 100 - 500 Returns documents 100 through 500. Note - If searching for a field that utilizes a numbering schema based on the <code>varchar</code> database type, and that numbering schema utilizes dashes (e.g., document number C5N-2-4566), you will not be able to search for ranges within that field.

Table 6-1: Search options

Document Search Results Page

Once a search has been executed, you can view each indexed document that matches your search query in the Document Search Results page. Results are displayed in condensed view as shown below, or with a thumbnail sketch as shown in “[Figure 6-4: Document Search Results \(Thumbnail\)](#)”.

Document Search Results [183 found]				New Search	
<input type="checkbox"/> Select All <input type="radio"/> Print <input type="radio"/> Download				Display Condensed	
Document Attributes	Revision	Action			
<input type="checkbox"/> DOCNO: 25671 SHEET: 1 TITLE: BT60 Body Tube TYPE: Manufacturing MODEL: Nike Smoke	A				
<input type="checkbox"/> DOCNO: 25675 SHEET: 1 TITLE: Engine Hook TYPE: Manufacturing MODEL: Nike Smoke	A				
<input type="checkbox"/> DOCNO: 25676 SHEET: 1 TITLE: Decal (United States) TYPE: Manufacturing MODEL: Nike Smoke	A				
<input type="checkbox"/> DOCNO: 25677 SHEET: 1 TITLE: Decal (Access Panel) TYPE: Manufacturing MODEL: Nike Smoke	A				
<input type="checkbox"/> DOCNO: 25678 SHEET: 1 TITLE: BT60 Nose Cone TYPE: Manufacturing MODEL: Nike Smoke	A				
<input type="checkbox"/> DOCNO: 25679 SHEET: 1 TITLE: Med Eye Screw TYPE: Manufacturing MODEL: Sentry	A				

Figure 6-3: Document Search Results (Condensed)

Document Search Results [19 found]				New Search	
<input type="checkbox"/> Select All <input type="radio"/> Print <input type="radio"/> Download <input type="radio"/> Delete				Display Thumbnail	
<input type="checkbox"/>	View Properties Print Download		Revision: A Doc Name: BT60 Body Tube Doc No (P/N): 25671 Model: NKE Smoke Type: Manufacturing Related Site: www.nkesmoke.com Sheet: 1		
<input type="checkbox"/>	View Properties Print Download		Revision: A Doc Name: Engine Hook Doc No (P/N): 25675 Model: NKE Smoke Type: Manufacturing Related Site: www.nkesmoke.com Sheet: 1		
<input type="checkbox"/>	View Properties Print Download		Revision: A Doc Name: Decal (United States) Doc No (P/N): 25676 Model: NKE Smoke Type: Manufacturing Related Site: www.nkesmoke.com Sheet: 2		
<input type="checkbox"/>	View Properties Print Download		Revision: A Doc Name: Decal (Access Panel) Doc No (P/N): 25677 Model: NKE Smoke Type: Manufacturing Related Site: www.nkesmoke.com Sheet: 2		

Figure 6-4: Document Search Results (Thumbnail)

Document Search Results Page Bar

The Document Search Results page bar lists the page title, the number of documents found, the number of seconds it took to find the documents listed, and provides the option to perform a new search.

- **New Search**—Opens the “[Search for Documents Page](#)” on page 129.

Search Results Option Bar

The Search Results option bar allows you to conduct a new search, select or deselect documents displayed, add selected documents to a DocPak and change how the search results are displayed.

- **Select All**—Selects or deselects all documents on the Search Results page.
- **Print**—Displays options to print selected documents. For more information, see “[Printer Options Page](#)” on page 192.
- **Download**—Downloads the selected document(s) to the hard drive. Multiple documents are compressed as Zip file.
- **Display**—Select to display the Search Results page with a thumbnail sketch (**Thumbnail**) of the document and its attributes, or with only the documents’ attributes (**Condensed**).

Search Results Content Area

The Search Results content area lists all documents found and a subset of each document’s attributes (the number of attributes displayed is configured by the system administrator). For each document you can perform an action such as view the document or any additional properties, print the document, or download the document:

Action Items

The Search Results content area contains the following action items:



- **Select box**—Select documents individually for the purpose of printing or downloading.



- **View**—Click the View icon, link or thumbnail image (if displayed) to open a document with DigitalPaper XE’s [Document Viewer](#). If the document is not supported by the Viewer, you will be prompted to download the document to your computer. For more information on supported file types, please see [Chapter 9: “File Type Reference”](#).



- **Properties**—Displays all attributes associated with a document, and allows you to view, print, or download the document, as well as view its revision history and saved ViewMarks, if any. For more information, please see “[Document Properties](#)” on page 147.



- **Print**—Displays printer options. For more information, see “[Printer Options Page](#)” on page 192.



- **Download**—Downloads the selected document(s) to the hard drive. Multiple documents are compressed as ZIP file.

Document Viewer

DigitalPaper XE's Viewer tool lets you display and navigate through documents that were imported as BMP, GIF, JPEG, or PNG types or formats, as well as file that have been converted to TIFF or DPCI during the import process (for more information on these file types, please see [“Supported Document File Types”](#) on page 202). You can view documents of any size, print and download displayed documents, as well as annotate and e-mail the marked up copy to other Enterprise Users, Publishers, and Trading Partners (as discussed in [“Annotation Tools \(ViewMark\)”](#) on page 140).



To utilize the Viewer functions, you must click a thumbnail image, **View** link or icon from any page that contains a list of documents or a document's properties.

Single Page Document

Opening a single page document displays the Viewer window similar to the one shown below.

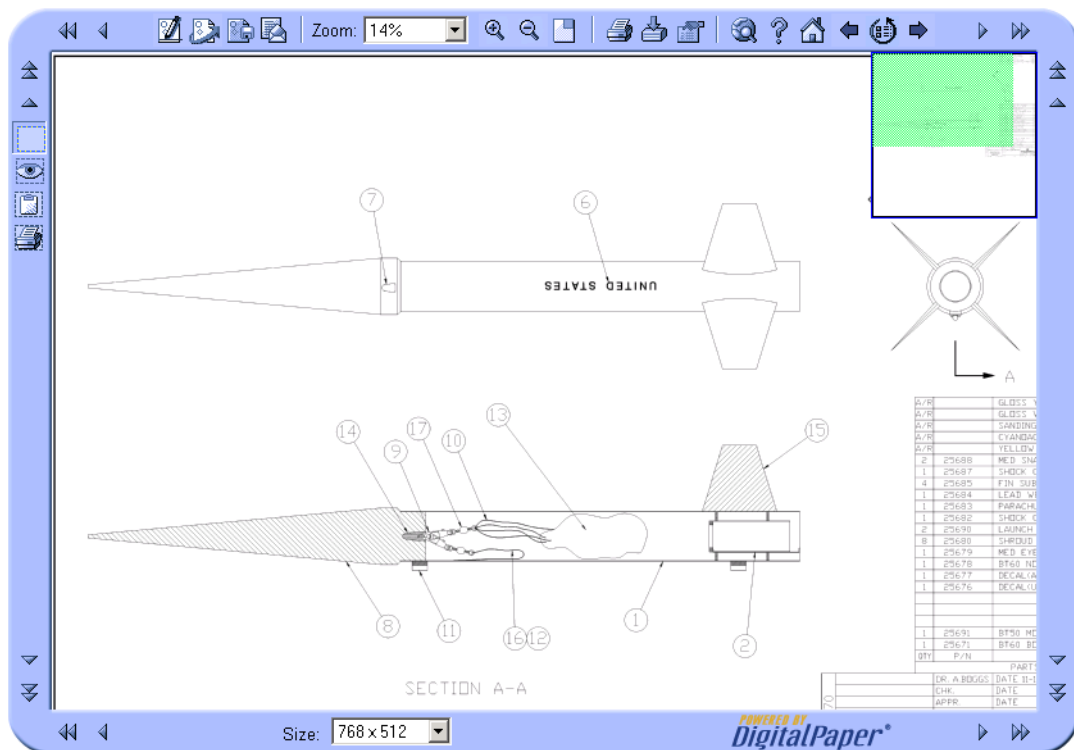


Figure 6-5: DigitalPaper XE Viewer

The Viewer window provides you with the options listed in the [“Viewer Functions”](#) on page 136.

Multi-page Documents

Opening a multi-page document into the Viewer will display a Page List in the left pane and the first page of the document in the right pane as shown below.

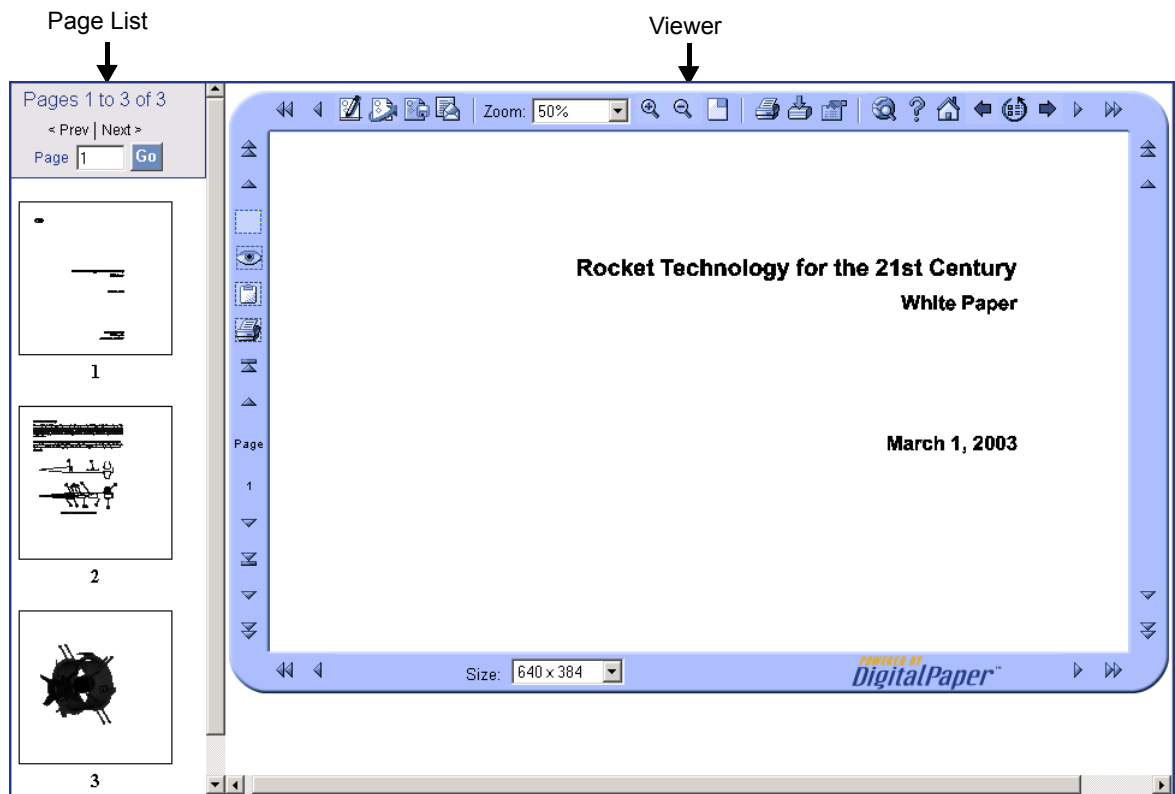


Figure 6-6: Multi-page document within the Viewer

Page List (left pane)

The Page List acts as a table of contents, displaying the number of the page currently shown in the right pane and the total number of pages contained within the document. In addition, the Page List provides navigation to the pages not displayed using the tools below.

Go

- **Page text field and Go button**—Enter the page number (displayed beneath each thumbnail) in the text field then click the **Go** button to display the page in the right pane. The page number of the currently displayed document will appear at the top of the Page List and in the mid-left portion of the Viewer frame.
- **<Prev | Next>**—Displays the previous set of thumbnails or the next set of thumbnails.

Note

This feature is used to display the next or previous set of thumbnails. Clicking one of these links will not affect the document page displayed in the right pane.

- **Thumbnail**—Click a thumbnail image to display the full page in the right Viewer pane.

Viewer Window (right pane)

The Viewer window in the right pane provides you with the options listed in the “[Viewer Functions](#)” section below.

Viewer Functions

The Viewer window frame includes icons and pulldown menus that let you perform the functions listed below.

Viewer Frame (Top)



- **Pan Arrows (left)**

- **Frame Double Arrow (left)**—Moves the document the distance equivalent to one Viewer window frame to the left.
- **Pan Single Arrow (left)**—Moves the document approximately a half-inch to the left.



- **Create ViewMark**—Opens the ViewMark toolbar described in “[Create ViewMark Toolbar](#)” on page 140.



- **Load ViewMark**—Opens the Saved ViewMark toolbar allowing you to view a saved ViewMark. For more information, see “[Load ViewMark Menu](#)” on page 145.



- **Save ViewMark**—Saves the current ViewMark as described in “[Save ViewMark](#)” on page 145.



- **Send ViewMark**—E-mails a URL of the current document view with markups to another user. The e-mail recipient displays the document in the Viewer by clicking the hyperlink enclosed in the e-mail message. For more information, see “[Send a ViewMark via E-mail](#)” on page 146.

- **Zoom**—This menu contains options to modify the displayed document’s magnification by a percentage of its original size or by scaling the document to fit the constraints of the Viewer.

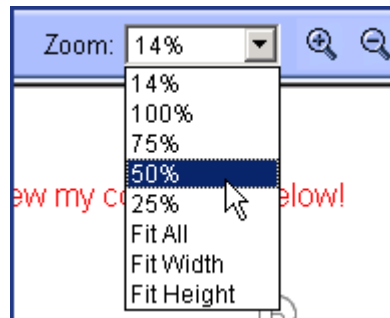





Figure 6-7: Zoom menu

- **100%, 75%, 50%, 25%**—Changes the magnification based upon a percentage of the document’s original size.
- **Fit All**—Modify the document’s magnification so the document fills the entire Viewer window (top to bottom and side to side).
- **Fit Width**—Modify the document’s magnification so the document fills the entire width of the Viewer window (side to side).
- **Fit Height**—Modify the document’s magnification so the document fills the entire height of the Viewer window (top to bottom).

-  • **Zoom in**—Incrementally increases the entire document's or a selected area's magnification.
-  • **Zoom out**—Incrementally decreases the document's or a selected area's magnification.
-  • **Bird's Eye View**—Displays a miniature view of the entire document just inside or outside of the Viewer frame (as defined by the Administrator). This feature is used to navigate through the image; clicking a point within the Bird's Eye View will re-center the current view of the document to selected location within the Viewer window, while maintaining the current zoom level.

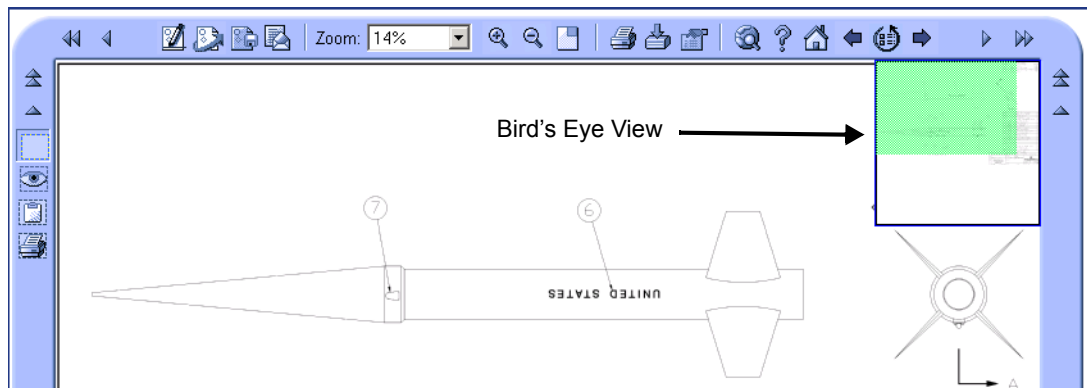












Figure 6-8: Bird's-Eye View

-  • **Print**—Displays the Print Options page used to print a document, and optionally associated ViewMark annotations (if any). For more information, see “[Printer Options Page](#)” on page 192.
-  • **Download**—Downloads the displayed document (without ViewMarks) to the hard drive.
-  • **Display Document Properties**—Displays the properties of the current document. For more information, please see the “[Document Properties](#)” on page 147.
-  • **Search**—Returns you to the Search for Documents page. For more information, see “[Search for Documents Page](#)” on page 129.
-  • **Help**—Displays the *Enterprise User and Publisher's Guide* in PDF format with searchable topics.
-  • **Home**—Returns you to the DigitalPaper XE home page.
-  • **Previous Document**—Displays the previous document contained in the Search Results List or DocPak, depending on the page you were on when you opened the Viewer.
-  • **Close Viewer**—Closes the Viewer and returns you to the page you were on when you opened the Viewer.
-  • **Next Document**—Displays the next document contained in the Search Results List or DocPak, depending on the page you were on when you opened the Viewer.
-  • **Open Viewer into New Window**—Displays the Viewer in a separate window instead of within a frame. This option is available for the Viewer opened from a DocPak or Line Item window only.



- **Pan Arrows (right)**
 - **Pan Single Arrow (right)**—Moves the document approximately a half-inch to the right.
 - **Frame Double Arrow (right)**—Moves the document the distance equivalent to one Viewer window frame to the right.

Viewer Frame (Left)



- **Pan Arrows (up)**
 - **Frame Double Arrow (up)**—Moves the document the distance equivalent to one Viewer window frame upward.
 - **Pan Single Arrow (up)**—Moves the document approximately a half-inch upward.



- **Define Area**—Select a specific area to view or magnify by drawing a selection box around the area of interest.



- **View Area**—Magnifies a defined area using the Define Area button in the Viewer.

Note

Printing the View Area will print the entire document.



- **Copy Area to Clipboard**—Copies a defined section of the document to the computer's clipboard so it can be pasted into another document.



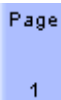
- **Print Area**—Prints a defined section of the document to the default printer. For more information on printing, see [“Printer Options Page”](#) on page 192.



- **First Page of a Multi-page Document**—Displays the first page of the document (if a multi-page document).



- **Previous Page of a Multi-page Document**—Displays the entire previous page of a document if you are not already on the first page (if a multi-page document).



- **Page <number>**—The current number of the page is displayed in between the previous and next page icons.



- **Next Page of a Multi-page Document**—Displays the entire next page of a document if you are not already on the last page (if a multi-page document).



- **Last Page of a Multi-page Document**—Displays the last page of the document (if a multi-page document).

- **Pan Arrows (down)**



- **Pan single arrow (down)**—Moves the document approximately a half-inch downward.
- **Frame double arrow (down)**—Moves the document the distance equivalent to one Viewer window frame downward.

Viewer Frame (Bottom)



- **Pan Arrows (left)**
 - **Frame Double Arrow (left)**—Moves the document the distance equivalent to one Viewer window frame to the left.
 - **Pan Single Arrow (left)**—Moves the document approximately a half-inch to the left.

- **Viewer Window Size**—Modify the Viewer window size to the respective width and height values listed in the figure below without affecting the zoom value of the document being displayed.

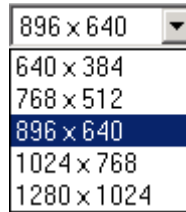


Figure 6-9: Image size options



- **Pan Arrows (right)**
 - **Pan Single Arrow (right)**—Moves the document approximately a half-inch to the right.
 - **Frame Double Arrow (right)**—Moves the document the distance equivalent to one Viewer window frame to the right.

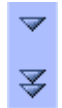
Viewer Frame (Right)

- **Pan Arrows (up)**



- **Frame Double Arrow (up)**—Moves the document the distance equivalent to one Viewer window frame upward.
- **Pan Single Arrow (up)**—Moves the document approximately a half-inch upward.

- **Pan Arrows (down)**



- **Single Arrow (down)**—Moves the document approximately a half-inch downward.
- **Frame Double Arrow (down)**—Moves the document the distance equivalent to one Viewer window frame downward.

Viewer Frame (Corners)



- **Old Revision Alert**—Indicates the document displayed in the Viewer is an old revision and that a more current version is available to be viewed. Simply click the Old Revision Alert exclamation mark to display the current version in the Viewer.

Document Properties



Regardless of display type, only a limited number (as configured by the system administrator) of a document's attributes can be displayed in each Search Results page. To view the complete set of attributes associated with a document, click the **Properties** icon or link within the Search Results page to display the document's properties.

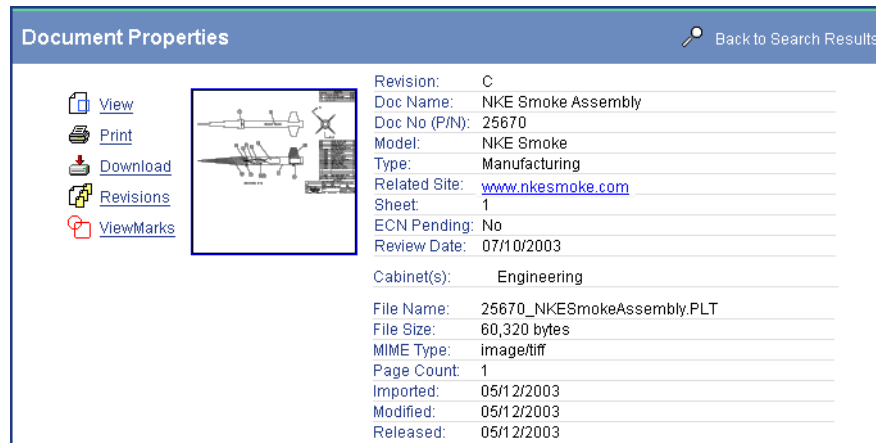


Figure 6-23: Document Properties page

Document Properties Page Bar

- **Back to Search Results**—Returns the user directly to the “Document Search Results Page” or “DocPak Search Results Page” page.

Document Properties Content Area

The Document Properties content area contains the document's complete set of attributes, plus the following file information:

- **Cabinet(s)**—The name of the cabinet(s) where the document is referenced.
- **File Name**—The name of the source file imported into the repository.
- **File Size**—Size of the file in bytes.
- **MIME Type**—The MIME type associated with the file extension assigned to source file when imported to the repository. For more information on supported file types, please see [Chapter 9: “File Type Reference”](#).
- **Page Count**—The number of pages contained within the imported document.
- **Imported**—Date the file was imported into the system.
- **Modified**—Date the document was last modified.
- **Released**—Date the document was released to the repository.

Action Items

- **View**—Click the View icon, link or thumbnail to open a document with DigitalPaper XE’s [Document Viewer](#). If the document is not supported by the Viewer, you will be prompted to download the document to your computer. For more information on supported file types, please see [Chapter 9: “File Type Reference”](#).



- **Print**—Displays printer options. For more information, see [“Print Options”](#) on page 192.



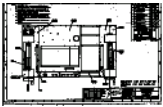
- **Download**—Downloads the selected document to the hard drive.



- **Revisions**—Displays the revision history of the document in the [“Revisions Page”](#) described below.



- **ViewMarks**—Displays a list of ViewMarks that have been saved for this document in the [“View-Mark History Page”](#) on page 149.



Thumbnail—A thumbnail is either a miniature preview of the first page of the document (if supported by the Viewer) or a file’s application icon. Clicking a thumbnail will perform the same action as clicking the View icon or link (as described above).

Revisions Page

The Revision Page displays all versions of the document released to the repository. In addition, this page displays the Revision Keys and Revision value combination used to release the document to the repository.

Document Revisions		Back to Document Properties	
<input type="checkbox"/> Select All	<input type="radio"/> Print	<input type="radio"/> Download	
Revision Keys	Revision	View	
<input type="checkbox"/> Doc Name: NKE Smoke Assembly Doc No (P/N): 25670	C		
<input type="checkbox"/> Doc Name: NKE Smoke Assembly Doc No (P/N): 25670	A		
<input type="checkbox"/> Doc Name: NKE Smoke Assembly Doc No (P/N): 25670	B		

Figure 6-24: Document Revisions page

Action Items

- **Select All**—Selects or deselects all documents on the Document Revisions page.
- **Print**—Displays printer options. For more information, see [“Print Options”](#) on page 192.
- **Download**—Downloads the selected document(s) to the hard drive. Multiple documents are compressed as Zip file.

Document Revisions Content Area

- **Revision Keys**—One or more attributes defined by the Indexing Specialist that are used by DigitalPaper XE to determine the uniqueness of a document during the import process. A document with the same revision key values as a previously released document is marked as a revised document in the system.
- **Revision**—Displays the revision label of the document. Old revisions are marked with a red icon.

About DPPrint

DPPrint enables additional printing options. Once installed, the DPPrint plug-in can be used to:

- Print high resolution images on a local printer (client-side printing).
- Print a selected region of an image displayed in the Viewer.
- Copy all or part of an image displayed in the Viewer to the Windows® clipboard.

Note

The capabilities of the DPPrint plug-in are available for the Windows® 2000, Windows NT® and Windows XP environments only.

Downloading DP Print

The process for downloading the DP Print Applications is different according to browser type.

Internet Explorer

The DP Print Helper application download process will begin the first time you attempt to perform a client-side print job, copy a selection of an image displayed in the Viewer to the clipboard, or print a selected area of an image displayed in the Viewer.

1. If the DP Print Helper application has not been previously downloaded, an InstallShield dialog appears when you perform one of the steps listed above.

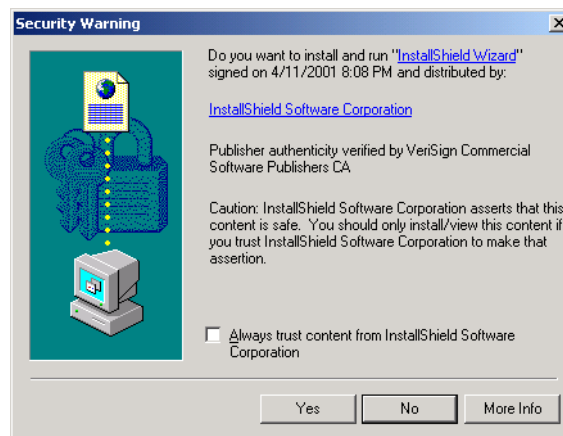


Figure 8-3: InstallShield Wizard

Click **Yes** to download the Helper application.

A. The Authenticity Verified dialog appears.

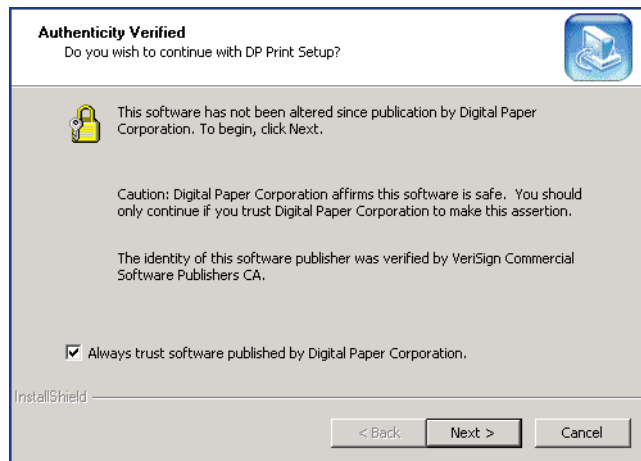


Figure 8-4: Authenticity Verified

Click **Next**.

B. The Preparing Setup dialog appears.

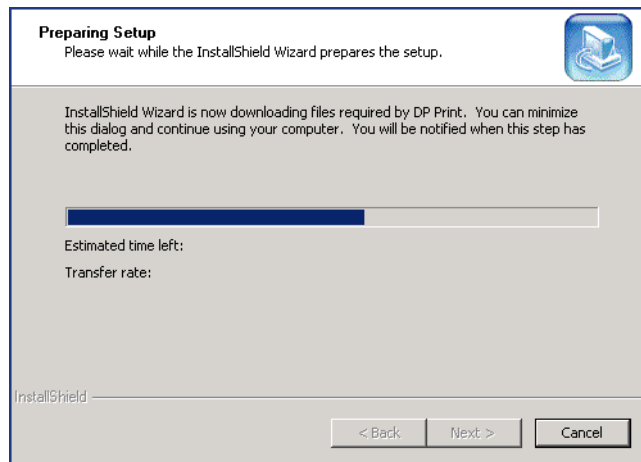


Figure 8-5: Preparing Setup

Wait while the helper application downloads.

- C. When the setup is complete, you are prompted to complete the installation.

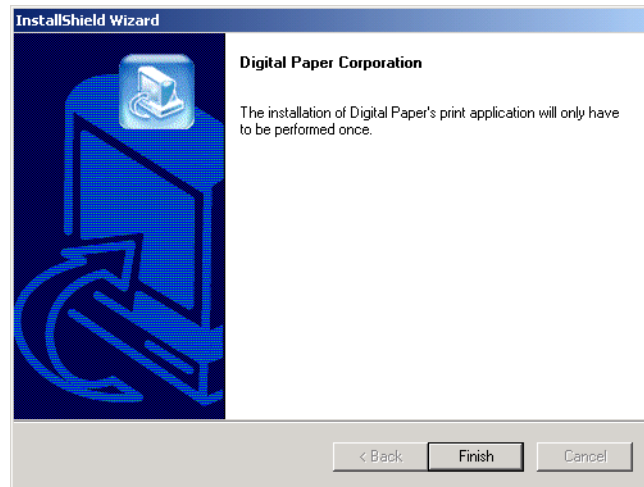


Figure 8-6: Installation complete

- D. Click **Finish**. The DP Helper application has been installed. No other steps are required for this application.

Netscape Navigator 6 or 7

In order to perform a client-side print job, copy a selection of an image displayed in the Viewer to the clipboard, or print a selected area of an image displayed in the Viewer, you must manually download the DP Print Helper executable, then run the application. This procedure only needs to be performed on a one-time basis.

To download the DP Print Helper application:

1. Click the **Options** link in the navigation bar.
2. The User Options page appears.

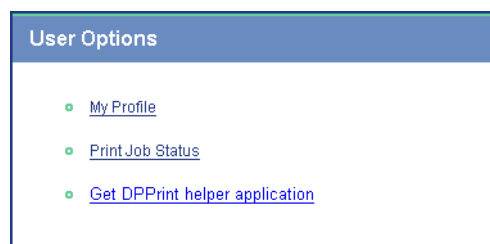


Figure 8-7: User Options page

3. From the User Options page, click **Get DPPrint helper application**.

4. In the dialog that appears, specify the location where the DP Print helper application will be downloaded.

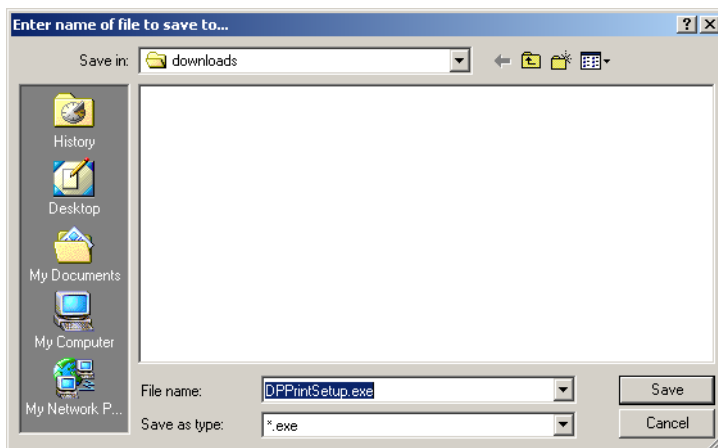


Figure 8-8: Download the DP Print Helper application

5. Click **Save**.
6. Navigate to the directory where you downloaded the DP Print helper executable. Double-click the file (DPPrintSetup.exe) to run the application.
7. No other action is required.