Metamation

INFORMATION STORAGE & RETRIEVAL

Metamation User Guide

User Guide Contents

1. Introduction to Metamation

Metamation is a complete Document and Information management system. Metamation allows a library of documents and data to be held in a central repository, with control and access allowed for users connected either internally, or externally over the intranet or internet.

Metamation allows full document control including document check-in, check-out and review processing, storage of scanned documents, control of structured data, and linking of documents to structured data (such as invoices against customers, and invoice images against the invoice details).

Please select one of the following topics for more information:

- The differences between EDM, ECM and document management
- How to use this help
- Document Management
- Data Management
- Document Scanning
- Metamation support

1.1 What is EDM, ECM and document management

Metamation provides all facilities required to provide an EDM (Electronic Document Management), ECM (Electronic Content Management) and Collaboration service.

EDM (Electronic Document Management) is the storing of documents, either electronically generated from 3rd party systems (such as accounts, invoicing, payroll etc), or the storage of scanned paper based documents. Typically, where documents are scanned in or generated by third party applications, the documents are submitted and do not change.

ECM (Electronic Content Management) is the electronic generation, processing and storing of electronic data either in a controlled form (such as structured data) or in an uncontrolled form (such as word documents, drawings, from PC products such as Microsoft Office, etc). ECM provides full processing for documents including:

- Generation of new documents
- Submission of documents and data
- Review of documents and data
- Version tracking
- Annotation of important information

1.2 Login Security

When you access the Metamation document and information management portal, you will be required to enter your user name and password to gain access to the system.

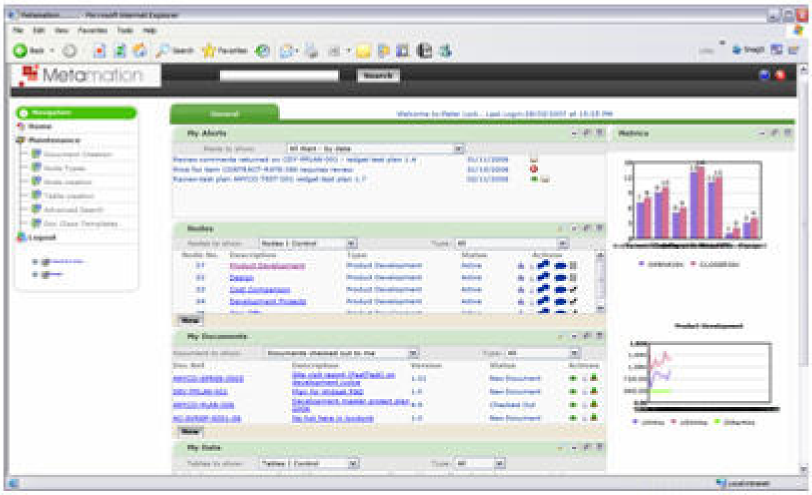
The security system requires that you enter your granted user code (which may be your email address or user code), and associated password. The entries are verified by pressing the **LOGIN** button.

If any problems are encountered during login (such as your password is not valid), the details of the problem will be displayed above the prompt for the user name, and you will be asked to re-enter your details. Where your user details are correct, then you will be taken to your Metamation document home page .

NOTE: All login attempts are logged and monitored. Repeated failures to log in may result in your terminal, PC or IP address being suspended.

2. The Main Metamation screen

The main Metamation display is shown when a user first logs into the system, or presses the **Home** menu item in the main navigation panel. The display shown is dependant on the configuration of the user, their personal settings, the panels that have been selected to be shown, the type of user and the information to be displayed. However, the screen will be shown as per the example below, with the various panels available showing different types of information:



All sections (panels) displayed can be tailored to show different information and different selections. All panels can be maximised to fill the work area, minimised to be hidden or can be updated as required. The sections (panels) available which may be displayed are as follows:

General Search

The general search entry box appears at the top of the frame in the title black bar and allows quick searching. Other search options are also available.

Navigation Panel

To the far left, is a navigation panel with a range of general maintenance options such as defining users, document types, advanced searches etc. The options displayed here will vary depending on you access level within the system.

Favourites

The favourites area shows your favourite projects, work areas, documents or tables. This area appears below the navigation area, and expands as more items are added to your favourites using the favourite icon (☑) next to any item.

My Alerts
The Alerts section displays actions which you need to be aware of, and need to take action on.

My Node
This displays the nodes/folders/stores which you have access to or control.

My Documents
This panel displays documents you are working on at the moment, documents you control etc.

My Data
This panel displays data tables which you control or can access.

Metrics
The metrics panel shows graphs and information based on the data tables defined within Metamation, showing information which is applicable (and available) to you.

2.1 Navigation Area

The navigation menu appears on the far left of the main Home page or Nodal display screen. Depending on your user type and configuration, the menu displayed will have a variety of menu options available for the control and configuration of the Metamation repository. These menu items will include:

My View - Changes the display to your custom display
SMTP Connection - for changing connection to an SMTP server for email production
User Maintenance - used to define or amend users who can use the system
Document Class - used to define the types of documents to be stored
Document Class Templates - for defining document templates and references
Node Types - defines the types of nodes which can be defined within the system
Advanced Searching - performs searches within the repository
General Forum - allows general discussions to take place
Nodal Forum - when in a view for a specific node, allows conversations regarding the specific topic or project
Audit enquiry - displays Metamation audit information
Change Password - allows you to reset your password
Out of Office - to notify of holidays and extended periods away

Logout - Logs you out of the application (back to the login screen)

Favourites
Below the main menu, your favourite items will be listed (nodes,

documents, tables etc). Each favourite can be selected with the mouse to jump to that area or item, or in the case of favourite nodes, can be unfolded to show specific items (documents, alerts etc). Selecting a sub-item (documents within a node) will not only show you how many documents exist within the node, but will jump directly to the specific item (documents, alerts, etc) for the node/project.

2.1.1 SMTP connection Admin

In order for Metamation to be able to send external emails, it must be able to communication with your organisations SMTP server. Configuration of the sending SMTP connection is performed using the SMTP connection administration, which is available to system administrators on the navigation menu.

Within the screen defined, the prompts allow the system administrator to specify SMTP features including the single SMTP server details, security credentials (where required), and 'sent from' information. All prompts marked with an asterisk (*) are mandatory, as follows:

Name	Mandatory entry requiring entry of the network name of the Metamation application server
Description	This is the optional description of the main Metamation application server (if you have multiple Metamation servers/databases, this is to describe its use)
From Address	This is a mandatory email, and is used to specify the email address Metamation alert emails will come from. Typically, this is either Metamation@yourdomain.com or NoReply@yourdomain.com.
Email Prefix	This mandatory entry is the prefix which appears as the start to the Subject of sent emails. I.E "Alert from mycompany... ". Metamation will add text to your prefix to describe the subject of the emails when sent.
Host Name	This optional entry allows the IP address or Network name of your SMTP server. If left blank, SMTP emails will be sent (if available) from the main Metamation server.
SMTP Port	By default, port 25 is used for SMTP email sending. If you need to change this,

	enter the port number here.
User Name	If your SMTP server needs authentication, enter the user name or email address here.
Password	If your SMTP server need authentication, enter the password for the named user here.

2.1.2 User Maintenance

In order for anybody to view, create or access documents on the Metamation information repository, they first need to be defined as a user within the Metamation application. The creation or amendment of users is carried out in the User Maintenance routine, which can only be accessed by pre-defined system administrators from the main Navigation Menu on the administrators home page.

User List
When the User Maintenance screen is first selected, the list of existing defined users is shown on screen. Existing users can be amended by clicking on the user line with the mouse. To create new users, the **New** button can be selected at the bottom of the user list.

User Creation or Amendment
After selecting **New** for a new user, or selecting an existing user for amendment, the main user maintenance screen is then presented. This allows creation or amendment of existing users through the following entries:

User Code	The user code is is used by the user when they log into Metamation to represent themselves. Every user in the system should have a unique user code. Normally, it is suggested that the user code be the users initials, email address or similar code.
User Name	The user name identifies the user to other system users. It is strongly suggest that user names are not changed when an old user leaves and a new user starts with the same initials, as this will cause any existing audit or control information to now point to the new user.
Department	The users department (or company for

	external users) can either be selected from existing departments (from the drop down list), or a new department can be specified in the space provided.
Password	The password should ideally be a mixture of alphabetic and numerical characters. When amending an existing user, the users current password will not be displayed, but can be changed by entering a new password here.
Validated Password	In order to save a new or amended user, the password needs to be re-entered to verify that the correct password has been specified.
User Type	The user type can be selected from the available list of drop-down user types: **Administrator** - Has access to all functions of the system including ability to create users, node types etc **Submitter** - Subject to other security, is allowed to create and amend documents and data **Viewer** - Subject to other security, is only allowed to view existing documents and data
Status	The user can be marked as activate or in-active from the drop down list. Only active users can logon into the application and be selected for tasks and work.
Email Address	Allows storage of the users email address. When entered, alerts and notifications will automatically be emailed to the user.

2.1.3 Document Class Maintenance

Documents held within the Metamation repository are stored and divided into Document Classes. Document Classes are used to group types of documents, to allow templates to be defined, and to allow document references to be set based on the type of document (document class). Examples of types of Document Classes that could defined may be:

- Invoices
- Letters
- Contracts
- Designs

- Specifications
- Quotations
- Maps and Directions
- Etc

The creation or amendment of Document Classes is carried out in the Document Class Maintenance routine, which can only be accessed by pre-defined system administrators.

For system administrators, the **Document Class Maintenance** option is available within the system Navigation menu options on the administrators home page .

Document Class List
When the Document Class Maintenance screen is first selected, the list of existing defined document classes is shown on screen.
Existing classes can be amended by clicking on the class line with the mouse. To create new document classes, the **New** button can be selected at the bottom of the existing Document Class list.

Document Class Creation or Amendment
After selecting **New** for a new Document Class, or selecting an existing class for amendment, the main Document Class maintenance screen is then presented on screen. This then allows creation or amendment of existing classes through the following entries:

Class Code	The document class code is a short code to define the document class type. Each document class requires a unique class code.
Description	This is the full description of the document class being defined.
Status	The document class can be marked as activate or inactive from the drop down list. Only active classes will be available for new documents created within the Metamation document store.

2.1.4 Document Class Templates Maintenance

Just as products such as Microsoft Word allow templates to be defined for common documents, so Metamation allows templates to be defined for every class and type of document. Metamation allows templates to be defined for each type of document, so for instance, templates can be defined for zip files which contain a zip file with Copyright notices, content indexes etc to which other items can be added.

In addition to the physical templates themselves, the Metamation document class template maintenance allows document references to be defined. Whenever a new document is created within Metamation, the system can optionally generate a new document reference, based on a template that you define.

When templates and document references are used, the template that is most relevant within the node structure is used. As an example, where a node structure is defined to represent a company or project structure, the template first as the system works it way up through the structure from the location where the document is being filed will be used. If a template exists at the top most level (a good fall-back position), then this will always be used, unless an alternative template further down the tree can be used instead.

The creation or amendment of Document Class Templates is carried out in the Document Class Template Maintenance routine, which can only be accessed by pre-defined system administrators.

For system administrators, the **Document Class Template Maintenance** option is available within the system Navigation menu options on the administrators home page.

Document Class Template List

When the Document Class Template Maintenance screen is first selected, the list of existing defined document classes templates is shown on screen. Where you have administrator rights to a particular node/document class combination, these existing class templates can be amended by clicking on the template line with the mouse. To create a new document class template, the **New** button can be selected at the bottom of the existing Document Class Template list.

By default, ALL document class templates defined within the system are listed. However, to list template for a particular node, the node selection drop down list can be used to filter the display to a specific node.

Document Class Templates Creation or Amendment

After selecting **New** for a new Document Class Template, or selecting an existing class template for amendment, the main Document Class

Template maintenance screen is then presented on screen. This allows creation or amendment of existing class templates through the following entries:

Node	This selects the node the template should apply to, from the drop-down list of nodes that you can access. When a document is created in the specified storage node or any children (subject to them having their own template over-rides), any documents of the specified document class will use your specific template.
Class Code	The document class code is a short code to define the document class type for the template being defined. The available activate document classes are available in the drop down list
Document Reference	The document reference is the template for the document reference number to be used for new generated documents. Almost any characters can be used for the document reference, however, the "?" has a special meaning as this is where the template generates the next available number. Placing a series of "?" together will pad the generated number with leading zeros. As an example, to generate a document reference of "DEMO-SPEC-0001-UK" (where 0001 is the next available number), enter a document reference of "DEMO-SPEC-????-UK" (4 "?"s means generate a 4 digit reference number).
Document Template	The defined document template for new documents can be uploaded into the database. Use the Browse button to point to the pre-defined template file, and the referenced template is then uploaded to the Metamation system for everybody to use. You are then free to delete the local copy of your template. When amending, the URL where the template was originally uploaded from is shown for reference.

2.1.5 Node Types

Documents held within the Metamation repository are stored against storage nodes. These storage nodes are divided into types of node, allowing selection and filtering of nodes based on type.

Examples of types of node types that could defined may be:

- Internal storage
- External storage
- Project folders
- Old storage files
- Etc

The creation or amendment of Node types is carried out in the Node Type Maintenance routine, which can only be accessed by pre-defined system administrators.

For system administrators, the **Node Type Maintenance** option is available within the system Navigation menu options on the administrators home page.

Node Type List
When the Node Type Maintenance screen is first selected, the list of existing defined node types is shown on screen. Existing types can be amended by clicking on the type line with the mouse. To create new node types, the **New** button can be selected at the bottom of the existing Node Type list.

Node Type Creation or Amendment
After selecting **New** for a new Node Type, or selecting an existing type for amendment, the main Node Type maintenance screen is then presented on screen. This then allows creation or amendment of existing types through the following entries:

Node Type Code	The node type code is a short code to define the node type. Each node type requires a unique type code.
Node Class	The node class is used for filtering, and can either be selected from existing classes (from the drop down list), or a class can be specified in the space provided.
Description	This is the full description of the node type being defined.
Status	The node type can be marked as activate or inactive from the drop down list. Only active node types will be available for new nodes.

2.2 Initial Screen Display - Alerts and Tasks

When actions are assigned to you (from project plans, data control, etc), or alerts are sent to you, these will either be sent to you by email or will be shown in the Alerts section of the Metamation home or Nodal page. This Alerts panel, shows all information which you need to be aware of, which directly effects you, and which you need to take action on. The Alerts panel should be reviewed on a regular basis to ensure tasks and actions assigned to you are carried out.

From the general Home page or your personalised home page, the Alerts panel will show all unfiltered alerts for your attention. When you are viewing a nodal display (a specific project/work area), the alerts panel will show only information for that node or work area.

By default, all Alerts will be shown, and will be sorted by relevance, with the most important alerts at the top of the list. As with all other panels in the home page, the Alerts panel can be minimised (hidden), maximised to show all alerts, or restored back to its original display.

At the top of the Alerts panel, a drop down selection list allows the alerts to be sorted and filtered either by the type of alert, or by the alert date.   Also, the various types of alerts are also listed, allowing the alerts to be filtered just to one specific type of alert or action.

Against each alert listed, the details of the alert (why you have been alerted to information) will be shown, together with important related information such as document details, versions and dates. Against each alert listed, depending on the type of alert, a number of icons will be displayed alongside the alert to allow actions to be carried out. These are as follows:

- The Watch Icon places a watch on the item you are being alerted to.

- The delete icon ignores or acknowledges the alert, and deletes it from your alerts list with no further action

- The read icon takes you into the document, data or node to carry out the alert action (read new version of document, carry out review etc)

- In the case of status alerts , this will in turn, send a status request to all sub-nodes under your control.

2.2.1 Alerts and Tasks - Alert Types

When viewing the alerts sent to you from another user or from the Metamation system librarian, the list of Alerts in the Alert Panel can be sorted either by default (all alerts, in order of importance), by Alerts type or by Alert Date . The filtering and sorting of the alerts is carried out using the drop down list of Alert options at the top of the alert panel.

Within the drop down list, each of the four types of alerts are listed allowing selecting and filtering on a specific alert type. These are as follows:

Document Alerts - When new versions of documents are available, or you have had a document checked out for too long

Node Alerts - Such as when you have been granted access to a node, control of a node, or a node you are watching has been updated.

Table Alerts- Such as when you have been granted access to a table, control of a table, or a table you are watching has been updated.

Status Checks - These are requests to provide a status update on nodes (work areas or projects) that you control

Document Reviews - Notification that you need to review documents

Document Approvals - Notification that you need to approve documents

Comments received- Notification that comments have been returned on a document

Out of date information - When structure table data needs periodic review, alerts that data is now out of data

New nodes you now own - Updates of nodes which have been passed over to you for control

New tables you now own - Updates of tables which have been passed over to you for control

Data condition alerts - Alerts on problems with data supplied to the system

Metamation system alerts - For system administrators, these are internal system alerts of problems (security notifications, invalid email addresses, data links now missing etc)

Planned tasks needing action - Alerts that tasks in linked project plans need your attention

Against each alert listed, the details of the alert (why you have been alerted to information) will be shown, together with important related information such as document details, versions and dates. Against each alert listed, depending on the type of alert, a number of icons will be displayed alongside the alert to allow actions to be carried out. These are as follows:

- The Watch Icon places a watch on the item you are being alerted to.

- The delete icon ignores or acknowledges the alert, and deletes it from your alerts list with no further action

- The read icon takes you into the document, data or node to carry out the alert action (read new version of document, carry out review etc)

- In the case of status alerts , this will in turn, send a status request to all sub-nodes under your control.

2.2.2 Alerts and Tasks - All alerts by alert type

When viewing the alerts sent to you from another user or from the Metamation system librarian, the list of Alerts in the Alert Panel can be sorted either by default (all alerts, in order of importance), by Alerts type or by Alert Date . The filtering and sorting of the alerts is carried out using the drop down list of Alert options at the top of the alert panel.

When the alerts are sorted by alert type, all the alerts are sorted and grouped by the type of alert (document watch, document review, changed data, overdue actions etc). Within the alert panel, each section is shown as a sub-section, with the alert type, number of alerts of that type, and with the ability to minimise and maximise each sub-section in the list.

Within each sub-section of Alert type, each different alert is listed with the associated actions which can be performed, which will vary depending on the alert type. This options are as follows:

- The Watch Icon places a watch on the item you are being alerted to.

- The delete icon ignores or acknowledges the alert, and deletes it from your alerts list with no further action

- The read icon takes you into the document, data or node to carry out the alert action (read new version of document, carry out review etc)

- In the case of status alerts , this will in turn, send a status request to all sub-nodes under your control.

2.2.3 Alerts and Tasks - All alerts by date

When viewing the alerts sent to you from another user or from the Metamation system librarian, the list of Alerts in the Alert Panel can be sorted either by default (all alerts, in order of importance), by Alerts type or by Alert Date. The filtering and sorting of the alerts is carried out using the drop down list of Alert options at the top of the alert panel.

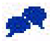
When the alerts are sorted by alert date, the alerts are listed in order of the date when the alert was received. Note, that this is not necessarily the order of importance.

Against each alert listed, the details of the alert (why you have been alerted to information) will be shown, together with important related information such as document details, versions and dates. Against each alert listed, depending on the type of alert, a number of icons will be displayed alongside the alert to allow actions to be carried out. These are as follows:

- The Watch Icon places a watch on the item you are being alerted to.

- The delete icon ignores or acknowledges the alert, and deletes it from your alerts list with no further action

 - The read icon takes you into the document, data or node to carry out the alert action (read new version of document, carry out review etc)

- In the case of status alerts , this will in turn, send a status request to all sub-nodes under your control.

2.3 Initial Screen Display - My Documents

Within the main Metamation work frame, displayed either from the home page or the "nodal display", the screen is initially divided into sections for different types of information including Alerts (actions you need to carry out), Nodes (storage or work areas), Data and Metrics .

The Documents area of the display shows documents which are of interest to you. The documents listed will depend on the level of access you have been granted, the document filter you have applied and the view currently in place.

At the top of the **My Documents** display, a drop down list is available to control the documents you want to see. The options available will vary depending on your security level and the view currently present, but will include:

Documents Checked out to me - Lists documents you are currently working on

Documents I Own or control - Lists documents owned by you, or you last checked in

Documents for a Node - Lists documents for a selected storage, work or project area

Documents I need to Review/Approve - Lists documents which you need to review/approve

Documents Last Submitted by Me - Lists documents you last submitted, even if you no longer own then.

To the right of the documents filter, another drop down list allows you to filter on the types of documents (Word, Excel, PDF etc) to be displayed. Finally, a third drop down option allows the documents to be filtered for a specific document class as defined within Metamation.

These three filters can be combined to quickly filter down to the documents of interest.

At the bottom of the "My Documents" portion of the work area, a "NEW" button is available to allow the creation of new documents .

Within the list of documents on the display, the document reference numbers, description, version, submission date and status will be displayed. You can select any line with the mouse pointer to view the properties of the document selected. When the mouse pointer is left over any of these document properties, the document synopsis (if entered) is displayed in a hovering window.

To the right of the other document information, various icons are displayed allowing activity to be performed on the document. The icons displayed and available will vary depending on the document type, your security level and the status of the document. The following options are generally available:

- The Watch Icon places a watch on the listed document to notify you of changes.

- Grants access to the specified document to other users. Where the icon is shown in red, Grants for the selected document are already in place

- Where you are working on a document, this allows you to check in a new version of the document

- This allows you to check out the document for amendment

- The read icon opens the last checked in version of the document using the native reader (opens the document for you to read, save etc)

- If shown, the document can be deleted from the system.

When the **My Documents** panel is maximised, the display changes to show all available documents in the Maximised Documents Display.

2.3.1 My Documents - Documents checked out to me

When viewing the documents of interest in the Metamation repository in the home pages My Documents panel , the documents listed can be filtered by the status of documents.

The **Documents checked out to me** filter shows only those documents that are awaiting action by you. This will be either documents you have just created (and not yet checked in), or documents you have checked out.

To the right of the documents filter (where the "Documents checked out to me" has been selected), another drop down list allows you to filter on the types of documents to be displayed. Finally, a third drop down option allows the documents to be filtered for a specific document class as defined within Metamation.

These three filters can be combined to quickly filter down to the documents of interest.

Where you are viewing documents for a specific node, the documents checked out to me is further filtered to only show the documents checked out to you, of the specified document type, that belong to the currently viewed document storage node.

To the right of the document information displayed for this filter, various icons are displayed allowing activity to be performed on the document. The icons displayed and available will vary depending on the document type, your security level and the status of the document. The following options are generally available:

- The Watch Icon places a watch on the listed document.

- Grants access to the specified document to other users. Where the icon is shown in red, Grants for the selected document are already in place

- Where you are working on a document, this allows you to check in a new version of the document

- This allows you to check out the document for amendment

- The read icon opens the last checked in version of the document using the native reader (opens the document for you to read, save etc)

2.3.2 My Documents - Documents I need to review or Approve

When viewing the documents of interest in the Metamation repository in the home pages My Documents panel , the documents listed can be filtered by the status of documents.

The **Documents I need to review or approve** filter shows only those documents that are awaiting action by you. This will be either documents you need to review (read and make comments on for improvement/sign off) or approve for general distribution.

To the right of the documents filter (where the "Documents I need to review or approve" has been selected), another drop down list allows you to filter on the types of documents to be displayed. Finally, a third drop down option allows the documents to be filtered for a specific document class as defined within Metamation.

These three filters can be combined to quickly filter down to the documents of interest.

Where you are viewing documents for a specific node, the documents you need to review is further filtered to only show the documents you need to review, of the specified document type, that belong to the currently viewed document storage node.

To the right of the document information displayed for this filter, various icons are displayed allowing activity to be performed on the document. The icons displayed and available will vary depending on the document type, your security level and the status of the document. The following options are generally available:

- The Watch Icon places a watch on the listed document.

- Grants access to the specified document to other users. Where the icon is shown in red, Grants for the selected document are already in place

- Where you are working on a document, this allows you to check in a new version of the document

- This allows you to check out the document for amendment

- The read icon opens the last checked in version of the document using the native reader (opens the document for you to read, save etc)

2.3.3 My Documents - Documents last submitted by me

When viewing the documents of interest in the Metamation repository in the home pages My Documents panel , the documents listed can be filtered by the status of documents.

The **Documents last submitted by me** filter shows only those documents where you were the last person to submit a new version, even where you are not currently working on the document or even own the document.

To the right of the documents filter (where the "Documents last submitted by me" has been selected), another drop down list allows you to filter on the types of documents to be displayed. Finally, a third drop down option allows the documents to be filtered for a specific document class as defined within Metamation.

These three filters can be combined to quickly filter down to the documents of interest.

Where you are viewing documents for a specific node, the documents last submitted by you is further filtered to only show the documents last submitted by you, of the specified document type, that belong to the currently viewed document storage node.

To the right of the document information displayed for this filter, various icons are displayed allowing activity to be performed on the document. The icons displayed and available will vary depending on the document type, your security level and the status of the document. The following options are generally available:

- The Watch Icon places a watch on the listed document.

- Grants access to the specified document to other users. Where the icon is shown in red, Grants for the selected document are already in place

- Where you are working on a document, this allows you to check in a new version of the document

- This allows you to check out the document for amendment

- The read icon opens the last checked in version of the document using the native reader (opens the document for you to read, save etc)

2.3.4 My Documents - Documents owned or created by me

When viewing the documents of interest in the Metamation repository in the home pages My Documents panel , the documents listed can be filtered by the status of documents.

The **Documents owned or created by me** filter shows only those documents that you own (you are the official document owner) or were originally created by you. These documents are listed regardless who last checked them in, checked them out or the status of the documents.

To the right of the documents filter (where the "Documents checked out to me" has been selected), another drop down list allows you to filter on the types of documents to be displayed. Finally, a third drop down option allows the documents to be filtered for a specific document class as defined within Metamation.

These three filters can be combined to quickly filter down to the documents of interest.

Where you are viewing documents for a specific node, the documents owned or created by you is further filtered to only show the documents created by you, of the specified document type, that belong to the currently viewed document storage node.

To the right of the document information displayed for this filter, various icons are displayed allowing activity to be performed on the document. The icons displayed and available will vary depending on the document type, your security level and the status of the document. The following options are generally available:

- The Watch Icon places a watch on the listed document.

- Grants access to the specified document to other users. Where the icon is shown in red, Grants for the selected document are already in place

- Where you are working on a document, this allows you to check in a new version of the document

- This allows you to check out the document for amendment

- The read icon opens the last checked in version of the document using the native reader (opens the document for you to read, save etc)

2.3.5 My Documents - Document for the Nodal tree

When viewing the documents of interest in the Metamation repository in the home pages My Documents panel , the documents listed can be filtered by the status of documents.

Within the documents filter drop down list, the nodes you manage will be listed for selection. When one of this nodes is selected, the documents for the specified node and all children, grandchildren etc will be listed.

All the documents for the nodes selected are sorted and grouped by the storage node. Within the Documents panel, each storage node is shown as a sub-section, with the node, number of documents within that store, and with the ability to minimise and maximise each sub-section in the list.

To the right of the documents filter (where the starting node has been selected), another drop down list allows you to filter on the types of documents to be displayed. Finally, a third drop down option allows the documents to be filtered for a specific document class as defined within Metamation.

These three filters can be combined to quickly filter down to the documents of interest.

Where you are viewing documents for a specific node, the nodal display will automatically display children of the currently viewed document storage node.

To the right of the document information displayed for each node sub-section, various icons are displayed allowing activity to be performed on the document. The icons displayed and available will vary depending on the document type, your security level and the status of the document. The following options are generally available:

 - The Watch Icon places a watch on the listed document.

 - Grants access to the specified document to other users. Where the icon is shown in red, Grants for the selected document are already in place

 - Where you are working on a document, this allows you to check in a new version of the document

 - This allows you to check out the document for amendment

 - The read icon opens the last checked in version of the document using the native reader (opens the document for you to read, save etc)

2.4 Initial Screen Display - My Nodes

Within the main Metamation work frame, displayed either from the home page or the "nodal display", the screen is initially divided into sections for different types of information including Alerts (actions you need to carry out), Documents, Data and Metrics .

The Nodal area of the display shows storage Nodes which are of interest to you. The nodes listed will depend on the level of access you have been granted, the node filter you have applied and the view currently in place. Depending on your configuration, the term Nodes may be called something else, such as folders, directories or stores.

At the top of the "My Nodes" display, a drop down list is available to control the nodes you want to see. The options available will vary depending on your security level and the view currently present, but will include:

Nodes I can access - Lists nodes you can access, which will be your own nodes (you control), children of those nodes, plus any nodes which you have been given access to

Nodes I Own or control - Lists storage nodes owned by you

To the right of the nodes filter, another drop down list allows you to filter on the types of nodes to be displayed.

The final display filter is the number of levels to display. By default, this will be set to "1" and will show header nodes only, but this level can be increased to show more storage node levels down to show more nodes.

These three filters can be combined to quickly filter down to the storage nodes of interest.

At the bottom of the "My Nodes" portion of the work area, a **New** button is available to allow the creation of new storage nodes .

Within the list of nodes on the display, the node reference numbers, description, type and status will be displayed. You can select any line with the mouse pointer to jump into the node (for the nodal view) of documents and data within the node. When the mouse pointer is left over any of these node properties, the node synopsis where available is displayed in a hovering window.

To the right of the other node information, various icons are displayed allowing activity to be performed on the node. The icons displayed and available will vary depending on the node type, your security level and the status of the node. The following options are generally available:

- This displays the graphical hierarchy of the nodal structure, starting at the selected node, allowing a view of sub and linked nodes

- Displays the properties of the Node, including the synopsis, icon and relationship with other stores

- This allows you to add the storage node onto your favourites list

☒ - Once the node is a favourite, this removes the node from your favourites list

- The sends a status update request to all child nodes of the selected node

- This updates the current status of the selected node, and allows status reports to be compiled.

- Grants access to the specified node to other users. Where the icon is shown in red, Grants for the selected node are already in place

- If shown, the node can be deleted from the system.

2.4.1 My Nodes - Nodes I control

When viewing the documents of interest in the Metamation repository in the home pages My Nodes panel , the nodes listed can be filtered by the status and access of the storage nodes.

The **Nodes I Control** filter shows only those nodes which you control.

To the right of the nodes filter, another drop down list allows you to filter on the types of nodes to be displayed.

The final display filter is the number of levels to display. By default, this will be set to "1" and will show header nodes only, but this level can be increased to show more storage node levels down to show more nodes.

These three filters can be combined to quickly filter down to the storage nodes of interest.

At the bottom of the "My Nodes" portion of the work area, a **New** button is available to allow the creation of new storage nodes .

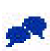
To the right of the other node information, various icons are displayed allowing activity to be performed on the node. The icons displayed and available will vary depending on the node type, your security level and the status of the node. The following options are generally available:

 - This displays the graphical hierarchy of the nodal structure, starting at the selected node, allowing a view of sub and linked nodes

 - Displays the properties of the Node, including the synopsis, icon and relationship with other stores

 - This allows you to add the storage node onto your favourites list

 - Once the node is a favourite, this removes the node from your favourites list

 - The sends a status update request to all child nodes of the selected node

 - This updates the current status of the selected node, and allows status reports to be compiled.

- Grants access to the specified node to other users. Where the icon is shown in red, Grants for the selected node are already in place

- If shown, the node can be deleted from the system.

2.4.2 My Nodes - Nodes I have access to

When viewing the documents of interest in the Metamation repository in the home pages My Nodes panel , the nodes listed can be filtered by the status and access of the storage nodes.

The **Nodes I have access to** filter shows not only the nodes which you control, but also all nodes below these controlled nodes, and all nodes that other people have granted you access to.

To the right of the nodes filter, another drop down list allows you to filter on the types of nodes to be displayed.

The final display filter is the number of levels to display. By default, this will be set to "1" and will show header nodes only, but this level can be increased to show more storage node levels down to show more nodes.

These three filters can be combined to quickly filter down to the storage nodes of interest.

At the bottom of the "My Nodes" portion of the work area, a **New** button is available to allow the creation of new storage nodes .

To the right of the other node information, various icons are displayed allowing activity to be performed on the node. The icons displayed and available will vary depending on the node type, your security level and the status of the node. The following options are generally available:

- This displays the graphical hierarchy of the nodal structure, starting at the selected node, allowing a view of sub and linked nodes

- Displays the properties of the Node, including the synopsis, icon and relationship with other stores

- This allows you to add the storage node onto your favourites list

- Once the node is a favourite, this removes the node from your favourites list

- The sends a status update request to all child nodes of the selected node

- This updates the current status of the selected node, and allows status reports to be compiled.

- Grants access to the specified node to other users. Where the icon is shown in red, Grants for the selected node are already in place

- If shown, the node can be deleted from the system.

2.5 Initial Screen Display - My Data

Within the main Metamation work frame, displayed either from the home page or the "nodal display", the screen is initially divided into sections for different types of information including Alerts (actions you need to carry out), Documents, Nodes (document and data stores) and Metrics .

The Data area of the display shows storage tables which have been defined within the Metamation repository to hold structured information. The "My Data" panel of the home page will list defined data tables based on the level of access you have been granted, the table filter you have applied and the view currently in place.

At the top of the "My Data" display, a drop down list is available to control the tables you want to see. The options available will vary depending on your security level and the view currently present, but will include:

Tables I can access - Lists tables you can access, which will be your own data tables (you control), plus any tables which belong within storage nodes which you have been given access to

Tables I Own or control - Lists storage data tables owned by you

To the right of the tables filter, another drop down list allows you to filter on the types of tables to be displayed based on the tables time period. These two filters can be combined to quickly filter down to the storage tables of interest.

At the bottom of the "My Data" portion of the work area, a **New** button is available to allow the creation of new storage tables.

Within the list of tables on the display, the table name, record type (local, shareable etc), description, and status will be displayed. You can select any line with the mouse pointer to jump into the table properties for the selected table. When the mouse pointer is left over any of these table properties, the table synopsis is displayed in a hovering window. You can select the table name with the mouse to display the data within the table.

To the right of the other table information, various icons are displayed allowing activity to be performed on the table. The icons displayed and available will vary depending on the table type, your security level and the status of the table. The following options are generally available:

- Places a watch on the table to report any changes. Where a watch already exists, this icon is displayed in red.

- Displays the properties of the table, allowing change of content and use.

- Displays the actual content (data) within the defined table, in a variety of formats.

- If shown, the table can be deleted from the system.

2.5.1 My Data - Tables I control

When viewing the tables of interest in the Metamation repository in the home pages My Data panel , the tables listed can be filtered by the status and access of the storage tables.

The **Tables I Control** filter shows only those tables which you control or own.

To the right of the tables filter, another drop down list allows you to filter on the types of tables to be displayed based on the tables time period. These two filters can be combined to quickly filter down to the storage tables of interest.

To the right of the other table information, various icons are displayed allowing activity to be performed on the table. The icons displayed and available will vary depending on the table type, your security level and the status of the table. The following options are generally available:

- Places a watch on the table to report any changes. Where a watch already exists, this icon is displayed in red.

- Displays the properties of the table, allowing change of content and use.

- Displays the actual content (data) within the defined table, in a variety of formats.

- If shown, the table can be deleted from the system.

2.5.2 My Data - Tables I have access to

When viewing the tables of interest in the Metamation repository in the home pages My Data panel , the tables listed can be filtered by the status and access of the storage tables.

The **Tables I have access to** filter shows only not only those tables which you control or own, but also tables which are shareable to everybody, and tables which belong in nodes you have been granted access to.

To the right of the tables filter, another drop down list allows you to filter on the types of tables to be displayed based on the tables time period. These two filters can be combined to quickly filter down to the storage tables of interest.

To the right of the other table information, various icons are displayed allowing activity to be performed on the table. The icons displayed and available will vary depending on the table type, your security level and the status of the table. The following options are generally available:

- Places a watch on the table to report any changes. Where a watch already exists, this icon is displayed in red.

- Displays the properties of the table, allowing change of content and use.

- Displays the actual content (data) within the defined table, in a variety of formats.

- If shown, the table can be deleted from the system.

2.6 Initial Screen Display - Metrics (Meta)

Within the main Metamation work frame, displayed either from the home page or the "nodal display", the screen is initially divided into sections for different types of information including Alerts (actions you need to carry out), Documents, Nodes (document and data stores) and Data.

The Metrics area of the display shows structured data which has been marked for graphical analysis within the defined storage tables.

The graphs displayed will change depending on the tables that you have access to, the data held within the tables, the graphs defined and also you current view of the repository. As an example, where you drill into a specific node, the metric display will change to reflect the tables, data and starting view (node) selected.

Where graphs are displayed which cannot fit on the home page, a scroll bar will be available scroll down to more charts and graphs.

Every graph can be selected to be expanded to show more detail of the information within the Metamation work area by right hand clicking on the graph, or other facilities are available for control of the graphed information.

2.6.1 Control and selection of Graphs and Grids

Within the main Metamation work frame, displayed either from the home page or the "nodal display", Graphs of metric information can be controlled for each of the graphs displayed on screen.

For control of the graphs, the following options are available:

Mouse Hover
By moving your mouse over a graph, the graph values will be displayed. A hover window will appear showing the item being graphed (data type), the minimum value and the maximum value.

Right Hand Click Options
Further options can be found by right hand clicking on a graph or grid with the mouse pointer. A pop-up window is then presented with the following options:

Maximise
This will expand the selected graph or grid to fill the work frame.

Hide
This will hide the single graph from the display, allowing more room for other graphs. Graphs and grids can be restored by pressing the "Home" menu option on the navigation menu.

View Data
This option will display the raw data used to produce the graph or grid. Basic raw data can be displayed by expanding the graph (as detailed above) and changing the graph type to a data grid, but viewing the data shows all associated data for the graph.

View Definition
This option will display the definition of the table used to produce the graph (columns, data types and graph types).

2.6.2 Expansion of a single graph or grid

Within the main Metamation work frame, displayed either from the home page or the "nodal display", Graphs of structured data will be shown on screen.

By right hand clicking on a single graph and selecting the **Maximize** option, the selected graph (or series of graphs) will be expanded in the Metamation work frame to display more information.

Once the graph has been expanded, above the graph(s), options will be available for controlling the graph type and for time based tables/graphs, the graph period as follows:

Graph Period
Where the graph is a time based graph (such as web hits for a given period), the time period displayed or graphed can be changed using the drop down list of available time periods. If the graph x-axis has been based around a time period (such as invoice date, budget date, etc) then the axis will be scaled from day, to week, to month, to quarter to year as will best fit in the graph area.

Graph type
When you first expand the graph, the graph will be a larger version of the graph shown on the home page. However, the type of graph can be changed to a Bar chart, data grid, pie chart, line chart etc using the drop down selection list. In some situations, changing the chart to a pie chart will cause the information to be split into multiple charts (as pie charts cannot easily display 3D information).

2.7 Work frame

The Metamation work frame is the main area of work within the application. Whenever actions are performed (such as defining documents, users, nodes etc), the work frame is updated to show the relevant area of the application. However, the main navigation menu, favourites and quick search options are always displayed, allowing you to quickly jump to a relevant section, back to the home page etc.

2.8 Header bar

Wherever you are within the Metamation application, the main application header bar is always displayed, together with the main navigation menu, favourites and quick search option.

The header bar provides access to the quick search option, and control icons as follows:

- Sets the current on screen view as your default

- Connects to the Metamation support issue logging or suggestion web site

- Displays the system on-line help

- Closes Metamation

2.9 Maximise on-screen lists

Just as standard application windows can be maximised within a Microsoft Windows environment, so the information panels of the Metamation "home" or "Nodal" screens can be maximised. Maximising areas of the screen temporarily removes other sections of the display, and expands the selected area of the display to fill the screen, and allows the maximum information to be displayed.

To maximise a panel on screen, simply click the maximise button () in the section header line with the mouse.

All sections of the "Home" or "Nodal Display" work frames can be expanded including:

- My Alerts
- My Documents
- My Nodes (work areas)
- My Tables
- Metric Displays

When the **My Documents** panel is maximised, the display changes to show all available documents in the Maximised Documents Display.

2.10 Minimise on-screen lists

Just as standard application windows can be minimised within a Microsoft Windows environment, so the information panels of the Metamation "home" or "Nodal" screens can be minimised. Minimising areas of the work area temporarily folds (hides) the selected area of the display, allowing more space for the other displayed areas. The minimise option reduces the selected area to just the panel header.

To minimise a panel on screen, simply click the minimise button () in the section header line with the mouse.

All sections of the "Home" or "Nodal Display" work frames can be minimised including:

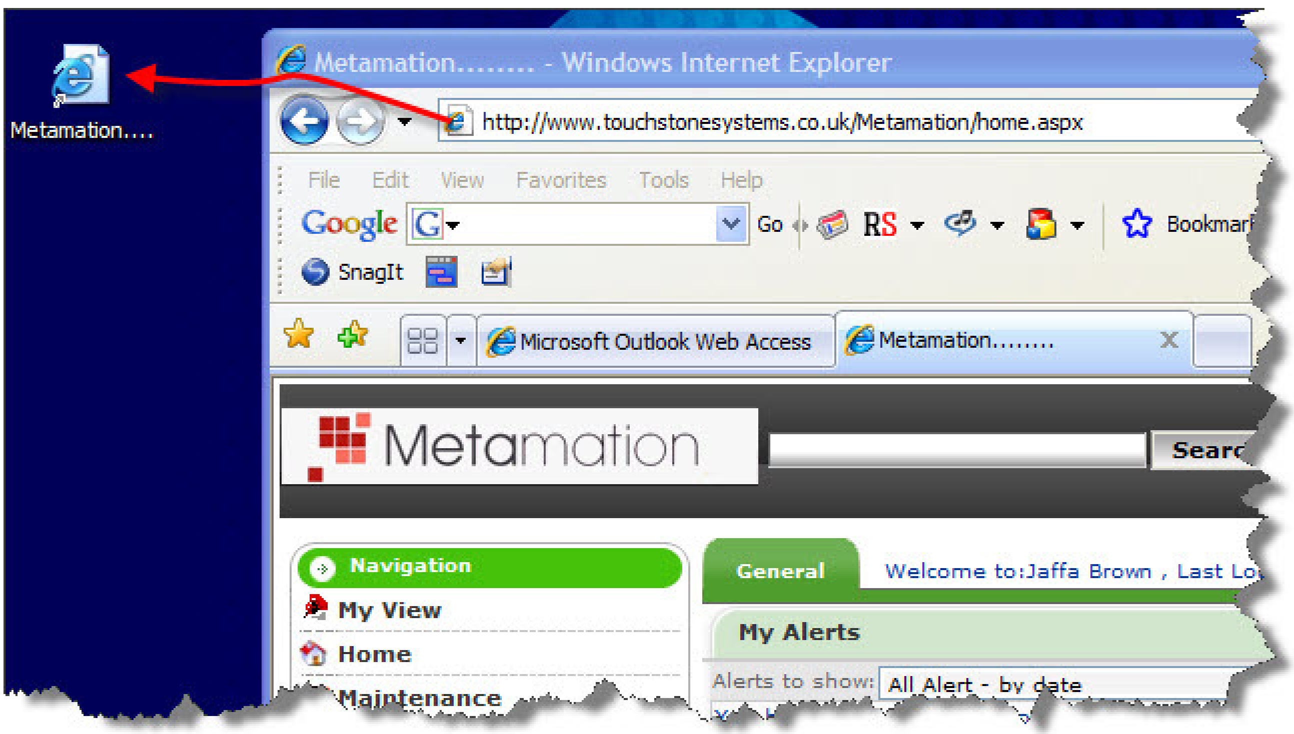
- My Alerts
- My Documents
- My Nodes (work areas)
- My Tables
- Metric Displays

2.11 Metamation shortcuts

Depending on the Web Browser used to access Metamation, links to documents, table, records, and system views can be saved for quick access. Each user can save any view as their main page using the My View icon ( ) in the top right of all Metamation screens.

In addition, standard Windows shortcuts can be created from within the Web Browser to the current page on screen by dragging the browsers shortcut from the browser title bar to the desktop, to an open email or any compatible application (such as Word, outlook, notepad, etc).

The following shows the creation of a shortcut being created within Microsoft Internet Explorer:



When you activate the saved short-cut, you will be first presented with the standard Metamation login screen, and once you have successfully logged in, will be taken to the document, table, item or view saved in the shortcut.

The same technique can be used for sending document or data links to co-workers.

2.12 MyView

Metamation allows the tailoring of the initial view when you first login . Each user can save any screen or view as their main page using the My View icon ( ) in the top right of all Metamation screens.

When the My View icon is used, the current view on screen is saved, including any settings of panels, drop down settings and selections.

When you next login to Metamation, the saved view will be the initial display. The standard Metamation home page can still be viewed using the Home Page menu option from the navigation menu, or the custom view can be displayed at any time again by selecting the **My View** option from the navigation menu.

2.13 Deleting Items

Tables, Documents and Storage Nodes can be permanently deleted from the Metamation database up to the point of use. If a Document has been checked in, if a table has physical data records within it, or a node has been used to create documents or data, they can no longer be deleted - only hidden.

Deletion can be carried out quickly from the home page by using the delete icon ( ) against a document, table or node. However, if the specific item cannot be deleted because it is in use, this delete icon will not be shown.

In addition, at the base of the node properties, table properties or document properties windows, you will also have the option to Delete the item if the item has not been used.

3. Document Storage and Processing

Documents is a generic term for any structured or unstructured information that is contained in a single entity. Examples of a document may be an Microsoft office document (Word, Excel, Project plan etc), an image (either drawn, from a CAD package or scanned in), a data file (such as a CSV, XML, HTML file), or a catalogue file (such as a ZIP, or RAR compressed catalogue).

Metamation stores these items as 'documents' within an internal library. Think of documents as books within a virtual library. The room has virtual storage areas which may be anything from a file within a storage cabinet, a shelf, room or even a different building. All the books are there, but subject to which areas you can access defines which books or documents you can see.

Each book (or document) clearly has a title, but it also has a lot of other information regarding its location, who last read it, who has checked it out (so the librarian knows who to chase when it becomes overdue) and also some other cross-relating index information, so that the librarian knows what books or documents relate to different subjects.

The Metamation library has a back-catalogue as well. As new updated versions of documents become available, it removes the old copies off the shelves and replaces the document with the new version. But the old version is not lost. Instead, it is filed away for future reference just in case it is needed.

Because the books or documents are held in virtual locations (virtual rooms, shelves, cabinets, filing trays and so on), it is easy for the librarian to move these virtual stores around. When the virtual shelf or filing cabinet is moved, all the documents or books in that cabinet are automatically moved at the same time.

These virtual storage locations are referred to as Nodes within Metamation, and the books are called Documents .

Metamations jobs is to act as a virtual librarian, keeping the library up-to-date with the latest documents, keeping a note of who reads, checks in, or checks out documents, allowing new documents to be added to library with the necessary indexes for rapid retrieval, and to provide other services associated with the documents, such as controlling the review of new documents.

Documents can be submitted to the library either as general documents (which are in storage or project nodes), or documents can be associated to structured data . Documents against data allows documents such as maps, invoices received, purchase orders, plans etc to be indexed to know structure data records, such as project files, customers, suppliers, staff or any type of other information.

3.1 Defining Documents

Documents are created from one of five sources within Metamation:

- From 3rd Party applications feeding documents directly into the Metamation document repository
- From document scanning (converting paper to electronic media)
- Directly from interfaced office applications (such as Microsoft Word, Microsoft Excel, Autocad, etc)
- Through application integration using the Metamation API
- Creating documents manually in Metamation

To create documents normally (manually) within Metamation, there are two options which create documents in almost the same way:

- On the navigation menu on the top left of the home or "nodal display" page, select the **Document Creation** menu option.
- On the My Documents section of the home or "nodal display" page, select the **New** document button within this section of the display.

The document properties window is then displayed allowing the creation of new documents. This window is also used for the amendment of existing documents.

The following entries are then made when defining or amending an existing document:

Document Node	The document node is used to record the location where the document will be stored (virtual cabinet). Available locations are listed in the drop down list.
Document Type	The document type indicates the type of application used to create or amend the document. This will normally automatically be selected by the document class (see below), but can be changed from the drop down list.
Document Class	This is used to classify the type of document (invoice, purchase order etc). A list of available document classes is again available from the drop down list.
Document Reference	Every document can optionally have a document reference number (for quick reference when talking about a particular document). The document reference must be unique. For new documents, a **NEW** button is displayed alongside the document reference to automatically generate the next new available reference for the selected document class.

Description	The description is a short title for the document. Most document searches will be performed against this document title.
Synopsis	The synopsis allows an unlimited amount of text to be entered to describe the document. If left blank, this will be automatically populated with the text from the document for text based documents (word documents, powerpoints, text based PDFs, etc).
Version	The version is a mandatory entry, and is used to record the current (or new) version of the document. Where other versions of the document exist (for existing documents), an option is displayed alongside the version number to see previous versions. Controls are available to increase the major, minor and sub versions.

For new documents being created in this way, after the document information and reference have been generated (if required), a button is available on screen to **Download template.** If activated, the defined template for the document will be presented on screen for saving or opening (to start work on the new document as a local copy).

To save any changes, or to create the new document, press the **Save** button at the base of the screen. If you have a document available now to upload (an existing document), you can use the **Check In** button to upload the document as part of the document creation.

Where a new document is being created, the new document will automatically appear in your home and "nodal display" pages in the My Documents section, with a status of "New Document".

Once the document has been completed, you can then check in the new document for others to see and review as required.

If an existing document is yet to be checked in, at the bottom of the document properties window, you will have the option to **Delete** the document. Once a document has been checked in, it cannot be deleted, only hidden.

At the top of existing document property windows, icons are available. Depending on your user type and security, the following options are generally available:

- The Watch Icon places a watch on the document.

- Grants access to the specified document to other users. Where the icon is shown in red, Grants for the selected document are already in place

- Where you are working on a document, this allows you to check in a new version of the document

- This allows you to check out the document for amendment

- The read icon opens the last checked in version of the document using the native reader (opens the document for you to read, save etc)

- If shown, the document can be deleted from the system.

If the document is going through a review process , you can monitor the status of the review or approval using the**Review Status** button under the document status display.

3.2 Checking out Documents for amendment

When you need to work on existing documents within the Metamation document repository, you are required to check out the documents. This step:

1. Ensures you are working on the correct latest version of the document
2. Marks the document as being work on by you and stops others working on the document
3. Audits the fact that you are working on the document, and when you checked the document out (allowing the system to remind you to check the document in again if you forget).

There are two methods of checking out a document to start work on a new version or amend the existing version:

1. On the home or "nodal display" page, locate the document you require in the My Documents panel and either select the

document to view its properties (see method 2 below), or select the check out icon ( ) next to the document.

2. On the document properties window (from a document search, or by selecting the document from My Documents), use the same check-out icon ( ) on the document properties screen to check out the document.

When you select the check out icon, the latest version of the document will automatically be given to you to open or save. Once you accept either option, the document will be updated to have a status of "Checked out" to you.

When you have completed your changes, you can then check-in your amendments.

3.3 Document Check In

The document check-in transfers the current version of the document from your local computer into the Metamation document repository and allows the next actions for the document to be specified. Document check-in can either be selected from the home or "nodal view" page against a listed document by selecting the check-in icon ( ), or can be selected from the main documents property window.

When documents are checked in, the check in window is displayed allowing the local copy of the document to be uploaded into the Document Repository. This upload and check in is performed by using the following entries on this window:

Document URL	The document URL is used to point to the document location to be uploaded. The document location (path) and name can either be entered manually, or the document local location can be selected using the Browse option.
Document Version	The document version is automatically incremented to the next version. However, options are available to increment the version number to the next major version, minor version, or manually enter the new version number as appropriate.
Synopsis	The current synopsis for the document is displayed. Where required, this can be amended to record any additional information for the new version of the

	document. It is always useful to include a brief description of the changes in this version of the document.
Next Action	The next action is used to indicate what should next happen with the document once check-in is complete. The next actions are as follows:

Check-In - This will upload the latest version of the document and mark the document as 'checked in'. After check in, any other user who has access to the document can read the latest version, can check out the document, and notifications of a new version will be sent as required. No further actions are required on the document.

Leave Checked Out - This will upload the latest version of the document into the repository, but will leave the document checked out to you so that others cannot work on the document. After check in, any other user who has access to the document can read the latest uploaded version, but they cannot check out or change the document as it will still be under your control.

Review - This will upload the latest version of the document and mark the document as 'checked in'. However, directly after the check in process is complete, the document will go through the document review process .

Approve - This will upload the latest version of the document and mark the document as 'checked in'. However, directly after the check in process is complete, the document will go through the document approval process .

3.4 Document Watching

Document watches are used to automatically notify you when actions are carried out on documents held within the Metamation repository. As an example, by placing a watch on a document, when a new version of the document is made available, an alert or email with the document will be sent to you (or anybody else you specify). This means, you never have to check to see when documents are updated - Metamation will do this for you automatically.

Watches are placed on documents from the main Metamation home page, or from the properties window of a selected document. On these screens, against the document listed, a document watch icon will be shown as follows:

Selecting this icon against a document will launch the document watch window, allowing you to specify the actions to be carried out on the watch. Within the presented watch window, the following prompts can be completed as required:

Status for Watch	The drop down allows you to select when watch alerts should be trigged. **Approved Only** alerts you once a watched document has been reviewed or signed off. **Submitted** will alert you whenever a new version is submitted.
Notification Type	Notifications available are either Message (which will send an Alert to your Alert panel), or email, which will trigger an email with the document attached.
External Email	Where the Notification type is "Email", the email alert with the attached document will be, by default, emailed to your registered email address. To send the document elsewhere (to another person), enter the recipients email address. Multiple email addresses can be used by separating email addresses using either a "," or ";" character

When a document is marked to be watched by you, the watch icon is changed to have a red glow to indicate a watch is in place. To remove the watch, re-select the watch icon for the document and use the **Remove Watch** action at the bottom of the screen.

3.5 Viewing Document History

When documents are added and updated within the Metamation repository, Metamation automatically keeps all previous versions available for historical reference. Access to any document will by default, always return the latest version. However, it is possible to see the history of versions and view the historical copies of the documents.

When a document is selected either from one of the document search options or from the My Documents list from the home or "nodal view" screens, selecting any part of the document (reference, name, version etc) will take you to the properties display for the selected document.

Within this display, the properties (version, description, status and synopsis) for the current version will be displayed. The current version of the document can then be viewed by pressing the **Read document** ( ) icon.

Where previous versions exist, against the current version number, a **Document History** button will be available. Selecting this will display a pop-up window of the previous versions of the document detailing the previous version numbers, who saved the version, date of creation and submission etc. Selecting any previous version with the mouse pointer will open that version of the document for reading or saving.

Against any document version listed, if the document version has progressed through a review cycle and review or approve comments have been noted, the option toView Review Comments will be shown against the version.

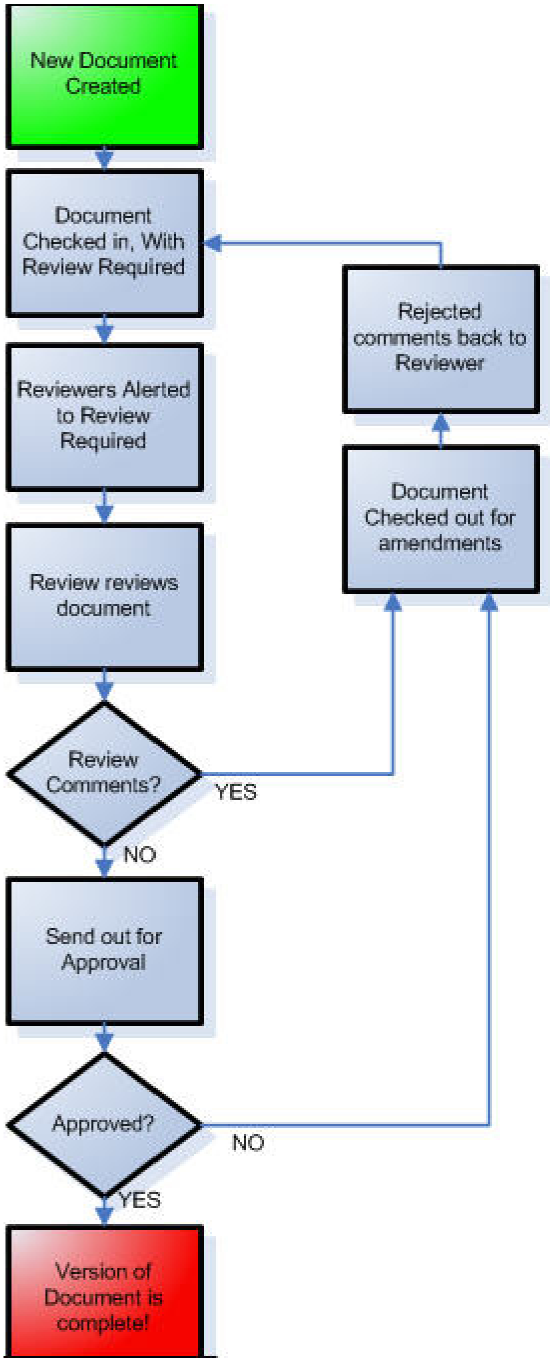
3.6 Overview of Document Approval

Document approval is used to automate the workflow of sending a new or amended document for internal or external reviews, allowing the reviewers to raise comments on the documents, provide marked up copies if required, and to sign off documents as approved for further distribution.

Whenever a new or updated document is submitted to the Metamation document repository, the author has the ability to perform a number of check in actions against the document to indicate what will happen with the document, and to allow document review or approval to take place. Depending on the configuration of the system, the type of user and the type of document, document review may be a mandatory process during document check-in.

When documents are marked for review or approval, the documents enter the review workflow.

The common workflow for documents will be as follows:



For more information see: Adding reviews to document review, Adding review comments and Author review of received comments

3.6.1 Document Review or Approval List

Once a document has been checked in to the document repository, depending on the actions required for document review or approval selected during check in, directly following the check-in, the document Review or Approval screen will be displayed. This process allows the document author to indicate the system users who are required to review or approve the document.

When reviewers or approvers are marked against a particular document, the system will remember this user list for future reference. Whenever future versions of the same document are uploaded, the same review and approval list will be available for the new versions. However, for different versions, people can be added or removed from the list as required.

On the review or approval list, users are added for review or approval from the drop down list of available users. When the number of registered users grows to a large number, this dropdown turns into a search facility, allowing users to be entered by quick searching based on first name, last name, user code or department. The users listed for review will be both internal and external users. As names are added to the review/approve list, so extra lines are automatically added to allow other people to be included.

If a selected reviewer is out of the office during the review process (they have placed an out of office notification), you will be alerted that they may not be able to review or approve your document. If they have selected another person to review/approve on their behalf, you will have the option to select this alternative reviewer.

Once all the names have been added, to the right of the names, the user review responsibilities can be indicated by the tick boxes. Each user can be indicated as a reviewer, an approver, or can be ticked to be removed from the list. Users can be both reviewers and approvers as required. Once review has been completed by the named reviews, if all reviews have signed off the document as review complete (without rejecting the document for amendment), then the document will automatically enter the approval phase. If there are no approvers listed against the document, then the document will automatically be approved for general circulation.

If the review/approve list has been selected from the document properties window of an existing document, then the status of the document review will be shown. Where a document review status is being viewed, the author can easily see against each reviewer or approver, the status of their review/approve tasks, who has still to review or approve the document, who has accepted or reject the document, who has left comments etc.

Before the document can be submitted for review or comment, it is important to enter the number of days for review at the top of the review/approve list. This indicates the number of calendar days that each named person has to review or approve the document. If configured, this will default to the standard review time, but can be entered or changed before submission.

When the review or approve list has been completed and submitted, an Alert is sent to each named reviewer or approver to carry out their actions on the document. As the review cut-off date is reached, Metamation will nag the reviewers or approvers to carry out their actions. Once ALL review or approval is complete, the document author will be sent confirmation of the review process and any comments received. The document author will then perform their own review of the received comments to update the document as required (to a new version).

For more information on the review workflow, please refer to the Review or Approval overview .

3.6.2 Document Approval or Rejection Process

If you have been asked to review or approve a document entered into the Metamation repository, you will receive an Alert or email pointing you to your required action, the document details, and a review icon to review the document.

Once you select the document or review icon from the alerts window , you will have the ability to carry out the document review. All reviews must be carried out within the Metamation environment, but reviews can be carried out in one of two ways:

Review comment entry - this allows you to build up a list of review comments on the submitted document/version to which the author can comment on, accept (and update a new version) or reject with a reason. This is the preferred method of document review as it allows the best form of communication between all reviewers/approvers and the document author.

Marked up version - This allows you to mark up a version of the document with your corrections and comments. This method relies of the native product (such as word) to track the changes and comments, and provides the lowest level of functionality.

When you select a document to review from the Alerts system, you will be taken to the review screen. Any previous comments or marked up documents will be available in this screen. The options available within the review screen are as follows:

Information and Icons
At the top of the screen, the document details (reference, title and version) are shown for confirmation. Next to this, icons are available for; ( ) watching future changes in the document, and ( ) reading the current version of the document. Before starting the review, you should use the book icon to read and review the document.

Action
The action will depend on the outcome of the review/approval process. The next action is available in a drop down list and allows you to **Defer** (you are not going to review) the document, **Reject** the document as changes are required, leave the document **pending** (allows you to come back to this document later) or **accept** the document without any changes required. If you accept, the alert will be removed from your Alerts list, and this will end your current involvement with the document.

View Documents
Where other people have submitted marked-up versions of documents, this button allows you to view who has submitted a marked up version and the marked up documents themselves. If you need to add your own comments to a marked up version, update the marked up document and then reload the document as detailed below.

Review Grid
Comments you may have on the document can be entered into the review grid. The grid is made up of a new row for every comment. The columns entered into the grid are as follows:

Reference	This column is generated automatically by the system as you enter comments, and generates a unique reference number for your comment for the document/version combination.

Page/Section	Enter the page number, section number, paragraph number to reference the area of the document you have a comment on. this should be as brief as possible, e.g "All doc." or "P6, S4.6"
Type	This pull down list allow you to select the type of comment you want to leave from the available list
Comment	This space allows you to enter as much text as you need to identify the problem to the document author.
Status	The status is not applicable to document reviewers or approvers, but is set by the document author when they respond to your comments. When reviewing the comments left on your review comments, this indicates if the author has accepted or rejected the comments.
Response By	Again, this is not applicable to document reviewers or approvers, but is set by the document author when they respond to your comments. This shows who responded to your comment (took action, rejected your comment etc).
Accept/Reject Notes	Again, this is not applicable to document reviewers or approvers, but is set by the document author when they respond to your comments. Where applicable, this is a notepad that allows the document author to indicate what they changed in the document to accept your recommendation, or why they rejected the comment.
Delete	If you want to remove any of you comments as no longer relevant, use this tick box to delete review comments.

Upload Document

If you have decided to mark up a copy of the document using the native application, at the base of the review screen you will find a facility to upload your marked up copy. Either enter the file path to your local marked-up version, or use the browse button to locate the marked up file. When you save the review, the marked up copy will be posted into the database for others to see.

3.6.3 Author review of comments

If you have asked people to review or approve documents, once the last reviewer/approver has either carried out their action or has Deferred the process (decided not to review or approve), you will receive an Alert or email indicating the outcome of the review/approval process, letting you know if your document needs further attention (review comments have been returned) or the document has been accepted and moved to the next stage (either moved to the approve phase for review, or been marked as an approved document).

Once you receive the alert or email notification, where the document has had review comments returned, you as document author have the ability to view the comments and act on them, either accepting the comments (and creating a new version of the document), or rejecting the comments. To view the comments returned, select the document or review icon from the alerts window. You will then have the ability to respond to all the comments returned.

When you select a document to review the review or approval comments, you will be taken to the review screen. All comments returned from all reviewers or approvers will be listed in this screen. The options available within the review screen are as follows:

Information and Icons
At the top of the screen, the document details (reference, title and version) are shown for confirmation. Next to this, icons are available for; ( ) watching future changes in the document, and ( ) reading the current version of the document (that you last checked in). If you decide that you need to make amendments to your document, before accepting or rejecting comments on the document, you should check out the document for review using the check out icon ( ).

View Documents
Where people have submitted marked-up versions of documents, this button allows you to view who has submitted a marked up version and the marked up documents themselves. Once you have checked out a new version of the document, you can review the marked up version as you normally would, and then upload the reviewed marked up copy as the new version. Any comments returned in the review grid which do not appear in the marked up version should also be included.

Review Grid
Comments others have put against you document will appear in the

review grid. This grid is made up of a new row for every comment. The columns entered (**in bold below**) into the grid are as follows:

Reference Number	This column is generated automatically by the system as the reviewers/approvers enter comments, and generates a unique reference number for their comment for the document/version combination. This is useful for communication with the reviewer/approver.
Page/Section	The page/section entered by the reviewers/approvers details the area of the document with the comment. You cannot amend this.
Type	The type indicates the type of comment. You cannot change this entry
Comment	This is the comment entered by the reviewer or author. When viewing comments left, you can scroll but cannot amend these comments.
Status	**The status allows you to indicate if you accept or reject the comment. The acceptance options are available from the drop down list.**
Response By	**As you accept or reject comments left, this will automatically be populated with your name to record who responded to the comments.**
Accept/Reject Notes	**If you want to leave comments on why you rejected comments, answer questions or note changes you made to the document, this area allows your notes to be recorded.**

Once you have processed all comments, when you save the changes, notification of your review will be sent back to the original reviewers/approvers for reference. From this point, they cannot use the system to respond to your acceptance or rejections.

3.7 Overview of Document Scanning

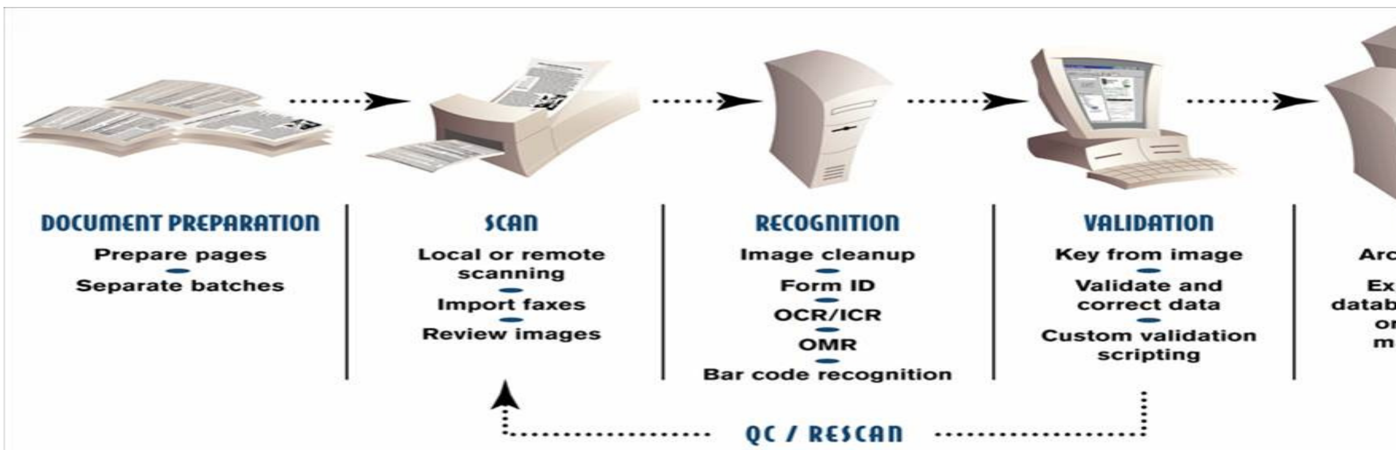
Document scanning is an optional element of the Metamation application, and allows paper records to be scanned into the application, and converted to image and data content.

Scanning can be provided as a bolt-on service to the Metamation application using a range of scanning providers such as Cardiff

Teleform and Kofax, or can be interfaced to your own scanning process. Subject to the scanning selection, a range of scanning hardware can be supported, but generally, should be either TWAIN or KOFAX compliant.

Depending on the scanning option selected, the pages can be scanned in and stored as a searchable image (picture file with associated searchable Meta data), or full text validation can be performed on pre-defined forms to verify the data on forms, and store the data recorded in the forms associated with the image. Examples of such data capture would include application forms, request processing forms, medical forms etc.

A separate guide to document scanning, scanning processing and options available is available from the Metamation support team . However, the general principle for document is as following:



The documents are prepared (pages flattened, staples removed etc) ready for scanning. The documents are then scanned in to capture the graphical images from the documents. A "recognition" engine then processes the form, performing any necessary Optical Character Recognition and data validation. A human "Validation" stage allows any pages recognised with scanning problems (unknown or missing data, low quality of hand writing etc) to be quickly corrected. The final stage is the release which updates and stores the images and associated data to the Metamation database.

Please contact Touchstone Systems for more information on document scanning, or consult your separate user guide on any document scanning solution provided as part of the Metamation system.

3.8 Deleting Documents

Once a document has been checked in (a real document exists), Documents are never really deleted within Metamation. Instead, they are removed by hiding them or making them inactive. If real deletion is required, a sperate administrator routine is available to delete, backup and purge documents and other data. However, the removal of documents goes against industry guidelines for document management such as ISO and PD0008.

To remove a document which is no longer required, the document can be marked as hidden so that it not shown in displays, or searches (unless you specifically search for hidden or deleted documents).

Documents are hidden either by changing the status of an individual document through its properties screen , or by maximising the "My Documents" or "Node Documents" area, and marking documents as hidden. See maximising the display for more information on deleting or hiding documents.

3.9 Maximised Document Display

Within the Metamation home page or the "nodal display", the **My Documents** panel can be maximised to list the documents in a larger display area by pressing the maximise button (). The display then fills the work frame with the documents which are of interest to you. The documents listed will depend on the level of access you have been granted, the document filter you have applied and the view currently in place.

At the top of the maximised **My Documents** display, a drop down list is available to control the documents you want to see. The options available will vary depending on your security level and the view currently present, but will include:

Documents Checked out to me - Lists documents you are currently working on

Documents I Own or control - Lists documents owned by you, or you last checked in

Documents for a Node - Lists documents for a selected storage, work or project area

Documents I need to Review/Approve - Lists documents which you need to review/approve

Documents Last Submitted by Me - Lists documents you last submitted, even if you no longer own then.

To the right of the documents filter, another drop down list allows you to filter on the types of documents (Word, Excel, PDF etc) to be displayed. Finally, a third drop down option allows the documents to be filtered for a specific document class as defined within Metamation.

These three filters can be combined to quickly filter down to the documents of interest.

At the bottom of the My Documents portion of the work area, a **New** button is available to allow the creation of new documents .

Within the list of documents on the display, the document reference numbers, description, version, submission date and status will be displayed. You can select any line with the mouse pointer to view the properties of the document selected. When the mouse pointer is left over any of these document properties, the document synopsis is displayed in a hovering window.

To the right of the other document information, various icons are displayed allowing activity to be performed on the document. The icons displayed and available will vary depending on the document type, your security level and the status of the document. The following options are generally available:

- The Watch Icon places a watch on the listed document.
- Grants access to the specified document to other users. Where the icon is shown in red, Grants for the selected document are already in place
- Where you are working on a document, this allows you to check in a new version of the document
- This allows you to check out the document for amendment
- The read icon opens the last checked in version of the document using the native reader (opens the document for you to read, save etc)

Showing Hidden Documents

By default, any hidden (deleted) documents will not be shown in the main Metamation displays. However, in the the maximised documents display, a selection option is available at the top right of the document list to include hidden documents as follows:

When this option is ticked, the display is updated to show any hidden documents. Hidden documents will be listed with a status of "Hidden".

Bulk Changes and Hiding Documents

The maximised documents display allows bulk changing of documents, including moving documents to different store locations, and to hide (delete) documents.   To activate the bulk changes or hiding of documents, the bulk change mode needs to be activated by ticking the selection box as follows:

When the bulk change box is selected, against each document listed, a selection box is displayed alongside the other document icons. To change or hide any documents, select the documents to be changed or hidden.

At the bottom of the document list, drop down options are available to mark the document as "hidden" or "active", and to change the store location from the available storage areas (that you have access to). Selecting the **Update Documents** button will then make the appropriate changes.

4. Overview of Data Table Processing and content viewing

Within Metamation, Documents refers to unstructured information, such as office documents, scanned images, drawings and presentations. Facilities are provided for the storage of structured data, effectively tables of information which can be edited or controlled either as useful information, or as data to which documents can be attached.

As example, an unstructured document may be a word document or image file containing an invoice or purchase order. Structured information may be a table of customers, with the account numbers, address, balance and credit limit held as rows.

Metamation allows the combining of the two forms of information, so that against a table of customers, tables of invoices can be held with invoice details such as dates, amounts, items to be held. Against these tables, unstructured documents can then be held, such as holding a copy of the invoice document against the structure invoice table. In this way, unstructured information is held against a structured database.

Documents can then be found both by searching for the documents in the usual way, but also by accessing the documents through the structured data.

Of course structured information also allows the removal of various offices spreadsheets and small Microsoft Access databases scattered around your organisation for storing telephone numbers, payment details, project tasks etc, as they can all now be held and controlled within Metamation allowing the information to be shared.

Data tables of structured information can be defined within Metamation, with the data either entered directly into the Metamation system, or imported from other systems such as a CRM (Customer relationship Management) or accounts system/database.

Regardless of the source of the information, Metamation provides facilities for the definition of the tables, contents (columns) layout and validation. Subject to the settings of the table, its source storage node, and your access, you may be able to add records to the table, view the contents, and view associated documents within the table.

When you use Metamation, and structured data tables that you have access to will be listed in the My Data area of the home page. When you **access any** of these tables, you will see the data contained inside.

4.1 Data grid data entry

Metamation provides a variety of different ways in which structured data can be accessed, entered and viewed, depending on your personal preference. When you access a table through the My Data panel of the Metamation home page, by default you will be taken to the summary view.

The various options available for viewing or entering data are as follows:

The summary view
This is the standard data view for Metamation, and provides a paged view of the data contents in a grid, similar to a spreadsheet. This view allows you to quickly filter the records you are interested in, add new records and download the data for external use.

The Data Form Panel
This view uses a form based screen to enter and view information, one record at a time.

Data Grid Entry
This view is very similar to the summary view in that the information is shown in a grid, but this allows new records to be added to the end of the listed records, rather like adding a row to the end of a spreadsheet.

4.1.1 Data sheet data entry - summary panel

When a table is first selected for data entry or viewing from the My Data panel of the home page , the default view of the data is the summary panel. This is a screen divided into 2 sections, with a set of filters at the top, and the contents of the data table below.

The filter options will depend on the columns within the table which have been defined to allow filtering. The filter panel is then used to filter the contents of the data list below to show only relevant information. By default, the data panel below will show all available records.

The data panel shows the contents of the selected data table. The columns shown in the summary display will vary depending on those columns within the defined table which have been marked for summary display.

Depending on the size of your computer screen, this information will be divided into display pages. You can page through the rows in the table using the paging control which appears above the data. The page control appears as follows:

<< < 43 44 45 46 47 48 49 50 51 52 > >>

The numbers shown represent the page numbers (with the current page highlighted). Pressing a page number will jump to that page. You can move to the start of the list or back one page using the back controls (<< <), and forward a page or to the last page using the forward controls (> >>).

As you move the cursor over the data, the fields will be highlighted. Clicking any line will take you into the data form view for the selected record for detailed viewing and amendment (subject to security). As you scroll the mouse left and right beyond the table, the whole table will automatically scroll to show additional information if available.

At the top of the screen, options are available for viewing the data in data sheet entry (which displays all rows, and allows viewing, entry and adding new rows in the same way as Excel), and the ability to Download the data to your local computer for other uses.

Documents Held Against Data Records

Where a data table has been defined to hold documents against data records, on the far right of the data record grid, an extra column will be available to add and view linked documents for each data record. Within this extra **Linked Doc** column, options will be available per data record as follows:

Add - The Add option allows new documents to be stored against the selected data record.

- This icon indicates that a single document is held against the data records. When you click on the icon, the document is shown on screen.

- This icon indicates that multiple documents are held against the data records. When you click on this icon, a window will appear allowing you to view the documents and select which one to view.

4.1.2 Data sheet data entry - Data form panel

When a table is first selected for data entry or viewing from the My Data panel of the home page , the default view of the data is the summary panel. From this display, when a record is selected for viewing/amendment with the mouse, or the **New** button is selected to add a new record, the data entry form is displayed.

Unlike the summary view, the data form shows all defined content of the table for the selected record. The layout of the form will depend on the layout defined for the table, and may be broken up into sections, may include sub-forms, and may include a list of documents associated with the record.

Within the form display, as you move your cursor over the fields, the field is highlighted to show focus. If you are creating a new record or your permissions allow you to edit existing records, selecting a field will allow entry in that field.

Different fields will react in different ways, depending on the definition of the table, fields and content. Some fields may be display only, and either will not allow entry, may be calculated from other fields, or will be presented as drop down calendars or selection lists.

If you are amending existing data or creating new records, the system will warn you if you try to do anything wrong (such as enter text into a numerical entry, or miss a mandatory field). Some warnings will be produced as you enter information, and some will be produced when you try to save the record.

Documents Held Against Data Records

Where a data table has been defined to hold documents against data records, at the bottom of the form view, a list of available documents will be shown in the tabbed document display.

4.1.3 Download of Data

When a table is first selected for data entry or viewing from the My Data panel of the home page , the default view of the data is the summary panel.

From this summary panel, once any data filtering has taken place, facilities are provided to export and download the table data to your local computer for further use (such as analysis, reporting, mail-merges, etc).

At the top of the summary display window, the **Download table data** button will generate a CSV file (using the table name and system date) which you can either save to you local drive or open with a local application (such as Microsoft excel).

Once the data has been exported, it is no longer controlled by Metamation and its use is no longer audited.

4.1.4 Data sheet entry - filtering

When a table is first selected for data entry or viewing from the My Data panel of the home page , the default view of the data is the summary panel. This is a screen divided into 2 sections, with a set of filters at the top, and the contents of the table below.

The filter options will depend on the columns within the table which have been defined to allow filtering. The filter panel is then used to filter the contents of the data list below to show only relevant information. By default, the data panel below will show all available records.

Within each filter field available, entries can be entered either by direct entry, or using the pull down calendars or drop down lists as defined within the columns. All data entered into the fields forms a logical AND in the selection.

I.e, entering a company name of "SMITH" and a location of "LONDON" will find companies called SMITH in LONDON.

Each text field is a logical CONTAINS selection. This means that entering a name of "SMITH", the filter will find "A SMITH", "B SMITH" etc. The more text you enter, the more specific the filter.

Once you have entered information to be filtered, options are available at the base of the filter panel as follows:

Filter - Filters the records shown by the filter criteria you have entered.

Show All - Clears the filter criteria and shows all records

Clear - Clears the filter criteria, but does not refresh the data shown

New - Where you have permissions, creates a new record using the Form view

Delete - Deletes records from the system. To remove records, first select records using the tick boxes to the far left of each record, then press the delete button.

Within the data records displayed, you may move through the pages of records using the controls on screen, jumping to a specific page using the page numbers, forward a page, back a page, to the first page or the last page in the data list.

Selecting a record from the list of records displayed will take you into the data maintenance form view, allowing amendment of the existing record (subject to the data source and your access rights to the data).

4.2 Data table Sheet Layout

When a table is first selected for data entry of viewing from the My Data section of the home page , the default view of the data is the summary panel. From this display, data is normally entered using the Data form (by selecting a record with the mouse or pressing **New** to create a new record). The data form allowing editing or entry of records one record at a time.

However, at the top of the summary display, an option is available to **View Data Grid Data Entry**. This will present a grid of all available records, allowing amendment and data entry of multiple records in a spreadsheet view.

In some situations, entry of data into the data entry sheet form will be faster as records can be entered one after the other and copying of data between records is possible. However, as this form views all available data, it is recommended that this view is limited to smaller table with less than 1000 records.

Unlike the summary view, the data sheet view shows all defined content of the table, for all the available records. The layout of the form will depend on the layout defined for the table and may include a list of documents associated with the record as a column at the end of the display.

At the top of the screen, options are available to return back to the sheet view of the data, or to filter the records for a particular storage area (node).   By default, completed records are not shown, but a tick box is also available to include records which have been marked as complete.

Within the full sheet display, as you move your cursor over the fields (columns) and records (rows), the field is highlighted to show focus. If you are creating a new record or your permissions allow you to edit existing records, selecting a cell will allow entry in that field. However, unlike excel, you must complete all mandatory columns in the record before starting a new row (the system will stop and warn you where information is missing).

Different fields will react in different ways, depending on the definition of the table, fields and content. Some fields may be display only, and either will not allow entry, may be calculated from other fields, or will be presented as drop down calendars or selection lists.

If you are amending existing data rows or creating new records at the end of the grid, the system will warn you if you try to do anything wrong (such as enter text into a numerical entry, or miss a mandatory field). Some warnings will be produced as you enter information, and some will be warned when you save the record.

4.3 Sub-grid processing

When a table is first selected for data entry of viewing from the My Data section of the home page , the default view of the data is the summary panel. From this display, when a record is selected for viewing/amendment with the mouse, the Data Form is displayed.

From within the data form, depending on the links between the table you are working with and other tables, sub-tables will be displayed below the table fields. Sub-forms are used to enter linked data, such as contacts with a company, or line items within an invoice.

Depending on the way that the tables have been defined, the sub-grid entries will be presented either as a sub-form page, or as a data entry grid.

As with the main form display, as you move your cursor over the fields, the field is highlighted to show focus. If you are creating a new record or your permissions allow you to edit existing records, selecting a field will allow entry in that field.

Different fields will react in different ways, depending on the definition of the table, fields and content. Some fields may be display only, and either will not allow entry, may be calculated from other fields, or will be presented as drop down calendars or selection lists.

If you are amending existing data or creating new records, the system will warn you if you try to do anything wrong (such as enter text into a numerical entry, or miss a mandatory field). Some warnings will be produced as you enter information, and some will be warned when you save the record.

4.4 Data Table Documents

Documents Held Against Data Records - Tabbed Document Selection

Where a data table has been defined to hold documents against data records, either from the data sheet view or at the bottom of the data form view of the data, a tabbed list of linked documents is available. From the data sheet view, when the multiple document icon is selected (), the linked document list appears as a new window. From the data form view, the tabbed document list appears as a scrollable list at the bottom of the screen.

Regardless of how the linked document display is activated, the display will appear as follows:

Add Document

Emails | Faxes | General | Invoices | Purchase Orders

Document Description	Version	Submit Date
Reply from clive on late payment status	V1.0	8/29/2007 6:23:09 PM
Email to Clive - chasing late payments (17/06/07)	v1.0	5/4/2007 9:21:35 AM

Each tab in the display is a different document class defined against the data table. Under each tab, the available documents for the selected class are listed, with the document description, version and submission date/time. To the right of each listed document, various icons are displayed allowing activity to be performed on the document. The icons displayed and available will vary depending on the document type, your security level and the status of the document. The following options are generally available:

- Displays the properties of the Document , and allows associated actions (such as check out for amendment, watching, update of details, etc)

- The read icon opens the last checked in version of the document using the native reader (opens the document for you to read, save etc)

By clicking on the Document name, depending on the document type, either the document will be opened for viewing, or a mini-view of the document will be displayed to the right of the document list. Clicking on the mini-view will open the document for full screen viewing.

Clicking on the tabs will change the display to list the documents for the selected document class.

To add additional documents, use the **Add Document** button against the current data record.

4.4.1 Adding new Data Document

Documents can be held as free format (general document held in a node document or project store), or can be linked to data records (such as holding copies of invoices against a table of invoice details). Documents held against data records can be created from one of five sources within Metamation:

- From 3rd Party applications feeding documents directly into the Metamation document repository against a selected data record
- From document scanning (converting paper to electronic media), again linked to a data record
- Directly from interfaced office applications (such as Microsoft Word, Microsoft Excel, Autocad, etc)
- Through application integration using the Metamation API
- Creating documents manually in Metamation

To create documents against a data record normally (manually) within Metamation, there are two options which create documents:

- At the bottom of the data form view for a selected data record, using the **Add Document** option within the tabbed list of linked documents
- From the data sheet view, using the **Add** option in the last Linked Doc column in the displayed data grid against a selected record

The document properties screen (for a document against a data record) is then displayed allowing the creation of new documents. This window is also used for the amendment of existing documents.

The following entries are available when defining or amending an existing document:

Document Node	The document node is used to record the location where the document will be stored (virtual cabinet). This will be set from the location of the controlling data record, and cannot be changed.
Document Type	The document type indicates the type of application used to create or amend the document. This will normally automatically be selected by the document class (see below), but can be changed from the drop down list.
Document Class	This is used to classify the type of document (invoice, purchase order etc). A list of available document classes defined for the data table is again available from the drop down list.
Document Reference	Every document can optionally have a document reference number (for quick reference when talking about a particular document). The document reference does not have to be unique. Typical uses

	for the document reference is to hold invoice numbers, purchase order numbers, etc.
Description	The description is a short title for the document. Most document searches will be performed against this document title.
Synopsis	The synopsis allows an unlimited amount of text to be entered to describe the document. Where existing documents have been automatically populated from external sources (such as office applications, 3rd party applications, or from document scanning), this will be populated with the text for the document. If left blank, Metamation will populate the synopsis from the text of text based documents (word, PDF, presentations, etc)
Version	The version is a mandatory entry, and is used to record the current (or new) version of the document. Where other versions of the document exist (for existing documents), an option is displayed alongside the version number to see previous versions.

For new documents being created in this way, after the document information and reference have been generated (if required), a button is available on screen to **Browse** to the document and upload the document into Metamation.

To save any changes, or to create the new document, press the SAVE button at the base of the screen. Where a new document is being created, the new document will automatically appear in the tabbed document lists against the selected data record. The status of new documents against the data record will be "Checked in".

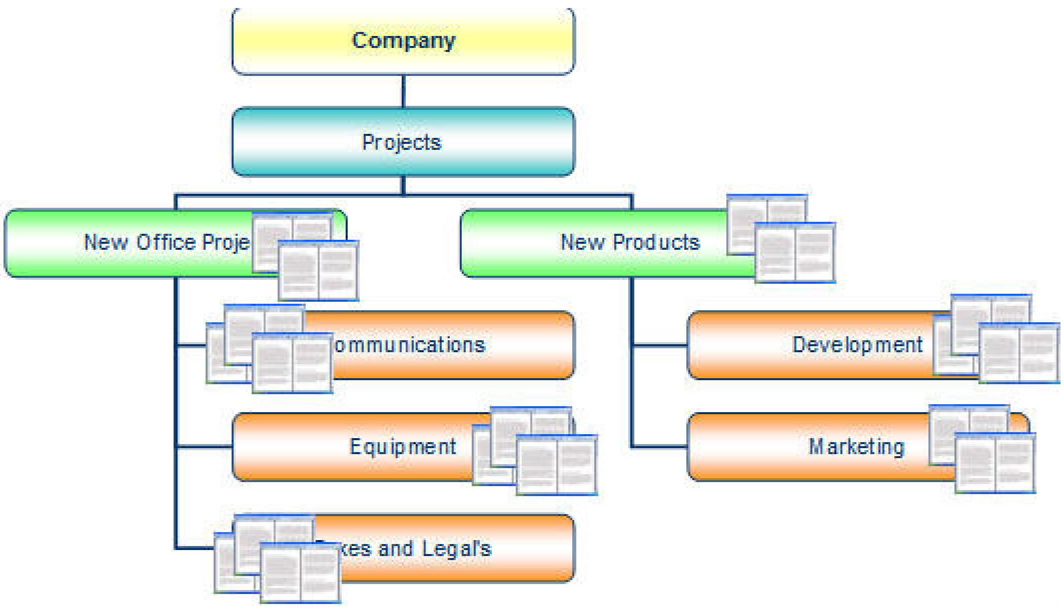
5. Metamation Nodal Definition

Within Metamation, all Documents and Data are stored in a hierarchical structure tree. This tree can be defined to represent a company structure, a project structure, or any combination where information needs to be organised.

Within this defined tree, each storage area is generally referred to as a node. However, in your configuration, these may appear on screen referred to as folders, directories, projects or other such terminology.

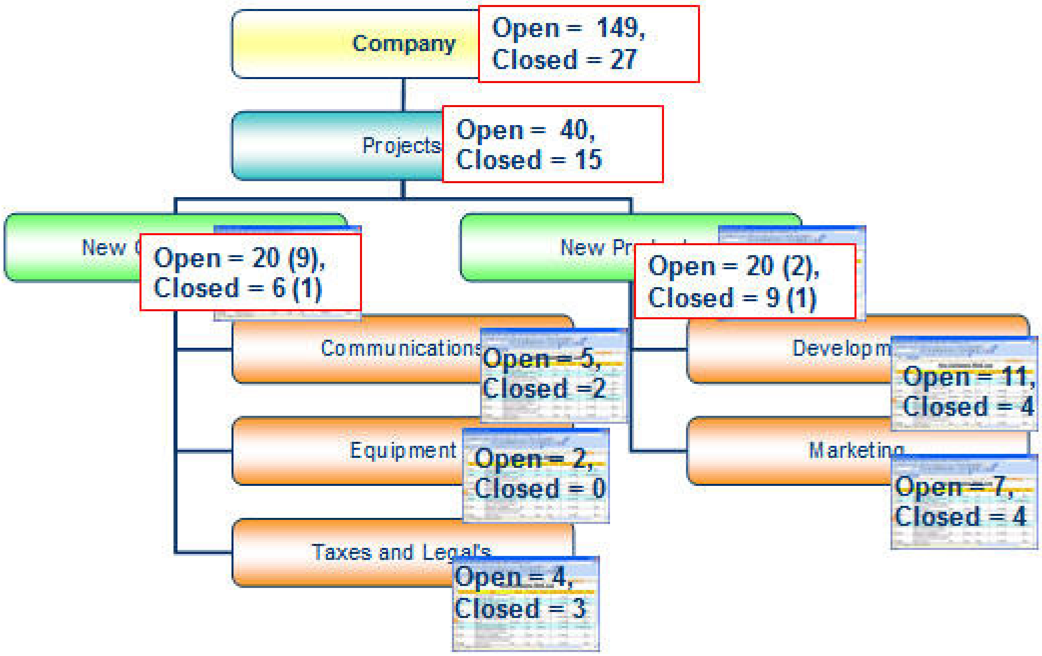
The nodes are virtual stores for data, documents and actions. Depending on the level of the node, these can be viewed as virtual rooms, cabinets, draws, folders and sections. What ever happens to a storage node, also effects alerts, data and documents (such as moving nodes in the tree).

When documents are added to a storage node, the documents exist in the specific node. However, as with a standard Windows directory structure, subject to security, where you have access to a node, you can also see documents in the child nodes.



However, nodes can have multiple children, multiple parents (so that documents can be seen from multiple locations) and can have siblings (where nodes share information, data and documents).

In addition to the control of documents, data also flows around the nodal structure. Where data is held in nodes and metrics are recorded within the data, data flow will up, down and around the nodal structure. As an example, where a metric such as risks and issues are recorded and metrics are used to record open and closed risks, the flow of the metrics can be defined to flow around the nodal structure to show the metrics based on the nodal level you are viewing. As an example:



Nodes are defined either from the properties window of existing nodes (from the My Nodes panel of the home page), or from the **new** button against the My Nodes in the same home page.

5.1 Metamation Node Maintenance

Storage Nodes are defined either by creating children in the properties of existing nodes (where nodes are selected from the My Nodes panel of the home page), from the graphical nodal display window , or from the **new** button against the My Nodes panel in the home page.

The node properties window is then displayed allowing the creation of new nodes. This window is also used for the amendment of existing nodes.

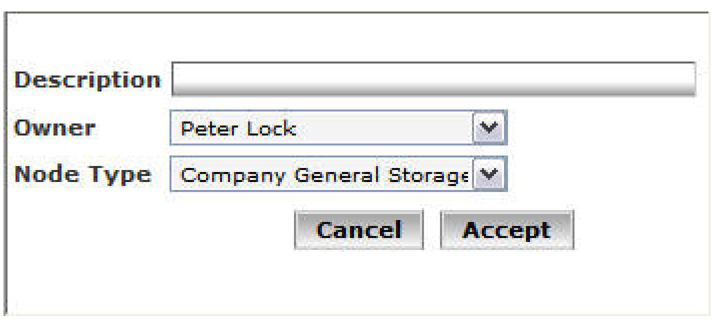
The following entries are then made when defining or amending an existing nodes:

Description	A short description to describe the node, project, document store etc
Node Type	The type of node (used for filtering) can be selected from the drop down list of active node types .
Synopsis	The synopsis allows an unlimited amount of text to be entered to describe the storage node.

Status	The status of the node controls how it is used, and can be selected from the drop down list of: **Active** - fully available for use subject to security **Hidden** - Only you can see the node **Deactivated** - Node is hidden, and all data and documents are also hidden
Owner	This is the owner of the node. when creating a new node, this is you, but you can specify somebody else from the drop down list of users to own the node. When you specify somebody else, they will be alerted that they now control the node.
Node Graphic	At the top of the node screen, a graphic image can be assigned to the node. This graphic will be uploaded into the Metamation system and will be presented in the nodal display for the selected node.

At the bottom of the screen, panels are available for defining nodal parents, siblings and children. All allow new parents, sibling and children to be added by selecting nodes from the drop down lists. Existing links can be removed using the **DEL** button against existing nodes.

Within the children panel, new children can be added to the existing node by using the **New Child** button. When used, a pop-up window will appear allowing a new child to be defined as follows:



Within this pop-up window, the entries available are as follows:

Description	A short description to describe the node, project, document store etc
Node Type	The type of node (used for filtering) can be selected from the drop down list of active node types .
Owner	This is the owner of the node. when

creating a new node, this is you, but you can specify somebody else from the drop down list of users to own the node. When you specify somebody else, they will be alerted that they now control the node.

If an existing node is yet to be used (no child nodes, or tables/documents within the node store), at the bottom of the node properties window, you will have the option to Delete the node. Once a node has been used, it cannot be deleted, only hidden or deactivated.

At the top of the node properties window, depending on your user type and security levels, icons will be available to further control the node. The following options are generally available:

- This displays the graphical hierarchy of the nodal structure, starting at the selected node, allowing a view of sub and linked nodes

- Displays the properties of the Node, including the synopsis, icon and relationship with other stores

- This allows you to add the storage node onto your favourites list

- Once the node is a favourite, this removes the node from your favourites list

- The sends a status update request to all child nodes of the selected node

- This updates the current status of the selected node, and allows status reports to be compiled.

- Grants access to the specified node to other users. Where the icon is shown in red, grants for the selected node are already in place

5.2 Nodal Structure Linking

The nodal structure is available for nodes by selecting the nodal icon ( ) from either the home page, the "nodal view" page, or from the node details screen. This icon is used to draw a graphical representation of the structure of nodal storage, starting from the selected node.

From the nodal graphic display, a graphical representation of the structure is displayed. On the left of the display, the users main nodes will be displayed, with children shown spreading to the right of the display. Each link between parent and child is shown with a connecting line on the display. Where a child is linked to a sibling , the connecting line is shown in yellow. This yellow link indicates that the siblings can share information (data and documents).

Within the nodal display, individual nodes can be moved to improve the display by selecting and dragging nodes around the display. Connection lines are re-drawn for the moved node units. Right hand clicking on a node with the mouse produces a sub-menu of different options including:

- Create new child node
- Delete the current node
- View the node properties

To change the node structure, a node can be moved and dropped onto the new parent node. When this happens, the selected parent node will be highlighted red. Once the moved node is dropped, a pop-up menu will appear with the following options:

- Change parent
- Make Sibling
- Cancel (does not effect the node structure)

Whilst the changed parent/child/sibling relationship will be saved, any node layout changes made by the user in this screen are not permanent. When the user next displays the GUI nodal view, any changes to the position of nodes (within the screen display) will not be remembered.

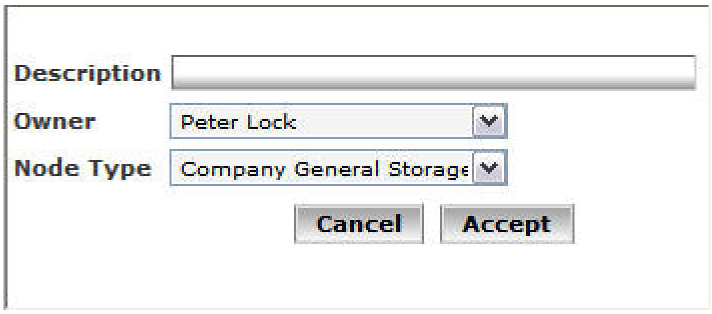
5.3 Child Nodes

Storage Nodes are defined either by creating children in the properties of existing nodes (where nodes are selected from the My Nodes panel of the home page), from the graphical nodal display window , or from the **new** button against the My Nodes panel in the home page.

Child nodes are new storage nodes which are created in a structure from a parent node. Unless specific access is set to remove access to the child node, any user who can access the parent node will be automatically access the child node created.

When data is added to the child node which has metrics defined, the child node metrics will automatically be rolled up into the parent level for analysis and reporting in the metrics display.

When a new child node is created either from within the GUI nodal display or another nodes properties window , a pop-up window will appear allowing a new child to be defined as follows:



Within this pop-up window, the entries available are as follows:

Description	A short description to describe the node, project, document store etc
Node Type	The type of node (used for filtering) can be selected from the drop down list of active node types .
Owner	This is the owner of the node. When creating a new node, this is you, but you can specify somebody else from the drop down list of users to own the node. When you specify somebody else, they will be alerted that they now control the node.

5.4 Parent Nodes

Storage Nodes are defined either by creating children in the properties of existing nodes (where nodes are selected from the My Nodes panel of the home page), from the graphical nodal display window , or from the **new** button against the My Nodes panel in the home page.

Parent nodes are storage nodes which have children. Accessing a parent node automatically allows access to children nodes including the children's documents and data. To remove child access, specific access must be set to remove access to the child node.

A parent node may also be a child itself to its own parents.

5.5 Sibling Nodes

Storage Nodes are defined either by creating children in the properties of existing nodes (where nodes are selected from the My Nodes panel of the home page), from the graphical nodal display window , or from the **new** button against the My Nodes in the same home page.

Siblings nodes are nodes which have been linked as siblings. Siblings allow documents and data to be shared. Any user who can access a node will automatically be able to access documents and data in sibling nodes. However, unlike child nodes, this shared access does not extend to the siblings children or other siblings.

5.6 Node status Reporting

The Metamation Node status facilities are used to compile project or work status reports. As part of the compilation of the status reports, a facility is provided to request status updates from sub-groups, departments or projects.

Within the My Nodes panel of the home page, or from the properties window of an existing node, an icon ( ) is available for sending a status request to all owners of child nodes. This alert will notify the owners to complete a status report for the work area or project under their control.

Whether responding to the request for a status of your project or work area (as detailed in the My Alerts section of the Home page), updating the status of the node/project/work area, or compiling a status report, the node status reporting and update screen can be selected by using the node status reporting icon ( ) from either the Home page My Nodes area, or from the nodes properties window.

When the status update screen is displayed for the selected node, the current status of the node is displayed at the top of the screen allowing entry and amendment as required. Below this, is the hierarchy of children and grandchildren and the last recorded status of the nodes.

In between the two areas, is a status First Date entry with a drop down calendar. The status of the children and grand children will show the last status recorded, going back in time up to the specified First Date (which defaults to today). As you change the First Date entry, so the number of days to look back for a status report will increase, but so the status will be less relevant as it will be more out of date. However, for every child and grandchildren node, the most relevant (recent) status report will be included.

In addition to the options to Save and Cancel (don't save) the status for the selected node, there is an option available for **Download To Word** . This will download a word document on to your client machine with the full status report, starting at the selected node, and producing a status report for every child and grandchild. This generated report can then be edited and used as required.

5.7 Node status Requesting

The Metamation Node status facilities are used to compile project or work status reports. As part of the compilation of the status reports, a facility is provided to request status reports from sub-groups, departments or projects.

Within the My Nodes panel of the home page, or from the properties window of an existing node, an icon ( ) is available for sending a status request to all owners of child nodes. This alert will notify the owners to complete a status report for the work area or project under their control.

These status reports can then be combined into your (or your managers) status report for the projects or work.

6. Meta Table Definition

Metamation allows internal data stores (tables) to be defined which can hold structured information. Information held within these tables can be used by the Data repository in a number of different ways including:

- Producing metric graphs for status displays on the Home or Nodal Display screens
- Can be used to hold documents against data (such as documents or scanned images against customers, suppliers, invoices, patients etc)

- Can be used for quick look-up of information (such as company information, mobile phone numbers, customers, car details etc)
- Can be used to consolidate useful information held on stand-alone spreadsheets, access databases and other data sources.

Metamation data tables can be free-standing where information is held and entered directly into Metamation, or information can be pulled or pushed from other databases including 3rd party applications , external databases, internet/extranet database sources (such as stock prices, or supplier databases), or other data sources.

Data tables are listed within the home or Nodal Display pages under the My Data panel of the display. Within this **My Data** display, existing tables can be modified by selecting the table on the list, or the **New** button can be used to define new data tables .

In addition to the creation of tables for the general storage of information, tables can be created to also store Documents linked to data records. This allows documents such as maps, invoices received, purchase orders, plans etc to be indexed to know structure data records, such as project files, customers, suppliers, staff or any type of other information.

6.1 New data table definition

New data storage tables are defined from the **New** button on the My Data panel of the home or Nodal Display section of the Metamation screen, or by selecting the **New Table** option from the main Metamation menu. Alternativlly, existing table definitions can be amended by selecting an existing table from the **My Data** panel using he mouse pointer, or selecting the properties icon ( ) against the table. Once the table properties screen is displayed, new tables can be defined or selected parts of existing tables can be amended.

Tables allows structured and controlled data to be stored and/or viewed within Metamation.

When defining new or amending existing tables, the following entries can be set:

Description	The description is used to describe the use of the table. This is a short description.
Record Type	Tables can be either single record or

	Multiple record. Single record tables are used to record one piece of information per storage location (node) which would be used for storing customer details for nodal projects, budgets for a work area etc. Multiple records would allow more than one item per location, such as multiple company details.
Synopsis	The synopsis is the full, unlimited description for the table being held.
Data Edit Mode	The data edit mode is used to set the default security for the defined table. The mode can be selected from the drop down list, and contains the following options: • No Editing allowed by anyone. No user can add, amend or delete records. Normally used when table is feed from an external source. • Owner of Table Only. Only the owner of the table can add, amend or delete records. Any other user can only view the contents (subject to other security). • All nodes to add, but edit own. Any user who has access to the table can add new records. But once added, only the person who created the records can amend or delete the records. Other users can only view these records. • Anybody can add, edit or delete. Any user who has access to the table can add new records, or amend/delete any existing record.
Data Time Period	Tables can be for a time period (from the drop down list of Weekly, Monthly, Quarterly or Yearly). Time period tables automatically have the required level of time added as part of the storage key. As an example, staff payroll details would be set yearly, so that each year, new payroll figures would be entered. Sales targets, budgets and other calendar based information would benefit from time based tables. Where information is not divided by a calendar event (such as invoices, phone numbers, suppliers, etc),

	these can be set to Indefinite.
Start of Year	For tables which are defined as yearly based, an additional entry allows the starting month to be defined. This then allows the yearly time period to work on calendar years (start of year is Jan), or a financial year starting on your selected month.
Active Status	The active status is used to indicate if the table is active or not (from the drop down list). Deactivated tables are removed from common use, but you will still be able to view the table and re-activate as required, retaining the data content. De-activated tables are no longer refreshed from the linked data source.
Share Status	The share status is a major override of access to the table. Where the shareable drop down is set to "yes", all users of Metamation will be able to view the table and contents (subject to other grants and security), whilst the default of "No" to shareable means access is set by the users access to the tables node.
Default Review Period	The default review period is used to default how often owners of data items within the table should review the content. An entry of 0 will not force review. Whereas, an entry of say "7" will force owners of data records added to the table to review the records added every 7 days.

If an existing table is yet to be used (table does not contain any actual data records), at the bottom of the table properties window, you will have the option to Delete the table. Once a table has data, it cannot be deleted, only hidden.

Once the basic table has been defined, where connection is required to PULL information from an external data source, the data connection can be defined. Options for data connection are Excel, Microsoft project and a generic ODBC connector .

Before saving the table for use within Metamation, the columns of information to be held within the table are defined using the Define Content option.

Finally, where documents are to be stored against items within the data table defined, the data table document classes need to be defined. These document classes are set per table, and are defined using the Define Classes option.

6.2 Table Column Definition

New data storage tables are defined from the **New** button on the My Data panel of the home or Nodal Display section of the Metamation screen. Once the basic properties of the table have been defined, you can then define the columns (fields or content) which can be stored in the table.

As with any other form of structured database (Access, Oracle, SQL Server etc), columns are used to define the information that can be stored. Within Metamation, the types of information required has already been defined, you simply need to utilise the fields and provide the missing information such as labels, lengths, formats and validation

The column definition screen is divided into two sections. On the left, existing columns within the defined table are listed. Selecting any existing column with the mouse pointer displays the columns properties on the right. New columns can be added by using the **New** button at the base of the screen.

On the right of the existing column list, the column properties panel shows the properties of new or existing columns of information. When adding or amending columns within the table, the columns are defined through the following groups of entries:

Column Settings
These prompts are used to define the column, how the data is stored, and how it is labelled on screen:

Column Name	The name is used to describe the use of the column. This is a short description.
Data Store	The data store indicates the real storage field where the information will be held in the table. Metamation is provided with a variety of available storage fields of different data types.
Entry Label	The entry label is the prompt which appears on entry and summary screen displays. This will be set from the column name, but can be amended as you see fit.

Data Source	This entry is only available where the table properties have been defined to pull data from an external data source, and is used to set which external field, column or entry your new column will be populated from.

Meta Data Flow

This series of prompts are used to define Metric controls, used to move data around (such as pull or push information to other tables/levels), graph data and set useable fields. Where data is not to be moved around by Metamation automatically, or graphing of the data is not required for any field, this area can be left blank. Otherwise, the following entries are made:

Meta Name	The name is used to describe the metric which will be stored. This is a short code/description and must be unique within the Metamation database (you will be warned if your selected title has already been used). I.e, for an Invoice Net amount, try "INVNETAMT"
Meta Description	A short textual description of the defined metric.
Meta Group	This is a numerical entry and is used to group different metrics in the same table together for the purposes of graphing. Placing different metrics in the same numbered group will make the items appear on the same graph. Putting them in separate groups will result in separate graphs.
Meta Spread	This is used to indicate if the metric should spread up, down, no spread or both up and down. Spreading the data is used to automatically flow information to other levels within the defined table or nodal structure. As an example, budgets normally flow down the defined tree (a budget set at a higher level, is sub-divided to projects), invoice amounts flow up (so that at the top level, you get the grand total of all invoices generated), etc.
Up Link	This is the defined Meta area where up flowing information will be sent. The drop down list of up links shows other defined Meta fields. Example of upflow may be

	invoice line items flowing UP to an INVTOT (Invoice total) in a separate invoice header table.
Up ID	Where the data flow is upwards, this is the ID column (in the defined table) to use in the upward table (e.g. invoice number)
Down Link	This is the defined Meta area where down flowing information will be sent. The drop down list of down links shows other defined Meta fields. Example of down flows may be budget figures flowing down to a budget record in a separate table.
Down ID	Where the data flow is downwards, this is the ID column (in the defined table) to use in the downward table (e.g. department number)
Show type	For the defined metric, this defines the default type of graph to be displayed. The available graphs can be selected from the drop down list. This will effect all other metrics in the same group in the defined table.
X-Axis	When the metrics are to be graphed, you can select the x-axis (how the data should be segmented in the graph). By default, the X-axis will be the node (project, department, work area, etc) for the data, however this can be changed to any column as required. If the graph x-axis has been based around a DATE column for a time period (such as invoice date, budget date, etc) then the axis will be automatically scaled by Metamation from day, to week, to month, to quarter to year as will best fit in the graph area.

Validation Settings

These prompts are used to define the format, length, and validation of the defined column:

Max Length	This is the maximum length of the entry you will allow. This will default depending on the storage area defined above, but you can change this to be a smaller number if you require. If you need to hold more information, change the storage location to be a larger field .
Format	Where left blank (--Select--) the data will remain as entered. In the drop down list, common date and time formats are listed. However, the **other option** allows you to specify formats for numerics, leading characters, padding etc.
Entry List	Where entries must be one of a range of set values, the values can be entered here, separated by a semi-colon (;). Ie

	entry of "PLC;Ltd;Co" will limit the entry to one of these three options via a drop down list.
Valid Table	Where entries must exist in another table, this allows the table to be specified of available tables in the drop down list.
Valid Column	Where entries must exist in another table, this entry allows the column which holds the ID to be stored (normally the ID column) to be selected.
Set Display	Once the Valid Column has been selected, the **set display** button will display the available fields in the selected validation table. Tick those columns that should be displayed in the drop down selection list (as few as possible to avoid display truncation)
Mandatory	If during row insertion, this is a mandatory field, this should be ticked. Leaving this unticked makes entry of the defined column optional.

Validation Settings

The 2nd set of validation settings are used to define field calculations, and how the defined field is used for filtering and summary display as follows:

Calculation	As with excel, one column can be calculated from the contents of another. This allows say, the VAT amount to be calculated from a column holding the net amount. The calculation allows the calculation to be directly entered. Options besides the calculation allow the entered calculation to be validated ( ) which will check for errors, or for the calculation to be built up through field and calculation selection ( ).
Data filter	Where this tick-box is marked, the defined column can be used for the filtering of information in the summary data display .
Show Summary	Where this tick-box is marked, the defined column will be displayed in the data summary display. Where left unticked, it will only be displayed in the form or sheet entry.

Once all prompts in the column definition have been entered, press the **add/update** button to save the changes to the column or add it to the defined column list.

At the base of the screen, the other action buttons available are:

New - Adds a new blank column to the table (enter the definition into the column properties panel)

Display Layout - Is used to define the layout of the form based screen for this table

Save - Saves your changes to the defined table.

6.2.1 Calculation Definition

New data storage tables are defined from the **New** button on the My Data panel of the home or Nodal Display section of the Metamation screen. Once the basic properties of the table have been defined, you can then define the columns (fields or content) which can be stored in the table.

As with excel, one column can be calculated from the contents of another. This allows say, the VAT amount to be calculated from a column holding the net amount. The calculation allows the calculation to be directly entered. Within the properties panel of the column, options besides the calculation allow the entered calculation to be validated () which will check for errors, or for the calculation to be built up through field and calculation selection ().

Within the prompt for the calculation, calculations may be generally entered as text as per Excel style notation. The fields are named as per the internal field names, so for instance, if you have defined a field for VAT NET AMOUNT stored within internal field VALUE1, you should refer to the field as VALUE1.

As an example, to add two values together, the formula would be "VALUE1 + VALUE2", where VALUE1 and VALUE2 are the field names.

The common operators which are available for use in the manual calculation entry are as follows:

/ - Divide the first number by the 2nd
+ - Add the two numbers together
- Subtract the 2nd number from the 1st number
***** - Multiply the two numbers together
& - Join the two numbers together (i.e, "12 & 34" makes it "1234", not

46)
() - Brackets - used to control flow of logical calculation

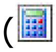
The other entries which can be manually entered into the calculation are as follows:

Expression	Actual action	Validation
>, <, =, <=, >=, =>, =<	Conditions, can be used in the 1^{st} parameter of an IF clause	Must have a 1^{st} and 2^{nd} value – of any type
IF()	An IF condition, must have 3 parameters (as per excel IF format) of condition, result true, result false	1^{st} parameter must beacondition(see<,>,=,<=,=> etc), or a condition test of AND, OR, ISBLANK, ISNUMBER, NOT – see below)
"text"	Any text inside double quotes is valid, and acts as a text value	Any brackets or commas inside quote marks are part of text
numeric	Any numeric entry up to the next separator is valid, and is treated as a literal value (i.e., 9, "101.7" or "3.145927")	
ABS()	ABS function – as per excel	Only 1 parameter, must be a numeric
AND()	Logical join of 2 or more (separated by commas) conditions – can only be used in IF() condition	2 or more parameters, each parameter must be a condition, see IF() 1^{st} parameter
OR()	Logical OR join of 2 or more conditions – can only be used in IF condition	2 or more parameters, each parameter must be a condition, see IF() 1^{st} parameter
NOW	Returns the current system time in the format HH:MM:SS	
TODAY	Returns the current system date in the format DD/MM/YY	
DATETIME	Returns the current system date and time	
DATEDIFF()	Returns the time or date difference. Three parameters (separated by commas) are the 1^{st} date, 2^{nd} date and a difference marker of "D" for days, "M" for months, "H" for hours, "M" for minutes or "S" for seconds	

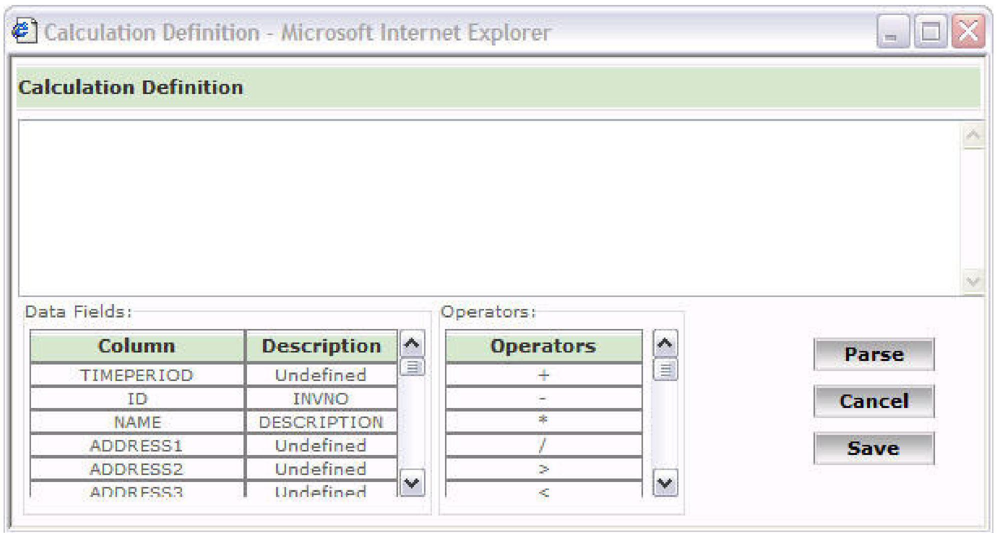
DAY()	Returns the date (1-31) within a specified date element	1 parameter only, must be a date type
MONTH()	Returns the month (1-12) within a specified date element	1 parameter only, must be a date type
YEAR()	Returns the year (yyyy) within a specified date element	1 parameter only, must be a date type
INT()	Returns the integer element of a numeric parameter	1 parameter only, must be a numeric type
HOUR()	Returns the hour (0-23) within a specified time element	1 parameter only, must be a date type
MINUTE()	Returns the minute (0-59) within a specified time element	1 parameter only, must be a date type
SECONDS()	Returns the seconds (0-59) within a specified time element	1 parameter only, must be a date type
ISBLANK()	Returns a condition of whether the column described is blank or not – has to be used in an IF() clause	1 parameter only, of any type
NOT()	Swaps the true and false around in an IF clause	1 parameter only, of any type
TRIM()	Trims leading and trailing spaces of a defined element	1 parameter only, of any type
ISNUMBER()	Returns a condition of whether the column described contains a numeric or not – has to be used in an IF() clause	1 parameter only, of any type. If ISNUMBER works, then returns true else returns false
ISTEXT()	Returns a condition of whether the column described contains text or not (i.e., is not numeric) – has to be used in an IF() clause	1 parameter only, of any type. If ISTEXT works, then returns true else returns false
MID()	Extracts part of a text string. Three parameters (separated by commas) are element, start position and number of characters	1st parameter must exist and can be any type, 2nd and 3rd parameters must be numeric
LEN()	Returns the length of an element	1 parameter only, must be numeric

6.2.1.1 Column Calculation Wizard

New data storage tables are defined from the **New** button on the My Data panel of the home or Nodal Display section of the Metamation screen. Once the basic properties of the table have been defined, you can then define the columns (fields or content) which can be stored in the table.

As with excel, one column can be calculated from the contents of another. This allows say, the VAT amount to be calculated from a column holding the net amount. The calculation allows the calculation to be directly entered. Within the properties panel of the column, options besides the calculation allow the entered calculation to be validated () which will check for errors, or for the calculation to be built up through field and calculation selection ().

Within the calculation wizard is displayed, a pop-up window will be presented on screen as follows:



The calculation wizard allows fields to be selected from the scrolling left hand list, and operations from the scrolling right hand list. As entries are selected by clicking on the field or operation name, so the calculation is built up in the calculation window.

As operators are selected (such as the IF condition), the number of parameters will automatically be shown. Reposition the cursor in the correct location for the condition, positive and negative results as required.

Adding fields or operators will automatically be inserted in the current cursor location. If required, text can be added, calculations be amended, and sections copied and pasted within the calculation using the keyboard and mouse within the calculation window as it is build up.

Calculations are generally entered as text as per Excel style notation. The fields are named as per the internal field names, so for instance, if you have defined a field for VAT NET AMOUNT stored within internal field VALUE1, you should refer to the field as VALUE1.

As an example, to add to values together, the formula would be "VALUE1 + VALUE2", where VALUE1 and VALUE2 are the field names.

The common operators which are available for use in the manual calculation entry are as follows:

/ - Divide the first number by the 2nd
+ - Add the two numbers together
- Subtract the 2nd number from the 1st number
***** - Multiply the two numbers together
& - Join the two numbers together (i.e, "12 & 34" makes it "1234", not 46)
() - Brackets - used to control flow of logical calculation

The other entries which can be manually entered into the calculation are as follows:

Expression	Actual action	Validation
>, <, =, <=, >=, =>, =<	Conditions, can be used in the 1st parameter of an IF clause	Must have a 1st and 2nd value – of any type
IF()	An IF condition, must have 3 parameters (as per excel IF format) of condition, result true, result false	1 st parameter must beacondition(see<,>,=,<=,=> etc), or a condition test of AND, OR, ISBLANK, ISNUMBER, NOT – see below)
"text"	Any text inside double quotes is valid, and acts as a text value	Any brackets or commas inside quote marks are part of text
numeric	Any numeric entry up to the next separator is valid, and is treated as a literal value (i.e., 9, "101.7" or "3.145927")	
ABS()	ABS function – as per excel	Only 1 parameter, must be a numeric
AND()	Logical join of 2 or more (separated by commas) conditions – can only be used in IF() condition	2 or more parameters, each parameter must be a condition, see IF() 1st parameter
OR()	Logical OR join of 2 or more conditions – can only be used in IF condition	2 or more parameters, each parameter must be

		a condition, see IF() 1st parameter
NOW	Returns the current system time in the format HH:MM:SS	
TODAY	Returns the current system date in the format DD/MM/YY	
DATETIME	Returns the current system date and time	
DATEDIFF()	Returns the time or date difference. Three parameters (separated by commas) are the 1st date, 2nd date and a difference marker of "D" for days, "M" for months, "H" for hours, "M" for minutes or "S" for seconds	
DAY()	Returns the date (1-31) within a specified date element	1 parameter only, must be a date type
MONTH()	Returns the month (1-12) within a specified date element	1 parameter only, must be a date type
YEAR()	Returns the year (yyyy) within a specified date element	1 parameter only, must be a date type
INT()	Returns the integer element of a numeric parameter	1 parameter only, must be a numeric type
HOUR()	Returns the hour (0-23) within a specified time element	1 parameter only, must be a date type
MINUTE()	Returns the minute (0-59) within a specified time element	1 parameter only, must be a date type
SECONDS()	Returns the seconds (0-59) within a specified time element	1 parameter only, must be a date type
ISBLANK()	Returns a condition of whether the column described is blank or not – has to be used in an IF() clause	1 parameter only, of any type
NOT()	Swaps the true and false around in an IF clause	1 parameter only, of any type
TRIM()	Trims leading and trailing spaces of a defined element	1 parameter only, of any type
ISNUMBER()	Returns a condition of whether the column described contains a numeric or not – has to be used in an IF() clause	1 parameter only, of any type. If ISNUMBER works, then returns true else returns false
ISTEXT()	Returns a condition of whether the column described contains text or not (i.e., is not numeric) – has to be used in an IF() clause	1 parameter only, of any type. If ISTEXT works, then returns true else returns false

MID()	Extracts part of a text string. Three parameters (separated by commas) are element, start position and number of characters	1st parameter must exist and can be any type, 2nd and 3rd parameters must be numeric
LEN()	Returns the length of an element	1 parameter only, must be numeric

Once the calculations have been built up, the **Parse** option will validate the calculation for obvious errors, and the **Save** will save the calculation back into the original properties screen.

6.2.2 Prompt Formats

New data storage tables are defined from the **New** button on the My Data panel of the home or Nodal Display section of the Metamation screen. Once the basic properties of the table have been defined, you can then define the columns (fields or content) which can be stored in the table.

Against the defined columns, the **Format** column of the properties window dictates the format for entry and re-display of the columns. Where left blank (--Select--) the data will remain as entered. In the drop down list, common date, time and numeric formats are listed. However, the **other** option allows you to specify formats for numerics, leading characters, padding etc.

Common characters with special meanings are as follows:

A = Mandatory position for an alphabetic character
N = Mandatory position for a numeric character (user must enter a numeric here)
0 = Mandatory pad for a numeric number (Metamation will pad with a numeric if not entered)
# = Optional position for a numeric number
-, +, _ etc = padding characters
"xx" = pad characters in the text

The following gives a guide to the most common formats that you can specify in the other format area, and how entries and validation will be performed:

Other format	Example	Rejected? If	Resulting entry

Specified	Entry by User	so, why	prompt displayed after entry
AANNNNN	P12345	Rejected – only one alpha	
AANNNNN	AA1234	Rejected – only 4 numerics	
AANNNNN	RE09123		RE09123
AA####N	R98	Rejected – only 1 alpha	
AA####N	TE78		TE00078
AA-NNNNN	AA1234	Rejected – only 4 numerics	
AA-NNNNN	PE-12345		PE-12345
AA-NNNNN	PO98987		PO-98987
#.00	FISH	Rejected – not numeric	
#.00	.98		0.98
#.00	125		125.00
#.00	134.567		134.57
#,###.00	12345.567		12,345.57
"DP"NNNNN	1234	Rejected – only 4 numerics	
"DP"NNNNN	12345		DP12345
"DP"####N	12		DP00012
"DP"#####N-"XE"	DP1234		DP01234-XE
"DP"#####N-"XE"	DE12345	Rejected – DE does not match DP	
"DP"#####N-"XE"	DPA1234	Rejected – A (which takes up numeric spot) is not numeric	
"DP"#####N-"XE"	123456	Rejected – too many numerics	
AAA-NNNN-AA	ABC1234ER		ABC-1234-ER
AAA-NNNN-AA	ABC-9897-TT		ABC-9698-TT

6.2.3 Available Storage fields

New data storage tables are defined from the **New** button on the My Data panel of the home or Nodal Display section of the Metamation screen. Once the basic properties of the table have been defined, you can then define the columns (fields or content) which can be stored in the table.

When defining data, your created field will be stored in one of the pre-defined available fields within the Metamation table structure. Each pre-defined field can have only once user per defined table. When defining the fields (columns), in the column properties panel, the data store indicates the real storage field where the information will be held in the table. Many storage fields of different data types are available.

Every type of field has a number of occurrences. So for instance, the field to hold fax numbers (FAX) has two occurrences, so available storage fields are FAX1 and FAX2.

The following gives a guide to the available Metamation defined fields, how many occurrences there are per field type, and the maximum format (length) available:

Column Name	Number of occurrences	Maximum Format of each occurrence
TABLENO	1 – Primary key part 1	8N
TIMEPERIOD	1 – Primary key part 2	4A
ID	1 – Prirmary Key part 3	20A
NAME	1	50A
ADDRESS	5	40A
COUNTRY	3	40A
URL	4	100A
EMAIL	4	100A
FAX	2	20A
PHONE	4	20A
MOBILE	2	20A
VERSION	5	10A
DATE	10	Date/Time
TIME	5	Time (only) in format HH:MM:SS
STATUS	5	20A
VALUE	20	10N
FLAGS	10	1A

NOTES	5	Memo
USER_ID	10	10A
REF	5	20A
LINE_NO	1	5N
ASSIGNED_USER_ID	1	10A
VISIT_FREQ_DAYS	1	3N

6.3 Table External Link Definition - Excel

New data storage tables are defined from the **New** button on the My Data panel of the home or Nodal Display section of the Metamation screen. Alternativlly, existing table definitions can be amended by selecting an existing table from the My Data panel using the mouse pointer to select the properties icon ( ) against the table. Once the table properties screen is displayed, new tables can be defined or selected parts of existing tables can be amended.

Tables can be defined to allow data to be entered directly within the Metamation database, or can be set to import (pull) information in from a number of different data sources including ODBC connection, Excel spread sheets or Microsoft Project Plans.

When an Excel connection is made for a table, the columns returned from the specified Excel spread sheet can be linked to the defined table columns. The excel spread sheet can be held either within the Metamation document repository (as a checked in document), or held somewhere on the network.

As records are returned (pulled) from the Excel spreadsheet, records are created or updated in the linked tables, with the map between the imported fields and the defined named areas of the spreadsheet. The definition of the Excel connection defines exactly how the import will work.

To define an Excel connection for a table, once the table properties are on screen, use the selection list on the **External Data Connection** to set the connection type to Excel connection, and then use the Define Connection button to define the links to the named area in an Excel spread sheet.

6.3.1 Table External Link Definition - Excel - Connections

An Excel connection for a table is set through the table properties window. Using the selection list on the **External Data Connection** to set the connection type to Excel connection, and then use the Excel Admin button, the Excel connection properties window is then displayed.

On the Excel connections screen, connections are set in three parts:

Specify the data source
You have the option to use two different sources for the data source. One is the imported documents - select the imported excel spread sheet from the list of imported documents. Alternativly, you can specify an external spreadsheet somewhere on the network. Once this selection has been made, either type in the name directly, or use the browse button to find the file.

Note: It is highly recommended that any connected excel sheet is located on a network path which is ALWAYS available (i.e, not a client PC). Also, the path should ALWAYS be a direct network path (i.e, it should be a URL in the format \\myserver\dir\mysheet.xls) rather than pointing to a file on a Windows Mapped directory.

Range Name
The range name is used to indicate the range of cells in the spreadsheet to use for the import. Each row within the specified range will be imported as a new record into the table, with each named column being available for linking into a defined table column. Select the ranges from the drop down list, and use the refresh icon () to connect the spreadsheet and renew the named ranges.

Refresh Type
The refresh type drop down indicates what should happen with the imported data. The options available are:

Refresh Entire Table - Before the Excel connection is made, the current contents of the table will be cleared and the Excel import will re-create the contents.

Add new Items only - The Excel import will look for new records and where the records do not exist, they will be created. Existing records will not be amended, and records missing from the Excel source will not be deleted within Metamation

Add new Items and Amend Changed - The Excel import will look for new records and where the records do not exist, they will be created. Existing records will also be updated to reflect the Excel data source. However, any records missing from the Excel source will not be deleted within Metamation

Add new Items, amend changed and mark deleted - The Excel import will look for new records and where the records do not exist, they will be created. Existing records will also be updated to reflect the Excel data source. Where records are missing from the Excel source, these will be marked as deleted (making them unusable, but not actually deleting them) within Metamation

Refresh Time
The refresh time is how long in minutes, between every data refresh. This entry will only accept a numeric. 60 will be a refresh once an hour, 1440 will be a refresh once a day, 10080 will be once a week, and 40320 will be once a month. Any numeric is valid.

Below the selected refresh time, the last date and time of refresh will be displayed.

6.4 Table External Link Definition - MS Project

New data storage tables are defined from the **New** button on the My Data panel of the home or Nodal Display section of the Metamation screen. Alternativlly, existing table definitions can be amended by selecting an existing table from the My Data panel using the mouse pointer to select the properties icon ( ) against the table. Once the table properties screen is displayed, new tables can be defined or selected parts of existing tables can be amended.

Tables can be defined to allow data to be entered directly within the Metamation database, or can be set to import (pull) information in from a number of different data sources including ODBC connection, Excel spread sheets or Microsoft Project Plans.

When an MS Project connection is made for a table, the columns returned from the specified project plan can be linked to the defined table columns. The project plan can be held either within the

Metamation document repository (as a checked in document), or held somewhere on the network.

As records are returned (pulled) from the project plan, records are created or updated in the linked tables, with the map between the imported fields and the defined columns within the project plan. The definition of the Project connection defines exactly how the import will work.

Tables linked to Project plans can also be linked to users (by project tasks). As long as there is a known relationship between the resource in the project plan, and the Metamation user ID or email address, these tasks can also appear in the users alerts area as tasks become due or overdue.

To define a Project connection for a table, once the table properties are on screen, use the selection list on the **External Data Connection** to set the connection type to Project connection, and then use the Define Connection button to define the links to the named Microsoft project plan.

6.4.1 Table External Link Definition - MS Project - Connections

An Microsoft Project connection for a table is set through the table properties window. Using the selection list on the **External Data Connection** to set the connection type to Project connection, and then use the Project Admin button, the Project connection properties window is then displayed.

On the Project connections screen, connections are set in two parts:

Specify the data source
You have the option to use two different sources for the data source. One is the imported documents - select the imported project plan from the list of imported documents. Alternativly, you can specify an external project plan somewhere on the network. Once this selection has been made, either type in the name directly, or use the browse button to find the file.

Note: It is highly recommended that any connected project plan is located on a network path which is ALWAYS available (i.e, not a client PC). Also, the path should ALWAYS be a direct network path (i.e, it should be a URL in the format \\myserver\dir\myplan.mpp rather than a Windows mapped drive.

Refresh Type
The refresh type drop down indicates what should happen with the imported data. The options available are:

Refresh Entire Table - Before the Project connection is made, the current contents of the table will be cleared and the Project import will re-create the contents.

Add new Items only - The Project import will look for new records and where the records do not exist, they will be created. Existing records will not be amended, and records missing from the Project source will not be deleted within Metamation

Add new Items and Amend Changed - The Project import will look for new records and where the records do not exist, they will be created. Existing records will also be updated to reflect the Project data source. However, any records missing from the Project source will not be deleted within Metamation

Add new Items, amend changed and mark deleted - The Project import will look for new records and where the records do not exist, they will be created. Existing records will also be updated to reflect the Project data source. Where records (tasks) are missing from the Project source, these will be marked as deleted (making them unusable, but not actually deleting them) within Metamation

Refresh Time
The refresh time is how long in minutes, between every data refresh. This entry will only accept a numeric. 60 will be a refresh once an hour, 1440 will be a refresh once a day, 10080 will be once a week, and 40320 will be once a month. Any numeric is valid.

Below the selected refresh time, the last date and time of refresh will be displayed.

6.5 Table External Link Definition - ODBC

New data storage tables are defined from the **New** button on the My Data panel of the home or Nodal Display section of the Metamation screen. Alternativlly, existing table definitions can be amended by selecting an existing table from the My Data panel using the mouse pointer to select the properties icon ( ) against the table. Once the table properties screen is displayed, new tables can be defined or selected parts of existing tables can be amended.

Tables can be defined to allow data to be entered directly within the Metamation database, or can be set to import (pull) information in from a number of different data sources including ODBC connection, Excel spread sheets or Microsoft Project Plans .

When an ODBC connection is made for a table, the columns returned from the ODBC connection can be linked to the defined table columns. As records are returned (pulled) from the ODBC data source, records are created or updated in the linked tables, with the map between the imported fields and the defined table columns. The definition of the ODBC connection defines exactly how the import will work.

To define an ODBC connection for a table, once the table properties are on screen, use the selection list on the **External Data Connection** to set the connection type to ODBC connection, and then use the Define Connection button to define the links to the ODBC data source.

6.5.1 Table External Link Definition - ODBC - Connections

An ODBC connection for a table is set through the table properties window. Using the selection list on the **External Data Connection** to set the connection type to ODBC connection, and then use the Define Connection button , the ODBC properties window is then displayed.

ODBC properties are set through the three pages of the ODBC settings process:

- ODBC connection
- ODBC Refresh
- ODBC Filtering

On the ODBC connections screen, ODBC connections are set in three parts:

1. Specify the data source
As with standard Microsoft ODBC settings, you have the ability to

select an existing data source (on the Metamation server) from the pull down list, or specify a new connection string manually.

If you want to re-use a data connection, you can use the new data source icon ( ) to build an ODBC data source entry. Please note, any data source entry built will be created on the main Metamation server, not on your local client PC. Once you have created a new data source entry, use the refresh icon ( ) to refresh the data source list from the server.

If building a new connection string, the string can be entered manually, or you can use the build icon ( ) to build a connection using a wizard.

2. Enter user name and password
These entries are only required for secure data connections, and are provided to allow secure access to the data source. For some databases (Excel, Project, Access etc), these may not be required and can be left blank.

3. Initial Catalogue
For the majority of data sources, an initial catalogue (database or sub-database) is required. Select the database from the drop down list. If no databases are listed, then you may need to connect to the selected database from item 1 by using the re-connect icon ( ).

Once the first page is complete, use the tabs at the top of the screen to move to the refresh tab .

6.5.2 Table External Link Definition - ODBC - Filtering

An ODBC connection for a table is set through the table properties window. Using the selection list on the **External Data Connection** to set the connection type to ODBC connection, and then use the Define Connection button , the ODBC properties window is then displayed.

ODBC properties are set through the three pages of the ODBC settings process:

- ODBC connection
- ODBC Refresh
- ODBC Filtering

On the ODBC build screen, a large window is available to enter free format SQL to select records and columns to be used from the linked data source. The SQL is mandatory to allow Metamation to know what information to be included in the database, and is usually entered in the format; "*SELECT * from tables* ".

Within the free hand SQL, macros can be included to perform data selections. When run, these macros will be converted to dates as follows:

Macro	Use and conversion (on select)
@SYEAR@	Start of the current year. When converted in script, takes the first day of the current year. If the current date is "12/06/2005", then the macro is converted to "01/01/2005" in the SQL Script when executed.
@EYEAR@	Last day of the current year. When converted in script, takes the last day of the current year. If the current date is "12/06/2005", then the macro is converted to "31/12/2005" in the SQL Script when executed.
@SMONTH@	Start date of the current month. When converted in script, takes the first day of the current month If the current date is "12/06/2005", then the macro is converted to "01/06/2005" in the SQL Script when executed.
@EMONTH@	Last day of the current month. When converted in script, takes the last day of the current month. If the current date is "12/06/2005", then the macro is converted to "30/06/2005" in the SQL Script when executed.
@SQUARTER@	Start of the current quarter. When converted in script, takes the first day of the current quarter. If the current date is "12/06/2005", then the macro is converted to "01/04/2005" in the SQL Script when executed.
@EQUARTER@	Last day of the current quarter. When converted in script, takes the last day of the current quarter. If the current date is "12/06/2005", then the macro is converted to "30/06/2005" in the SQL Script when executed.
@SWEEK@	First day of the current week – based on calendar weeks. When converted in script, takes the first day of the current week. If the current date is "12/06/2005", then the macro is converted to "06/06/2005" in the SQL Script when executed.
@EWEEK@	Last day of the current week. When converted in script, takes the last day of the current week. If the current date is "11/06/2005", then the macro is converted to "12/06/2005" in the SQL Script when executed.

An example of using these Macros would be "select * from invoices where invoice_date => '@SYEAR@' and invoice_date <= '@EYEAR@'". Note that for the SQL statement to be valid, normally the macros (which will be converted into dates) must be included in the quote characters.

The alternative to entering free format SQL is to use the **Build** button. This will launch a new window which will connect to the specified data source, and will allow you to select tables, links, sort options, filter criteria etc.

Once the SQL has been entered, use the tabs at the top of the screen to return back to the Connections page, to test the connection.

6.5.3 Table External Link Definition - ODBC - Refresh

An ODBC connection for a table is set through the table properties window. Using the selection list on the **External Data Connection** to set the connection type to ODBC connection, and then use the Define Connection button , the ODBC properties window is then displayed.

ODBC properties are set through the three pages of the ODBC settings process:

- ODBC connection
- ODBC Refresh
- ODBC Filtering

On the ODBC refresh screen, options are available to define the type of connection (what to do with the data) and also the refresh time. The two entries available are:

Refresh Type
The refresh type drop down indicates what should happen with the imported data. The options available are:

Refresh Entire Table - Before the ODBC connection is made, the current contents of the table will be cleared and the ODBC link will re-create the contents.

Add new Items only - The ODBC import will look for new records and where the records do not exist, they will be created. Existing records will not be amended, and records missing from the ODBC source will not be deleted within Metamation

Add new Items and Amend Changed - The ODBC import will look for new records and where the records do not exist, they will be created. Existing records will also be updated to reflect the ODBC data source. However, any records missing from the ODBC source will not be deleted within Metamation

Add new Items, amend changed and mark deleted - The ODBC import will look for new records and where the records do not exist, they will be created. Existing records will also be updated to reflect the ODBC data source. Where records are missing from the ODBC source, these will be marked as deleted (making them unusable, but not actually deleting them) within Metamation

Refresh Time
The refresh time is how long in minutes, between every data refresh. This entry will only accept a numeric. 60 will be a refresh once an hour, 1440 will be a refresh once a day, 10080 will be once a week, and 40320 will be once a month. Any numeric is valid. When entering a refresh time, it is important to select a time which provides the correct balance of providing Metamation with the required data in a timely manor, but also does not put a strain on the original data source.

Below the selected refresh time, the last date and time of refresh will be displayed.

Once the refresh page is complete, use the tabs at the top of the screen to move to the filter tab .

6.6 Table Form Layout

New data storage tables are defined from the **New** button on the My Data panel of the home or Nodal Display section of the Metamation screen. Once the basic properties of the table have been defined, you can then define the columns (fields or content) which can be stored in the table.

At the bottom of the table column definition screen, there is a button to set the **Display Layout**. This allows the defined columns to be sorted and laid out for display of the table data in a form view.

The Display Layout will display a window showing all of the defined columns. Against each prompt, the group (screen section) and the prompt order can be defined as follows:

Screen Sections
The data entry form can optionally be divided into sections or panels. This will break the entry or display screen into more readable sections,i.e,header and detail sections. Against each prompt, there is a drop down list of the panels/sections that each prompt can be placed into.

Initially, this section list will be empty, but new sections can be added to the table layout using the new section icon ( ). When used, a pop-up window will allow a new section to be defined, and against the display group, an order number. Sections will be shown on the form in the numerical order specified (1 at the top, then section 2, and so on).

As prompts are divided into screen sections, so the group name and group number will be listed.

Any prompts not defined in a section will be automatically displayed in a blank section at the end of the defined form. If no prompts are put into sections, then the form will just be one form with no sections but all prompts shown.

Prompt Order
Within the sections, each prompt can be specified into an order by enter of a numerical sort order. When the form is displayed, the prompts will be shown on screen in section order, and then in order of the prompt order number. If no prompt order is specified, the prompts will be shown in the order they were defined.

At the base of the screen, the **Display Layout** will give you a view of how your defined form will look. In order for the layout to reflect your changes, you must first save the changes.

6.7 Document Classes against Tables

Documents held within the Metamation repository are stored and divided into Document Classes. When storing Documents against Data items, document classes are used to group types of documents together which will be stored against each data table, allowing easier document location.

Examples of types of document classes may be:

- Invoices
- Maps

- Faxes
- Dockets
- Purchase Orders
- Other/General

Data Table Document Classes are defined against each defined table through the table maintenance option. Document classes defined against a table are specific to that table. Whilst the same document class (type) can be defined in more than one table, it has to be set-up in each table required.

Document Class List
When the Data Table Document Class Definition option first selected from the table maintenance main screen, the list of existing defined document classes is shown on screen. Existing classes can be amended by clicking on the class with the mouse. To create a new document class, the **New** button can be selected at the bottom of the Class list.

Document Class Creating or Amendment
After selecting **New** for a new Document Class, or selecting an existing class for amendment, the main Table Document Class maintenance screen is then presented on screen. This allows creation or amendment of existing classes through the following entries:

Class Code	The document class code is a short code to represent the class of documents (such as "INV" for invoices). Each document class within the table requires a unique class code.
Description	This is the full description of the document class being defined for the selected table.
Status	The document class can be marked as activate or in-active from the drop down list. Only active classes will be available for use within Metamation when storing documents against the current data table.

Once document classes have been defined within a table, the documents can be placed against data records either in the data entry grid or form data views.

7. Searching for Information

Metamation provides a variety of methods for searching for documents and data. Depending on the level of searching required, the following search options are available:

- Item Specific Searching allows a specific area of information to be searched by simply entering a search term. Item specific searches can be applied to just documents, data, alerts, or lists of information displayed on screen (such as lists of users, document classes etc)
- Quick Searching allows searching across all documents and data available to you, for a specific search term. For quick searching, only the description and reference number of items are searched, and the results ranked in the order of most likely match.
- Advanced Searching allows a range of search options to be specified. Advanced searching allows searching of more areas of the repository including the contents of documents, data within tables, and filtering of creation date, owners etc.

7.1 Performing Advanced Searches

Within Metamation, data, documents, storage areas and actions can be searched for in the following ways:

- Context Searching
- Quick Searching
- Advanced Searching

The advanced search option allows a key word or phrase to be entered for the search, together with a range of options to narrow the search down to selected types of items. The **Advanced search** option is available to all users, and appears under the main home page Navigation Menu on the far left of the display. When selected, the advanced search window is displayed.

Within the Advanced search, the following options are available:

Search String	This is the search string to be located. See below on the options available for entering search strings.
Search Synopsis?	By default, only the items reference code and description will be searched. By selecting this option, the items synopsis is also searched

Include Hidden/Deleted?	By default, only active items will be searched. By selecting this option, documents, tables, nodes etc which are marked as hidden or deactivated will also be searched.
Owner	By selecting a user from the drop down list, the items searched are restricted to those owned (last updated) by the specified user.
Created Between	By entering a range of dates (by enter or using the pop-up calendar controls), the items search are restricted to items created within the specified range of dates.
Search Documents	Indicates if the search should include documents within the repository.
Search nodes	Indicates if the search should include node definitions within the repository.
Search Tables	Indicates if the search should include table definitions within the repository.
Search Data	Indicates if the search should include data held within tables within the repository (note, this does not require the table search to be selected to search the actual data content).
Search document against Data Items	Indicates if the search should include documents which are held against data items (in data tables). The standard method of finding documents against data records is by viewing the data items.
Search Full Document Text	Indicates if the search should include the full text of stored documents. Full text is picked up and indexed within Metamation of text based documents such as Word, Powerpoint, text based PDFs etc. For text searching within images (scanned, non-text PDFs etc), OCR of the documents must be performed at the time of capture.

When entering the Search String to be found, the following search options can be entered :

Text in quotes - will search for the exact match of the phrase as entered

+ (plus) before word - will only return entries where the specified word is found

- (minus) before word - will only return entries where the specified word is not found

Search terms specified are not case specific.

Examples:

Project plan for Anywhere council - This will return all entries that contain ANY of the words, and rank them in order. Common words such as "for, and, the, on, of, etc" are automatically stripped out.

"Project plan" for Anywhere Council - This will return all entries that contain ANY of the words, and rank them in order, but will treat the phrase "Project plan" as a single word in the searching. Common words such as "for, and, the, on, of, etc" are automatically stripped out.

"Project plan for Anywhere Council" - This will return only those entries where the phrase "Project plan for Anywhere Council" and rank them in order. Common words such as "for, and, the, on, of, etc" are NOT automatically stripped out of phrases.

+"Project Plan" for +Anywhere council - This will return all entries that contain the optional word "council", but the entries MUST contain the mandatory phrase "Project Plan" and Anywhere. Common words such as "for, and, the, on, of, etc" are automatically stripped out.

-Rejected +"Project Plan" for +Anywhere council - This will return all entries that contain the optional word "council", but the entries MUST contain the mandatory phrase "Project Plan" and Anywhere. In addition, any documents or data where the word Rejected is found will not be included in the listed results.

7.2 Performing Quick Searches

Within Metamation, data, documents, storage areas and actions can be searched for in the following ways:

- Context Searching

- Quick Searching
- Advanced Searching

The quick search option allows a key word or phrase to be entered in the quick search box at the top of the home page or nodal display page. Quick searches will search all documents and work areas that you have access to, and will list all the results in the order based on likely match. Quick search only searches on the description of the item.

The quick search allows any word or phrase to be search for simply by entering the search word or phrase and pressing the **SEARCH** button (or pressing return after entering the text). However, quick searching also allows the following search options to be used:

Text in quotes - will search for the exact match of the phrase as entered

+ (plus) before word - will only return entries where the specified word is found

- (minus) before word - will only return entries where the specified word is not found

Search terms specified are not case specific.

It should be noted that quick searches will not find any references of documents that are either hidden (deleted), or are stored against data records. To find these documents, you need to use the advanced search option.

Examples:

Project plan for Anywhere council - This will return all entries that contain ANY of the words, and rank them in order. Common words such as "for, and, the, on, of, etc" are automatically stripped out.

"Project plan" for Anywhere Council - This will return all entries that contain ANY of the words, and rank them in order, but will treat the phrase "Project plan" as a single word in the searching. Common words such as "for, and, the, on, of, etc" are automatically stripped out.

"Project plan for Anywhere Council" - This will return only those entries where the phrase "Project plan for Anywhere Council" and rank them in order. Common words such as "for, and, the, on, of, etc" are NOT automatically stripped out of phrases.

+"Project Plan" for +Anywhere council - This will return all entries that contain the optional word "council", but the entries MUST contain the mandatory phrase "Project Plan" and Anywhere. Common words such as "for, and, the, on, of, etc" are automatically stripped out.

-Rejected +"Project Plan" for +Anywhere council - This will return all entries that contain the optional word "council", but the entries MUST contain the mandatory phrase "Project Plan" and Anywhere. In addition, any documents or data where the word Rejected is found will not be included in the listed results.

7.3 Specific Item Searches

Within Metamation, data, documents, storage areas and actions can be searched for in the following ways:

- Context Searching
- Quick Searching
- Advanced Searching

Specific or Context searching allows searching within the list currently displayed on the page. Within each panel of the work page (my documents, my data, my alerts, user lists, document types, etc) on the right of the title bar, a magnifying glass ( )appears. Pressing this icon presents a pop-up search criteria window, which allows searching on the items within the selected or specified area of the application.

The context search works like the quick search option, in that it allows a key word or phrase to be entered, and will then search the items listed, displaying a list of results in the order based on likely match. This search only searches on the description of the items on the screen, and only the items listed.

The specific item search allows any word or phrase to be search for simply by entering the search word or phrase and pressing the **SEARCH** button (or pressing return after entering the text). However, specific item searching also allows the following search options to be used:

Text in quotes - will search for the exact match of the phrase as entered

+ (plus) before word - will only return entries where the specified word is found

- (minus) before word - will only return entries where the specified word is not found

Search terms specified are not case specific.

Examples:

Project plan for Anywhere council - This will return all entries that contain ANY of the words, and rank them in order. Common words such as "for, and, the, on, of, etc" are automatically stripped out.

"Project plan" for Anywhere Council - This will return all entries that contain ANY of the words, and rank them in order, but will treat the phrase "Project plan" as a single word in the searching. Common words such as "for, and, the, on, of, etc" are automatically stripped out.

"Project plan for Anywhere Council" - This will return only those entries where the phrase "Project plan for Anywhere Council" and rank them in order. Common words such as "for, and, the, on, of, etc" are NOT automatically stripped out of phrases.

+"Project Plan" for +Anywhere council - This will return all entries that contain the optional word "council", but the entries MUST contain the mandatory phrase "Project Plan" and Anywhere. Common words such as "for, and, the, on, of, etc" are automatically stripped out.

-Rejected +"Project Plan" for +Anywhere council - This will return all entries that contain the optional word "council", but the entries MUST contain the mandatory phrase "Project Plan" and Anywhere. In addition, any documents or data where the word Rejected is found will not be included in the listed results.

7.4 Search Results Displayed

When any information search has been carried out (specific searches , quick searches or advanced search), the display is updated to show the documents, data and other information which has been found for the given search criteria.

All items which closely fit the search criteria will be listed, and will be sorted into order, with the most relevant items at the top of the display.   The percentage chance of the item meeting your criteria will be displayed on the right of each document, node or data item.

Against each item listed, the item type will be displayed as an icon (such as word icon, excel icon, folder, data item, PDF file, tale, node, etc), followed by the type of item, storage location, the reference number and description.

Placing the mouse pointer over the item will display the item synopsis if it is available.

To view the details of any item (to view the data, table, node or view the document properties), simply select the relevant item with the mouse.

8. Grant maintenance

Access to Information (Documents, Tables, and Nodes) can be defined in two ways. First, Metamation system users can be made owners of the information type (see Tables, Documents and Nodes), or users can be Granted or denied access to information using the Grant Maintenance process.

Within the Metamation Home or Nodal Display screens, against the nodes, documents or tables that you yourself can see, you have the ability to grant access to the nodes, and therefore the tables or documents held within the nodes.   Against each item listed, either in the main display or the items maintenance process, a grant icon ( ) will be displayed.

Clicking on this icon will take you into the Grant Maintenance process, allowing you to grant or deny access to this storage area by other people. When grants have been set, the grant icon will change colour to red to indicate that a grant is in place.

When access is granted to a table or document, the access is to that specific item. When access is granted to a Node, access is granted to any items contained within the storage node, child nodes, and siblings (subject to the settings).

8.1 Granting access to items

The Grant Maintenance process is used to grant specific access to Storage Nodes, Documents or Tables within the application to specific users or user groups. The grant maintenance is activated against a specific node, table or document, either from the node within the home pages, or from within the node maintenance process.

When the Grant Maintenance is activated, a window is presented allowing users or user groups to be added to the list of those that can, or in the case of denying access, cannot access the selected item.

Entry of grants is made by adding lines onto the table of granted users or departments, adding lines with the following entries:

User Name	Where a grant is to be set to a specific user, the user to be granted access to the selected item can be selected from the drop-down list of active users.
Department	Where a grant is to be set for all users in a group or department, the department to be granted access to the selected item can be selected from the drop-down list of active departments.
Grant Level	Each user or department can be set individual levels of access which will determine the features available to the users when working on the documents, tables or child nodes within the selected node. Access can be: **Administrator** - Can maintain the node, add children, change the node properties etc. **Submitter** - Can add new documents into the node, add data to existing tables etc. **Viewer** - Can only view existing contents of the node, existing documents and existing table table **No Access** - No access of any kind is permitted to the node, or contents of the

	node
Flow Down	The flow down is used to indicate if access is allowed by default to child nodes of the granted nodes. When flow-down is granted, children automatically have the same access levels for the user of the granted node. Clearly, this can be changed by granting specific access levels to child nodes.

9. Acess via Remote Web Workplace and the Internet

Metamation allows access to your companies documents and information from anywhere around the world through a PC, Mac or smart mobile device (PDA) running a standard Web Browser (such as Internet Explorer, Opera or Firefox).

In order to allow external access to the Metamation application server, your system administrator needs to have granted Remote Web Workplace access to the application through either Microsoft Internet Information Services (IIS) or similar technology such as TomCat or Apache. A sperate "Metamation - Enabling Remote Access" document is available with the security steps and consideration for the set-up of remote access.

Once Metamation has been connected to the internet, the main Metamation document portal can be accessed by simply accessing your companies intranet or extranet portal and selecting Metamation from the list of available options.

In some situations, the Metamation portal will be provided via a URL (web address) which you may need to enter into your web browser in the following format:

http://www.yourcompanydomain.whatever/Metamation

Once you have successfully accessed the Metamation portal, the standard Metamation login security screen will be displayed.

10. The Metamation Background Service

Part of the Metamation system is the background processor. This is a service which runs on the main Metamation server, and carries out general maintenance on a regular basis (as defined by the system administrator when Metamation is first installed, or the service time changed).

The Metamation service carries out low priority tasks within the system which includes:

- Provides alerts of out of date actions, data and documents
- Provides alerts for document reviewers or approvers to work on documents
- Provides distribution of amended or new documents
- Refreshes Table data from external data sources
- Refreshes Table Metrics

If any of these actions fail to occur, it is likely that either the Metamation service is not running (in which case, please contact your system administrator), or the service has yet to run and find the information. Please wait a few moments and check your information/alerts again.

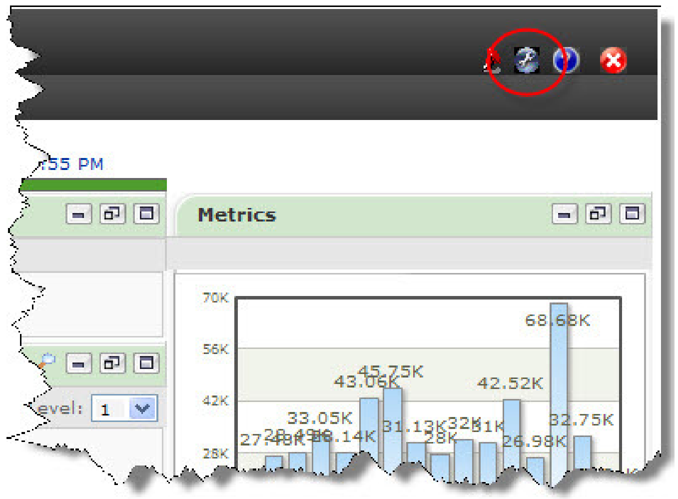
11. Metamation Support

Metamation and associated products (such as document scanning facilities, customer web portals, email portals etc) are fully supported by Touchstone Systems Limited.

Standard support is provided between the hours of 9:00am and 5:30pm GMT, Monday to Friday, excluding public holidays. Support outside of the standard hours can be provided where required. These support hours are applicable to all methods of requesting support on Metamation.

Direct Support

From within the Metamation application, issues can be logged with the Touchstone Systems support page, or suggestions for improvements can be made, by clicking the support icon ()in the top right of the Metamation application as follows:



Contacting Touchstone Support:

Phone support is provided by calling (UK - +44) 0845 434 8949.

Email support is provided by detailing your questions or problem to support@touchstone-systems.co.uk.   This email address should be used whenever further details are required by our support staff (such as screen shots, details of configurations, etc).

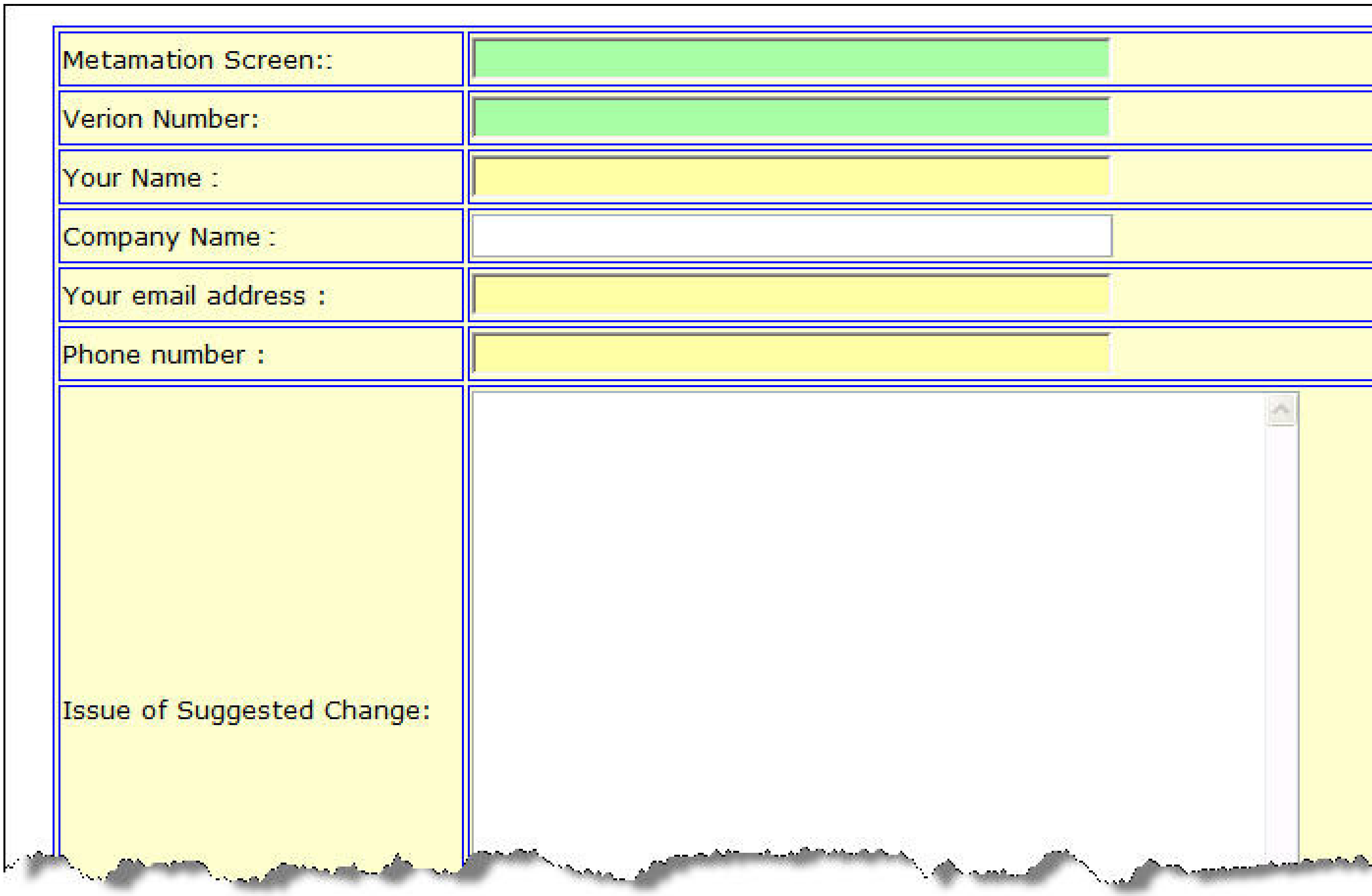
Web support is provided by accessing the on-line support site at www.touchstone-systems.co.uk/issues. This site provides the ability to log new issues or change requests, view details of support issues, software changes or releases, or to provide updates to existing issues.

Alternatively, issues and change requests can be logged through the Metamation application, by selecting the "Log Issue/change" icon at the top right of each Metamation screen ().

11.1 Logging issue/change requests

If you would like support in using Metamation, you have found a faulty in the software (or this manual), or would simply like to request an enhancement or change to Metamation, Touchstone Systems would be glade to hear from you.   A form is provided for logging both software issues (bugs) and for requesting changes to the software.

At the top right of all Metamation screens, icons are available for displaying this help system, logging off Metamation, and a separate icon ( ) is available for logging change requests/fault reports. When selected, this will present you with a form for entering your details (name, email address so we can keep you advised of progress, phone number in case we need to contact you), as follows:



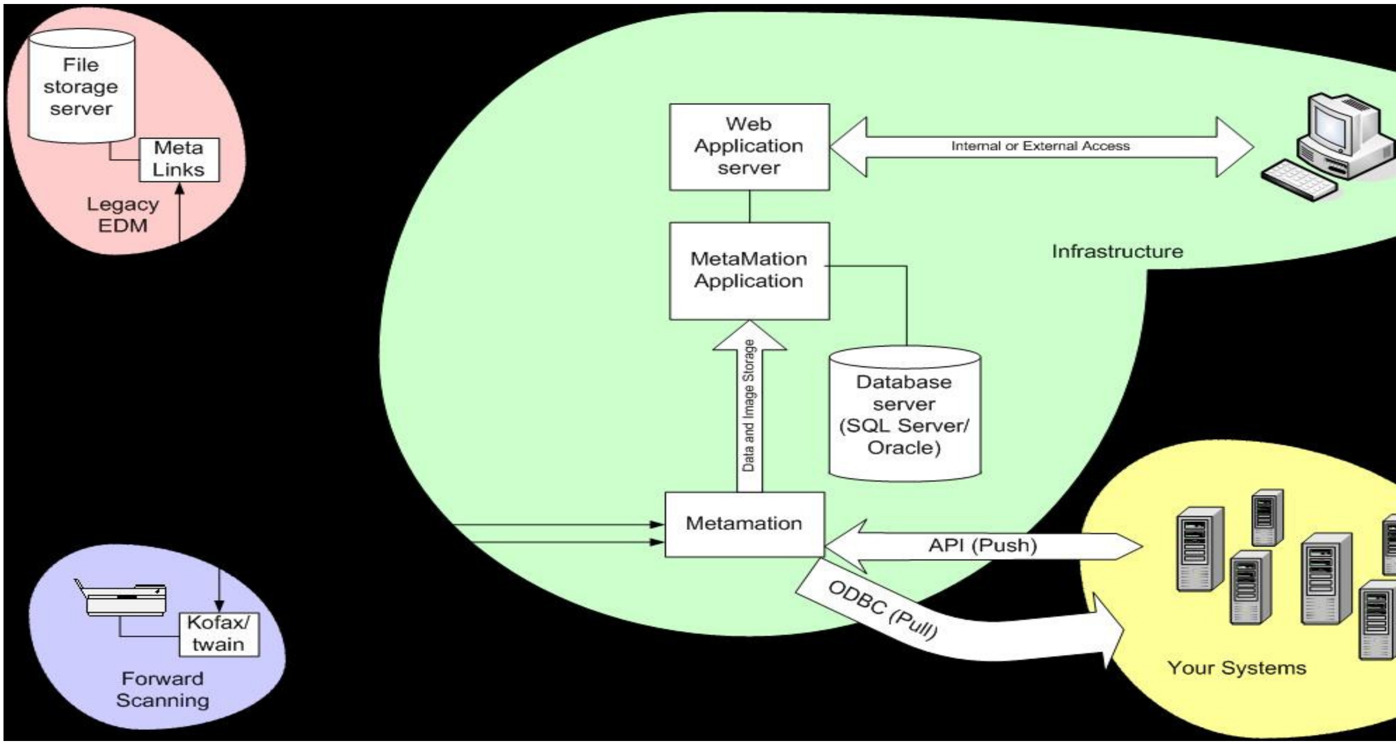
Issues will be passed to the Touchstone support desk, and change requests will be considered for the next release of Metamation. When completing this form, please be as descriptive as possible in the description area of the form.

12. Interfaces

Metamation comes complete with a range of integration interfaces which allow external 3rd party systems to feed and fetch both data and documents into the system repository. Various types of interfaces are available, and all are provided with a separate user guide which can be found through the Metamation support area.

Types of interfaces currently available include:

- **ActiveX DLL API** - Allows passing of information and documents into and out of Metamation by calling subroutines within your own Windows 32 (WIN32) or Windows 64 (WIN64) applications.
- **SOAP** - Allows passing of information and documents into and out of Metamation by using a web SOAP service to connect to the Metamation application. This is less efficient that the direct integration via the ActiveX component.
- **WEBDAV** - Allows connectivity to the document repository from any application which can access a network file share.



13. Forums

Metamation allows discussions and announcements to take place in forums. Forums allow conversations to take place in an electronic format, with the ability to post new comments, ask questions, make announcements and hold general conversations. All conversations are held within Metamation for future reference.

Metamation supports both a general forum (for general discussions), and node specific forums, which allow discussions based on a project or storage area.

From the Home or Nodal display page, the options for the General Forum or Nodal Forum will appear under the main menu . The forums are open to all registered Metamation users.

Selecting the General forum or the Nodal Forum will display the selected forum.

13.1 Nodal Forums

Metamation forums allow conversations to take place in an electronic format, with the ability to post new comments, ask questions, make announcements and hold general conversations. Node specific forums, which allow discussions based on a project or storage area.

When a forum entry is made against a selected node, the discussion remains with the node. It is not currently possible to move the discussion to the general forum, or move the discussion to a different node or project.

The nodal forum can be started either by selecting the Node Forum option from the main Metamation menu (when a node has been selected for focus), or from the "Node Forum" sub-menu option from the un-folded favourites list.

Once a Node Forum option has been selected, the forum for that node will be displayed.

13.2 Displaying Forum

When either the main Metamation forum or a nodal specific forum is selected for display, the forum screen will be presented in the work area of the Metamation screen. The forum is made up of a screen of postings, allowing paging through the forum discussions, with the latest forum posting shown at the top of the page.

Within the header of the forum, options are available to change the 'page size' of the displayed entries, allowing selection of 5,10,15,20,25 etc postings per page display. Once the page size has been selected from the drop down list, pressing the **Set Pagesize** button will refresh the display with the new desired page size.

Each forum entry is shown with the topic, author and posting time. An icon is displayed against the forum entries to indicate if the discussion is a general comment, a question, news, a suggestion etc. An indication of how long ago the posting was made is also shown alongside the entry. Where the entry has received replies, this will be shown below the main posting in a hierarchical display.

To read a posting or a reply, selecting the posting subject line with the mouse will unfold the posting to show the main text of the posting. Selecting the same or a different subject will fold the original posting. When a posting is unfolded, options are provided at the base of the comment to **reply** to the posting, or where you own the posting, to **delete** the posting.

At the bottom of the forum page, options are provided to page through the forum discussions shown using First, Last, Next, Previous page options.

To start a new discussion, a **New Message** option is available at the top of the screen. When selected, this will present a window allowing a new forum posting to be recorded in the current view (general or for a specific node).

13.3 Adding a new Subject

When either the main Metamation forum or a nodal specific forum is selected for display, the forum screen will be presented in the work area of the Metamation screen. The forum is made up of a screen of postings, allowing paging through the forum discussions, with the latest forum posting shown at the top of the page.

To start a new discussion, a **New Message** option is available at the top of the screen. When selected, this will present a window allowing a new forum posting to be recorded in the current view (general or for a specific node).

Postings are made up of three entries, as follows:

Discussion type	By default, all new postings will be created as a general discussion. However, the specific type of entry can be

	selected from Question, Comment, News or Suggestion.
Title	This is a short description or subject title for the posting.
Comment	The comment is the full posting for the discussion. The posting allows text to be recorded as required, but special formatting (make text bold, a selected colour etc) is not possible within the forum.

When the **Save** option is used to add the new posting, you will be returned back to the main forum page, with your new entry added to the top of the page.

13.4 Reply to forum postings

When either the main Metamation forum or a nodal specific forum is selected for display, the forum screen will be presented in the work area of the Metamation screen. The forum is made up of a screen of postings, allowing paging through the forum discussions, with the latest forum posting shown at the top of the page.

To read a posting or a reply, selecting the posting subject line with the mouse will unfold the posting to show the main text of the posting. When a posting is unfolded, options are provided at the base of the comment to reply to the posting.

When you reply to an existing posting, the entry details (including subject and posting text) are displayed for confirmation. Below this, space is provided to reply to the original posting as follows:

Reply type	By default, all new postings will be created as a general discussion. However, the specific type of entry can be selected from Question, Comment, Answer, News or Suggestion.
Title	This is a short description or subject title for the posting. By default, this is the same as the original posting but can be changed if required.
Comment	The comment is the full posting of your reply for the discussion. The posting allows text to be recorded as required,

but special formatting (make text bold, a selected colour etc) is not possible within the forum.

When the **Save** option is used to add the new posting, you will be returned back to the main forum page, with your new entry added to the appropriate place within the discussion

13.5 Forum delete entry

When either the main Metamation forum or a nodal specific forum is selected for display, the forum screen will be presented in the work area of the Metamation screen. The forum is made up of a screen of postings, allowing paging through the forum discussions, with the latest forum posting shown at the top of the page.

To read a posting or a reply, selecting the posting subject line with the mouse will unfold the posting to show the main text of the posting. When a posting is unfolded, options are provided at the base of the comment to delete the posting.

You are only able to delete postings or replys that you have posted. When you delete a posting using the **delete** option, any sub-postings or replies will automatically also be removed, regardless of who posted the reply or comment.

14. Audit Overview

Whenever activities are carried out within Metamation, those activities are audited. With the exception of forum discussions (posts and replies) all data entry, document creation, configuration changes, data and document views are audited within Metamation.

An audit enquiry process is available that allows this audit information to be shown in a variety of methods and for a range of criteria.

Because the audit information can grow to be fairly large, it is recommended that the audit information is regularly reviewed, downloaded and cleared. Filters can be used to change the audit information which is displayed and cleared, with options to filter by document type, reference, date range etc.

The Audit Enquiry option is available from the main Metamation menu, but is only available to system administrators or Supervisors.

14.1 Audit Enquiry

The Metamation audit enquiry process allows the selection and reporting of system events as recorded whenever any actions are carried out within the system. This will include logging in to the system, viewing information (data and documents), changing information, and registering new information (nodes, data and documents).

The Metamation **audit enquiry** is available from the main system menu, but only to system administrators and system controllers.

When activated, an enquiry options screen is displayed which allows the selection and filtering of the audit information to be displayed. The more open the audit selection, the more information that will be displayed and the longer the time to display/clear the information shown.

When the Audit enquiry screen is displayed, the filtering of the audit information can be carried out using the range of options as follows:

Search Type	This allows selection and filtering based on the type of event (document, data, login, etc). By default, the filtering will show all types of events
Sub Type	This drop down allows sub-filtering based on the specific occurrence (creation of document/data, amendment, deletion etc). By default, the filtering will show all types of occurrence
User	This drop down shows all defined users (regardless of user status), and allows selection of events based on a single user. By default, the filtering will show events for all users
Date Range	This allows a date range of events to be specified (either by direct entry or from the pop-up calendar selectors). The default date range is for the current month.
Search Term	The search term allows a term to be located in the

	audit. Generally, this is used to search for a document reference number, customer account number, invoice number etc. However, this can also be used to enter a new data item value (such as customer name) to locate where the name was changed.
Item Number	For nodes, document numbers and tables, this allows the document internal number, table internal number or node internal number to be used as part of the filter criteria.
Version	This allows a specific version of a document to be selected as part of the filter criteria.

When the filter options have been specified, using the **Enquire** option will produce a listing of the audit events which meet your filter criteria. To view the full text of the audit events, hover the mouse over an event of interest.

Depending on your security level and system configuration settings, at the end of the enquiry list will be options to **Download** the listed events to a CSV data file, and/or to **Clear** the events listed from the audit table.

15. Documents Against Data

In addition to the storage of general documents, and data items, Metamation provides the facility to store one or more documents against data records. Examples of the use of this facility includes:

- Storing electronic copies of printed Invoices against a data table of invoice details
- Storing customer documents (maps, letters, faxes, etc) against a data table of customers
- Storing of receipts and pictures of assets against an asset data table

As with Metamation general documents, "Documents" is a generic term for any structured or unstructured information that is contained in a single entity. Examples of a document may be an Microsoft office document (Word, Excel, Project plan etc), an image (either drawn, from a CAD package or scanned in), a data file (such as a CSV, XML, HTML file), or a catalogue file (such as a ZIP, or RAR compressed catalogue).

As with other documents within Metamation, documents held and linked to data items includes version control. As new updated versions of documents become available, Metamation stores the latest version of the document against the data. However, the old version is not lost. Instead, it is filed away for future reference just in case it is needed.

Metamations job is to act as a virtual librarian, keeping the library of documents against the data items up-to-date with the latest documents, keeping a note of who reads, checks in, or checks out documents, allowing new documents to be added to the data item and general document library with the necessary indexes for rapid retrieval, and to provide other services associated with the documents, such as controlling the review of new documents.

When data tables are defined within Metamation, as part of the table maintenance process, the types of documents to be held for the data table are defined. Documents can then be attached to the data records as they are added or removed through the data grid entry, or data sheet entry forms.

16. Change Password

Within the the main Metamation navigation menu, you have the option to **Change Password**. This, as the title suggests, will change your current Metamation system login password to a new password of your choice. This facility only changes your own password, and cannot be used to change the password of other users (System administrators should use the User Maintenance option to change the password of other users).

When the Change Password option is selected, you will be presented with a screen which will ask for your existing password (which must be entered correctly to allow your password to be changed), and your new password, which must be entered twice for confirmation.

When you enter your new password information and apply the change, your password is immediately updated, and will need to be used when you next login.

17. Out of Office

Within the the main Metamation navigation menu, you have an option to record yourself as **Out Of Office**. This, as the title suggests, will change your current Metamation status to out of office. In the event that actions are set for your attention (such as document reviews or approval), the document author will be notified that you are out of the office or otherwise unavailable.

The Out of Office screen allows you to select a person to delegate actions to, and to record Out of Office notice text. This text will be shown to other users of the system when they place actions against you.

When you activate the Out of Office settings, the effect is immediate, and alerts to other users will appear immediately when they try to place actions against you.

The Out of Office status will stay in place until the next time you log into Metamation. At that time, you will be shown an alert indicating that Out of Office status is in place, with options to leave the Out of Office on, or remove the Out of Office status.

18. Touchstone Systems Limited

Metamation is written and supported from the UK by Touchstone Systems Limited. Support for Metamation is provided through the support routes detailed on the main Metamation support area.

For any other questions, please contact Touchstone Systems at the following address:

Touchstone Systems Limited
Touchstone House
21 Monarch Close
Hatch Warren
Basingstoke
Hampshire
RG22 4XA

Email : enquiries@touchstone-systems.co.uk

Web : www.touchstone-systems.co.uk

Phone : 0845 434 8949

19. Using this help

This help provides an overview of the major elements and day-to-day use of the Metamation application. This help does not cover specialist areas of the Metamation application such as initial installation, document scanning, integration with Microsoft Exchange, Lotus Notes (Domino), etc. Separate specific guides are provided for these subjects and are available by contacting Touchstone Systems support.

The help is provided as a standard help file. Whilst this is supplied with the Metamation application, updates to the help file may be provided at the same time or separately from the Metamation application.

The Metamation help file displays the main subjects on the left hand panel. Click on a subject to view the help, or expand the books (the [+] box to expand) to see the sub-topics.   You may also search for a specific subject using the "Search" option in the top left hand corner of the page.

Further help and support on any Metamation subject can be found through the Metamation support area .

20. Automatic System Updates

As new versions of Metamation become available, they will be loaded on the main Metamation internet web site for download. If your Metamation server has a connection to the internet, your Metamation installation will check for updates and will automatically download the updates to be applied as soon as they become available.

When new updates are available, system administrators will be alerted that updates have been downloaded as they login to the system, with a pop-up update screen showing a list of new features, changes and fixes. They will then have the option to upgrade the system, defer the decision or ignore the update.

Once an administrator has decided to apply the update, the new update will be applied in the background.   Upon completion of the upgrade, all users will be presented with the list of changes and updates when they next login to Metamation.