

ARCHIVING Software User's Guide

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CHAPTER 1

Introduction

Welcome!

Congratulations! You have just acquired a complete and secure product solution to store barcode labels, trace the history of design modifications and print events, manage label versions and set up approval workflows.

The **ARCHIVING** Server and Clients run on your company's network in conjunction with your Label Designers, and an optional Web module can also be used to provide limited access to external users.

The great scalability of this product allows you to also install all components on your PC, and work in standalone mode like a simple desktop application.

ARCHIVING Server Modules

The **ARCHIVING Server** package contains several modules: the **ARCHIVING Server**, the **ARCHIVING Server Client** and the **ARCHIVING Web Module**.

ARCHIVING ServerThe **ARCHIVING Server** is a centralized database driven through a Windows® service. It establishes the connection with the different data sources, and processes all client requests: Check In, Check Out, Print History, Document Approval, etc. The Server also uses two subsystems to operate: UMSS (User Management System) and MSGS (Messaging System). UMSS and MSGS respectively perform user configuration and messaging functions.

ARCHIVING Server Client

The **ARCHIVING Server Client** is the add-in for the Label Designer application. When the user invokes the **ARCHIVING Software** from the Label Designer, this add-in connects to the **Server** and checks user rights. If the connection is successful then the user is allowed to perform different document management actions such as Check In and Check Out, and is given access to the centralized label storage database. The actions allowed depend upon the security settings and permissions that have been granted to the group to which the user belongs.

ARCHIVING Server Web Module

The **ARCHIVING Server Web Module** is a Web application accessible from any Web browser on the Internet or an intranet. Upon successful user Web authentication, this module establishes a connection with the **ARCHIVING Server** and gives access to limited functions including viewing documents and history records, and approving documents before delivery in production.

How It Works

The **ARCHIVING Server** typically runs on a server machine. On the internal network, any client station that has a Label Designer and the **ARCHIVING Server Client** add-in can interact with the server at any time. All the **ARCHIVING Software** components can also be installed on a single PC. In that case the system works in standalone mode, like a simple desktop application.

Product Description

The **ARCHIVING Software** is designed to run on any computer running a supported Windows® operating system.

Your product includes the following components:

- a CD-ROM
- complete documentation
- a license agreement
- an activation code, which allows you to activate the license of the **ARCHIVING Server** on your server machine

Note

If you have not purchased an activation code yet, you can still use the ARCHIVING Software for 30 days. During this trial period you can install as many clients as you want, and the system will accept up to 3 simultaneous connections to the server. After the trial period you will need to purchase an activation code. All the work that was done during the trial period is kept in the database, and you can continue it after activation without any disruption.

About this Manual

Typographical Conventions

This manual distinguishes between different types of information using the following conventions:

- Terms taken from the interface itself, such as commands, appear in **bold**.
- Keys appear in small caps, for example: "Press the SHIFT key".
- Numbered lists mean there is a procedure to follow.
- When the conjunction -or- appears next to a paragraph, it means there is the choice of another procedure for carrying out a given task.
- When a menu command contains submenus, the menu name followed by the command to select appear in bold. Thus, "Go to **File > Open**" means choose the **File** menu, then choose the **Open** command.



This symbol highlights important information on how a particular command or procedure works.



Following this symbol you will find hints and tips for optimizing tasks, speeding up commands, and so on.

**About your
Product**

Some of the functions described in this manual may not be available in your product.

For the complete list of specific features available in your software, refer to the specification sheet provided with the product.

CHAPTER 2

Using the ARCHIVING Software

Connecting to the ARCHIVING Software

To connect to the **ARCHIVING Software**:

Step 1 > Open your Label Designer, and click **File** menu > **ARCHIVING Software**.

A submenu of additional commands appears.

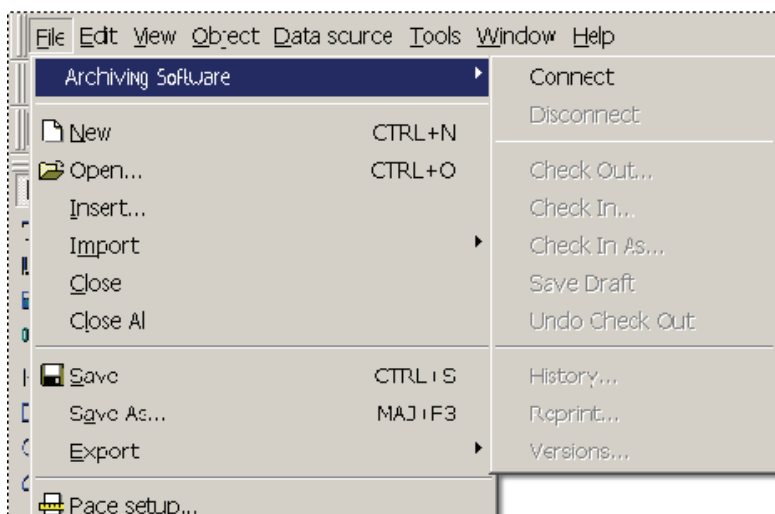


Figure 1 ARCHIVE Commands in the Label Designer

Note

The **File** menu display may differ from the one shown depending on which **Label Designer** you are using.

Step 2 > In the **File > ARCHIVING Software** submenu, click **Connect**. A connection dialog box is displayed.

Step 3 > Enter the user and password that have been defined for the **ARCHIVING Software**.

Once successfully authenticated, the menu items that the user's profile and settings are allowed to use will be enabled.

User Actions List

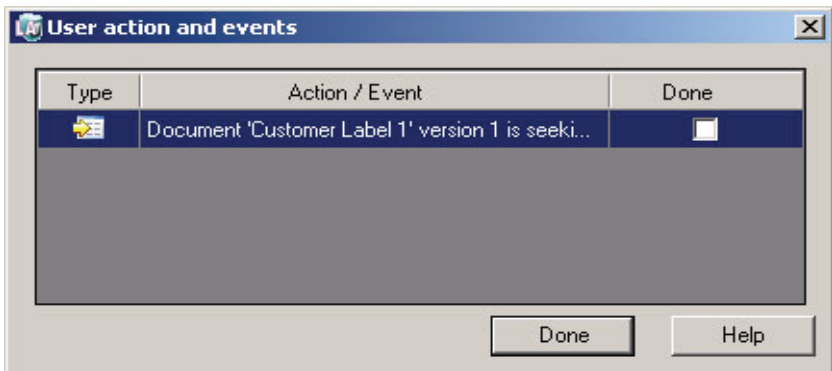


Figure 2 User Actions and Events List

When connecting to the **ARCHIVING Server**, the system checks in a specific “actions list” and determines whether there are action entries present for that user. If actions are available, they are displayed in this window.

If you double-click on a given action, different processes may be run depending on the action type:

- **Info Message** Information type messages are simply checked as **Done**.

- **Seeking Approval** If the actions list contains a message about a document waiting for approval, you can click on the message to display the approval window. See **Approval Request** for more information.

- **Document Approved** This type of notification message is simply checked as **Done**. The message contains the document and the name of the person who has approved it.

- **Approval Denied** In this type of message, the system displays a dialog box that includes the following:
 - Document details, such as category, document name, and version
 - Date when approval process was started
 - Information about the user who initiated the approval
 - Person who denied the approval
 - Comment about the denial

Messages that are checked as **Done** no longer appear in the window. You can remove the check mark by clicking on the check box in the row.

Check Out

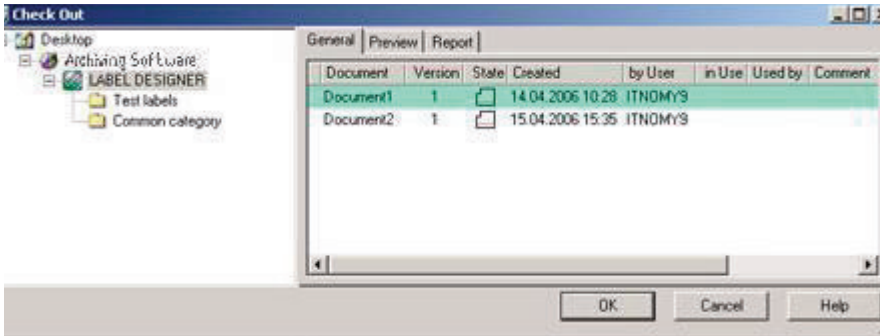


Figure 3 Check Out

To open the **Check Out** window, click on **File > ARCHIVING Software > Check Out**.

This window allows checking out a document from the **ARCHIVING Server** database. Once a document is checked out, other users will have restricted access, depending upon the category settings.

The left tree pane shows the categories (folders) into which documents are classified. Category settings allow defining different management rules for each category. See the *ARCHIVING Software Administrator's Guide* for more information.

When clicking on a category in the tree, sub-categories are expanded.

OK button opens the selected document in the calling Label Designer.

Cancel button closes the window without any further action.

Help button opens online help for the current window or tab.

General Tab

To access the Check Out window's **General** tab:

Step 1 > Go to **File > ARCHIVING Software > Check Out**.




Step 2 > In the source tree, select the category containing the desired document.



The **General** tab shows detailed information on the selected document.

This tab shows the list of documents which are stored in the selected category, and which correspond to the calling Label Designer. Documents which were created for other Label Designers do not appear.

By default, document versions in the list are collapsed. When expanding a document to view the different versions of that document, all versions are shown. The most recent version is shown on the top. When selecting a document version from the list, the other tabs (**Preview** tab, **Report** tab) are enabled.

The following column headings are displayed on the **General** tab:

- **First Column** An expand/collapse button is displayed when the document has several versions.
- **Document** The document name.
- **Version** The document version number.
- **State** The document state. Possible states are:
 -  **Final:** approved for production
 -  **In Approval:** seeking approval, after design
 -  **Draft:** under design
- **Created** The date when the document version was created.
- **By User** The name of the user who created the document.

- **In Use** Displays one of the following icons to indicate the usage status:
 -  Label is checked out by a user
 -  Label is checked in by a user
- **Used By** The name of the user who has checked the document.
- **Comment** Lists any comments associated with the document.

Note

Only one user can check out a given document. Once a document is checked out, the other users have restricted access to it. The level of restriction is determined at category level, by the “Lock at check out” setting. See the *the ARCHIVING Software Administrator’s Guide* for more information.

Preview Tab

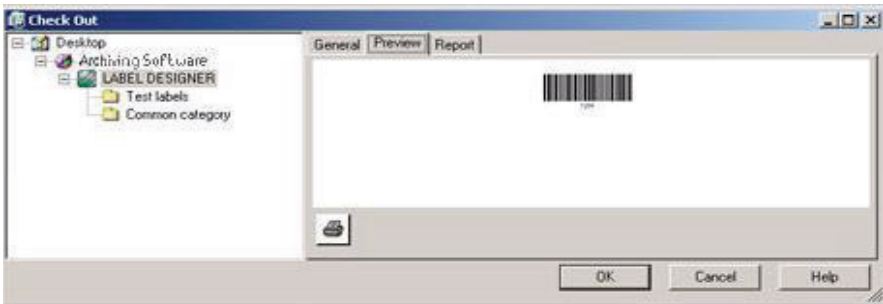


Figure 4 Preview tab in Check Out


Step 1 > Go to **File > ARCHIVING Software > Check Out**.

Step 2 > On the **General** tab, select the document version that you want to preview.

Step 3 > Click the **Preview** tab.

Preview tab shows a preview image of the document selected in the **General** tab.

When this tab is activated, the preview is generated for the selected document version.

 Print the document preview.

Report Tab

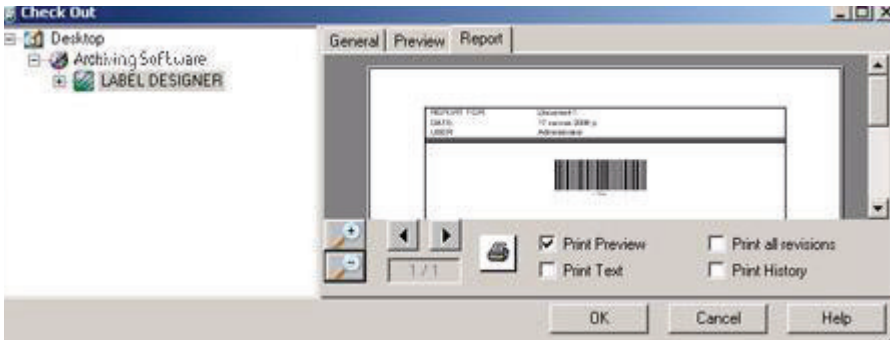


Figure 5 Report tab in Check Out

To access the **Report** tab:

Step 1 > Go to **File > ARCHIVING Software > Check Out.**

Step 2 > On the **General** tab, select the document for which you want to generate a report.

Step 3 > Click the **Report** tab.

The **Report** tab displays a report for the document selected in the **General** tab.



Zoom in.



Zoom out.



This button enables **scrolling forward** to the next page in a multi-page report.



This button enables **scrolling backward** to the previous page in a multi-page report.



Print the report.

The content of the report depends on the selected print options:

- **Print Preview** The preview image of the document is added to the report.
- **Print Text** Document information is added to the report.
- **Print All Revisions** All existing versions of the document are added to the report.
- **Print History** All historical events that occurred for the document version are added to the report.

Check In

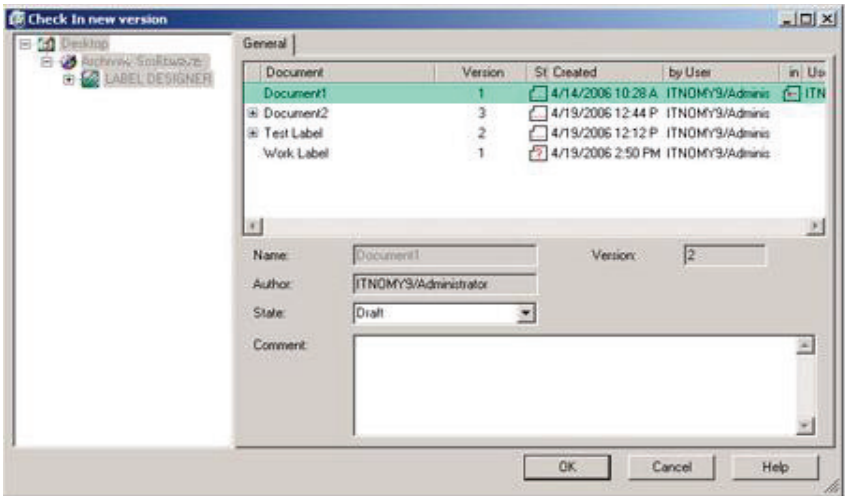


Figure 6 Check In

To open the **Check In** window, click on **File > ARCHIVING Software > Check In**.

This window allows checking in new versions of documents that have previously been checked out.

OK button checks the document into **ARCHIVE Software**. Once successfully checked in, this window is automatically closed.

When checking-in a document, the source tree is disabled, the document can only be archived within its current category (folder). The source tree is enabled only in the **Check-In As** function, when you need to choose a different name and category for the document.

Cancel button closes the window without any further action.

Help button opens online help for the current window or tab.

General Tab

To access the Check In window's **General** tab:

Step 1 > Check out any document.

Step 2 > Go to **File > ARCHIVING Software > Check In**.

The **General** tab shows detailed information on the document to be checked in.

- **Name** The document name.
- **Author** The name of the user who created or modified the previous document version. Once the new version is checked in, the new user name will be displayed.
- **Version** The document version number. (If the **Archiving** setting is enabled in **the ARCHIVING Software Administration**, the version number is automatically incremented from the last version.)
- **State** You can select the desired document state. The global list of possible states in **the ARCHIVING Software** is:
 - Draft
 - In Approval
 - Final

Note

The list of states allowed by your configuration depends upon the settings which have been defined in the ARCHIVING Software Administration. If 3-state Approval is OFF, then the “In Approval” state is not available. If Approval is OFF, then the “Draft” state is not available.

See the *ARCHIVING Software Administrator's Guide* for more information.

- **Comment** Type any comments pertaining to this document version.
- **Valid from Date** Enabled when the document state is set to **Final**. You can enter the date from which the document version is considered valid. Note that this date cannot be backdated.

Check In As

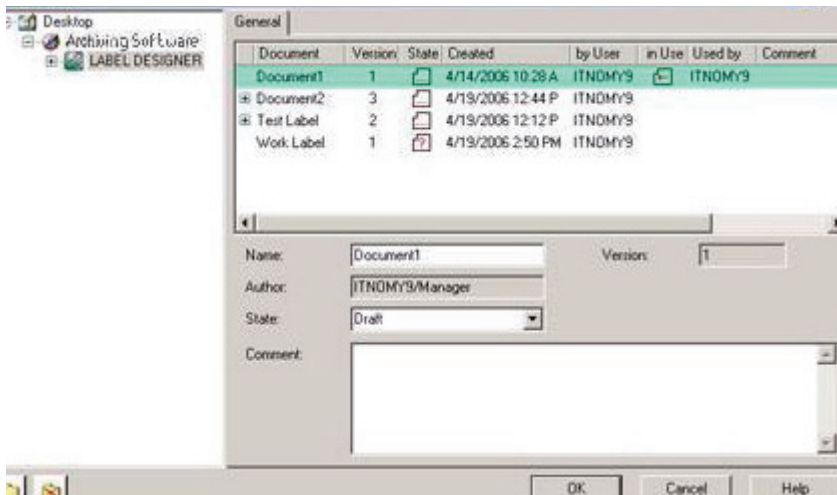


Figure 7 Check In As

To open the **Check In As** window, click **File > ARCHIVING Software > Check In As**.

The **Check In As** window allows you to check in a document using a different name (similar to a typical **Save As**

command) and if desired, within a different category.

During **Check In As** the source tree is enabled.

OK button checks the document into **the ARCHIVING Software**.

Cancel button closes the window without any further action.

Help button opens online help for the current window or tab.

General Tab

To access the Check In As window's **General** tab:

Step 1 > Check out a document or create a new one.

Step 2 > Go to **File > ARCHIVING Software > Check In As**.

The **General** tab shows detailed information on the document to be checked in.

This tab shows the list of documents that are stored in the selected category, and that correspond to the calling Label Designer. Documents that belong to other Label Designers do not appear.

The following **Category** buttons are available:



Create a new category.



Delete an existing category, together with its affiliated sub-categories and documents. Sufficient privileges are required to perform such an operation.

- **Name** The document name, which can be modified.
- **Author** The name of the user who created or modified this document version.
- **Version** The document version number. When using **Check In As** to check in a document, the version is automatically set to 1.
- **State** Select the desired document state. The global list of possible states in **the ARCHIVING Software** is:

- Draft
- In Approval
- Final

Note

The list of states allowed by your configuration depends upon the settings which have been defined in the ARCHIVING Software Administration. If 3-state Approval is OFF, then the “In Approval” state is not available. If Approval is OFF, then the “Draft” state is not available.

See the *ARCHIVING Software Administrator's Guide* for more information.

- **Comment**

Type any comments pertaining to this document version.

- **Valid from Date**

Enabled when the document state is set to **Final**. You can enter the date from which the document version is considered valid. Note that this date cannot be backdated.

History

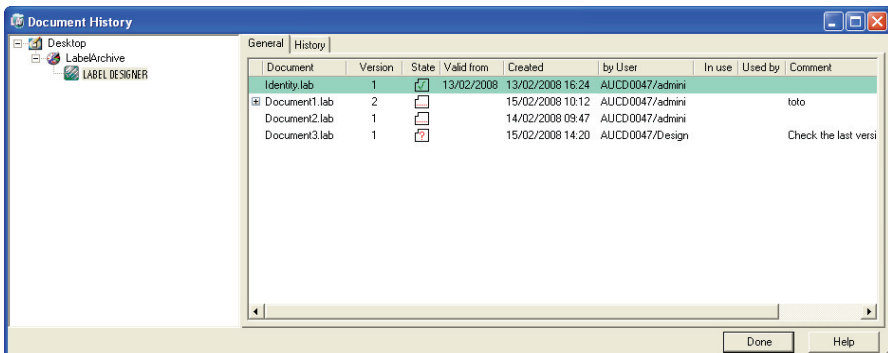


Figure 8 History

To open the **History** window, click **File > ARCHIVING Software > History**.

This window shows all history events for a document version stored in the **ARCHIVING Software**.

Done button closes the window without any further action.

Help button opens online help for the current window or tab.

General Tab

To access the History window's **General** tab:

Step 1 > Go to **File > ARCHIVING Software > History**.

Step 2 > In the source tree, select the category containing the desired document.

The **General** tab shows the list of documents which are stored in the selected category, and which correspond to the calling Label Designer. Documents which were created for other Label Designers do not appear.

For information on the column headings displayed on the **General** tab, see the "Check Out" section.

History Tab

General History						
<input checked="" type="checkbox"/> Print	First day	16/04/2008		Job Filter	Job Name	
<input checked="" type="checkbox"/> Modification	Last day	24/04/2008		<input type="checkbox"/> Ignore Job Name		
<input checked="" type="checkbox"/> Error	Apply					
<input checked="" type="checkbox"/> Warning						
<input checked="" type="checkbox"/> Information						
Date	Type	Info	Job Name	Workstation	User	
22/04/2008 17:22	Information	Checked in Closed		AUCD0069>P	jauregva	
23/04/2008 11:31	Information	Checked out		AUCD007>P	Manager	
23/04/2008 11:31	Print	Bullzip PDF Printer, ...	RF12456	AUCD007>P	Manager	
23/04/2008 11:32	Information	Checked in Closed		AUCD007>P	Manager	
23/04/2008 11:33	Information	Checked out		AUCD007>P	Manager	
23/04/2008 11:33	Print	Bullzip PDF Printer, ...	RF12468	AUCD007>P	Manager	
23/04/2008 11:33	Print	Bullzip PDF Printer, ...	RF13645	AUCD007>P	Manager	
23/04/2008 11:34	Print	Bullzip PDF Printer, ...	RF1452	AUCD007>P	Manager	
23/04/2008 11:34	Print	Bullzip PDF Printer, ...	RF18563	AUCD007>P	Manager	
23/04/2008 11:35	Print	Bullzip PDF Printer, ...	RF18565	AUCD007>P	Manager	
23/04/2008 11:35	Print	Bullzip PDF Printer, ...	RF18575	AUCD007>P	Manager	
23/04/2008 11:35	Print	Bullzip PDF Printer, ...	RF18439	AUCD007>P	Manager	
23/04/2008 11:36	Information	Checked in Closed		AUCD007>P	Manager	

Page:1 Pages:1 History Data

Done Help

Figure 9 History tab in History

To access the **History** tab:

Step 1 > Go to **File > ARCHIVING Software > History**.

Step 2 > In the source tree, select the category containing the document, and then click on the desired version.

Step 3 > Select the **History** tab to view the events that are linked to the selected document version.

When the **History writing** setting is enabled in the **ARCHIVING Server**, the system tracks and keeps a history of events that occur for each document.

The following types of history events can be tracked:

- **Print:** Print events
- **Modification:** Modifications that were made to a document
- **Error:** Error type events
- **Warning:** Warning type events
- **Information:** Information type events

First day and **Last day** fields allow you to select time boundaries for showing history events.

Apply button launches the history search process.

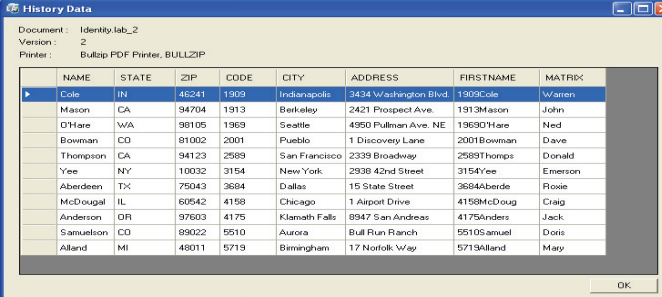
Job Filter zone allows the user to search a particular label that has been printed by using the **Job Name** assigned to the printed label. This is especially useful if you are using a Print Management software which may print hundreds or thousands of copies of a same label. Using the Job Name filter allows the user to quickly find the specific information desired.

The event list columns are:

- **Date:** Event date
- **Type:** Type of event
- **Info:** Description of the event, when applicable
- **Workstation:** Name of the workstation from which the event was initiated
- **User:** User ID of the person who initiated the event
- **Job Name:** The name assigned to the print job

History data button allows you to visualize, according to the

record selected, the data used for this printer job.



Document : Identity Lab_2
Version : 2
Printer : Bullzip PDF Printer, BULLZIP

NAME	STATE	ZIP	CODE	CITY	ADDRESS	FIRSTNAME	MATRCO
Cole	IN	46241	1909	Indianapolis	3434 Washington Blvd.	1909Cole	Warren
Mason	CA	94704	1913	Berkeley	2421 Prospect Ave.	1913Mason	John
O'Hare	WA	98105	1969	Seattle	4950 Pullman Ave. NE	1969O'Hare	Ned
Bowman	CO	81002	2001	Pueblo	1 Discovery Lane	2001Bowman	Dave
Thompson	CA	94123	2569	San Francisco	2339 Broadway	2569Thompson	Donald
Yee	NY	10032	3154	New York	2939 42nd Street	3154Yee	Emerson
Abendanz	TX	75043	3694	Dallas	15 State Street	3694Abendanz	Rosie
McDougal	IL	60542	4188	Chicago	1 Aispel Drive	4158McDoug	Craig
Anderson	OR	97603	4175	Klamath Falls	8947 San Andreas	4175Anders	Jack
Samuelson	CO	89022	5510	Aurora	Bull Run Ranch	5510Samuel	Doris
Allard	MI	48011	5719	Birmingham	17 Norfolk Way	5719Allard	May

Figure 10 History data.

Help button opens online help for the current window or tab.

Reprint

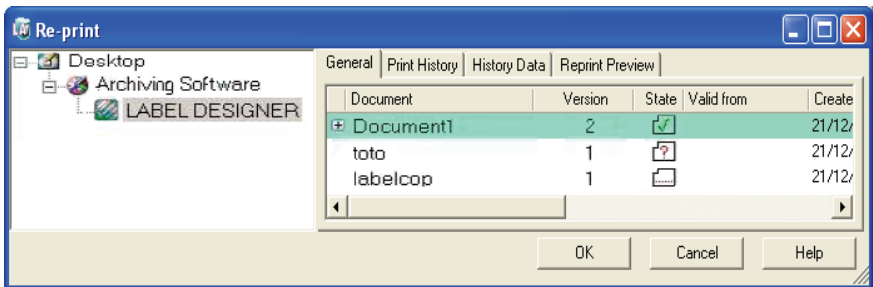


Figure 11 Reprint

To open the **Reprint** window, click on **File > ARCHIVING Software > Reprint**.

This window allows you to select a print job history record for a given document version, and to rerun the *entire* original print job with its former parameters and variable data.

In the **Reprint** window the source tree is enabled.

OK and **Cancel** buttons simply close the window without any further action.

Help button opens online help for the current window or tab.

General Tab

To access the Reprint window's **General** tab:

Step 1 > Go to **File > ARCHIVING Software > Reprint**.

Step 2 > Select the document from the source tree.

The **General** tab shows the list of documents which are stored in the selected category, and which correspond to the calling Label Designer. Documents which were created for other Label Designers do not appear.

From this tab you must select the document version for which you want to view the print history. Then on the **Print History** tab, select the print history record that you want to reprint. Finally, on the **Reprint Preview** tab, you can preview and reprint the original document instances.

For information on the column headings displayed on the **General** tab, see the "Check Out" section.

Print History Tab

Date	Info	Job Name	Workstation	User
27/12/2007 15:...	EaspCoder PM4i D...	fsdf	AUJCD0007	administrator
27/12/2007 15:...	EaspCoder PM4i D...	R124563	AUJCD0007	administrator
▶ 27/12/2007 15:...	EaspCoder PM4i D...	R124565	AUJCD0007	administrator
27/12/2007 15:...	EaspCoder PM4i D...	R124565	AUJCD0007	administrator
27/12/2007 15:...	EaspCoder PM4i D...	R124567	AUJCD0007	administrator
27/12/2007 15:...	EaspCoder PM4i D...	R124568	AUJCD0007	administrator
27/12/2007 15:...	EaspCoder PM4i D...	R124569	AUJCD0007	administrator
27/12/2007 15:...	EaspCoder PM4i D...	R124570	AUJCD0007	administrator
27/12/2007 15:...	EaspCoder PM4i D...	R124571	AUJCD0007	administrator
27/12/2007 15:...	EaspCoder PM4i D...	R124572	AUJCD0007	administrator
27/12/2007 15:...	EaspCoder PM4i D...	R124573	AUJCD0007	administrator
27/12/2007 15:...	EaspCoder PM4i D...	R124574	AUJCD0007	administrator
27/12/2007 15:...	EaspCoder PM4i D...	R124575	AUJCD0007	administrator
27/12/2007 15:...	EaspCoder PM4i D...	R124576	AUJCD0007	administrator
27/12/2007 15:...	EaspCoder PM4i D...	R124577	AUJCD0007	administrator
27/12/2007 15:...	EaspCoder PM4i D...	R124578	AUJCD0007	administrator
27/12/2007 15:...	EaspCoder PM4i D...	R124579	AUJCD0007	administrator
27/12/2007 15:...	EaspCoder PM4i D...	R124580	AUJCD0007	administrator

Figure 12 Print History tab in Reprint

To access the Reprint window's **Print History** tab:

Step 1 > Go to **File > ARCHIVING Software > Reprint**.

Step 2 > Select the desired document from the source tree.

Step 3 > Select the desired document version on the **General** tab.

The **Print History** tab allows reprinting documents from the print history. It is available only if a document is selected. The table shows all print events from the database for the specified period. If no document is selected then a warning message is shown.

First day and **Last day** fields allow you to select time boundaries for showing print events.

Job Filter zone allows the user to search a particular label that has been printed by using the **Job Name** assigned to the printed label. This is especially useful if you are using a Print Management software which may print hundreds or thousands of copies of a same label. Using the Job Name filter allows the user to quickly find the specific information desired.

The event list columns are:

- **Date**: Event date
- **Info**: Description of the print event (with printer name and port)
- **Workstation**: Name of the workstation from which the print event was initiated
- **User**: User ID of the person who initiated the print event
- **Job Name**: The name assigned to the print job

Help button opens online help for the current window or tab.

History Data

To access the Reprint window's **History Data** tab:

Step 1 > Go to **File > ARCHIVING Software > Reprint**.

Step 2 > Select the desired document from the source tree.

Step 3 > Select the desired document version on the **General** tab.

Step 4 > Select the desired print history record from the

Print History tab.

Step 5 > Click on **History Data** to visualize data contained into a record from the **Print History** tab.

This tab presents all data contained in a print history record. It shows data which appear in a specific document (Document Name, Document version, Printer used). It is available only if a document is selected. If no document is selected, a warning message appears.

The event list columns are the database's fields which are selected to create a label.

Ok and **Cancel** buttons simply close the window without any further action.

Help button opens on-line help for the current window or tab.

Reprint Preview Tab

To access the Reprint window's **Reprint Preview** tab:

Step 1 > Go to **File > ARCHIVING Software > Reprint**.

Step 2 > Select the desired document from the source tree.

Step 3 > Select the desired document version on the **General** tab.

Step 4 > Select the desired print history record on the **Print History** tab.

Step 5 > Click on **Reprint Preview** to display all labels

having been printed in a print job.

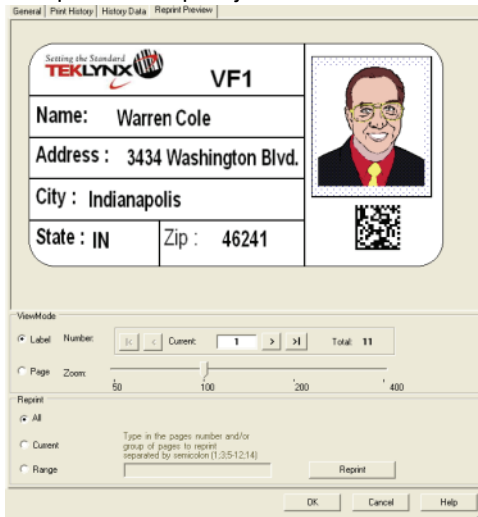


Figure 13 Reprint Preview tab in Reprint

The **Reprint Preview** tab gives a preview of the document for the print event selected in the **Print History** tab.

ViewMode

Two reprint mode would be selectable: per **Page** and per **Label**.

Per label mode: allows to display all the label printed in the print job one by one.

- A slider allows to browse the different labels.
- A slider allows to zoom the label

Per page mode: allows to display all the label printed on each printed page.

- A slider allows to browse the different output page and show the exact labels that have been printed on each of them.

- A slider allows to zoom the entire page.

Reprint

This section allows you to:

- reprint all pages from the print job,
- reprint only the current page that is displays,
- reprint a range of page using the following syntax:
1;2;5;8-10;50-100.

Reprint button initiates the reprint of the document. It re-runs the original print job with its former parameters and variable data.

OK and **Cancel** buttons simply close the window without any further action.

Help button opens online help for the current window or tab.

Versions

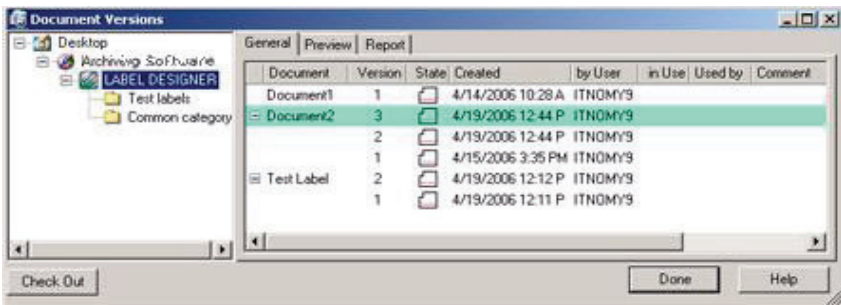


Figure 14 Versions

To open the **Versions** window, click **File > ARCHIVING Software > Versions**.

This window shows the versions history of a document stored in **the ARCHIVING Software**.

Check Out button allows you to directly check out the selected document version.

Done button closes the window without any further action.

Help button opens online help for the current window or tab.

Note

In the ARCHIVING Software, a document may have several versions in “Draft” state and several versions in “Final” state, but no more than one version in “In Approval” state is allowed.

General Tab

To access the Versions window’s **General** tab:

Step 1 > Go to **File > ARCHIVING Software > Versions**.

Step 2 > Select the desired folder.

For information on the column headings displayed on the **General** tab, see the “Check Out” section.

Preview Tab


To access the Versions window’s **Preview** tab:

Step 1 > Go to **File > ARCHIVING Software > Versions**.

Step 2 > Select the document version to preview.

Step 3 > Select the **Preview** tab.

The **Preview** tab shows the preview of the selected document version. When this tab is activated, the preview is generated.

 **Print** button initiates the print of the document version preview.

Report Tab

To access the Versions window’s **Report** tab:

Step 1 > Go to **File > ARCHIVING Software > Versions**.

Step 2 > On the **General** tab, select the document version for which you want to generate a report.

Step 3 > Click the **Report** tab.

The **Report** tab shows the report generated for the document selected on the **General** tab. For information on the options available on the **Report** tab, see the “Check Out” section.

Seeking Approval Request

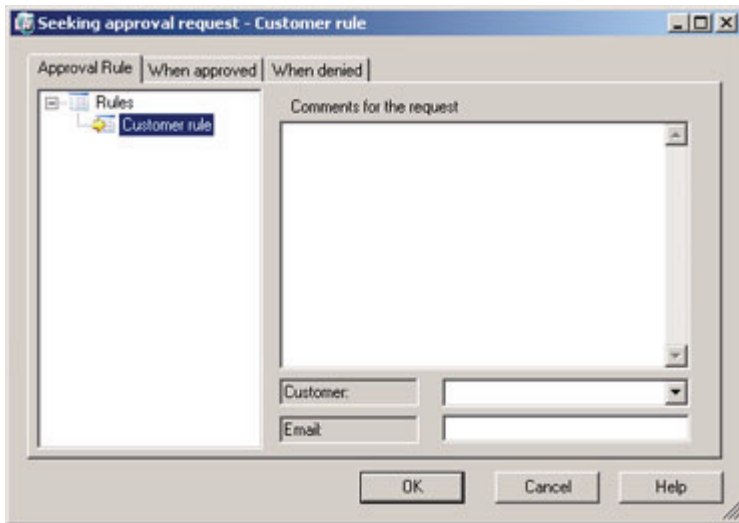


Figure 15 Seeking Approval Request

The **Seeking Approval Request** window appears if you select the **In Approval** state for a document during Check In or Check In As.

This window allows you to select a predefined rule for the approval workflow and to specify parameters when required. You may set up a list of users and/or user groups who will be notified when the document is approved or when the approval is denied.

OK button confirms all changes done and sends the request to **the ARCHIVING Software Server**.

Cancel button closes the window without any action.

Help button opens online help for the current window or tab.

Approval Rule Tab

This tab allows selecting a predefined rule for the approval workflow and to specify required parameters.

The left tree pane shows all predefined rules. When there is a predefined rule for the category, this rule is automatically selected.

The Parameters section on the right side depends on the rule definition. When selecting a node in the rules tree, the right section is updated to show the required settings for the rule.

- **Comments** You can type a comment to be added to the approval request.
- **Customer** Subject to approval rule, this edit field allows you to specify the name of the customer who will approve the current document.
- **E-mail** E-mail address of the customer, used in the case of e-mail notification.

When Approved / Denied Tabs

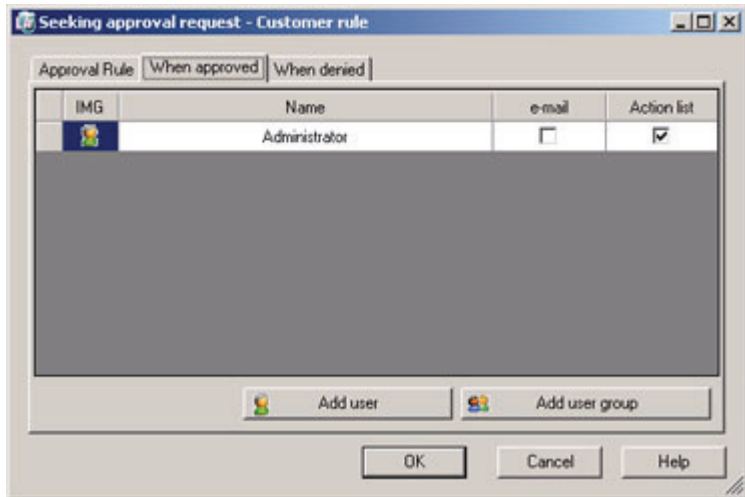


Figure 16 When Approved tab in Seeking Approval Request

The When Approved and When Denied tabs can be selected from the **Seeking Approval Request** window, which appears if you select the **In Approval** state for a document during Check In or Check In As.

These tabs allow you to specify a list of users and/or user groups who will be notified when the document is approved or denied. By default, the table displays the name of the user who starts the approval process.

e-mail and **Action** check boxes allow specifying how the notification message will be delivered.

Note

E-mails can only be sent to single users.

Add user and **Add user group** buttons allow adding users or user groups to the notification list.

Approval Request

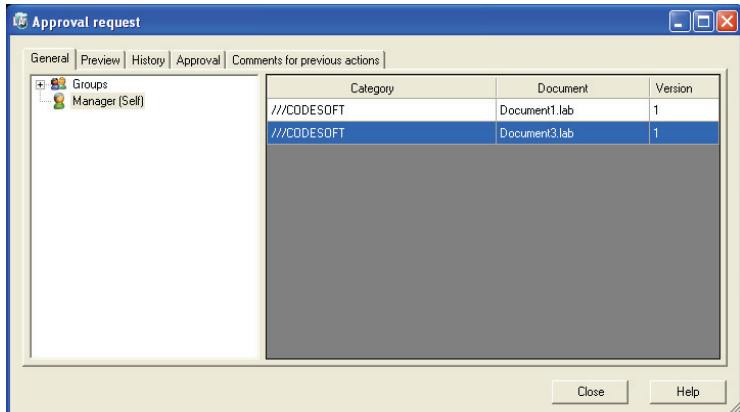


Figure 17 Approval Request

The **Approval Request** window appears when you click on a **Seeking Approval** event in the actions list (the actions list pops up at connection time when there are pending actions for the connected user).

This window allows you to select documents seeking approval, preview and print them, view changes history, and approve or deny them.

The left tree pane shows all user groups of which the current user is a member.

OK and **Cancel** buttons close the window without any further action.

Help button opens online help for the current window or tab.

General Tab

This tab gives access to all documents seeking approval. When selecting a node in the left tree pane, all documents in this group are shown in the right grid.

The document list columns are:

- **Category** The folder where the document seeking approval is stored.
- **Document** The name of the document seeking approval.
- **Version** The version number of the document seeking approval.

Preview Tab

This tab shows a preview of the document selected in the **General** tab.

When this tab is activated, a preview is generated for the selected document.

Print button initiates the print of the preview image.

History Tab

This tab shows all history events from the database for the specified time and selected event types. By default, all event types are selected.

For more information on the **History** tab in the Approval Request window, see the “History” section.

Approval Tab

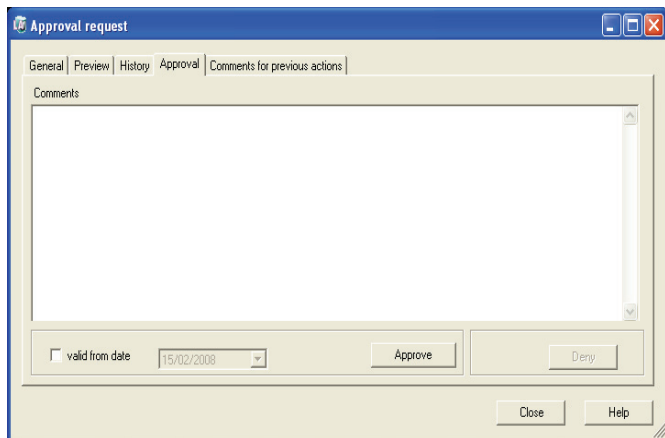


Figure 18 Approval tab in Approval Request

This tab allows approving or denying a document.

Comments field allows adding a comment to the approval or the denial.

Valid from date: when this option is checked, it is possible to define a date from which the label will be valid even if there is an approval request.

Approve button allows approving the document.

Deny button allows denying the document. (Text must be added in the **Comment** field in order for this button to be activated.)

Note

If the “Password required in approval” setting has been enabled in the ARCHIVING Server, then a dialog box will pop up to ask you to confirm your password right before completing the approval/denial process.

Comment for preview action

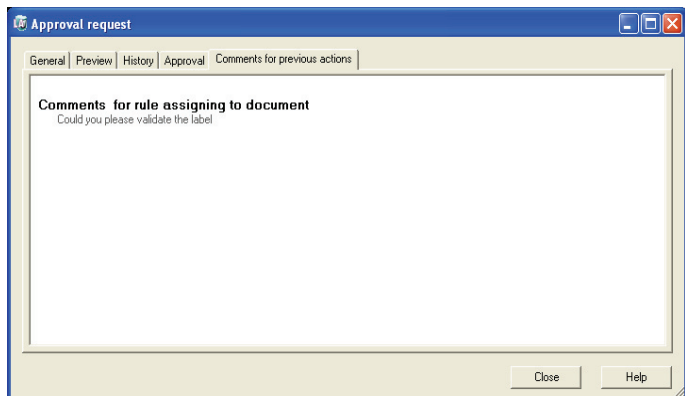


Figure 19 Comment for preview action tab in Approval request

This tab presents comments added to the approval request.

