

SECURE-ARCHIVES

Add In

Version 3.3.0

User' Manual

Evolusoft
Boulevard Balboa
Edificio Bay Mall
Technology Plaza
Segundo Piso, Local 213
República de Panamá
Tel.: (507) 263-1096
Fax: (507) 263-0962

Evolusoft Miami
5201 Blue Lagoon Drive, 8th. Floor
Miami, FL 33126, U.S.A.
(E0232) P.O. Box 527948
Miami, FL 33152-7948, U.S.A.
Tel.: (305) 629-3174
Fax: (305) 629-3100

Evolusoft Europe
Bernhofstrasse 23
8134 Zurich-Adliswil
Switzerland
Voice: +41 1 709 27 40
Fax: +41 86 079 423 24 82
e-mail: europa@evolusoft.com

About Secure-Archives Add In

Secure-Archives Add In is the module that will allow you to connect to our Secure-Archives application from the following MS Office applications:

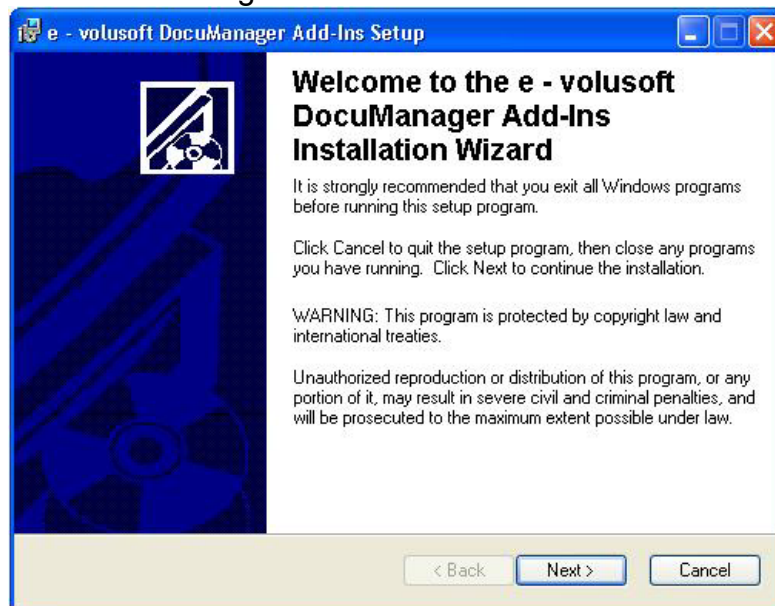
- Word, Excel and PowerPoint 97
- Word, Excel and PowerPoint 2000
- Word, Excel and PowerPoint XP

With the Add-In you can insert a document directly to Secure-Archives or DocuManager Server. You are also allowed to view or update the documents stored. All of these features without opening your Internet browser.

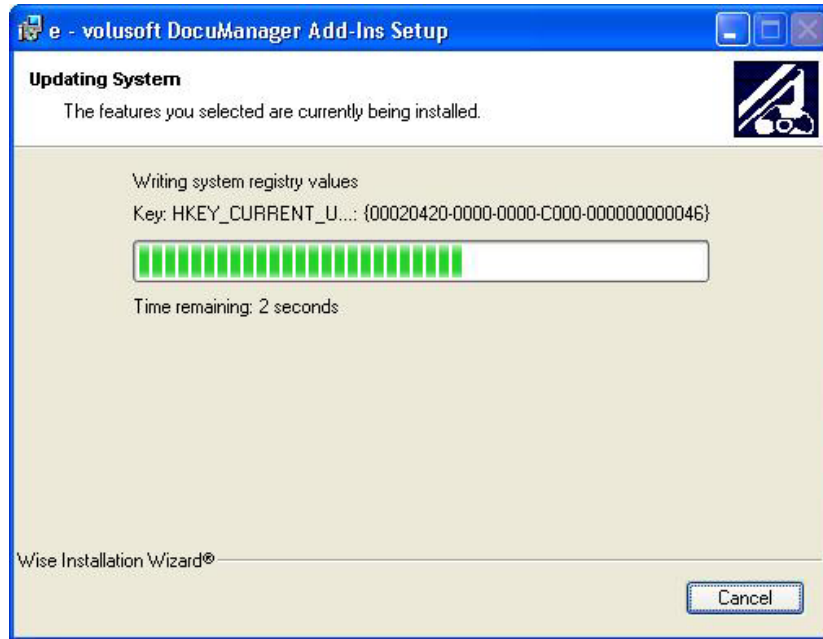
Add-In Installation

You can find the addin in the DocuManager cd in the following path, <YourCDDrive>:\SACLIENT\Addins or you can download it from e-volusoft's web site at http://support.evolutsoft.com/downloads/sa_addins.msi.

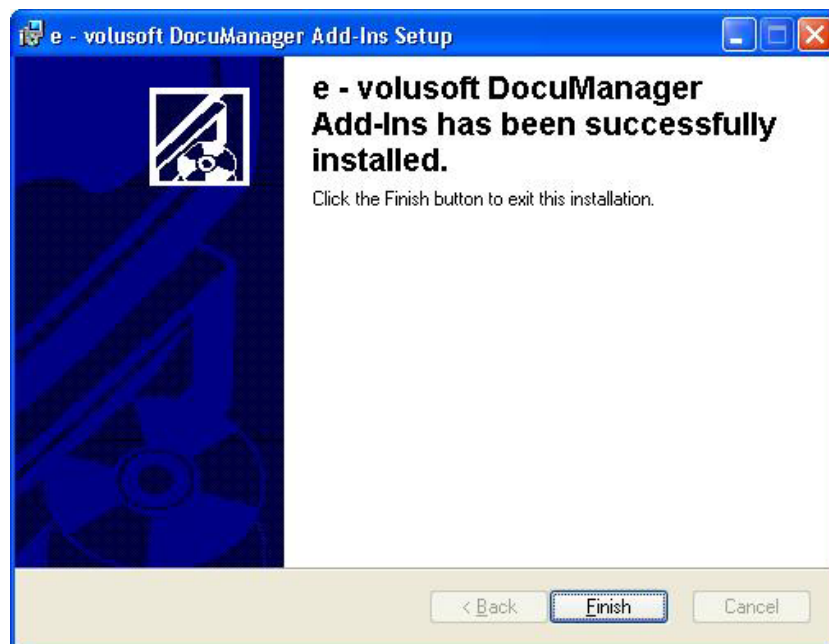
Once you have the sa_addins.msi file, please double click on it to install it. You should see the following window:



Click Next to start installing the Add-in for Office. A window with a progress bar will appear:



After all the necessary files click on Finish to close the installation program.



After setup is complete, you need to activate the Addin toolbar in the Office applications.

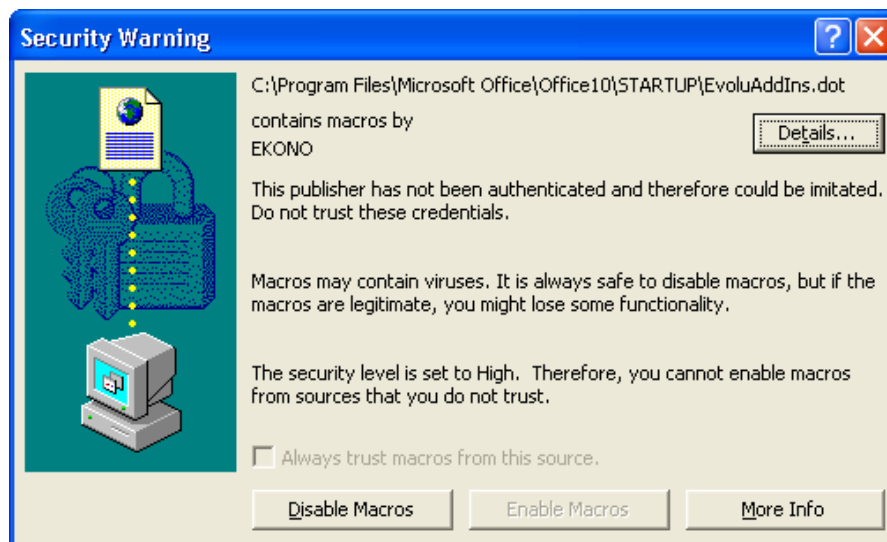
Activating the Addin

If you use Word 97 or Word 2000

In Word 97 and 2000 you need to open Word twice for the add-in to show up.

If you use Word XP

In Word XP, you open Word twice, the second time that you start Word you might be prompted with the following screen:

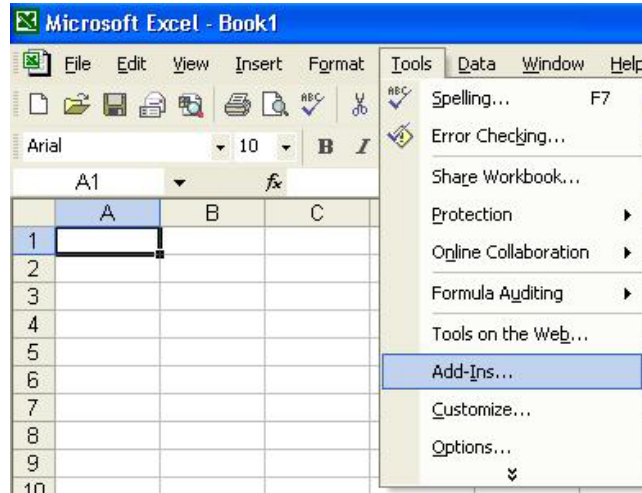


If you see this screen, you need to install our certificate before using the Add-in. Please refer to the section Installing the Certificate.

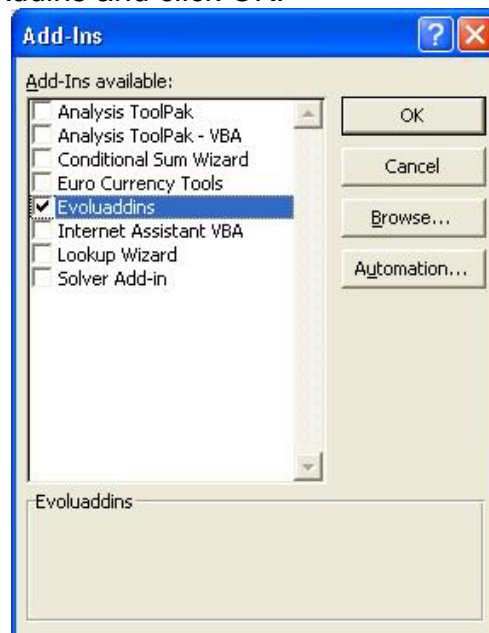
Activating the Addin in Excel (all versions)

In Excel, the bar is loaded automatically. In case that the toolbar is not displayed automatically, please follow the following steps:

1. Select Add-ins from the tools menu. The Add-ins window will be shown.



2. Uncheck EvoluAddins and click OK.



3. Open the Addins window again and this time check Evoluaddins, when you click OK the toolbar will be shown.

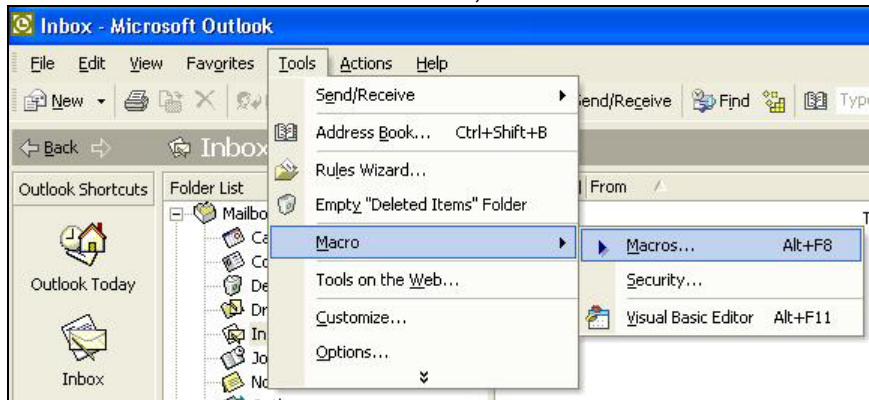
Activating the Addin in Powerpoint (all versions)

The add-in is loaded automatically.

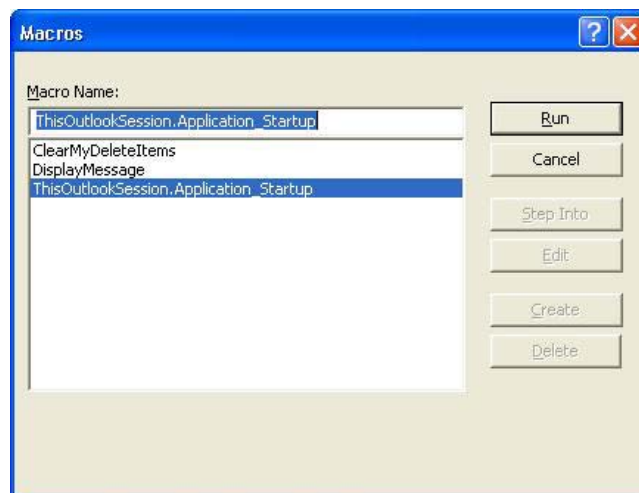
Activating the Addin in Outlook

For Outlook please follow these steps in order to get the toolbar:

1. Select Macro from the Tools menu, and select Macros.



2. On the Macros window select the macro named “ThisOutlookSession.Application_Startup” and then click on Run.



The toolbar will be shown when you open an email message.

If you get the following window:

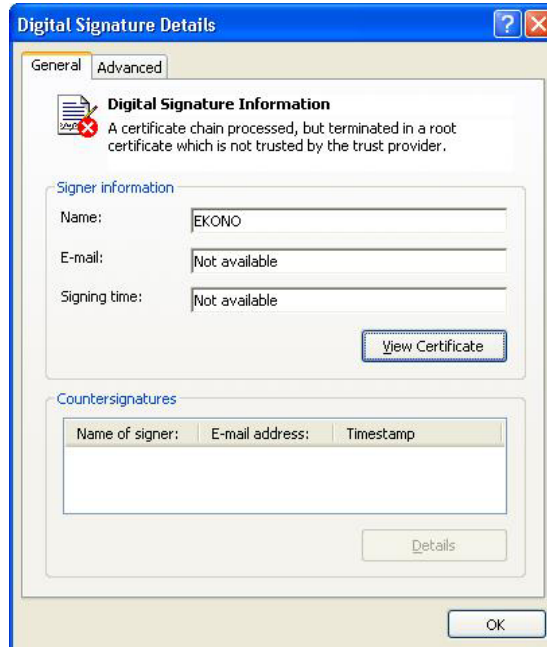


please follow the steps detailed in the section Installing the certificate.

Installing the Certificate

To install the certificate follow these steps:

1. Click Details..., you will be prompted with this screen:



2. Click on View Certificate, the following screen will appear:



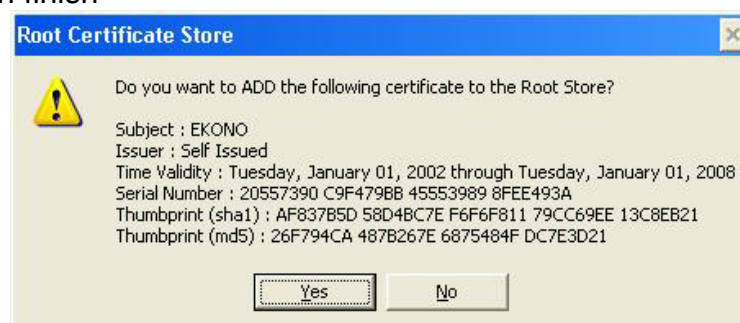
- Click on Install Certificate, the Certificate Import Wizard will appear,



- Click Next and select Automatically Select the Information Store and click Next, the following window will appear:



- Click on finish



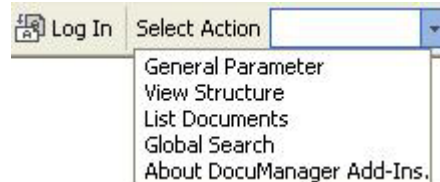
6. On the Root Certificate Store window click on Yes to confirm the certificate installation.
7. Close the wizard and close the application.
8. Open the application again, this time the following window will appear:



9. Check *Always trust macros from this source* and click on Enable Macros.

The Add-in bar

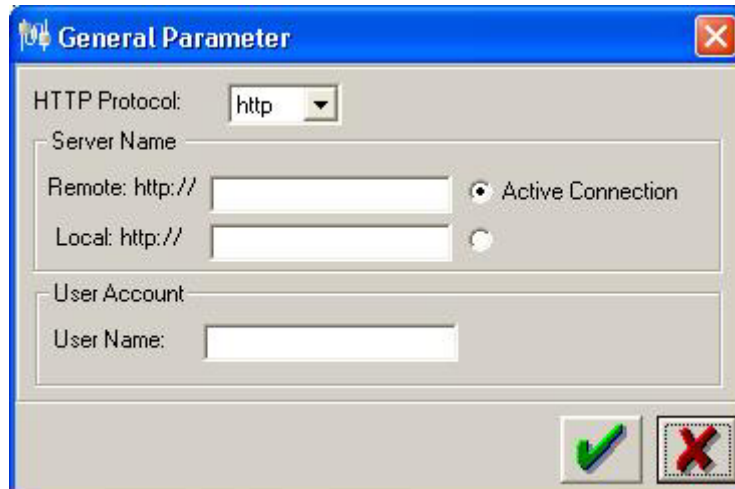
The Add-in bar is composed of two parts. The first part contains the Log In or Log Off button. The button will toggle depending on your connection state. The second option shows a list of the actions that you are allowed to do.



General Parameter

Before using the add-in for the first time, it is necessary to define the connection parameters in General Parameter.

You need to specify where to connect to, and what protocol to use, http or https. Also you can define the username that will be used by default. To do this, select General Parameter from the Select Action menu, the following window will pop up:



In http Protocol you need to select the appropriate method of connection, http or https (secure connection). In order to use https the server that you are connecting to needs to have a valid certificate installed.

In the section Server Name, please specify in the appropriate box, either local or remote, the server name or DNS name only. You do not need to specify the whole connection string that you use to connect using the browser.

The active connection radio button is used to specify which connection is going to be used. You can store a Lan server name and a remote or Internet server name.

For example, if you are a user of e-volusoft's Secure Archives service, you connect using the browser to the following web address:

<https://clients.secure-archives.com/securearchives>

From this address we can deduce that the server has a security certificate installed, so we can choose to use HTTPS protocol.

The Server Name will be in this case clients.secure-archives.com only, you should not fill in anything else since this will result in a DNS error, and the server will not be found.

In the username text, fill in the username that you use with your DocuManager or Secure Archives server when using the Internet browser.

Once you have correctly fill in the values in the General Parameter window you can log in to your server.

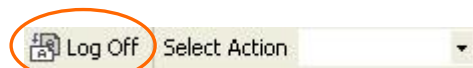
Logging In and Out.

To log in to the server you must press the Log In button on the toolbar, the Login window will appear.



If you defined a default username in the General Parameters window, that username will be shown here.

After you fill in the User and Password boxes, click on the Check button to validate your user and password. If the user and password are correct, you will be log in, the file structure will be shown and your Log In button will change to Log Off.

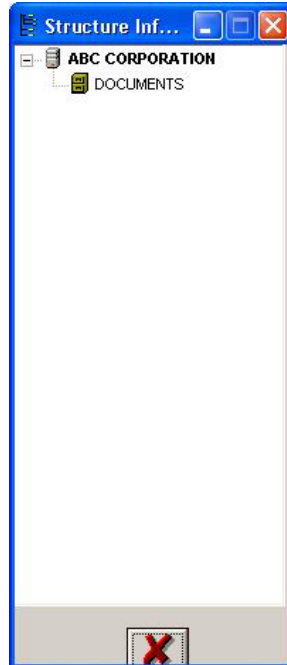


Once Logged In the button changes to Log Off.

When you finish working you have to Log Off from the server. To do so, just click the Log Off button, notice it will change back to Log In.

View Structure

The View Structure option will allow open the view structure window and show you how the file cabinets and folders are arranged in the server.



You can select a working folder by opening the structure and selecting a folder.

To close the window, press on the red X button.

List Documents

If you select the List Documents from the drop down menu, the View Documents window will be displayed showing the content of the last selected folder. You can also open this window by double clicking the folder on the View Structure Window.

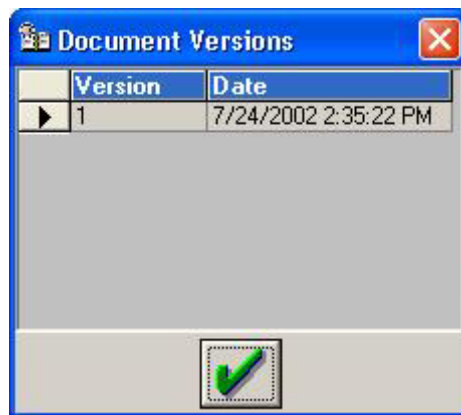


To close the window, press on the red X button.

You can use the View Documents window to use other features like Check Out/In a document, check how many versions a document has, view the document or delete the document.

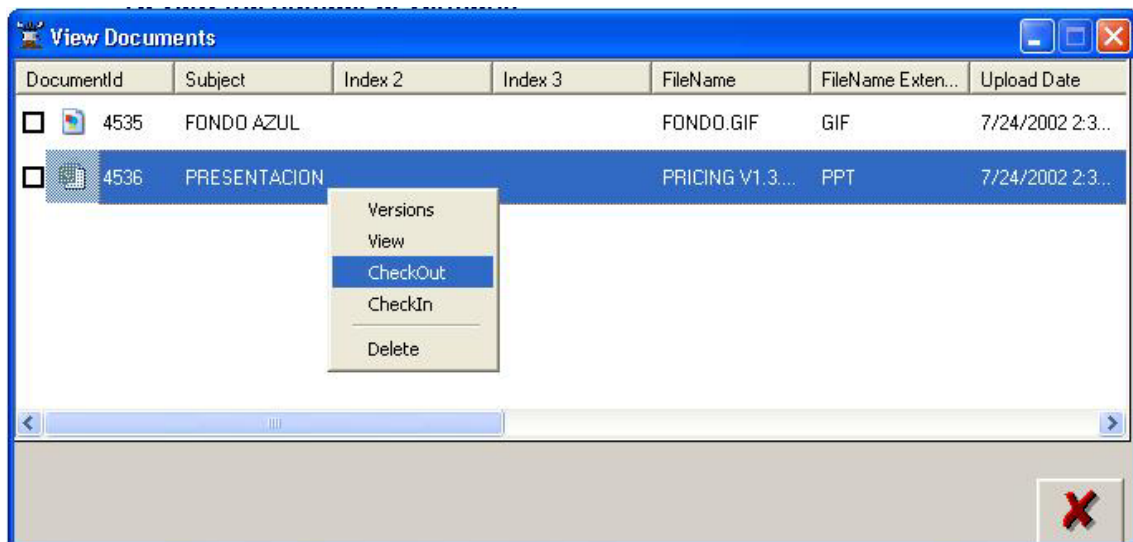
To view the number of versions

To view the number of versions, right click on a document in the document window and select Versions, the versions window will pop up with information on the number of versions and the date when the version was uploaded into the system. See the figure below.

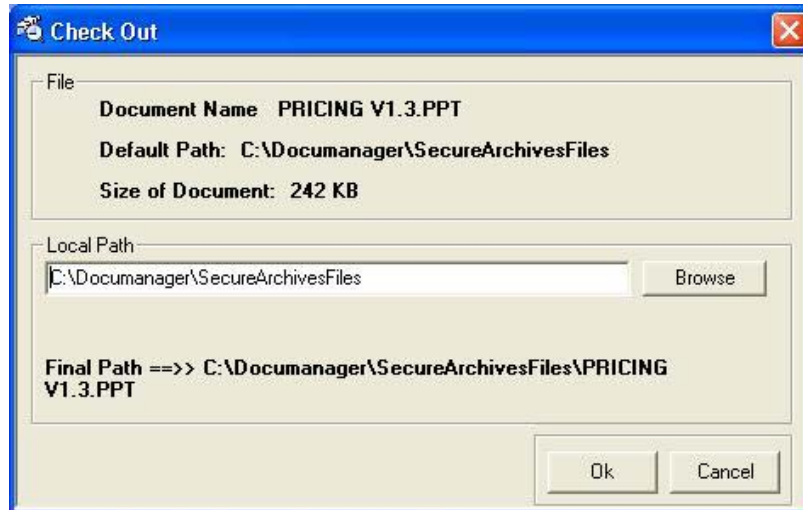


To Check Out a Document

To Check out a document right click on the document to be checked out, and select Check out from the menu.



The Check out window will appear:



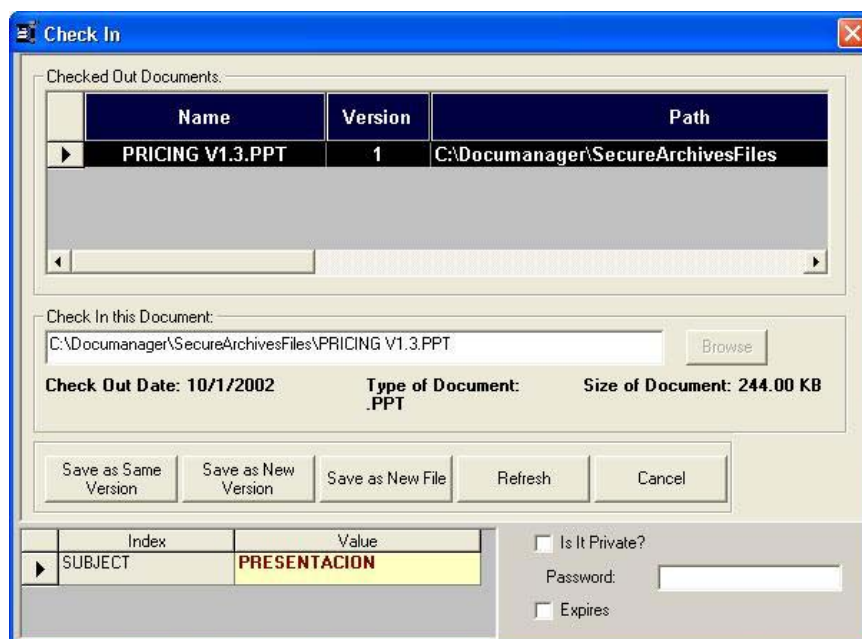
There you can specify a path where the downloaded file will be store while you work on it. Click OK to accept the path and the file will be downloaded and opened.

You can check out any file type, it will be opened using the application where the file was created, for example, you can use the Addin in Excel to open check out a Word document. The document will be opened using Word.

You can log off from the server and work on your file, since it is store locally. Once you make the necessary changes to the file, you can check the file in, so it will be available for other users to use.

Check in

To check the file in, go to the View Documents window of the folder where the file was check out. Right click the file to check in and select Check in, the Check in window will appear.



In this window you can modify the Indexes for the document just by typing new values in the fields.

You can also specify a password for the file and also you can specify if the file should be private, meaning that only you will be able to see the file in the structure.

You are also given three different options to save your file:

- Save as Same Version will replace the file in the system with the file that will upload
- Save as a New Version will add a new version to the file, the original version remains unchanged.
- Save as a New File will add a totally different document, the original version remains unchanged.

Note: The administrator may set permissions to use these features.

Once you decide how to save the changes and click the corresponding button to send the modified file to the server.

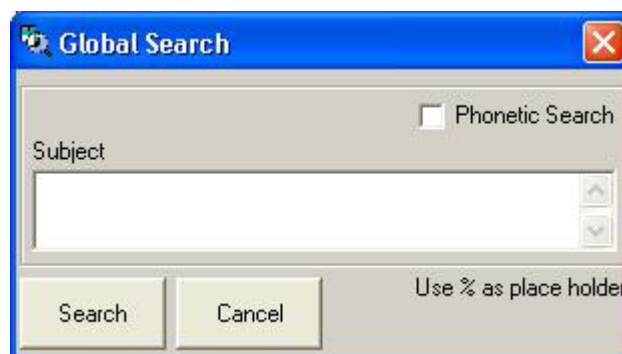
Note: You can check in documents that where check out using the Addin or the browser. You need to check in the document in the same machine and with the same user that checked out the document.

View

You can open a file in the Vie Documents window by right clicking the file. The file will be copied to your local hard drive and the opened.

Global Search

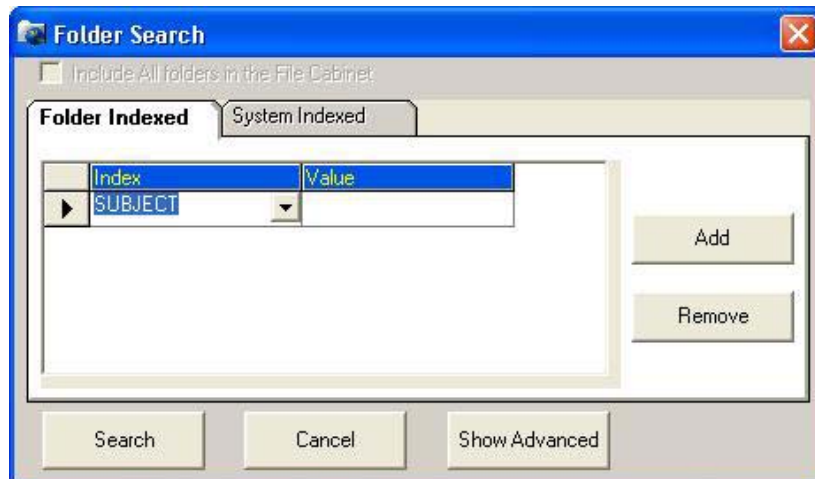
You can perform a Global Serach of your structure by selecting Global Search from the drop down menu. The Global Search window will appear:



Write the keyword to search in the indexes and click Search. A window showing you the results of your search will appear. You can right click on the documents and use all the features already explained.

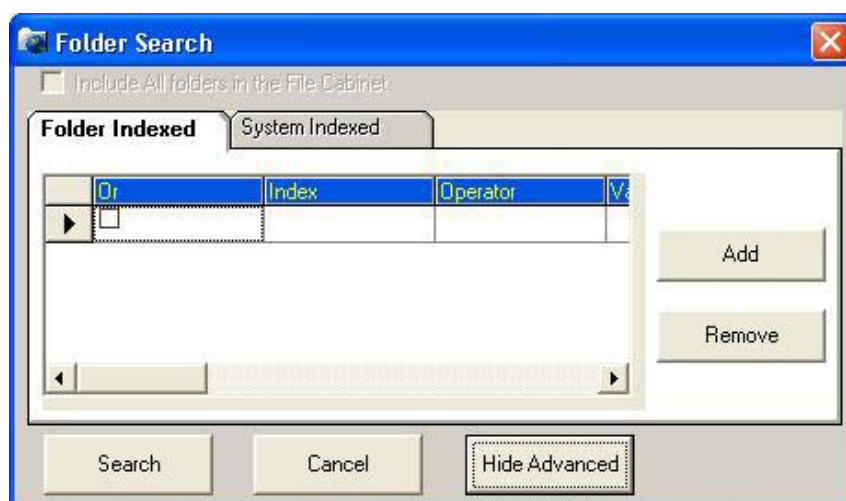
Folder Search

You can search a document in a folder by using the indexes. To do a folder search, right click on the folder, select Search and the Folder Search. The following window will be shown:

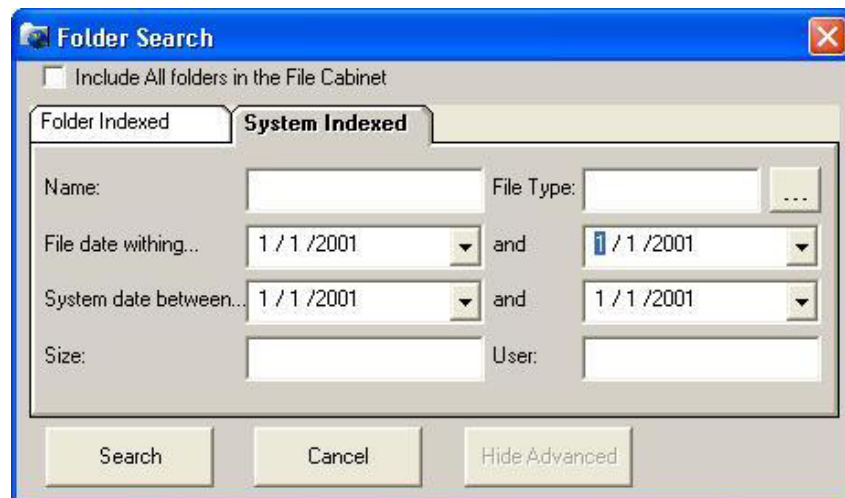


- To search a document select the index where you want to search and in the column Value enter your search criteria. Then press the Search button.
- If you wish to search using more than one criteria, click the Add button to add a new criteria. If you wish to delete a criteria, select the criteria to be deleted and click the Remove button.

You can also perform an OR search, meaning that you want to search for a file that meets criteria A OR criteria B, by clicking the Show Advanced button. Once you click the show advanced button, you define that you want an Or search by checking the Or check box.



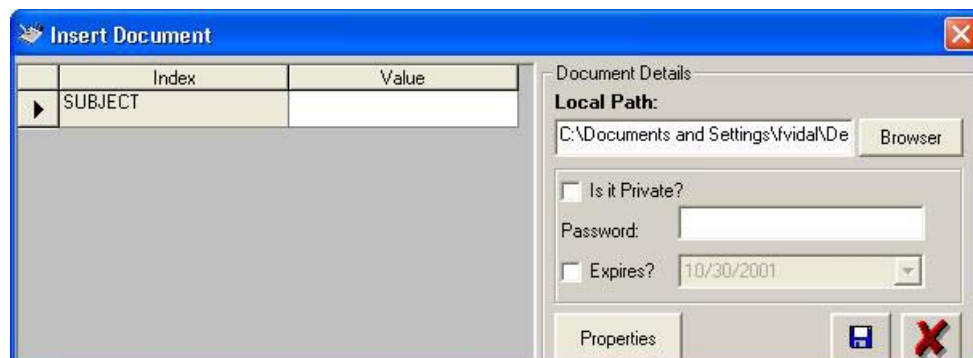
You can also Search by system indexes, like filename, file date, file size or file size, to search by system indexes, select the System Indexes tab, the following screen will be shown:



Fill in the appropriate boxes and click on Search to retrieve the files that meet your search criteria.

Insert Documents

To insert a document, right click the folder where you want to store the document and select Insert Document. The Insert Document window will pop up.



You need to fill in the indexes that were defined for the selected folder. You can also specify if the file is private, so you will be the only one to see it in the file structure. Also, you can define a password for the document by typing a password in the password box.

If you want your document to expire on a certain date, you can define an expiration date, once the expiration date is reached, the file will automatically be put in the Recicle Bin. An example of a file that needs to expire can be a monthly price list.

Once you have filled in the necessary fields, click on the diskette icon to save the file in the system.

Additional Support

If you need additional support please contact us at support@evolusoft.com or call us at +507 223 1954.

You can also visit our support website at <http://support.evolusoft.com>

Evolusoft
Boulevard Balboa
Edificio Bay Mall
Technology Plaza
Segundo Piso, Local 213
República de Panamá
Tel.: (507) 263-1096
Fax: (507) 263-0962

Evolusoft Europe
Bernhofstrasse 23
8134 Zurich-Adliswil
Switzerland
Voice: +41 1 709 27 40
Fax: +41 86 079 423 24 82
e-mail: europe@evolusoft.com