
Aviator[®] ODMA Guide

Aviator ODMA Release 1.1

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INTRODUCTION TO AVIATOR ODMA

Welcome to Aviator's ODMA Client

Aviator's ODMA client tightly integrates office productivity applications with the document management capabilities in Aviator's library. Users do not even need to have Notes running on their desktop in order to open and save files to Aviator.

ODMA allows you to open files that are stored in Aviator documents and save files into Aviator documents directly from your familiar office productivity applications. This latest version, in conjunction with Aviator Release 2.3, also enables you to launch files from within Aviator's Notes interface directly into your applications using the ODMA client. This means that you can launch your files from within your applications or from within Aviator and seamlessly maintain their connection to Aviator's container.

For those of you intimately familiar with Aviator's internal functionality, ODMA will not allow you to release draft documents, unless the document profile used creates documents as released. In addition, the ODMA client does not interact with Aviator's powerful workflow.

This guide is designed to help you get up and running Aviator's ODMA client. Some sections are simplified due to assumptions that you are familiar with Aviator's features.

ODMA INSTALLATION

ODMA-Compliant Applications

Aviator integrates its library functionality with the following ODMA-compliant office productivity applications:

- Microsoft Word 97, 2000
- Microsoft PowerPoint 97, 2000
- Microsoft Excel 97, 2000 (see Application Notes below)
- Microsoft Visio 2000
- Lotus WordPro 9.0 and above
- Lotus Freelance 9.0 and above
- Corel WordPerfect 8, 9 (R4.6 only)
- Corel QuattroPro 8, 9 (R4.6 only)
- Corel Presentations 8, 9 (R4.6 only)
- Adobe Capture 3.0 (see Application Notes below)
- ScanSoft PaperPort (see Application Notes below)

System Requirements

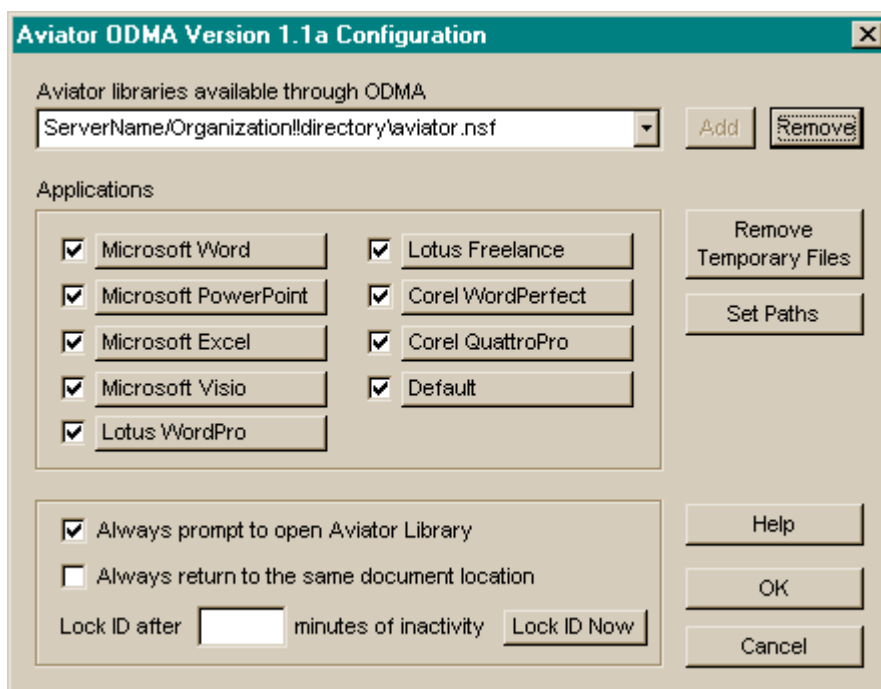
The Aviator ODMA client runs on a user's local computer. Each user that will utilize ODMA's functionality requires the following:

- Microsoft Windows 95/98/NT 4.0/2000
- ODMA-Compliant Applications (see above)
- Aviator databases running on a Domino server

Installing and Configuring ODMA

ODMA installs very quickly. Perform the following actions to install ODMA on a local client:

- Run AviatorODMA.exe on the local machine
- The suggested default location is C:\Program Files\Aviator\Aviator ODMA. The only files placed here are the configuration utility (avconfig.exe) and an uninstall file.
- At the end of the install process, the ODMA configuration window will appear:



When this panel displays for the first time, it has scanned your system for ODMA-compliant applications and set the check box active for any that it has found. If you do not wish to use Aviator with these applications ever, you should uncheck the box now. However, by default the "Always prompt..." option is also checked so that you can optionally use Aviator from within your application on a case-by-case basis. See additional information below about this option.

Adding Aviator Libraries

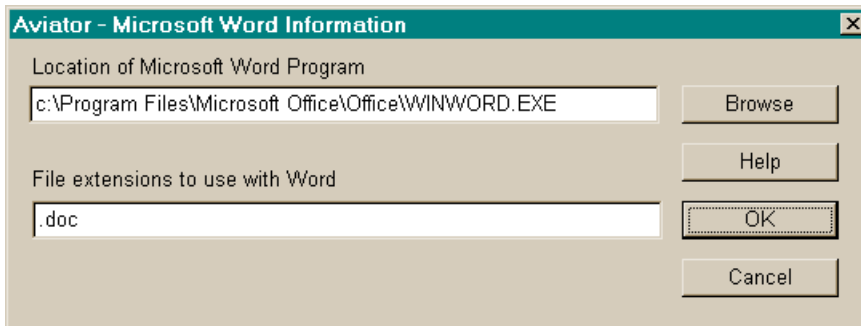
Add the Aviator libraries available through ODMA. A connection to these libraries must be available at the time you install ODMA. The required syntax for the path to the libraries is:

- the server name, followed by two exclamation points, followed by the path to the library on the above server:
 - For example: Myserver/Myorg!!Aviator\Library\aviator.nsf is the string for the library aviator.nsf (file name for ALL libraries) in the Library directory of the Aviator directory on the server Myserver within the server ID Myorg.
 - If you do not know the server name or path, go to the Aviator library on your Notes desktop that you want to make available and right click on it. Select the first item in the menu "Database Properties". This displays a panel with the exact server name and library path that you will need.
- Once satisfied with your path, click Add and the program will attempt to connect to the specified library. If the library path is incorrect, or the server is down, or a connection to the library was not available for any reason, you will receive an error message.

Activating ODMA Applications

The check boxes for any ODMA-compliant applications you have installed on your system will be preset during install. Leave any that you intend to use with Aviator checked. When this box is checked, these ODMA-compliant applications will communicate with Aviator through the file open, close, save, and save as mechanisms.

Click on the name of the application to set a path and file extension(s) to use when launching files from within Aviator's Notes client. The following dialog will display:



The standard file extension for each application is displayed by default and a search of your system has been done to locate the program file. This most often will be successful, but you should check this information for each application that you intend to use. You can add other extensions or locate different versions of the programs using the Browse button.

Default Application - Some applications on some platforms do not honor the standard settings for ODMA. Other applications only use a general setting to detect ODMA in the system. In this case, the default selection informs the operating system to use Aviator with ODMA for all applications that are ODMA compliant. It is suggested that this check box always be set. Note that you may associate a file extension (such as .shw for Corel Presentations) and set a path to any ODMA-compliant application that you wish to use in this default slot.

Application Notes

- **Note on Excel** - For some reason Microsoft Excel 97 and 2000 do not contain the ODMA interface. However, we have created an add-on for Excel that duplicates it exactly. When you check the Excel box, we will install this add-on and remove it should you uncheck this item. When Excel is checked here, you will see a new item in Excel's File Menu called "Aviator". To

use Aviator with Excel, simply use Aviator - Open instead of the normal File - Open to fetch files from Aviator, and Aviator - Save, - Save As and - Close to put them away.

- **Note on Capture** - Adobe Capture 3.0 version contains an ODMA interface in its Archive step. This is different than the way most of the other applications work with Aviator. In this case one sets up the Archive step to point to Aviator. Then when a scan is run through the defined workflow, any archive step will bring up the Aviator Save dialog for you to specify a place to put this file. To set this up correctly, right click on the Archive Step Template, Select Aviator, Select Other for file type information, and type in the extension of the file type you wish to save to Aviator. This can be any of the supported file types in the workflow, for example, PDF, TIF, TXT, etc.
- **Note on PaperPort** - PaperPort 7.0 (and perhaps earlier versions) have a DMS (Document Management System) option for exporting or importing files to and from the PaperPort desktop. First a selection of a DMS is made from the File menu. (Many systems will display more than one; and Aviator will appear in this list) Then when an image is selected on the PaperPort desktop, the Export to DMS option (under the File menu) will bring up the Aviator Save Dialog for you to specify a place to put this file. Files are stored in the PaperPort native format (.MAX) and can be launched from Notes directly into the PaperPort Viewer/Annotator if this file extension and the path to the PaperPort executable are set in the default application slot described previously. Images can be imported to the desktop from Aviator by using the Import from DMA function from the File menu.

Additional Options

The 'Always prompt to open Aviator Library' option will cause a prompt to be displayed inside each active application when opening a file for the first time. This enables you to choose to use ODMA during that session or not. If this option is not selected, the Aviator library is always opened by default if the application check box is checked.

The 'Always return to the same document location' option determines where you will return when re-selecting Aviator Open or Save dialogs.

With the check box selected, every time the dialogs open, you will return to the Library/Cabinet/View you last accessed.

Accessing cabinets with many documents may cause delays. By leaving the option un-checked, every time the dialogs open, you will return to the top Library level (list of cabinets) that will improve performance.

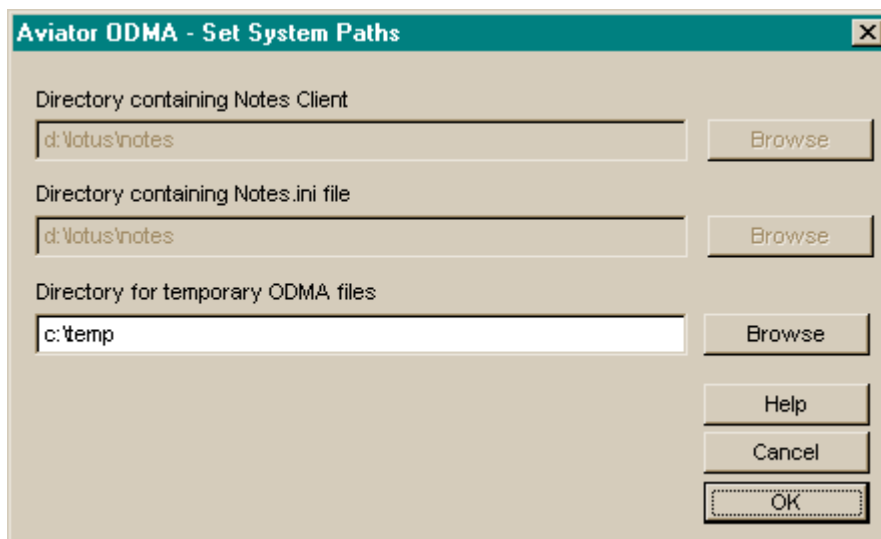
Password Options

- The 'Lock ID after XX minutes of inactivity' feature enables you to use ODMA in your applications with no need to keep supplying your Notes password. After entering your password once, this interval determines how long you can continue to work without needing to supply your password again. If you enter 0 or leave it blank, the interval lasts forever.
- The 'Lock ID Now' button gives you the ability to force the system to require a password for the next entry to the Aviator library through ODMA. This is a security feature that allows you to instantly lock access to your Aviator files from applications should you need to leave your desk.
- Select OK, and you will be prompted to restart the computer.

Files and Paths Options

The "Remove Temporary Files" option scans the directory specified for storing temporary transfer files and tells you how many it has found. You then have the option to remove these files. Just after installation there will not be any temporary files in this directory, but after use the number of files will continue to grow until you periodically remove them.

The Set Paths option will bring up the following dialog:



The directory containing the Notes Client is set during install by searching your system. This could be incorrect if you have more than one version of the Notes Client on your system, or you have installed an upgrade from a different version of Aviator ODMA without completely uninstalling the previous version. If there are errors, reset your PATH environment variable by hand to the correct directory.

The directory containing the Notes.ini file is also set during install by searching your system. Again, this could be incorrect, but only if your Notes.ini file is in a non-standard place or there are multiple versions of the Notes Client installed on your system. Again, if this is incorrect, reset your PATH environment variable by hand to the correct directory.

The directory for temporary ODMA files is set to the standard temporary directory for your system. The files created here are for transfer purposes to and from the Aviator Notes database and the applications. They are transitory and important only when an application is actively editing a file through ODMA. Once the application is closed, these files cease to have value. You may reset this to any valid directory.

USING ODMA

Aviator's ODMA client integrates very tightly with the ODMA-compliant office productivity applications you selected during the configuration.


NOTE: To use ODMA, you do not need to have Notes running on your local computer, but you must have a Notes client at least installed and be connected to the server where the Aviator library is located.


The ODMA client allows you to open files located in Aviator, and save files into Aviator directly from your office productivity application.


About Aviator Documents


Aviator documents viewed through the ODMA client look exactly like the Aviator documents in the Aviator library. Icons represent the same status:

 Released: the document is completed and issued for all relevant readers to access;

 Draft: the document is in progress, on its way to being released;

 Checked out: the document (draft or released) is being edited by a user (check the document's attributes to see who has it checked out);

 Deleted: the document is no longer used and remains in the cabinet for reference purposes;

 Review in progress: the draft document is being reviewed by certain users.

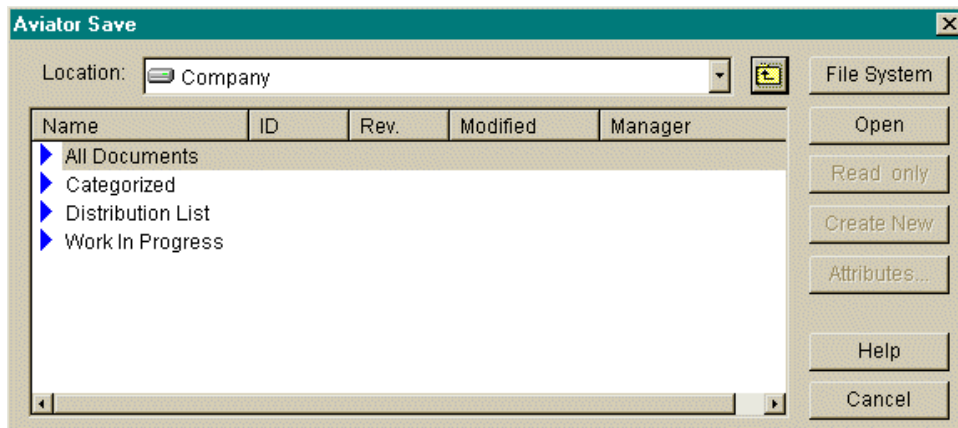
Creating a New File

To create a new file, simply open the ODMA-complaint application you wish to use, such as Word, and create a new file as you normally would. The Aviator ODMA client will only activate upon saving the file.

Saving a New File into an Aviator Document

To save a new file, simply select 'File – Save As...' or click the 'Save' icon. The ODMA client may require you to log in (depending on your ID settings) and will then open the 'Aviator Save' dialog box.

NOTE: The Aviator ODMA client dialog window is now your default file-open / file-close window. If you wish to go directly to your local drives, click the 'File System' button at the top right, and your standard Explorer dialog box will open.



- For a new Aviator document, click the 'Create New' button. Note that this will be highlighted when you click into the folder and document level where document creation is allowed.
- The new document attributes window will appear (see below).
- Just like in Aviator, you need to select a profile and enter a name for the document.
- Optionally enter a summary and Doc ID.

Aviator New Document Attributes

Profile: General

Doc. Name: ODMA Test Document

Summary: Test Summary

Doc. Id:

Author: Steve Levine/Aviator

Date Created: 11/03/99 06:33:16 PM

OK

Advanced

Cancel

- Once a document profile is selected, the other fields will be populated with the default attributes, if any. If you wish to access the document's other attributes, click the 'Advanced' button. The following window will appear.

Aviator Advanced Attributes

Author: Steve Levine/Aviator

Manager: Rick Wallat/Aviator

Editors: -No one-

Readers: -Everyone-

Distribution:

Categories: ODMA Client

Index:

Custom Attribute 1:

Custom Attribute 2:

Custom Attribute 3:

Custom Attribute 4:

OK

Cancel

- Fields that can be typed into appear with white background. Fields that are selected from a list appear with gray background. The down-arrow button to the right of the attribute field will bring up a list of available items for that particular attribute.
- Once you have entered any desired attributes, click 'OK'. You will then be required to enter the file name.

Aviator Document File Save

Name	Size	Modified

File name: ODMATest.doc

Save

Delete

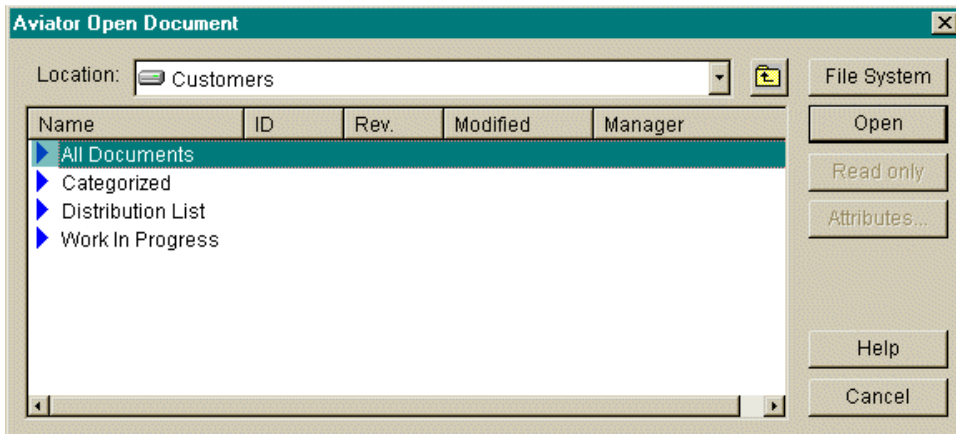
Cancel

- Click 'Save' to save the file.

From now on, every time you save this file from your application, the ODMA client will save it into the Aviator document.

Opening an Existing File

A file can be opened from an Aviator document by selecting File – Open from the task bar, or by clicking the 'Open' icon. The following dialog box will appear:

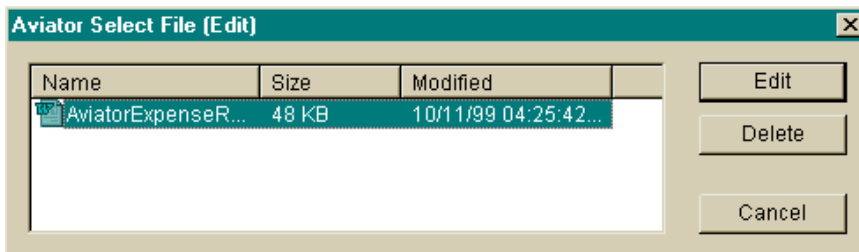


You can browse Aviator's library structure from the 'Location' drop-down list, or by double clicking through the cabinets and categories. The 'Open' button will also open selected cabinets and categories.

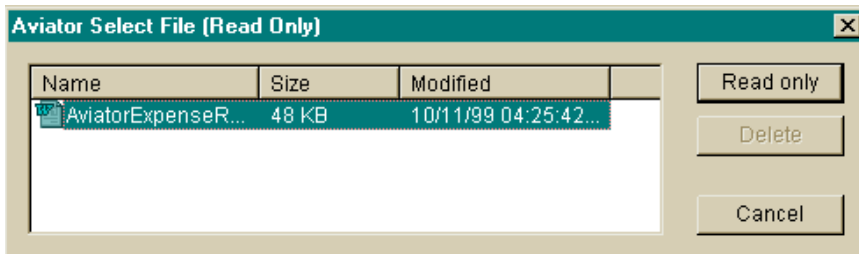
NOTE: If at any time you wish to access your local file system to find a file, click the 'File System' button.

Once you find the document that contains the file(s) you are looking for, you will have three options:

- Edit – with sufficient access, this will check out the document for you to edit the file(s). Every time you save the files you are editing, it will save changes directly to the Aviator document.



- Read only – this will open the file(s) for read only purposes.



- Attributes – this will access the document's attributes (see below).

Double-clicking – If the document is a non checked out released or a draft document, the Read only open option will appear. If the document is checked out, and you are the user who has checked it out, the Edit open option will appear. If the document is checked out, and you are NOT the user who checked the document out, you will be notified accordingly.

Closing a File

When you are finished editing a file, and have saved it as an Aviator document, close the file. You will be prompted to check in the document. If you wish to check it in, select the appropriate actions and check the document back in. If you do not wish to check the document back in, simply click 'Cancel' or 'OK' and the file will be closed.

Checking Out a Document and its File(s)

If you are editor or manager of a document and wish to check out a document and its file(s) for editing:

- Find the document you wish to check out;
- Click the 'Edit' button.

The document is now checked out to you, and you can edit the files.

Checking In a Document and its File(s)

When you are finished editing a file, and have saved it as an Aviator document, close the file. You will be prompted to check in the document. To check it in, select the appropriate actions and click 'OK' to check the document back in.

Copying a Released Document

If you wish to create a new document from an existing Aviator document:

- open the existing document and file(s) in read only mode;
- select 'File – Save As...' and follow the steps to create a new file and document.

This will create a completely new Aviator document containing the file you are currently editing.

Deleting a File

If you are editor or manager of a document and wish to delete the document's file:

- check out the document by clicking the 'Edit' button;
- the file window will appear with the 'Delete' button;
- click the 'Delete' button to delete the selected file.

Reviewing a File

Documents (and its files) assigned for you to review can be accessed from the ODMA client.

- Edit action - If you are assigned to edit the document, you can do so, but in order to send the document to the next reviewer, you must access the document in Aviator and select the 'Next Assigned' action.
- All other Review actions – If you are assigned to comment, rate, or approve the document, you can access the file in read only mode, but must access the document in Aviator in order to perform your action and assign the next reviewer.

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