XEROX

Workstation Administration and System Resources

2

XEROX

Xerox ViewPoint

Workstation Administration and System Resources Reference

Volume 2

XEROX

Xerox ViewPoint

Workstation Administration and System Resources Reference

VP Standalone

VP NetCom

VP RemoteCom

VP Long Document Options: Shared Books

Object Conversion Utility

VP Series Reference Library
Version 2.0

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This publication was printed in May 1988 and is based on the VP Series 2.0 software.

Publication number: 610E12240

Printed in the United States of America

Changes are made periodically to this document. Changes, technical inaccuracies, and typographic errors will be corrected in subsequent versions.

This book was created on the Xerox 6085 Professional Computer System.

Table of contents

Part 2 Access to resources, Printing, Filing, Mailing

Part 3 VP Long Document Options: Shared Books

List of tables

Introduction

This volume is part of the *VP Series Reference Library,* which is the encyclopedia for ViewPoint software. This library provides the most complete source of information on ViewPoint and VP Series applications for your 6085 Professional Computer System or 8010 Information System.

Before you use this volume

Several separate volumes make up the *VP Series Reference Library.* Each volume provides information about a general category of applications, such as graphics, terminal emulation, or file conversion.

Before you refer to any VP Series reference application volume, you should become familiar with the following "core" documentation:

- *ViewPoint QuickStart Training.* Provides training and exercises for basic workstation operations as well as for creating, editing, printing, mailing, and filing documents.

- *General User Reference.* Describes the basic operations common to all ViewPoint and VP Series application software.

- *Document Editor Reference* volume 3. Provides complete information on creating and editing a document.

By mastering the ViewPoint and Document Editor basics, you will soon be able to use other

VP Series applications to perform important tasks quickly and confidently.

About this volume

This volume contains the following:

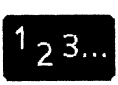
- Part 1 Workstation administration
- Part 2 Access to resources, printing, filing, and mailing
- Part 3 *VP Long Document Options*: Shared Books
- Part 4 Object Conversion Utility

How chapters are organized

Reference material is rarely read through from cover to cover. Instead, you use it to look up specific information from time to time, much as you would use an encyclopedia.

To help you locate information, the major topics of most chapters are organized as follows:

- A key concepts section describes the principal elements of the application or feature. The key graphic illustrated at the left marks the beginning of such sections.
- A description of property sheets, option sheets, and windows provides detailed information about the properties and options related to the application.



- A procedures section provides step-by-step information on how to use the application. The 1-2-3 graphic illustrated at the left marks the beginning of such sections.

Documentation conventions

The *VP Series Reference Library* uses the following conventions:

- Square brackets. Names of commands and property and option choices that you select with the mouse appear enclosed within brackets; for example, the [Close] command.

- Angle brackets. The names of workstation keys and alternate function keys are enclosed within angle brackets; for example, the <OPEN> key and the <PROP'S> key. This convention applies to alphabetic and numeric keys. It does not apply to words used to describe keys marked with arrow symbols, such as the tab key.

- Italics. Glossary words, VP application names, volume names, and the library name appear in *italics*.

- Bold. Names of properties, options, selections in the User Profile, information you must type, notes, and warnings appear in **bold**.

As often as possible, graphic images (such as pointer arrows) are printed in the text as they appear on the screen or on the keyboard.

Hardware and software requirements

The applications described in this volume run on the 6085 Professional Computer System and the 8010 Information System.

The following 2.0 software must be installed, enabled and running on the workstation:

- *Xerox ViewPoint*

- *VP NetCom*, *VP RemoteCom*, or

VP Standalone

- *VP Document Editor*

For Shared Books the following Network Services are required:

- File Service
- Librarian Service

For object conversion, you must also install, enable, and run the following:

- Appropriate VP up/down graders (OS 5 to VP 2.0, VP 2.0 to VP 1.0, VP 2.0 to VP 1.1.1, VP 2.0 to VP 1.1)

Related documentation

The following training and reference materials are recommended reading.

- *ViewPoint QuickStart Training*

You should be familiar with the following training guides before using the specific application:

- *VP Standalone Training* guide
- *NetCom/RemoteCom Training* guide
- *VP Local Laser Printing Training* guide
- *VP Local Character Printing 630 Training* guide
- *VP Long Document Options Training* guide

Information for VP CUSP Button programmers

Filing

If you are writing a CUSP program and want the program to refer to filing icons, use the following as the icon types (the case does not matter):

- Book
- Folder
- FileDrawer

CUSP currently cannot manipulate a reference icon.

Mailing

If you are writing a CUSP program and want the program to refer to mailing icons, use the following as the icon types (the case does not matter):

- MailFolder
- MailNote
- Inbasket
- Outbasket

Printing

If you are writing a CUSP program and want the program to refer to printing icons, use the following as the icon types (the case does not matter):

- Printer
- IPMaster

The icon type "IPMaster" applies to a print format icon.

Shared Books

If you are writing a CUSP program and want the program to refer to shared book icons, use the following as the icon type (the case does not matter):

- SharedBook

Object Conversion Utility

CUSP currently cannot manipulate the icons for Object Conversion Utility.

1. Overview of Workstation Administration and System Resources

The 6085 and 8010 workstations configured with VP *application* packages provide you with access to resources such as printing, mailing, and filing. The resources available to you are determined by your workstation configuration (*VP Standalone, VP NetCom*, and *VP RemoteCom)*. This part of the reference library describes the software applications for workstation configuration and the resources available with each configuration.

Workstation administration

To use 6085/8010 workstations, you must be a registered user and have access rights established. Your administrator is responsible for performing these functions.

Workstation Administrators are responsible for *standalone workstations* (not attached to the Ethernet), and *System Administrators* are responsible for *networked workstations* (attached to the Ethernet). The "Workstation Administration" chapter discusses the administration responsibilities for each and the administration procedures that you can perform from the workstation.

The following key concepts are described in the "Workstation administration" chapter:

- System Administrator
- Remote system administration
- Workstation Administrator
- Workstation Administrator option sheet

- Fully qualified names
- Passwords

Access to resources

Your workstation configuration determines the resources available to you. There are three software configuration packages:

- *VP Standalone*
- *VP NetCom*
- *VP RemoteCom*

Each package provides access to local or remote resources. The "Access to resources" chapter discusses the three software packages and how to access the resources provided by each.

The following key concepts are described in the "Access to resources" chapter:

- Resources
- Resource icons
- *VP Standalone*
- *VP NetCom*
- *VP RemoteCom*
- Applications

Printing

The *electronic printing* facility gives you access to printing functions through printer icons. You can print data icons by moving or copying them to a printer icon and setting parameters for the print job.

Printing is available to workstations configured with *VP Standalone, VP RemoteCom* and *VP NetCom.* Workstations running *VP Standalone* software can only access a local printer attached to the workstation. Workstations running *VP NetCom* or *VP RemoteCom* can access attached local printers as well as network printers when attached to a network configured with a Print Service.

The "Printing" chapter discusses the types of printers available and the procedures for using them to produce hard copies of your document.

The following key concepts are described in the "Printing" chapter:

- Network printers
- Printer icons
- Printer property sheet
- Print Format icons
- Print Format Document property sheet
- Printer window
- Fonts
- Local printers
- Local printer action request window

Filing

The *electronic filing* facility provides you with the ability to file any *data icon* (icon that contains information that can be printed) on a File Service which is remote from your workstation. Filing provides a storage facility which frees up workstation disk space, and occurs by moving data icons to a file drawer icon. Access rights to the file drawer are provided by your System Administrator or the owner of the file drawer.

Remote filing is available to workstations that are configured with *VP NetCom* or *VP RemoteCom* and that have access to a network configured with a File Service. Remote filing is not available to workstations configured with *VP Standalone*.

The "Filing" chapter discusses the types of access available to you and the actions and procedures for using the electronic filing facility.

The following key concepts are described in the "Filing" chapter:

- File drawers
- File Drawer property sheet
- Folders
- Folder property sheet
- Folder window
- Reference icons

Mailing

The *electronic mailing* facility provides the ability to send and receive information between ViewPoint and non-ViewPoint users. Workstations configured with *VP NetCom* or *VP RemoteCom* and attached to a network configured with a Mail Service can use electronic mailing.

The basic element of the mail system is the mail note. Information sent through a mail note can be read at any workstation with access to the Mail Service. Data icons can also be mailed.

To use electronic mailing, you must be a registered user and have a mailbox on the Mail Service. Mail is sent to individuals or distribution lists using an Outbasket icon. Incoming mail is displayed in an Inbasket icon.

The "Mailing" chapter discusses the use of electronic mail and the actions and procedures for sending and receiving mail.

The following key concepts are described in the "Mailing" chapter:

- Mail addresses
- Distribution lists
- Inbasket icon
- Inbasket property sheet
- Inbasket window
- Outbasket icon
- Outbasket property sheet

- Mailing option sheet
- Cover sheets
- Mail folder
- Mail notes

Shared Books

The Shared Books application allows several people to share documents and other ViewPoint objects that are stored in a remote file drawer. When these objects are placed in a shared book, they can be used and managed effectively by a large group of people.

Shared Books is available to workstations that have access to a network configured with a File Service and the Librarian Service which contains a data base for Shared Books. Users must also have appropriate access rights to a file drawer on the File Service.

Some of the key concepts that are described in the Shared Books chapters are:

- The remote shared book
- The local copy of the shared book
- Locking to prevent simultaneous edits
- Coordination of user activities
- The Librarian data base
- Access rights

Object Conversion Utility

The Object Conversion Utility provides a conversion utility for converting one version of documents to another version. It eliminates the need for you to retrieve the documents to the desktop, convert them one by one, and store them back on a File Service.

The following key concepts are described in the "Object conversion" chapter:

- File drawers
- Log document
- Object Conversion Utility

Part 1

Workstation administration

2. Workstation administration

The VP series software provides application packages that allow you to configure your workstation as a standalone, network, or remote workstation. To use these workstations you must be a registered user and have access rights. These functions are performed by System Administrators (for networked workstations) and by Workstation Administrators (for standalone and remote workstations).

Key concepts of workstation administration

Workstation administration is performed by System and Workstation Administrators at either the workstation or at the server. (A server is a hardware unit running one or more services that provides shared facilities.)

System Administrator

The *System Administrator* (SA) is a user with specific network privileges who is responsible for workstations attached to the *network* (using *VP NetCom* or *VP RemoteCom* software). The SA sets up and maintains the services and the organization of network services, registers users, creates file drawers and mailboxes, and sets user access rights to network facilities.

Each network must have at least one System Administrator. A large network may require several SAs or SA assistants to maintain the network.

Remote system administration

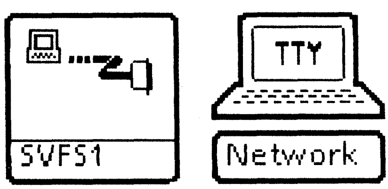
Normally, the SA performs administration functions at the *server* running the service. However, sometimes the server location is not convenient. Using the *remote system administration* facility, you can access all the functions available at the server terminal and make the changes from the workstation.

To use remote system administration, you must have port and TTY icons (Figure 2-1) on your desktop and the appropriate software loaded and running on your 6085/8010 workstation.

When performing remote system administration through an emulation window, the keys on your keyboard are automatically assigned new meanings. These new meanings correspond to the keys found on the server terminal that you are emulating. In addition, remote system administration allows you to record the entire session in a document for future reference.

As a user without system administrator privileges, you can use remote system administration to perform limited administration tasks. You can change your password, change file drawer access, and check on printer status.

Figure 2-1 **Administration icons**



Port icon

Network Management icon

Workstation Administrator

The *Workstation Administrator* (WA) is responsible for workstations not attached to the network (using *VP Standalone* or *VP RemoteCom* software). The WA is a user, with special privileges, who is responsible for creating desktops for users and maintaining the user's access rights to the workstation.

All user information on a standalone or remote workstation is stored on the workstation's rigid disk. Therefore, only users registered on the standalone workstation can access a desktop.

Every standalone workstation must contain at least one Workstation Administrator desktop. The user associated with this desktop is the Workstation Administrator and is responsible for creating and deleting desktops, changing desktop passwords, and assigning administrator privileges to others.

Workstation Administrator desktop

After the software is loaded, the first person who attempts to log on to the workstation is given workstation administration privileges and must create a WA desktop.

If the Workstation Administrator desktop is accidentally deleted and no additional administrator desktops exist on the workstation, the software detects the absence of an administrator desktop and requests that a new administrator desktop be created.

Fully qualified names

Each user must be registered using a fully qualified name. As an administrator, you will work with users to determine their distinguished fully qualified names and passwords.

Fully qualified names consist of three parts: the user's name, a *domain name*, and an *organization name*; for example, Janet C. Jones:D2:Xerox. The maximum length for a three-part name is 80 characters, consisting of 40 characters for the name, 20 characters for the domain, and 20 characters for the organization.

The distinguished *user name* (Janet C. Jones) typically consists of a Firstname, Middleinitial, and Lastname. You must make sure that no two users are registered with the same name.

The domain name (D2) in the above example represents a geographical grouping, such as a building. The user's name must be unique within the domain, but all users within a domain have the same domain name.

The organization name (Xerox) in the above example is traditionally the company name or equivalent.

Passwords

In addition to a fully qualified name, each user must have a registered password. This password is entered each time the user logs on and ensures that only the registered user accesses the desktop.

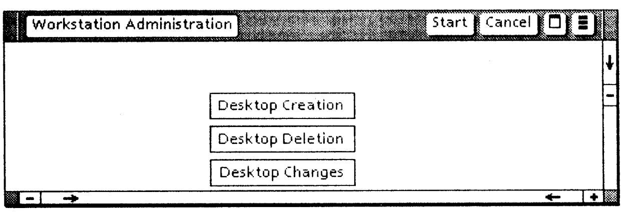
Passwords should be easy to remember, but not easy to guess, and can consist of alpha or alphanumeric character strings. Although the password can consist of up to 40 characters, it is recommended that they be kept to 6 or 8 characters for ease of use.

Workstation Administration option sheet

You use the Workstation Administration option sheet (Figure 2-2) to create and delete user desktops as well as make changes to desktops (for example, changing passwords and assigning administrator privileges) on a standalone or remote workstation.

You display the Workstation Administration option sheet by pressing any key on the workstation when it is in the idle state. (The workstation displays a bouncing keyboard, moving randomly across the screen at one-second intervals during the idle state.) If the Logon option sheet appears, you must log on to an administration desktop and select [WS Administration] in the desktop auxiliary menu to display the option sheet.

Figure 2-2 **Workstation Administration option sheet**



Window commands

[Start]
Validates the supplied information and performs the appropriate action.

[Cancel]
Closes the option sheet without applying any changes to it.

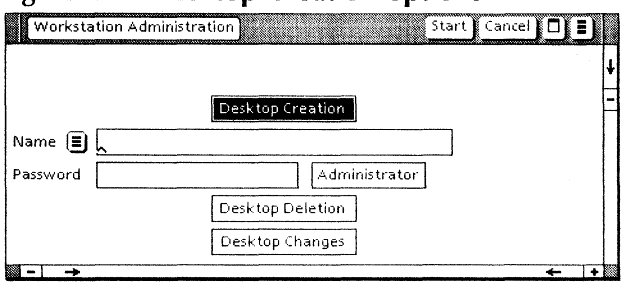
Note: [Cancel] appears only when the Workstation Administration option sheet is displayed by selecting [WS Administration] in the desktop auxiliary menu. [Cancel] does not appear if the Workstation Administration option sheet appears after the idle state.

[List Local Desktops]
Contained in the auxiliary menu and lists desktops residing on the workstation, together with each owner's fully qualified name and an asterisk (*) to indicate Workstation Administrator status.

Desktop Creation options

Selecting [Desktop Creation] provides additional options (Figure 2-3) that allow Workstation Administrators to add users to the standalone workstation.

Figure 2-3 **Desktop Creation options**



Name
Provides a box in which you enter the user's fully qualified name. The Name auxiliary menu lists the users with desktops on the workstation.

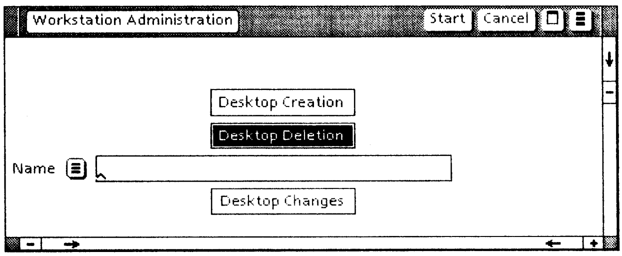
Password
Provides a box in which you enter the user's password.

[Administrator]
Provides the user with workstation administration privileges.

Desktop Deletion options

Selecting [Desktop Deletion] provides additional options (Figure 2-4) that allow Workstation Administrators to delete users from a standalone workstation.

Figure 2-4 **Desktop Deletion options**



Name
Specifies the fully qualified name of the user whose desktop is being deleted. The Name auxiliary menu lists the uses with desktops on the workstation.

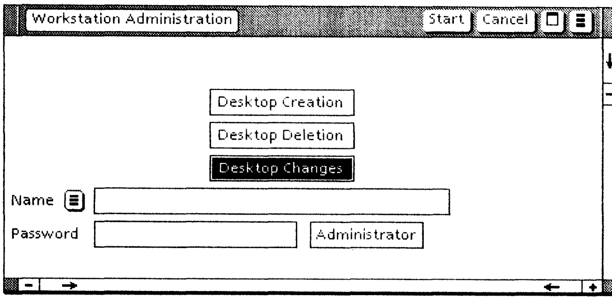
A desktop without data icons is deleted immediately. A desktop containing data icons requires a confirmation before deletion.

Note: If a user deletes a desktop by selecting [Delete] on the Logoff option sheet, the user will no longer be registered on the workstation.

Desktop Changes options

Selecting [Desktop Changes] provides additional options (Figure 2-5) that allow Workstation Administrators to change a user's password or administrator status on a standalone workstation.

Figure 2-5 **Desktop Changes options**



Name

Specifies the fully qualified name of the user whose desktop is being changed. The Name auxiliary menu lists the users with desktops on the workstation.

Password

Provides a box in which you enter the user's password. If left blank, the password is not changed.

[Administrator]

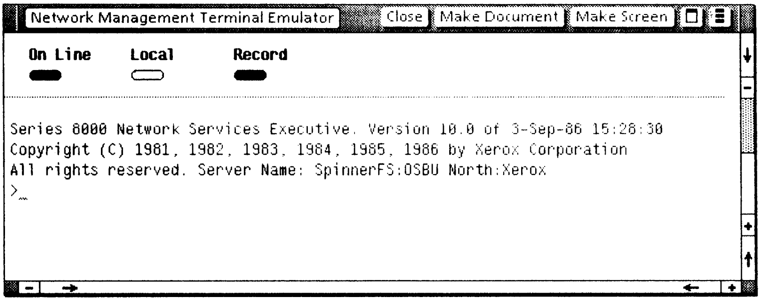
Provides the user with Workstation Administrator privileges.

Note: A Workstation Administrator can change his/her password but not his/her administrator status. Administrator status must be changed by a different Workstation Administrator.

Network Management window

The Network Management window (Figure 2-6) displays when you start a remote system administration session. It is through this window that you communicate with the server.

Figure 2-6 **Network Management window**



[Close]
: Closes the window and ends the emulation session.

[Make Document]
: Makes a document that contains a transcript of the complete session.

[Make Screen]
: Makes a document that contains the information on the screen.

Remote system administration procedures

Using remote system administration, SAs can perform system administration functions and users can change their passwords and check the status of services.

Performing remote system administration

1. Make sure that Asynchronous Terminal Basic software and Remote System Administration software are loaded and running in your Loader icon.

   Information regarding the loading of different workstation applications and a detailed description of the application loader are both contained in the *General User Reference* volume of the *VP Series Reference Library*.

2. Copy the Network Management Terminal Emulator icon to your desktop. (Open your Directory icon, the Workstation divider, and the Terminal Emulators divider. The emulators divider displays the emulator icons.)

   Note: If the Network Management Terminal Emulator is not listed in the Terminal Emulators divider, your system administration software is not loaded and running.

3. Copy the port icon representing the desired server to your desktop. (Open the Directory icon, the Network divider, your Organization divider, your Domain divider, and the Network Management divider. The Network Management divider displays port icons for each server in your domain.)

4. Copy or move the port icon into the Network Management TTY icon.

5. Open the TTY icon.

   Note: If you just copied the TTY icon from the directory, you do not have to set any properties on the displayed property sheet. If the icon was used before, you need to determine if the proper port is going to be used (it should be enabled and listed first in the port listing) and if the screen is wide enough. (For information on how to use the TTY property sheet refer to the *ViewPoint Terminal Emulations* section in the *Host Interfaces Reference* volume of the *VP Series Reference Library.*)

6. Select [Start] on the option sheet. This initiates communication with the server and opens an emulation window.

7. Select inside the window.

8. Type **logon** inside the displayed window and press the return key.

9. Type your fully qualified name and press the return key.

10. Type your password and press the return key.

11. Perform the desired system administration functions. (For complete instructions, refer to the *Network Administration Library.*)

12. When the session is complete, type **logoff** and press the return key.

13. Type **quit**, press the return key.

14. Select [Close] at the top of the emulation window.

Displaying the server terminal keyboard on the workstation

1. With a selection in the emulation window, hold down <KEYBOARD>.
2. Press <SHOW>. This displays a keyboard window that stays in effect for the entire emulation session.
3. You can close the keyboard at anytime, by selecting [Close].

For more information on the System Administrator and remote system administration functions, refer to the *Network Administration Library*.

Making a transcript of the administration session

If *VP Document Editor* software is running, you can make a transcript of your completed session.

1. Select [Make Document] at the top of the emulation window. A document appears on the desktop with the emulator's name and a time stamp. You can rename, open, reformat, and copy or move the document.

   Note: If you select [Make Screen], only what is displayed on the screen is captured in the document.

2. Paginate the document before printing it to ensure all captured information is printed correctly.

Changing your password

1. Contact your System Administrator and get the name of the server running the *Clearinghouse Service*. (The Clearinghouse Service provides a directory function, allowing all other system components to locate resources and other registered objects.)
2. Retrieve the administration icons.
3. Move the Port icon for the Clearinghouse Service into the Network Management TTY icon.
4. Open the TTY icon.
5. Select [Start] on the option sheet.
6. Type **logon** inside the displayed window and press the return key.
7. Type your fully qualified name and press the return key.
8. Type your password and press the return key.
9. Type **clearinghouse service** and press the return key.
10. Type **change password** and press the return key.
11. Follow the prompts to change your password.

Changing file drawer access

1. Retrieve the administration icons.
2. Move the Port icon for the File Service into the Network Management TTY icon.
3. Open the TTY icon.
4. Select [Start] on the option sheet.

5. Type **logon** inside the displayed window and press the return key.
6. Type your fully qualified name and press the return key.
7. Type your password and press the return key.
8. Type **file service** and press the return key.
9. Type **change file drawer** and press the return key.
10. Enter the volume information.
11. Follow the prompts to change file drawer access.

Checking Print Service status

1. Retrieve the administration icons.
2. Move the Port icon for the Print Service into the Network Management TTY icon.
3. Open the TTY icon.
4. Select [Start] on the option sheet.
5. Type **logon** inside the displayed window and press the return key.
6. Type your fully qualified name and press the return key.
7. Type your password and press the return key.
8. Type **print service** and press the return key.
9. Type **show status** and press the return key.

Workstation administration procedures

The following workstation administration procedures can be performed only by a user designated as a Workstation Administrator.

Creating the initial Workstation Administrator desktop

1. Press any key. The Workstation Administration option sheet appears.

2. Select [Desktop Creation] on the resulting option sheet.

3. Type the fully qualified user name into the **Name** option.

4. Press <NEXT> to move to the **Password** box, and type a password.

5. Select [Administrator].

6. Select [Start] on the option sheet. The system returns to the idle state. Pressing any key displays the Logon option sheet.

   Note: If you did not select the [Administrator] option, the desktop is created; however, the option sheet continues to display until a desktop is created by selecting [Administrator].

   If the Workstation Administrator desktop is created successfully, the bouncing keyboard reappears on the screen. If problems are encountered, a message appears in the *message area* of the desktop.

7. Once the bouncing keyboard appears, log on to the administrator desktop using the fully qualified name and password. Additional user desktops can be created at this point.

Creating a Workstation Administrator desktop when the original was deleted

1. Return the system to the idle state (bouncing keyboard on the screen) by selecting [Cancel] in the Logon option sheet or by logging off the system, whichever is appropriate.

2. Reboot the system. (Press the B Reset button on the workstation and the F1 key on the keyboard.)

3. Once the bouncing keyboard appears, refer to the procedure titled "Creating the initial Workstation Administrator desktop."

Deleting an old Workstation Administrator desktop and creating a new one

1. Return the system to the idle state (bouncing keyboard on the screen) by selecting [Cancel] in the Logon option sheet or by logging off the system, whichever is appropriate.

2. Reboot the system and boot the installer using the installation disk.

3. Select the option "Special installation and error recovery commands" from the installer menu. Then select the option "Boot to change Administrator."

4. Once the bouncing keyboard appears, refer to the procedure titled "Creating the initial Workstation Administrator desktop."

Creating a Workstation Administrator desktop when the administrator's password is unknown

If the Workstation Administrator's password is unknown and no additional administrator desktops exist on the workstation, use the following procedure.

1. Boot the installer using the installation disk.

2. Select the option "Special installation and error recovery commands" from the installer menu. Then select the option "Boot to change Administrator."

   This deletes the existing Workstation Administrator desktop and allows a new Workstation Administrator desktop to be created. Rebooting with this option selected causes the Workstation Administration option sheet to appear after the idle state. When the option sheet appears, create the administrator desktop as described in "Creating the initial Workstation Administrator desktop."

Creating user desktops on a standalone or remote workstation

Only users who are designated as Workstation Administrators can add users to the workstation.

1. Record all user information. Check for proper spellings, and discuss passwords with each person. Encourage users to select brief names and passwords but not ones that can be easily guessed. Verify that no users have the same user name.

2. Log on to the workstation using a fully qualified Workstation Administrator name and password.

3. Select [WS Administration] in the desktop auxiliary menu.

4. Select [Desktop Creation] on the resulting option sheet.

5. Type the new user's fully qualified name in the **Name** box, and press <NEXT> to move to the **Password** box.

6. Type the user's password.
7. Select [Administrator] if the user is to have administrator privileges.
8. Press <NEXT> to create additional desktops. Repeat steps 5 through 8 for each additional desktop.
9. Select [Start] on the option sheet.

Verifying users

To verify that all user desktops were entered correctly:

1. Select [WS Administration] in the desktop auxiliary menu.
2. Select [Desktop Creation] on the resulting option sheet.
3. Select the auxiliary menu located next to the Name option in the Workstation Administration option sheet. A list of user desktops appears.

To verify users with Workstation Administrator status:

4. Select [List Local Desktops] in the options sheet auxiliary menu. Users with Workstation Administrator status have asterisks to the right of their fully qualified names.

Deleting user desktops from a standalone or remote workstation

A desktop no longer required on a standalone or remote workstation, can be deleted either by a registered Workstation Administrator or by users at logoff.

Deleting desktops (Users)

1. Select [End Session].
2. Select [Delete] on the Logoff option sheet. The user is no longer registered on the workstation.

Deleting desktops (Workstation Administrators)

1. Log on to the workstation using a fully qualified Workstation Administrator name and password.
2. Select [WS Administration] in the desktop auxiliary menu.
3. Select [Desktop Deletion] on the resulting option sheet.
4. Select the user's fully qualified name in the auxiliary menu located next to the **Name** box in the Desktop Deletion option sheet.
5. Press <NEXT> to delete additional desktops. Repeat steps 4 and 5 for each additional desktop.
6. Select [Start] on the option sheet.

   Note: Desktops without data icons are deleted immediately. Desktops containing data icons require a confirmation before deletion.
7. If confirmation is required, select the appropriate response in the desktop message area.

Changing user passwords/administrator status

A user's password and administrator status can be changed only by a registered Workstation Administrator.

1. Logon to the workstation using a fully qualified Workstation Administrator name and password.

2. Select [WS Administration] in the desktop auxiliary menu.

3. Select [Desktop Changes] on the resulting option sheet.

4. Select the user's fully qualified name in the auxiliary menu located next to the **Name** box in the Desktop Changes option sheet.

5. Press <NEXT> to move to the **Password** box.

6. Type the user's new password, if applicable. If a new password is not entered, the user's password is not changed.

7. Select [Administrator] if the user is to have Workstation Administrator privileges.

   Note: If a user has administrator privileges and his/her password is changed, [Administrator] must be selected again. If [Administrator] is not selected, the user will no longer have administrator privileges.

8. Press <NEXT> to make changes to additional desktops. Repeat steps 4 through 7 for each additional desktop.

9. Select [Start] on the option sheet.

Listing user desktops on a standalone or remote workstation

1. Select [List Local Desktops] in the auxiliary menu of the Desktop Deletion, Creation, or Change option sheet. It lists all user desktops currently residing on the workstation.

2. Alternatively, the auxiliary menu on the Workstation Administration option sheet can be used to list desktops.

Part 2

Access to resources
Printing
Filing
Mailing

3. Access to resources

VP Series applications provide an extensive array of capabilities to suit your individual needs. Three of these packages (*VP Standalone, VP NetCom,* and *VP RemoteCom*) configure the workstation and provide *access* to resources like printing, mailing, and filing.

Key concepts of access to resources

Resource icons provide access to the resources available through the loaded applications.

Types of resources

There are two kinds of resources available to 6085/8010 workstations:

- *Local*—resources available to you without going over the *Ethernet* (for example, local printing)
- *Network*—resources accessed over the network and shared by many users, (for example, electronic mail)

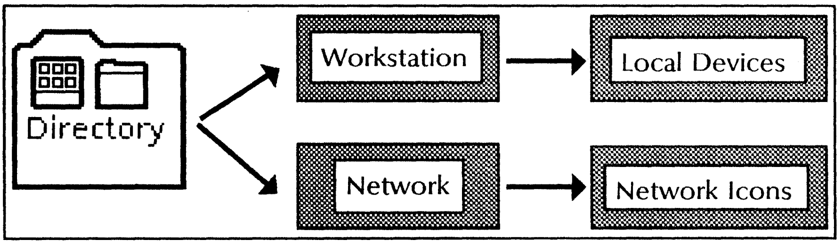
You access both types of resources through icons on the desktop.

Resource icons

Resources are visually represented through icons located in a master icon called the *directory*. Specific services (for example, printing) are accessed through the appropriate icon (for example, the Printer icon).

Local resource icons are in the Local Devices divider icon in the Workstation divider of the directory. Network icons are in the Network divider of the directory. Figure 3-1 illustrates the path for locating your resource icons.

Figure 3-1 **Resource icon path**



The *General User Reference* volume of the *VP Series Reference Library* contains a detailed description of the directory.

Your ability to access local and/or network resources is determined by the *configuration software* loaded and running on your workstation. There are three workstation configuration software packages for your 6085/8010 workstation:

- *VP Standalone* (workstation without network attachment)
- *VP NetCom* (workstation with direct attachment to the network)
- *VP RemoteCom* (workstation with network attachment via phone line)

Applications

The workstation configuration determines the applications available to you. Table 3-1 lists the *applications available to standalone, network, and remote workstations.*

Table 3-1 **Applications available to standalone, network, and remote workstations**

Applications	***VP Standalone***	***VP NetCom***	***VP RemoteCom***
Local printing	X	X	X
Remote printing	—	X	X
Mailing	—	X	X
Filing	—	X	X
Document Creation (Graphics, Equations, Spreadsheets, etc.)	X	X	X
Conversion	X	X	X
Communication (Data Capture, Terminal Emulation)	—	X	X
Languages	X	X	X

For information on particular applications refer to the appropriate sections in the *VP Series Reference Library*.

VP Standalone

VP Standalone software builds on the ViewPoint software and allows you to use applications that do not require network access. A standalone workstation provides you with an intensive document creation workstation, and allows the attachment of a local printer for printing of documents. It does not provide remote printing, filing, or mailing.

Standalone user access

Registered standalone workstation users have access rights to all local facilities. You access the local facilities through icons copied from the directory to your desktop.

Authentication

The workstation verifies your access rights and displays the locally stored desktop when you log on to the standalone workstation. If the desktop is not found on the workstation, the option sheet redisplays and requests that you specify a valid name or have the Workstation Administrator create a local desktop. The Workstation Administrator must register your name and password on the workstation before access is allowed.

The "Workstation Administration" chapter in this volume of the VP Series Reference Library contains a detailed description of the Workstation Administrator's tasks.

Standalone mailing

VP Standalone software does not provide access to electronic mail.

(You can exchange information with other workstation users by placing the data on floppy disks, which they can copy to their desktops. Because the Help folder is available to all desktops on a workstation, you can also use it to share files. You can move or copy documents in the Help folder to any desktop on the same workstation.)

Standalone printing

Printing allows you to transform data icons into hardcopy form. *VP Standalone* software provides you with access to a local printer when local printing software is loaded and running.

A printer icon represents the local printer attached directly to a single workstation via the Printer port at the rear of the workstation's processor. It does not require an Ethernet connection. You move or copy data icons to the printer icon for printing.

The "Printing" chapter in this volume of the *VP Series Reference Library* contains a detailed description of the printing functions, actions, procedures, property/option sheets, and windows.

Standalone filing

VP Standalone software does not provide access to remote electronic filing. You store data icons created on a standalone workstation locally in folders on the workstation disk.

An alternative to storing information in folders on the desktop is storing, retrieving, and organizing data icons on floppy disks. This method allows information to be copied to the workstation, when necessary, or copied to another workstation at a later time.

The *General User Reference* volume of the *VP Series Reference Library* contains information on using the floppy utility.

Standalone communication

Workstations configured with *VP Standalone* and *Local RS232C Communication Access* software allow you to exchange information with remote TTY devices/hosts. The conversion between Ethernet protocols and asynchronous protocols is handled by the workstation's RS232C port connected to a modem with a phone line connected to the host. This allows direct host connection for TTY, DEC VT100, and Tektronix 4014 emulation sessions.

VP NetCom

VP NetCom software builds on the ViewPoint software and provides access to all local resources, and a wide assortment of network facilities. (The actual functions available depend upon the individual network configuration and the software packages running on the workstation.) The *VP NetCom* software package provides you with access to the following:

- Authentication
- Mailing
- Remote printing
- Remote filing
- Communication

NetCom user access

The networked workstation user has access rights to all local and network facilities. You access the facilities through icons copied from the directory.

Authentication

The *VP NetCom* software package contains a facility that authenticates you and verifies your access rights. This includes the right to use the workstation and to access network facilities, such as mailing, printing, and filing.

After authentication and verification of your access rights, your desktop displays, and (unless indicated otherwise) is stored at the local workstation. Then, even if the *authentication* facility is unavailable, the workstation authenticates you and displays the locally stored desktop. It is not necessary to reenter a password to access files.

The system automatically verifies your access rights before displaying your desktop.

Names, passwords, and access rights for NetCom users are set up by the System Administrator in the Clearinghouse Service. For more information on the Clearinghouse refer to the *Network Administration Library*.

NetCom mailing

Using a networked workstation, you can communicate with other Ethernet-connected workstation users that are using the mailing facility.

The basic element of the mail system is a specialized document called the mail note, but any data icon can be mailed. (This includes documents, folders, spreadsheets, and record files.) When mailing a data icon, a cover sheet is automatically attached. Only the cover sheet can be read at workstations other than the Xerox 6085 and 8010.

Mail is sent by moving or copying a mail note or data icon to the Outbasket icon. An option sheet automatically appears, asking for the names of the intended recipients. Distribution lists can be used when mailing to groups of individuals.

For *VP NetCom* users to access electronic mail, their workstations must be attached to a network configured with the Mail Service containing registered mailboxes.

The chapter titled "Mailing" in this volume of the *VP Series Reference Library* contains a detailed description of mailing functions, actions, procedures, property/option sheets, and windows.

NetCom printing

Printing allows you to transform data icons into hardcopy form. Workstations configured with *VP*

NetCom software provide you with access to remote printers as well as local printers.

A local printer is attached directly to a single workstation by means of the Printer port at the rear of the workstation's processor. It does not require an Ethernet connection.

A remote printer is attached to the Ethernet. It is commonly used in a network setting and shared by several people.

Printer icons are visual representations of the printers that are available. You print objects by moving or copying them to a printer icon. An option sheet displays requesting relevant options of the print job, including number of copies, pages to be printed, phone number for transmission to a remote facsimile machine, and (if available) use of various paper sizes and a local graphics printer. Double-sided printing and automatic stapling appear as options, if the actual printer has these features.

The chapter titled "Printing" in this volume of the *VP Series Reference Library* contains a detailed description of printing functions, actions, procedures, property/option sheets, and windows.

NetCom filing

Filing allows you to file data icons at a remote File Service. Workstations configured with VP NetCom software have access to the File Service. You move or copy data icons to and from file drawers as needed by means of file drawer icons.

Access rights to file drawers are set up in the File Service by the System Administrator. These access rights include: read, write, add, remove, and change access. When you attempt a filing action that requires specific rights, the system verifies your rights without any explicit action on your part. If you have sufficient access rights, the attempted action is completed. If you do not have sufficient access rights, an error message is posted in the message area on the desktop.

The chapter titled "Filing" in this volume of the *VP Series Reference Library* contains a detailed description of filing functions, actions, procedures, property/option sheets, and windows.

NetCom communication

Workstations configured with *VP NetCom* and the appropriate communication software packages, allow you to exchange information with remote devices/hosts. The VP software series provides several communication packages that include:

- Data capture
- PC emulation
- Terminal emulation

Each communication package and its user interface is described in the *VP Series Reference Library*. Refer to the appropriate section for more information on a particular package.

DashLink

VP NetCom, installed on a Documenter system (Xerox 6085 with an attached desktop 4045 Laser CP printer) with *VP Basic LAN Services* software, provides a combination server/workstation Documenter product. It provides shared network printing and filing services for a small cluster of workstations (maximum of five) connected to a low-cost, thin-cable Ethernet. This cluster of networked workstations forms the DashLink network.

A complete description of DashLink can be found in the following DashLink manuals: *VP Basic LAN Services* and *Your Roadmap to DashLink.*

VP RemoteCom

VP RemoteCom software builds on the ViewPoint software and allows you to configure your workstation as a standalone or a networked workstation.

As a user of a standalone workstation, you have access to all local facilities after the Workstation Administrator creates your desktop. For more information refer to the "Workstation Administration" chapter in this volume of the *VP Series Reference Library*. Refer to the "VP Standalone" section in this chapter for more information on standalone facilities.

As a user of a networked workstation, you have access to network facilities after the System Administrator registers you and gives you network access rights.

VP RemoteCom allows you to attach a remote workstation to the network through a modem and phone line providing access to a wide assortment of network facilities. Refer to the "VP NetCom" section in this chapter for more information on network facilities.

RemoteCom user access

The *VP RemoteCom* workstation user has access rights to all local and network facilities when the workstation is attached to a network by means of a telephone line. The directory contains the icons for using local and network facilities.

Authentication

Authentication for a workstation that is not attached to the network is done locally, thus eliminating the need for remote authentication at logon. Remote authentication, by means of the Clearinghouse Service, is required only on a workstation with *VP RemoteCom* software with access to the network.

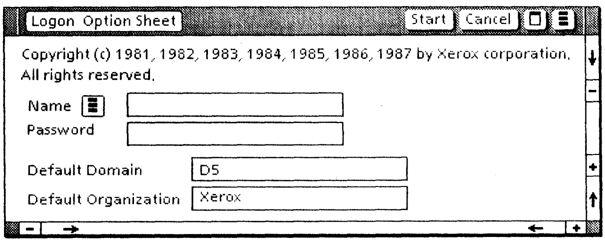
When you attempt to access the network by a telephone, the authentication facility in the *VP RemoteCom* software package is used to verify your right to access the network. This includes the right to use the workstation and to access network facilities such as mailing, filing, and remote printing.

To ensure your access to both the network facilities and the workstation, your name, password, and access rights must be registered on the workstation by the Workstation Administrator and in the Clearinghouse data base by the System Administrator.

Logon option sheet

The Logon option sheet (Figure 3-2) displays when you press any keyboard key during the workstation *idle state* (a bouncing keyboard moving randomly across the screen at one-second intervals). It allows you to log on to your desktop.

Figure 3-2 **Logon option sheet**



[Start]
Locates the desktop and displays it on the workstation. If the desktop cannot be found, a message displays requesting you to confirm the creation of a new desktop.

[Cancel]
Cancels the logon and returns the workstation to the idle state.

Name
Specifies the name of the person logging on. Selecting the name auxiliary menu lists all the individuals with a desktop on that workstation.

Password
Specifies the password for the person entered in the **Name** option.

Default Domain
Displays the default domain of the

workstation. This option must be changed to reflect the domain of the person entered in the **Name** option, if it is different from the default.

Default Organization

Displays the default organization of the workstation. This option must be changed to reflect the organization of the person entered in the **Name** option, if it is different from the default.

Connecting a remote workstation to the network

To attach a remote workstation to the network via a phone line you need:

- A modem attached to your workstation with an RS232C cable
- A standard 4-pin telephone wire to attach your modem to the phone jack
- To be registered as a user in that network by the System Administrator

  All connections and settings should be coordinated with the System Administrator for the connecting network.

1. With your workstation in the idle state (bouncing keyboard on the screen), dial the phone number provided by the System Administrator of the desired network.
2. After receiving the tone indicating data transfer, continue according to your modem instructions. (Each modem has specific operating instructions.)
3. After about 30 seconds, log on to your workstation by pressing any key to get the Logon option sheet, and fill in the information.
4. Select [Start].
5. If your user name and password are authenticated, your desktop displays.

Logging on to a workstation

1. Press any key. The Logon option sheet appears automatically. The Logon option sheet consists of two options labeled [Name] and [Password].

2. If this is the first time you have logged on to this workstation, type the appropriate user name and press <NEXT>.

   <u>or</u>

   If you have used this workstation before, select the appropriate fully qualified name in the auxiliary menu located next to the **Name** box in the Logon option sheet.

3. Type the appropriate password and press <NEXT>. The workstation authenticates you and displays the desktop.

   - If the desktop does not display, and the workstation is not attached to the network, go to step 4.

   - If the desktop does not display, and the workstation is attached to the network either directly or by telephone, go to step 5.

4. **When using *VP Standalone*:** The Logon option sheet displays, requesting that a valid name be supplied or that the Workstation Administrator create a local desktop. Check to determine that you entered the correct fully qualified user name and password, and then ask the Workstation Administrator to create a local desktop for you.

   When using *VP RemoteCom*: The Logon option sheet displays the following option: "Do you want to try to retrieve the desktop from the File Service?" Select [No], and then select [Start]. When the option sheet redisplays requesting a valid name or that the

Workstation Administrator create a local desktop, ask the Workstation Administrator to create a local desktop.

Note: Desktops on a workstation not attached to the network are always stored on the workstation disk.

5. The Logon option sheet displays the following option for workstations attached via a telephone: "Do you want to try to retrieve the desktop from the File Service?" Select [Yes], and then select [Start]. After authentication by the Clearinghouse Service, the desktop, if available, is retrieved from the File Service.

   If the desktop cannot be retrieved, either you are not registered in the Clearinghouse or the Clearinghouse Service is unavailable. In either instance, the option sheet redisplays, requesting that a valid name be supplied.

   Directly attached workstations receive the option: "Do you want a new desktop created for you?" Select [Yes], and then select [Start].

6. If the problem continues, check with your System Administrator to determine that you are registered in the Clearinghouse.

   If using *VP RemoteCom,* you can have a temporary desktop created by the Workstation Administrator.

   Note: To ensure access to both the network facilities and remote workstation, your name, password, and access rights must be set up on both the workstation by the Workstation Administrator and in the Clearinghouse Service data base by the System Administrator.

4. Printing

Printing allows you to transfer data icons (documents, folders, record files, spreadsheets, free-hand drawings, print format documents, and mail notes) on the workstation into hard copy form. In addition to printing icons residing on the desktop, data icons residing in a file drawer can be printed directly from the file drawer.

Printing data icons normally produces one paper copy of the entire document and occurs as a *background process* on the workstation. Background processing allows you to perform other workstation activities while your documents are being printed.

Key concepts of printing

You print data icons by moving or copying them to a Printer icon and selecting the desired options on the displayed property or option sheet.

Types of printers

There are two types of printers available to 6085/8010 workstation users:

- *Network*—attached to the network and available to all users with network access
- *Local*—attached directly to the workstation and available only to users of that workstation

Within these two types there are many models from which to choose.

Although the hardware for each printer is different and provides different abilities, you access them all through printer icons. The configuration of the workstation determines your access to network and local printers.

Network printers

Network printers are used by multiple users, because they are not attached to a single workstation and can be used by several people at one time.

Configuration

Workstations communicate with network printers by means of the Ethernet network. Therefore, workstations configured with *VP NetCom* or *VP RemoteCom* software can print documents at network printers. The workstation must be attached to a network with a Print Service and have a remote printer available.

Models

Network printers (such as the 8000 electronic printer) use laser technology to electronically reproduce whatever is seen on the screen. These printers are extremely fast and, depending on the model, can handle graphics and multiple fonts.

The network printers currently available include:

- 3700 Laser Printing System
- 4050 Laser Printing System
- 5700 Electronic Printing System
- 8000 series electronic printer
- NS 8000 Laser CP Printer (4045 Laser CP)
- 8790/8700 Laser Printing Systems
- 9790/9700 Laser Printing Systems
- 495-1 Telecopier (referred to as a facsimile or *FAX* printer)

Refer to Table 4-1 for specifications on each printer.

Table 4-1 **Network printer capabilities**

Printers	Dots per inch	Inter-press	Max. pages per min.	Page sizes	Paper tray(s) capa-city	Double-sided printing	Output paper capacity
3700	300	X	24	8½"x11" 8½"x13" 8½"x14" 11"x17" A3, A4	(3) 1,500, 2@ 250	—	500
NS 3700 LPS Release 4.0 Series	300	X	24	8½"x11" 8½"x13" 8½"x14" 11"x17" A3, A4	(3) 1,500, 2@ 250	—	2000
4045 Laser CP	300	X	10	8½"x11" 8½"x14" A4	(1) 250	—	100
4050	300	X	50	8½"x11" 8½"x14" A4	(2) 1000, 500	X	1500
5700	300	X	40	8"x10½" to 8½"x14"	(2) 500 each	X	1000
8000 Elec-tronic	300	X	12	8½"x11" 8½"x14" A4	(2) 250 each	—	500
8790 & 8700	300	X	70	8½"x11"	(2) 2550, 550	X	1000
9790 & 9700	300	X	120	8½"x11"	(2) 2550, 550	X	3000
495-1 FAX	N/A	X	N/A	8½" or 210 mm wide	N/A	—	100 meter roll input

Local printers

Local printers are attached directly to the workstation via the *serial* or optional *parallel printer ports* at the rear of the workstation's processor (no network connection is required). All users of that workstation have access to the local printer.

You use local printers just as you use network printers. The only difference is the specific properties displayed on the property sheet for each printer. When an icon is copied to a local printer icon the property sheet displays with additional properties to support that printer.

The following sections include a brief description of the available local printers. For more information refer to the *Peripheral Equipment* volume of the *VP Series Reference Library.*

Configuration

Workstations configured with *VP Standalone, VP RemoteCom,* or *VP NetCom* software can access a local printer. The printer must be attached to the workstation, and the workstation must be running the appropriate software (*VP Local Laser Printing, VP Local Draft Printing,* or *VP Local Character Printing 630*).

Models

Local printers currently available include:

- Xerox 4045 local laser printer (Documenter system)—a versatile, high quality laser printer that can be used as a printer or copier. It prints any VP document created by applications capable of producing documents in Interpress format. It prints up to 10 pages a minute with a resolution of 300 dots per inch in both the horizontal and vertical directions. It is sold with the Documenter system.

- Xerox Diablo 630/635 printers and compatible printers—medium speed letter-quality daisywheel printers. They print at speeds of 40 characters per second (630) and 55 characters per second (635).

- P-32/P-12 CQI dot matrix local draft printers—high speed (150 characters per second), dot matrix printers. They have a print resolution of 72 dots per inch in both the horizontal and vertical directions and can intermix numerous fonts and images in both orientations on the page.

Printer icons

You copy printer icons (Figure 4-1) from the directory and use them to perform all printing functions. Printer icons are available for printing regardless of their location, thus allowing you to copy a printable icon to a printer icon on the desktop or inside the directory. For convenience, however, printer icons which are frequently used are copied to the desktop.

Figure 4-1 **Printer icon**

A Printing properties sheet is used to set the properties for the specific printer. These properties control the printing requests sent to that printer.

A Printing option sheet is used to set the options that control the printing of the data icons placed on the printer. It displays the available options for the selected printer, as well as *object specific printing related options*.

Object specific printing related options are options that appear to support the printing of a specific object. For example, when printing documents, you can specify which pages are to be printed; with spreadsheets, you can specify the cells and font; and the calendar provides view and date options. For more information, refer to the instructional chapter that pertains to the particular object being printed.

When a data icon is copied to a Printer icon, the printing software creates a print format document of the data icon and sends it to the specified printer. You can keep a copy of this document to facilitate printing in the future.

Print format documents

A *print format document* (Figure 4-2) is a permanently formatted document that facilitates the printing of documents, by eliminating subsequent formatting each time the document is printed. It appears on the desktop, after the document is formatted for printing, and has a small printer in the upper left corner.

Figure 4-2 **Print format document**

Note: Print format documents can be created using Local Character printers and Local Laser printers, as well as network printers. Local Draft printers <u>cannot</u> create print format documents.

Print format documents can be copied, moved, or deleted like other data icons. However, they cannot be opened and edited.

To avoid confusion, print format documents should be deleted once changes have been made to the source data icon.

Printer windows

Each print request copied to the Printer icon is maintained in the printer queue and displayed in the Printer window until printing of the specific icon is complete. A maximum of six completed entries display in the queue before the status of the first completed print request is removed.

Print requests within a Printer window can be moved (to change the order of the print request) or deleted from the queue (to stop the print request) before the request is sent to the printer. Once a request is sent to the printer, however, this type of manipulation is not possible.

The contents of the Printer window are not automatically updated. To see status changes, you must select [Redisplay], or close the Printer icon and reopen it.

Note: Print requests displayed in the window that have not been sent to the printer at logoff time will not be printed unless otherwise indicated on the Logoff option sheet. (For more information on the Logoff option sheet, refer to the *General User Reference* volume of the *VP Series Reference Library.)*

Facsimile (FAX) printing

A Xerox 495-1 facsimile printer, commonly referred to as a FAX printer, can be used to transmit data icons, via telephone, to other FAX printers not connected to the network. In addition, data icons can also be printed on the local FAX printer.

Printing data icons on a local FAX printer is the same as printing data icons on a remote or local printer. Printing data icons on a remote FAX printer requires the entry of the printer's telephone number on the property or option sheet.

All network printer icon property and option sheets have a FAX printing option. (Facsimile printing cannot be used with local printers.) The option, however, works only when the printer icon selected is a FAX printer icon. Visually, a FAX printer icon cannot be distinguished from a remote or local printer icon. Therefore, to determine if a FAX printer is available, contact your System Administrator.

Fonts

ViewPoint workstations support the creation of documents containing characters, ranging from mathematics and science symbols to office and foreign languages. A single document can contain several different *font* styles (a collection of letters and symbols that share certain characteristics), in different sizes with varying intensities, and graphics representations. This is determined by the fonts running on the workstation.

To print the documents in the desired font, the fonts must also be loaded and running at the printer. When using network printers and the font is not available on the Print Service, the document is printed with a substitute font. The substitute font will match the original font as closely as possible, and a substitution message prints on the banner page.

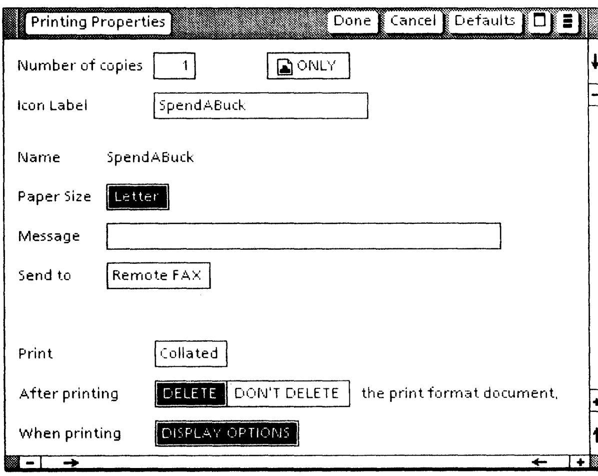
With local printers, you determine what the printer does when it encounters a font problem by your selections on the property sheet.

Printing properties sheet

The Printing properties sheet reflects the available properties for the selected printer. Properties selected on the Printing properties sheet are retained and used each time a data icon is copied to the Printer icon, unless otherwise indicated on the Printing option sheet.

You display the Printing properties sheet (Figure 4-3) by selecting the Printer icon and pressing <PROP'S>.

Figure 4-3 **Printing properties sheet for a network printer**



Common properties

Three properties are common to all network and local printers.

Number of Copies
Allows you to specify the number of printed

copies. The default setting is [1] unless you enter a new number.

Icon Label

Changes the name of the printer icon on the desktop. You delete the current name and type in the new name.

Note: It may be useful to add "FAX" to the name of the facsimile printer icons on the desktop to locate them quickly.

When Printing

Provides the option for displaying the option sheet when printing.

[Display Options]

Displays the option sheet each time an icon is copied to the Printer icon. If [Display Options] is not selected, the option sheet does not appear. The default setting is [Display Options].

Note: The following option is available to all network printers and the local character and laser printers. It is not available to local draft printers.

 ONLY

Creates a print format document of the data icon, without actually printing it, and is used as a printing accelerator. Distributing print format copies of data icons eliminates the time required to format each document before printing.

Network printer properties

The following is a list of the properties that may appear on your property sheet when using a network printer. The property sheet displays a set of standard options and any additional options that are available for the selected printer.

Name

Contains the actual name of the remote printer as set by the System Administrator. This option is in read-only format and cannot be changed.

Paper Size

Specifies the page size selection(s) available on the printer.

[Letter]

Specifies that the document prints on $8\frac{1}{2}$ by 11 inch paper. [Letter] is the default setting and appears on all network printers. Other options, such as [Legal], may also appear if the printer supports additional paper sizes.

Message

Allows you to enter a short message that appears on the *banner page* (the cover sheet) of the printed object. Any data icon copied to this Printer icon prints with the message you entered on its banner page.

Send To

[Remote FAX]

Selecting [Remote Fax] displays two additional options: [Local] and [Phone].

[Local]

Sends the document to the local FAX printer as well as to the remote FAX printer.

[Phone]

Provides an area to type in the telephone number(s) of up to 10 remote FAX printers.

Print

[Collated]

Prints the contents of an entire folder of documents as if they were one document. For each copy requested, a complete set of documents (representing the entire contents of the folder) prints.

Collated documents print faster and require less paper.

Note: If [Collated] is not selected, each document within the folder is printed as a separate document with its own banner page.

After Printing

[Delete]

Deletes the Print Format icon once it has been sent to the remote printer. This is the default setting.

[Don't Delete]

Saves the Print Format icon. The icon appears on the desktop once it is sent to the remote printer.

It is useful to keep a Print Format icon for printing additional copies of the document, as the Print Format icon decreases printing time.

Note: The following properties only appear when the printer provides the capabilities.

Print Pages

Specifies if a document is printed [Single-sided] or [Double-sided].

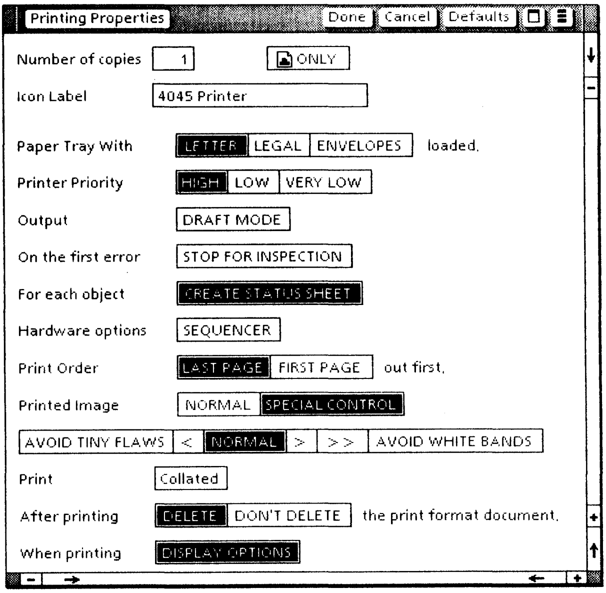
Each Copy

Specifies whether or not the printed document is stapled.

Local printer properties

Property sheet items for a 4045 printer

Figure 4-4 **4045 Printing properties sheet**



Paper Tray With

[Letter]

Specifies that the document prints on $8\frac{1}{2}$ by 11 inch paper. This is the default setting.

[Legal]

Specifies that the document prints on $8\frac{1}{2}$ by 14 inch paper.

[Envelopes]

Specifies that xerographic envelopes are loaded in the printer.

Note: An envelope cassette tray is necessary for printing envelopes.

Printer priority

Specifies the priority of the printing process. Background printing reduces the performance of other activities on the desktop, depending on printer priority. The printer priority can be changed at any time, even while a document is being printed. Changes in the priority takes place immediately and affects whatever document is being processed.

[High]

Specifies that the printer has higher priority than other activities performed on the desktop, such as keyboard and mouse operations. [High] is the default setting.

[Low]

Specifies that the printer has lower priority than other activities performed on the desktop, such as keyboard and mouse operations.

[Very Low]

Specifies that the printer runs only if you are not performing any action on the desktop, giving the keyboard and mouse all of the processor's power. Printing resumes 10 seconds after other desktop activities are complete.

Output

[Draft Mode]

Prints documents with increased printing speed and slightly lessened print quality (300 horizontal by 150 vertical dots per inch resolution). Draft mode can be used for intermediate copies of a document being edited.

On the first error

[Stop for Inspection]

Provides notification (via an attention request window) whenever there is a serious decomposition or compression problem with the document being printed. These errors include:

- A missing character in a font
- Image printed off the page
- Specified point size not available
- A non-compressed page cut off at the bottom

When this option is not selected, the window does not appear and the printing software proceeds the best it can to print the complex page(s). The default setting for this option is not selected.

For each object

[Create Status Sheet]

Enables the creation of status sheets for each document printed with errors on the local laser printer. The status sheet lists the page number and type of error (both serious and minor) for each page in the document which had any errors in decomposition or compression. [Create Status Sheet] is the default setting.

Tiny text flaws, referred to in status sheets as lessened image quality, are caused by extreme text density and are difficult to detect. Text flaws are noted in the status sheet, if [Create Status Sheet] is selected. If the page is extremely dense, a cut-off page may result. This is noted in the status sheet, if [Create Status Sheet] and the attention request window option, [Stop For Inspection], is selected.

The status sheets are filed in a folder which is placed on the desktop and is titled "VP Local 4045 Error Log." The default setting is to create the status sheets.

Note: Status sheets are created only for documents printed with errors.

Hardware options

[Sequencer]

Indicates whether a sequencer is attached to the 4045 Laser CP. The page sequencer (inverter) is an optional device which flips the paper on output, so the document is stacked in the proper order. If [Sequencer] is not selected, the **Print order** option displays.

Print order

Specifies the order in which the printed pages are delivered to the print output tray. Pages are delivered to the output tray face up. If the printer has a sequencer, this option does not display on the property sheet.

[Last Page]

Prints the document with page 1 on top of the stack. [Last Page] is the default setting.

[First Page]

Prints the document with the last page on top of the stack. Page 1 is output first, for quick viewing and editing.

Printed Image

In rare cases, a printed page may show either tiny flaws in text character shapes or an image interrupted by white bands across the page. These problems can be corrected with the [Special Control] selection, explained below.

White bands (1/10-inch image gaps) are caused by extreme complexity in the information to be printed (typically graphics). White bands, which occur very rarely, are not detected by the system and must be checked for by examining the printed output.

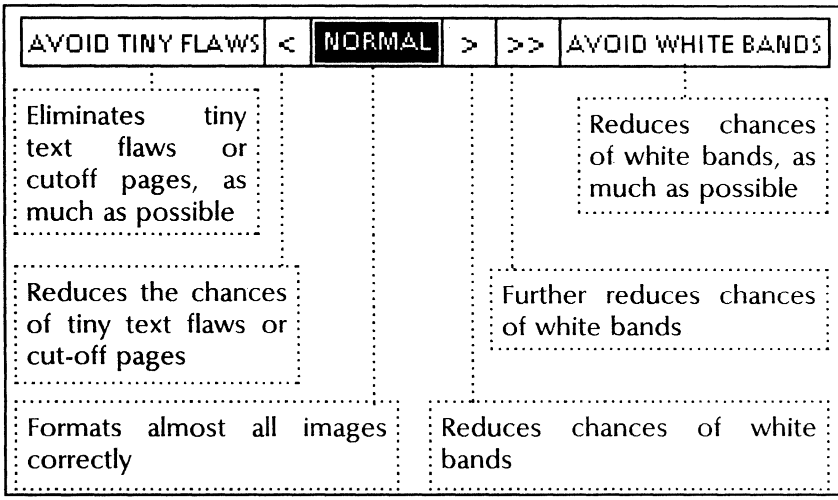
[Normal]

Prints the image correctly, in most cases. [Normal] is the default setting.

[Special Control]

If a problem appears on a printed page, selecting [Special Control] displays the settings illustrated in Figure 4-5. This is the default setting.

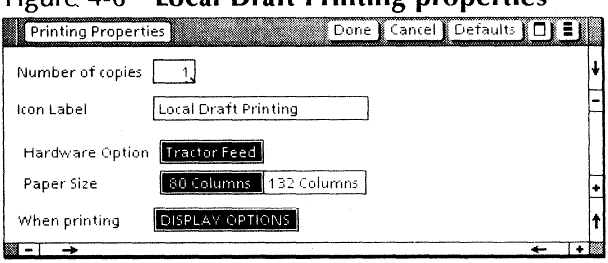
Figure 4-5 **Special control settings**



Note: [Special Control] settings should generally be used only when a problem appears on a printed page. Deselecting [Special Control] automatically returns the setting to normal.

Property sheet items for a local draft printer

Figure 4-6 **Local Draft Printing properties**



Hardware Options

[Tractor feed]

Provides continuous paper feed. Without the tractor feed hardware, printing will stop at the end of each page and instruct you to place a new sheet in the printer carriage.

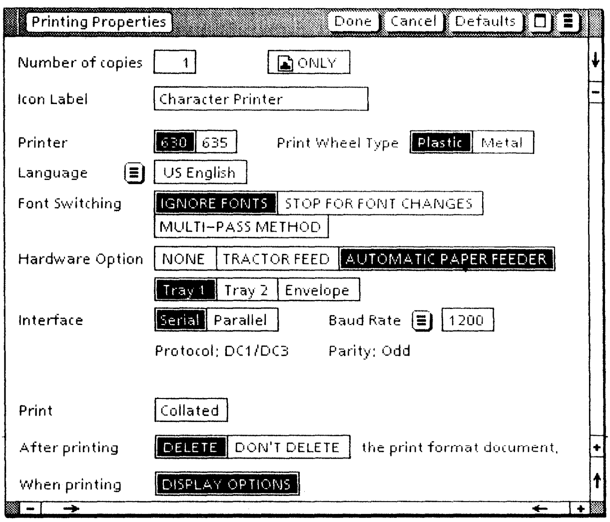
Page Size

[80 Columns] or [132 Columns]

Allows you to specify [80 Columns] or [132 Columns] per page. [80 Columns] is the default setting.

Property sheet items for a 630/635 printer

Figure 4-7 **Local Character Printing properties**



Printer

Specifies the printer type connected to the workstation.

[630]

Specifies a 630 or 630 compatible printer. [630] is the default setting.

[635]
Specifies a model 635 printer.

Print Wheel Type
If [630] is selected, additional options display for the **Print Wheel Type**.

[Plastic]
Specifies that a plastic printwheel is mounted. [Plastic] is the default setting.

[Metal]
Specifies that a metal printwheel is mounted.

Language
Specifies the desired printwheel language from the following: US English, UK English, German, French, Italian, Swedish/Finnish, Spanish, Dutch, French Canadian, ASCII, Norwegian, Danish, and Portuguese. [US English] is the default setting.

Font Switching
Enables you to change printwheels during printing of documents containing multiple fonts. The choices are:

[Ignore Fonts]
Ignores font changes within the document. The document is printed with whatever printwheel is installed. [Ignore Fonts] is the default setting.

[Stop For Font Changes]
Displays a message requesting that you change the printwheel each time a font change occurs within the document.

[Multi-Pass Method]
Prints sections of the document in the first font, requests that you change the printwheel, then prints the sections of the document in the second font, and so forth.

If the automatic paper feed is installed, a message displays, requesting that you reinsert the entire document in the feeder for each pass. If the automatic paper feed is not installed, you are requested to reinsert the pages in the printer for each pass.

If the tractor feed is installed, it automatically backs up the paper for each pass.

Hardware options

[None]

Printer stops and requests each new sheet of paper. [None] is the default setting.

[Tractor Feed]

Indicates the printer has a tractor feed for continuous form paper, and displays choices of 11 inch, 12 inch, 14 inch, or other for continuous paper height. You will be asked to line up the paper the first time the printer is used.

[Automatic Paper Feeder]

Indicates the printer has paper feeder hardware, and displays three additional options to choose from: [Tray 1], [Tray 2], or [Envelope].

Interface

Specifies the workstation port that the printer is attached to.

[Serial]

Specifies that the printer is attached to the serial (RS232C) port. Selecting [Serial] displays read-only information for the Parity and Protocol, and a selectable [Baud rate] option from 300 to 9600. [Serial] is the default setting.

[Parallel]
Specifies that the printer is attached to the parallel (Centronics) port.

Note: You can override the default values for character printers in your User Profile. In this way you can tailor the behavior of character printers to suit your needs.

The User Profile entry displays as:

[Character Printer]

PrinterType: 630 -- 630 | 635
Interface: Serial -- Serial | Parallel
DefaultPW: US English -- US English | UK English | German | ASCII | French | Italian | Swedish/Finnish | Spanish | Dutch | French Canadian | Norwegian/Danish | Portuguese

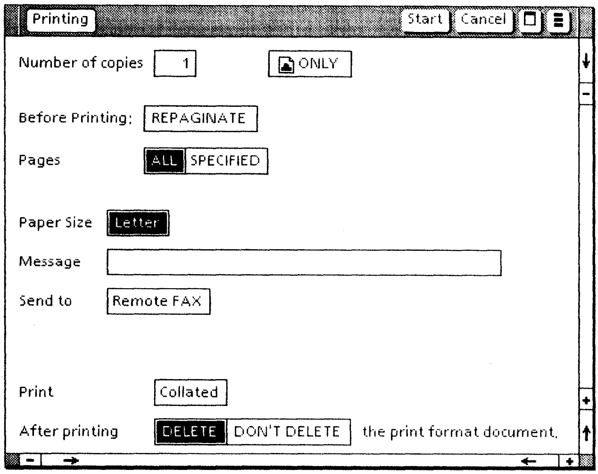
Refer to "The User Profile" chapter in the *General User Reference* volume for further information on setting up your User Profile.

Note: If you are using an 8010 workstation with a P1 impact printer, you can change the default Printwheel in the User Profile.

Printing option sheet

When you copy a data icon to the Printer icon, the Printing option sheet (Figure 4-8) displays if [Display Options] is selected on the Printing property sheet. Options selected on the Printing option sheet are not retained and must be reselected each time a print request is made. Options selected on the Printer property sheet are retained.

Figure 4-8 **Printing option sheet (Document)**



Printing option sheet window commands

[Start]
: Closes the option sheet and applies the options currently set on it, and sends the data icon to the printer.

[Cancel]
: Cancels the printing of the data icon, and closes the option sheet without applying any changes to the properties.

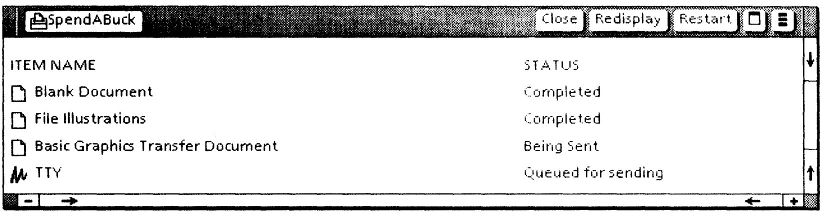
Options

The Printing option sheet contains a subset of the commands found on the Printing properties sheet. It also contains the specific options for the selected printer, as well as object specific printing related options as discussed in the "Key concepts" section of this chapter.

Printer window

You display the printer window (Figure 4-9) by selecting a Printer icon and pressing <OPEN>. It lists the queue of print requests sent to the printer, along with the current status of each print request.

Figure 4-9 **Printer window**



Printer window commands

[Close]
Closes the printer window.

[Redisplay]
Displays the current status of print requests in the queue.

[Suspend]
Halts the sending of print requests to the printer until you take further action.

[Resume]
Appears after [Suspend] is selected. Cancels the suspension, and allows print requests to be sent to the printer.

Printer window status descriptions

Print requests in the Printer window display with the item's name and status, as shown in Figure 4-9.

Terms used in the status column have the following meanings:

Status	Description
Queued for Sending	The data icon is queued for printing at the desktop, but not yet sent to the printer.
Being Sent	Data icon is being converted to print format and/or transmitted to the printer.
Pending	Data icon is received by the remote Print Service and waiting to be printed.
In Progress	Data icon is currently being printed at the remote Print Service.
Completed	Data icon has been printed.
Unknown	Either the data icon print request was removed from the remote Print Service queue, or no response was received from the remote Print Service.

If there is a problem with printing:

Status	Description
Completed with Warnings	Data icon was printed, but warnings were generated.

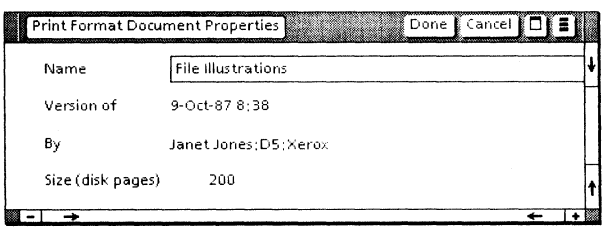
Status	Description
Rejected	Data icon was not printed due to errors in the print format document.
Aborted	Printing was aborted because of problems discovered during the formatting or marking process.
Canceled	Printing was canceled by user at the desktop or at the printer.
Held	Data icon is being held at the remote Print Service for processing later.

Print Format Document properties sheet

The Print Format Document properties sheet (Figure 4-10) lists information about the print format document.

You display the Print Format Document properties sheet by selecting the Print Format icon and pressing <PROP'S>.

Figure 4-10 **Print Format Document properties sheet**



Properties

Name
Contains the name of the print format document. You can change the name by deleting the existing text and entering new text.

Version of
Displays, in read-only format, the date that the document was created.

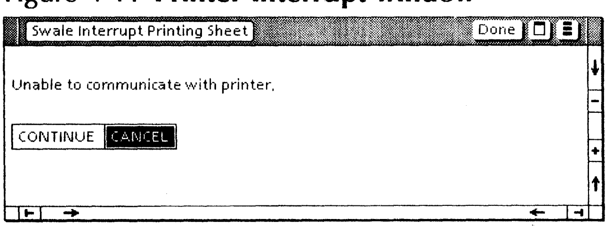
By
Displays, in read-only format, the name of the person who created the document.

Size (disk pages)
Displays, in read-only format, the size of the document in disk pages.

Network Printer Interrupt window

If your workstation is unable to communicate with the printer, a window (Figure 4-11) displays on your desktop with a message. The window remains open until you select [Continue] or [Cancel].

Figure 4-11 **Printer Interrupt window**



Local Printer Action Request window

A Printer Action Request window displays when printing on a local printer is interrupted. It may appear because the printer needs attention, or you are canceling a request. Each printer has its own window and options. Listed below are the options that may appear in the window.

Options

[Continue]
Continues the printing process at the point of interruption.

[Restart Document]
Restarts the printing of the document.

[Repeat Page]
Reprints the page being printed.

[Cancel Document]
Cancels the printing process of the document currently being printed.

Common printing procedures

Printing procedures vary according to the type of printer being used. The printing of a data icon, however, is the same for both network and local printers and is described in this section.

Printing data icons

Non-ViewPoint data icons (such as an 860 data icon) cannot be printed until they are converted to the appropriate format using the Converter icon. (For additional information on conversion, refer to the *File Conversions Reference* volume of the *VP Series Reference Library.)*

1. Select the data icon or icons you wish to print.
2. Press <COPY>.
3. Select the appropriate Printer icon. The Printing options sheet automatically appears, unless otherwise indicated on the Printer properties sheet.
4. Select the desired printing options.
5. Select [Start]. A copy of the print request is sent to the appropriate printer.

Note: When a *Reference icon* (an icon that refers to a data icon stored in a file drawer) is copied to the printer, the remote data icon is printed directly from the file drawer.

Network printing procedures

To print on a network printer, you must have the appropriate icon for the printer on your desktop.

Network printer icons are located in the Printing divider under the appropriate organization and domain of the Network divider of the desktop directory. When you open the Printing divider, it displays a list of available printer icons. The names displayed on the printer icons are the names assigned by the System Administrator.

Retrieving network printer icons

1. Open the Directory icon.
2. Open the Network divider.
3. Open the appropriate Organization divider.
4. Open the appropriate Domain divider.
5. Open the Printing divider.
6. Copy the appropriate printer icon to the desktop.

Note: You can have more than one printer icon per printer on your desktop. This allows you to set specific properties for the printer, so that it is ready when printing specific documents.

Sending to a local FAX printer

1. Select the data icon, and copy it to the appropriate FAX printer icon.
2. Select the desired options on the Printing option sheet, and then select [Start].

Sending to a remote FAX printer

1. Select the data icon and copy it to any FAX printer icon.
2. Select [Remote FAX]. The options [Local] and [Phone] appear.

3. Select [Local] to send a copy of the data icon to the local FAX printer as well as to the remote FAX printer(s).

4. Enter the remote FAX printer's telephone number in the space provided.

5. To enter another number (up to 10), press <NEXT>, and repeat step 4.

6. When all numbers are entered, select [Start].

   Note: The FAX Print Service recognizes characters that correspond to a touchtone telephone. These characters include the following: 1, 2, 3, 4, 5, 6, 7, 8, 9, 0, *, #, and P. (You type P at the point you would expect to pause when dialing a number, such as when expecting a secondary dial tone.) The left parenthesis, right parenthesis, hyphen, and space can be entered, but they are ignored.

   Note: If a telephone number is entered, the Print Service automatically dials the number and prints the document at the remote site. If multiple phone numbers are entered, the document is automatically printed at each FAX printer. If a telephone number is not entered or is invalid, the document does not print at the remote FAX printer.

Local printing procedures

1 2 3...

To access a local printer attached to a workstation, the appropriate printing software (*VP Local Draft Printing, VP Local Laser Printing,* or *VP Local Character Printing 630*) must be installed on the workstation to support the attached printer.

A local printer icon must be retrieved from the Local Devices divider in the Workstation divider of the directory. The names on the printer icons reflect the local printers available, for example, character printers or draft printers.

Retrieving local printer icons

1. Open the desktop Directory icon.
2. Open the Workstation divider.
3. Open the Local Devices divider.
4. Copy the local printer icon to the desktop, if desired. The printer is available for operation in the Printing divider of the directory or on the desktop.

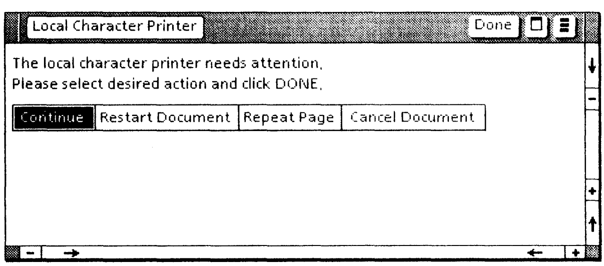
Canceling a print request on a 630 local character printer

1. Press the pause button on the printer.
2. Lift the front cover of the 630 printer.

Canceling a print request on a 635 local character printer

1. Press the stop button on the printer. The Local Character Printer Attention window (Figure 4-12) displays.

Figure 4-12 **Local Character Printer Attention window**



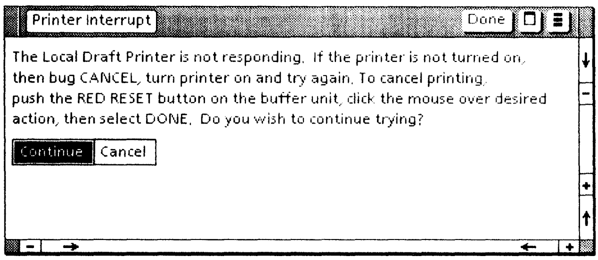
2. Select [Cancel Document].

3. Select [Done].

Canceling a print request on a P-32 draft printer

1. Press the power switch labeled <START/STOP> on the printer. The Printer Interrupt window (Figure 4-13) displays.

Figure 4-13 **P-32 Printer Interrupt window**



2. Select [Cancel].

3. Select [Done].

Canceling a print request on a local laser printer

1. Select [Cancel Local Laser Printer Job] in the desktop auxiliary menu.

2. Select [Yes] in the confirmation message.

5. Filing

Electronic filing provides a simple, but flexible way to store, retrieve, and organize *data icons* (documents, folders, record files) on a File Service. Workstations configured with *VP NetCom* or *VP RemoteCom* software have access to electronic filing, if they are connected to a network configured with the File Service. Users of these workstations must be assigned access rights to the available file drawer(s) on the File Service.

Workstations configured with *VP Standalone* software do not have access to remote electronic filing.

Key concepts of filing

You file objects by moving or copying them to the appropriate file container.

File containers

You store workstation documents in three different types of "containers": folders, file drawers, and floppy disks. Folders and file drawers compare to those items found in an office environment; for example, you put several documents in a folder, and then put several folders, as well as separate documents, in file drawers for storage. As an alternative method, or as a standalone workstation user, you store objects on floppy disks.

The chapter titled "File on floppy disks" in the *General User Reference* volume of the *VP Series*

Reference Library contains information on using the floppy disk icon.

While folders, file drawers, and floppy disks store information similarly, you retrieve the information from each type of container differently:

- Folders on the desktop and the objects contained in them are stored locally on the desktop. Only the user to whom the desktop is assigned can access the information stored there.
- Objects stored in file drawers are located on a shared or central File Service. When you move or copy an object to a file drawer, the information is stored on that File Service. Many users can share the drawer, or it can be secured so only a limited number of users have access to the contents.
- You can access information stored on a floppy disk only after you move or copy the contents from the floppy disk back onto a workstation desktop.

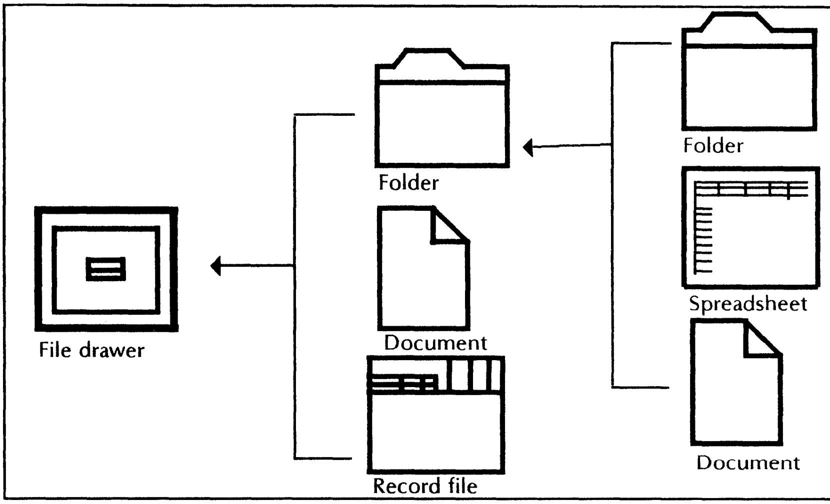
File objects

You can file any icon in a folder or file drawer. Commonly filed icons include: documents, folders, record files, spreadsheets, print format documents, mail notes, reference icons, and non-6085/8010 record files and documents. You can also file mail baskets, file drawers, wastebaskets, printers, and other non-data icons.

Figure 5-1 shows the organization of a typical file drawer containing files and folders used for file storage on the workstation. File drawers can contain folders and data icons. Folders can contain data icons and other folders.

You file objects by moving or copying them to the appropriate folder or file drawer. You retrieve objects by opening the appropriate level of

Figure 5-1 **Typical file drawer organization**



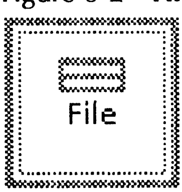
folders and/or file drawers and copying the object to your desktop.

Filing operations can be performed as background or foreground tasks as described in the procedures section on the following pages. Background operations allow you to continue working while the filing operation is taking place.

File drawers

To store objects on a File Service you need a File Drawer icon (Figure 5-2). You copy File Drawer icons to the desktop from the Network divider of the appropriate organization and domain.

Figure 5-2 **File Drawer icon**



File drawers appear on the desktop as gray-bordered File Drawer icons with the name of the file drawer on the icon. You can file icons in closed file drawers as well as opened ones.

Unlike documents and folders, a file drawer is a reference to a collection of icons stored on a remote File Service. Therefore, if you delete the File Drawer icon from the desktop, you delete only the reference to the file drawer. The contents of the file drawer remain on the File Service. You cannot move or copy file drawers to printers.

The system sorts file drawer contents alphabetically by icon name in either ascending or descending order. File drawer size, unless limited by the System Administrator, is limited only by the amount of space available on the File Service.

File drawer access rights

Many users can share file objects contained in a file drawer. To ensure that confidential data remains private, the owner of the file drawer or the System Administrator assigns varying levels of file drawer access rights.

Access rights include:

- **Read**—You can retrieve a copy of an object or list the contents of a file drawer.
- **Write**—You can change the contents of an object in a file drawer.
- **Add**—You can place new objects in a file drawer.
- **Remove**—You can remove an object from the file drawer. Both write and remove access rights are required to remove a file object from a file drawer. Read access is also required to delete an object from a file drawer.

- **Change the access list**—You can change the access list of the file drawer, through remote system administration.

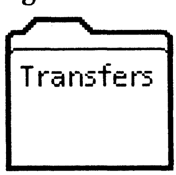
The System Administrator assigns read, write, add, and remove access rights to the owner of a file drawer when it is first created. Owners of file drawers who want to change individual access rights should refer to the "Workstation administration" chapter in this volume, or contact their System Administrator for complete instructions on how to use remote system administration.

If you do not have the appropriate access rights and try to open a file drawer, a window is displayed along with the error message, "Access rights insufficient."

Folders

A folder is represented by an icon resembling a file folder (Figure 5-3). You copy the Folder icon from the Basic Icons divider of the directory. You generally use a folder to group data icons, but you can also use it to hold other folders. This allows you to organize your icons, so you do not have to keep large numbers of icons on your desktop. There is no limit to the number of data icons that you can place in a folder. Folders on a desktop, however, are restricted by the space available on the desktop.

Figure 5-3 **Folder icon**



Icons filed in folders automatically sort in alphabetical order by icon name. You can store icons in a different order by changing the sort order on the Folder property sheet.

You can move or copy folders from a file drawer directly to the printer icon. Each item in the folder will be printed.

In most respects, file drawers and folders are alike; however, they differ in the following ways:

- File drawers are stored on the File Service; whereas, folders on the desktop are stored on the local disk at the workstation.
- File drawers can be shared, since they are on a File Service. Folders on a desktop can never be shared, since everything on a desktop is private. Folders in a file drawer can be shared.
- Data icons, such as documents, cannot be opened within an open file drawer, but they can be opened within an open folder if the folder is on the desktop. Folders and simple text documents, such as mail notes, can be opened within the File Drawer window.

File windows

File windows display the contents of open file drawers and folders in rows. Each row has several columns with one row per file object.

The title of the File window shows an object name and type. For example, if you open a File Drawer icon on the desktop, its header area includes a small File Drawer icon and the name of the file drawer. If you then open one of the folders in the file drawer, a small folder icon and the folder name are added to the title of the window.

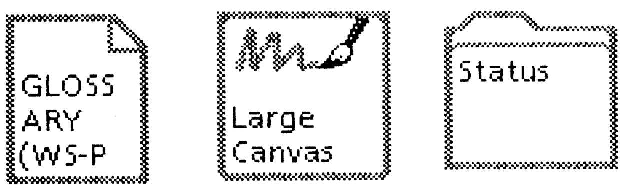
If each icon and its corresponding title cannot be displayed in the File Window header because the window is too narrow, the File Window header displays only the titles of the last items opened.

The header displays the rest of the objects as icons only.

Reference icons

Reference icons allow you to access data icons in file drawers without opening multi-level file drawer/folder structures. Reference icons are gray outlined icons resembling the remote data icon to which it refers (Figure 5-4). You must have appropriate access rights to the file drawer containing the referenced data icon to access the Reference icon.

Figure 5-4 **Reference icons**



Document — Free-Hand Drawing canvas — Folder

You can use Reference icons to:

- Provide different users with a folder of master copies of forms or documents that are changed frequently.
- Cross-index documents, folders, and record files that are stored in several different file drawers.
- Place numerous icons on a desktop without taking up additional disk space.
- Mail pointers to objects filed in file drawers to avoid transmitting large objects over the network.

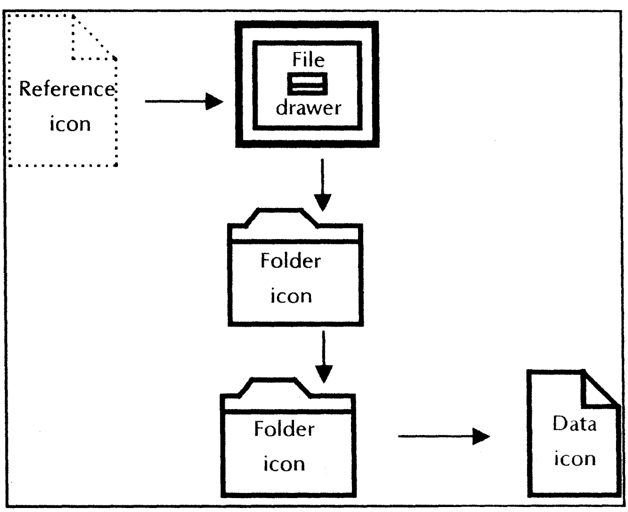
- Provide a method of always being able to access the latest version of a remote data icon without opening the file drawer.
- Print remote data objects without opening multi-level file drawer/folder structures.

Reference icons have all the attributes of the actual data icons and can be opened, closed, filed, mailed, printed, and moved to desktops. Deleting a Reference icon deletes only the Reference icon; it does not delete the remote data icon. For the reference icon to be valid, the remote data icon must remain in the file drawer.

CAUTION: Reference Folder icons act like remote containers. If a data icon within a reference folder is moved or deleted, the data icon in the folder in the file drawer is moved or deleted.

Figure 5-5 shows the relationship of a Reference icon to its stored data icon.

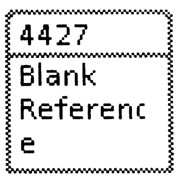
Figure 5-5 **Relationship of a Reference icon to its stored data icon**



Blank Reference icon

You retrieve a Blank Reference icon (Figure 5-6) from the directory's Basic Icons divider. You use Blank Reference icons to create a Reference icon for a specific file object. This procedure is a step-saving alternative for creating a reference icon that eliminates the multiple steps of opening the directory, file drawer, and appropriate folders when using the file drawer method. You simply fill in the Blank Reference Icon property sheet to create the reference.

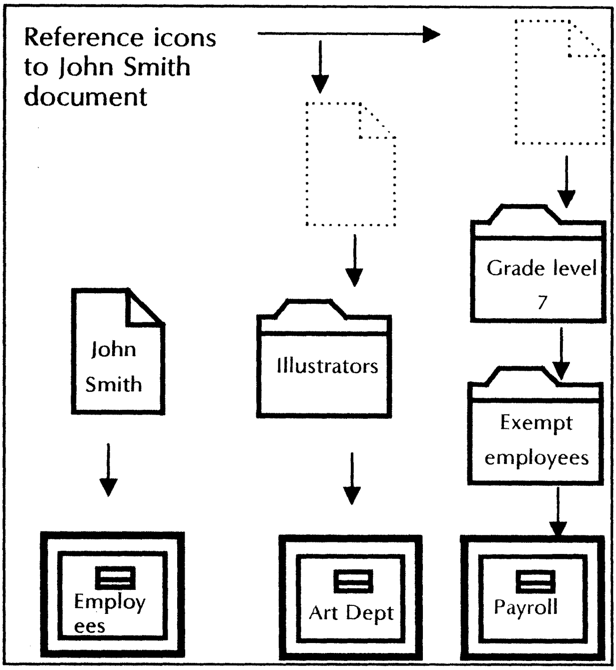
Figure 5-6 **Blank Reference icon**



Cross-reference with Reference icons

You can construct references to documents, folders, record files, and any other type of icon by creating Reference icons and placing them folders and file drawers. This type of referencing is called cross-referencing (Figure 5-7). The number of levels of folders within folders and the number of times a given document, folder, or record file is referenced are up to you.

Figure 5-7 **Example of cross referencing**



Because Reference icons do not require the disk space needed for the data icons, cross-referencing is useful when you must keep several copies of large documents, folders, or record files in several different file drawers.

Container icon contents

You can list the contents of a container icon by using the [List Container] command in the desktop auxiliary menu. This command makes a list in the form of a document. The default name is "List:" followed by the name of the icon being listed. For example, if you select a folder called "Manpower," the default name for the output document is "List: Manpower."

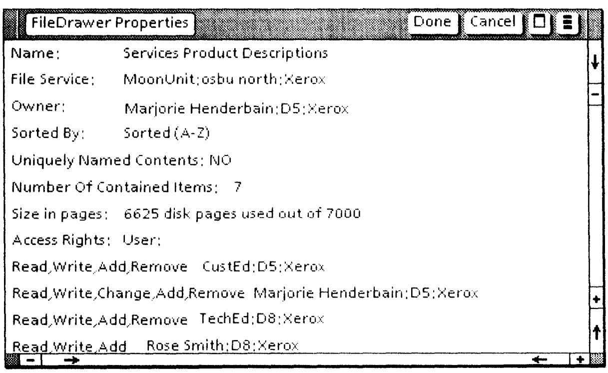
Making a container list is a background process and can be used on the following types of containers: file drawers, reference file drawers, folders, mail folders, mail inbasket, and floppy icons.

File Drawer properties sheet

The File Drawer properties sheet (Figure 5-8) contains read-only information about a file drawer, and lists the users who have access to the drawer. The property sheet displays the options set by the System Administrator (SA) or owner. Only the SA or the owner of the file drawer can change file drawer properties. (To change file drawer access, refer to the "Workstation administration" chapter in this volume.)

You display the File Drawer properties sheet by selecting the file drawer and pressing <PROP'S>.

Figure 5-8 **File Drawer properties sheet**



Properties

The following properties are for information only and are in read-only format.

Name

Displays the file drawer name assigned by the

System Administrator. The name appears on the icon and in the filing windows.

File Service
Displays the fully qualified name of the File Service where the file drawer is located.

Owner
Displays the name of the owner.

Sorted By
Displays the sort order of the objects in the file drawer. It is either ascending [A-Z] or descending [Z-A] order.

Uniquely Named Contents
If YES displays, every object placed in the file drawer is required to have a unique name. The system does not allow an object to be moved or copied into the file drawer if an object with the same name is already there. If NO displays, there are no name restrictions for filed objects.

Number of Contained Items
Displays the number of items contained in the file drawer.

Size in pages
Shows the number of pages used out of the total number of pages allocated by the System Administrator for the file drawer (for example, 90 disk pages used out of 1000).

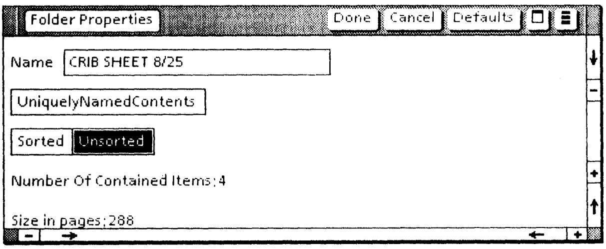
Access Rights
Lists the access rights specified for each user. Access rights can include: read, write, remove, add, and change.

User
Lists the names of users who have access to the file drawer.

Folder properties sheet

You use the Folder properties sheet (Figure 5-9) to name the folder and to control the filing order of objects contained in the folder. You display the Folder properties sheet by selecting a Folder icon and pressing <PROP'S>.

Figure 5-9 **Folder properties sheet**



Properties

Name

Allows you to change the name of the folder. This name appears on the icon and in filing windows. To change the name, edit the text in the box in the normal way (select it, delete it, type new text). The file name must be between 1 to 100 characters in length.

[Uniquely Named Contents]

Requires that every object placed in the folder has a unique name. You are not allowed to move or copy an object into the folder if an object with the same name is already there.

Note: You can select this option only for an empty folder or one that contains uniquely named objects.

[Sorted]
Instructs the system to sort the objects contained in the folder in either ascending or descending order. [Sorted] is the default setting.

When you select [Sorted], the following additional choices appear for specifying the order.

Name
Version Date

A-Z	Z-A

[Name] or [Version Date]—Sorts by the name of the icon, or the date from the most recent to the oldest. [Name] is the default setting.

[A-Z] or [Z-A]—Sorts in ascending or descending order by name. [A-Z] is the default setting.

[Unsorted]
Instructs the system not to sort the objects contained in the folder. The items appear in the order you file them. You can move icons manually to achieve the desired order.

The following information appears in read-only format and cannot be changed.

Number of Contained Items
Lists the number of objects contained in the top level of the folder.

Size in pages
Shows the disk size of the folder in disk pages.

File window

You display a File window by selecting a file drawer or folder, and pressing <OPEN>. The window displays the contents (documents, folders, record files) of the object (Figures 5-10 and 5-11).

Figure 5-10 **Folder window**

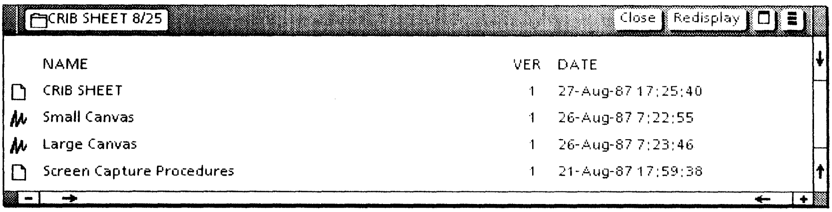
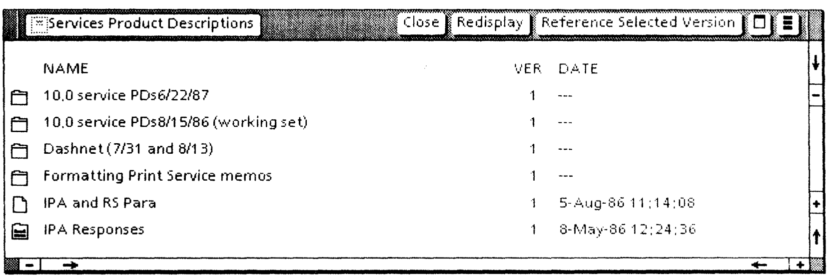


Figure 5-11 **File Drawer window**



Window commands

The following additional window header items display when an object is opened within another object.

[Close All]
Closes all windows within the folder or file drawer.

[Show Next]
Closes the opened object and displays the following object within the window.

[Show Previous]
Closes the opened object and displays the previous object.

[Redisplay]
Updates the information displayed on the screen.

Additional file drawer window commands

[Reference Selected Version]
Specifies the selected document as the version of the document to use when creating a Reference icon.

[Reference Last-Filed Version]
Specifies the last document filed as the document to use when creating a Reference icon.

[Show Cover Sheet]
Specifies if a cover sheet is displayed when the file drawer is opened.

Window contents

Default columns for the file window are name and version number. Additional columns include icon, name with version number, and creation date. You can set these columns on the Folder/File Drawer Display option sheet, or you can override the default values for folder windows in your User Profile. In this way, you can tailor the behavior of windows to suit your needs. Refer to "The User Profile" chapter in the *General User Reference* volume for further information on setting up your User Profile.

The User Profile entry displays as:

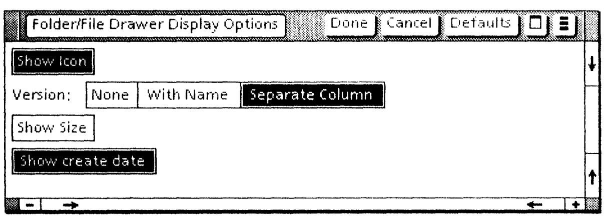
[Folder]
ShowIcon: True - - True| False
ShowSize: False - - True| False
ShowCreateDate: True - - True| False
Version: Separate Column - - Separate Column|With Name|None

Folder/File Drawer Display options sheet

The Folder/File Drawer Display options sheet (Figure 5-12) allows you to specify the columns displayed in a file window.

You display the Folder/File Drawer Display option sheet by selecting a folder or file drawer and then selecting [Folder/File Drawer Display Options] in the desktop auxiliary menu.

Figure 5-12 **Folder/File Drawer Display options sheet**



Options

[Show icon]
Provides a visual representation of the type of data icons filed in the folder or file drawer window.

Version

[None]

Removes the version number from the window.

[With Name]

Attaches a version number to the name. The version number is separated from the name by an "!."

[Separate Column]

Shows the version number of the data icons filed in the folder or file drawer in a separate column. [Separate Column] is the default setting.

[Show Size]

Provides the disk size of the data icons filed in the folder or file drawer. Also provides the number of icons within a folder filed in a folder or file drawer.

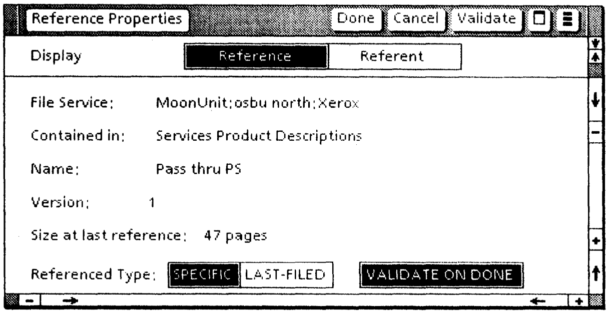
[Show Create Date]

Provides the last date the data icon was edited. Folder icons do not have creation dates. [Show Create Date] is the default setting.

Reference Icon properties sheet

Reference icons have two associated property sheets: the Reference properties sheet and the Referent properties sheet. You display the Reference properties sheet (Figure 5-13) by selecting the Reference icon and pressing <PROP'S>.

Figure 5-13 **Reference Icon properties sheet**



Window commands

[Validate]
Validates the existence of the data icon on the File Service, prior to accessing it and before closing the property sheet. This indicates if the remote data icon is still available for access.

Display

[Reference]
Displays the Referent Icon properties sheet. It contains information pertaining to the data icon being referenced.

[Referent]
Displays the Referent property sheet. It looks exactly like the property sheet for the referent object. For example, a Referent property sheet, to a folder looks like a Folder property sheet; a Referent property sheet to a document looks like a Document property sheet.

You can make changes to the Referent properties if you have proper access to the remote data icon. These changes occur when you select [Done] or display the Reference property sheet. For specific properties, refer to the section that discusses the specific type of icon being referenced.

Properties

File Service

Specifies, in read-only format, the fully qualified network name of the file server in the following format:

Server Name:Domain:Organization

Contained in

Specifies, in read-only format, the file drawer path, including all subsequent file levels (for example, folder names) to the remote icon.

Name

Specifies, in read-only format, the exact name of the remote icon.

Version

Specifies, in read-only format, the version number associated with the icon.

Size at last reference

Shows the estimated size of the remote icon in disk pages. This is updated every time the Reference icon accesses the remote data icon. If someone else stores a new version of the remote icon, this size may be inaccurate.

Reference type

[Specific]

Makes the version number part of the pathname. This allows you to specify access to only a single version of the icon through the reference. If the specified version is no longer available, the reference icon is invalid. [Specific] is the default setting.

[Last Filed]

Accesses the data icon with the latest version number. If the original remote data icon is replaced by another with the same name, the reference points to the replacement. If another data icon of the same name (with a higher version number) is put in the same remote location, the reference points to the new data icon.

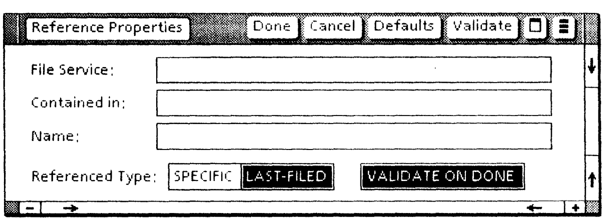
[Validate on Done]

Specifies that changes made to the property sheet are applied when [Done] is selected. If [Validate on Done] is <u>not</u> selected before [Done], the selected properties are retained but not applied. This is useful if the File Service is down, but you still want to keep the text you typed into the property sheet. [Validate on Done] is the default setting.

Blank Reference Icon properties sheet

You display the Blank Reference Icon properties sheet (Figure 5-14) by selecting the Blank Reference icon and pressing <PROP'S>. The Blank Reference Icon properties sheet allows you to create a reference to a data icon by filling in the properties sheet with information for the desired files.

Figure 5-14 **Blank Reference Icon properties sheet**



Properties

File Service

Specifies the File Service where the file drawer is located. This option must be filled in with a fully qualified name, including domain and organization name, in the following form:

Service:Domain:Organization

Note: If the network name is not fully qualified, the desktop defaults for Domain and Organization are used.

Contained in

Specifies the file drawer that contains the remote data icon, including all subsequent file levels. These names must be entered in order. For example, a folder contained within another folder would be listed as follows:

File drawer name/Folder name/Folder name

Name

Specifies the exact name of the remote data icon. If a version number is included in the name, it must be entered in this option.

Reference type

[Specific]

Allows you to specify access to only a single version of the icon through the reference. If the specified version is no longer available, the reference icon is invalid.

[Last Filed]

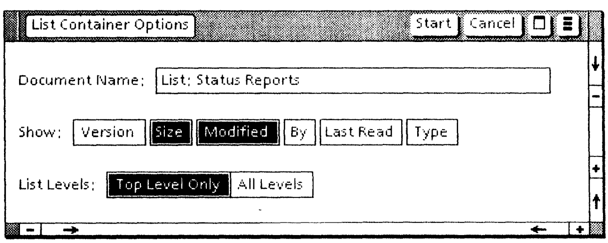
Allows you to access the data icon with the latest version number. If the original remote data icon is replaced by another with the same name, the reference points to the replacement. If another data icon of the same name (with a higher version number) is put in the same remote location, the reference points to the new data icon. [Last Filed] the default setting.

[Validate on Done]
Specifies that changes made to the property sheet are applied when [Done] is selected. If [Validate on Done] is not selected before [Done], the properties selected are retained but not applied. This is useful if the File Service is down, but you still want to keep the text you typed into the property sheet. [Validate on Done] is the default setting.

List Container options sheet

When you select [List Container] in the desktop auxiliary menu, the List Container options sheet displays (Figure 5-15). This option sheet allows you to define the attributes listed for the selected container.

Figure 5-15 **List Container options sheet**



List Container options sheet commands

[Start]
Begins the container list process.

[Cancel]
Cancels the container list process and removes the option sheet.

List Container options

Document Name

Allows you to name the resulting document. The default name is "List:" followed by the name of the icon being listed. For example, if you select a folder called "Manpower," the default name for the output document is "List: Manpower."

Show

Determines the information displayed. You can select one or more of the following output choices:

[Version]

Displays the version number of the container object.

[Size]

Displays the size of the object in the drawer or folder in disk pages. If the selected container is a drawer or folder, it also displays the number of objects in it. [Size] is the default setting.

[Modified]

Displays the date the object was last modified. For a file drawer or a folder, it displays a '-'. [Modified] is the default setting.

[By]

Displays the name of the user who last modified the selected item.

[Type]

Displays the object types. The types include: 8000 document, print format, folder, drawer, canvas, Japanese dictionary, mail note, mail folder, record file, spelling dictionary, 860 document, and unknown.

List Level

You can select one of the following as output choices:

[Top]
: Displays the first-level items. [Top] is the default setting.

[All Levels]
: Displays all items contained within all levels of folders, and displays the [Indent] option.

[Indent]
: Indents the listing for each nested level of folders or file drawers. Displays only when you select [All Levels].

Retrieving file drawers

1. Open the Directory icon.

2. Open the Network divider, the appropriate Organization divider, and the appropriate Domain divider. The Filing divider displays.

3. Select and open the Filing divider. A list of available network File Services in the selected domain displays.

   Note: Both the Filing and the File Service dividers can be copied to the desktop.

4. Open the appropriate File Service divider to display the names of the file drawers on the File Service.

5. Select and copy the appropriate File Drawer icon to the desktop.

   Note: The contents of the file drawer remain on the File Service; they are not copied to the desktop.

Filing in a folder or file drawer

You file icons by moving or copying them to the appropriate folder or file drawer. Objects can be filed in closed folders and file drawers as well as opened ones. Filing an object in a closed container is faster, because the time necessary to open and close the container is eliminated. Objects are stored in the sort order specified on the Folder or File Drawer property sheet.

Filing requests can either be processed in the foreground or background. Selecting the destination with the right mouse button performs the action in the background; selecting with the left mouse button performs it in the foreground.

Background processing allows you to perform other desktop activities while filing is taking place. *Foreground processing* ties up your workstation and does not allow other activities. During foreground processing, your pointer turns into an hourglass; during background processing your pointer appears as it normally does.

Note: You can file an icon in a file drawer only when you have appropriate access rights to that file drawer.

Filing in a closed folder/file drawer

1. Select the icon.

2. Move or copy it to the appropriate folder or file drawer.

   Once the move/copy action is completed, the destination icon (folder or file drawer) is highlighted when doing a foreground copy. If doing a background copy, the destination icon remains busy until the copy is complete.

Filing in an opened folder/file drawer

1. Select the icon.

2. Move or copy it to the desired area in the folder/file drawer. To accurately indicate the destination, you can hold the mouse button down while you are moving the mouse. When the destination is specified, a right-pointing arrow, indicating where the icon will be placed, appears to the left. If the pointer tracks over a row:

   - The row color reverses indicating that you can copy/move an object to the row.

   or

- The row color does not reverse, and the pointer changes to a question mark. In this case, when you move the mouse to a legal destination, the pointer changes back to the copy/move shape.

Notes: If [Sorted] is selected, the system automatically positions the icon as indicated on the Folder or File Drawer property sheet.

To store an icon in a folder within an open window, place the icon directly over that folder.

If you put an icon into a folder designated to have uniquely named contents, and the icon is not uniquely named, an error message is displayed, and the icon is not added to the folder.

Listing Container icon contents

Note: *VP Container List Tool Application* must be loaded and running to use this application.

1. Select an icon to list.
2. Select [List Container] from the desktop auxiliary menu. ViewPoint displays the List Container option sheet.
3. Select the options you want.
4. Select [Start]. The process begins as a background activity.
5. When completed, a document labeled "List:" followed by the name of the selected container appears on the desktop in the lowest available position on the right side of the desktop.

Reading data icons filed in folders

1. Select the data icon in the folder's listing.

2. Press <OPEN>.

   When the data icon opens, you can read or edit it just as if you had copied it onto the desktop and opened it.

3. To see additional icons within the folder, select the [Show Next] or [Show Previous] command.

Note: Only one data icon in the folder can be opened at a time. If you want to open several icons at a time, move them out of the folder to your desktop and then open them. You cannot read data icons stored in folders on a remote File Service.

Retrieving icons from a folder or file drawer

1. Select the appropriate folder or file drawer and press <OPEN>.

   Note: If you do not have read access rights to the file drawer, the file drawer opens and the message "Access rights insufficient" displays in the opened File Drawer window.

2. If the icon you want to retrieve is contained in a folder within the file drawer, select the folder containing the icon, and press <OPEN>.

3. Select the appropriate icon. Use the select-adjust method to select multiple icons.

4. Press <MOVE> or <COPY>, as appropriate, and then select the desired destination.

   When you press <MOVE> or <COPY>, the pointer takes on the shape of a generic copy or move. If the destination you select is a document window or any other destination that cannot contain the selection, the pointer becomes a question mark. After you select the final destination, the pointer returns to its usual shape.

Using file drawer commands to create a Reference icon

1. Select a data icon in a remote container (file drawer or folder within a file drawer).
2. Select [Reference Last-Filed Version] or [Reference Specific Version] in the File Drawer window.
3. Your pointer displays as a small reference icon.
4. Select a destination on the desktop.

Using a Blank Reference icon to create a Reference icon

1. Be sure you know the exact pathname of the file object, (that is, the names of the folder and file drawer in which the object is filed).
2. Retrieve a Blank Reference icon from the Basic Icons divider of the directory.
3. Select the Blank Reference icon.

4. Press <PROP'S>. The Blank Reference icon property sheet appears.

5. Type the name of the file you want in the **Name** option.

   Note: You may enter the entire pathname in the **Name** box. You must do this if the folders or remote icon contain any of the following File Service special characters: left parenthesis, right parenthesis, diagonal slash, exclamation point, pound sign, asterisk, or apostrophe. These characters must be preceded by an apostrophe, as shown in the following example, if they are part of the actual pathname to the data icon.

   HP/Test folder/Second test''s folder

   Note: The folder name "Second test's" contains a special character. Thus, in the pathname on the property sheet of the Blank Reference icon, the apostrophe must be preceded by another apostrophe.

   If pathnames are entered entirely in the **Name** box leave the File Service and Contained in properties blank.

6. Type the name of the File Service including the domain and organization where the file is stored in the **File Service** option (for example, Swan:D5:Xerox).

7. Type the name of the file drawer in which the file you want is stored in the **Contained in** option.

8. Type in all subsequent folder names, separating them with slashes (/) as shown in the following example:

   Contained in: Employees/Writers/Gradelevel7

9. Type the version number of the file object, if applicable.

Note: The asterisk and pound sign may be used as wildcard characters in the pathname. An asterisk matches multiple (zero or more) characters. A pound sign matches a single character. Using an asterisk or pound sign locates the last match within the remote location.

10. Select [Specific] or [Last-Filed].

11. Select [Apply] or [Done]. If the entries cannot be verified, a message displays.

Creating a local copy icon from a Reference icon

When you open a reference folder or file drawer on your desktop, a window appears showing you the contents of that file drawer.

You cannot open a document contained in a reference folder. You must copy the document to your desktop and open the new document icon.

1. Select the document.

2. Press <COPY> or <MOVE>.

3. Select a location for the data icon on the desktop.

   The resulting data icon on the desktop is only a copy of the data icon in the file drawer.

4. Press <OPEN>.

   If you open a Reference icon to an object that can be opened remotely, the Reference icon opens. If you open a Reference icon to an object that cannot be opened remotely (for example, a document), the Reference icon will open as an empty window with a [Make Local Copy] command in the header.

5. Select [Make Local Copy] and then select a destination on the desktop to make a local copy of the remote data icon.

6. Mailing

The electronic mailing facility allows you to send and receive objects like documents, folders, record files, spreadsheets, print format documents, and reference icons using workstations configured with *VP NetCom* or *VP RemoteCom* software. These workstations have access to electronic mail, if they are attached to a network configured with the Mail Service. Users need a registered mailbox in their name with the Mail Service to access electronic mail.

Workstations configured with *VP Standalone* software do not have access to electronic mail.

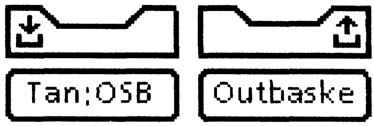
Key concepts of mailing

You mail objects by moving or copying them to a mail basket, and filling in the name and address of the person to whom they are being sent. You receive mail messages by retrieving them from the Mail Service using a mail basket.

Mail baskets

You receive mail messages with an *inbasket*; you mail messages with an *outbasket* (Figure 6-1). All icons that appear on the desktop can be moved or copied from inbaskets or to outbaskets. Mail baskets are located in the Desktop divider of the Directory icon.

Figure 6-1 **In and Outbaskets**

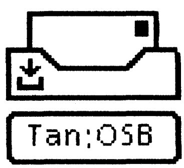


Note: *VP NetCom* and *VP RemoteCom* contain mailing software. Mailing software must be installed, enabled, and running on the workstation for the in- and outbaskets to appear in the Directory icon.

Inbasket

Inbaskets on the desktop poll the Mail Service for new mail at intervals defined on the Inbasket property sheet. When new mail is detected, an envelope appears in the inbasket (Figure 6-2).

Figure 6-2 **Inbasket indicating new mail**



Multiple inbaskets can exist on the workstation and poll the Mail Service for new mail. It is recommended, however, that only one inbasket be maintained on the desktop.

Opening the inbasket displays its contents. Mail is retrieved from the Mail Service automatically when [Get New Mail] is selected in the Inbasket property sheet; alternatively, you retrieve mail by opening the inbasket and selecting the [New Mail] command in the Inbasket window.

The following information displays for items in the inbasket: subject, from, and date. New mail that has not been opened displays with an asterisk (*) beside it. After you open an object, its status changes from new mail to old mail and the asterisk is removed.

You can copy or move icons in the Inbasket window to the desktop. Icons on the desktop however, cannot be moved or copied back into the inbasket.

Outbasket

You use the Outbasket icon to mail icons to other users. You mail icons by selecting the desired icon(s) and moving or copying them to the outbasket. The outbasket controls where mail is sent by means of options set on the option sheet, or information on the icon's cover sheet.

Outbaskets are available for mailing regardless of their location. This allows you to move or copy icons to outbaskets that reside in the directory, in a file drawer, or in a folder. For convenience, Outbasket icons are copied to the desktop.

Icons moved or copied to an outbasket are actually moved or copied on the rigid disk. If the workstation disk space is insufficient, the icon returns to its original location and the mailing attempt is stopped.

In the event a mailing attempt is unsuccessful (if [Cancel] is selected, or if you log off with mail inside the outbasket), a message appears indicating the attempt was unsuccessful. The icons that are not sent are either returned to the desktop if they were moved, or deleted if they were copied to the outbasket.

Mailing addresses

Every recipient (individual user or distribution list) of electronic mail has an address. An address is composed of a user's *fully qualified name*. It consists of three parts: the recipient name, domain name, and organization name, separated by colons. The recipient's name can consist of up to 40 characters, and the domain and organization names each can consist of up to 20 characters. When sending mail, you must use the recipient's correct address.

Mail recipients located in the same domain as you only require the use of the recipient's name or alias for delivery. For example:

John Smith

Mail recipients located in a different domain but the same organization require the use of the recipient's name or alias and the domain name. For example:

John Smith:Los Angeles

Mail recipients located in a different domain and a different organization require the use of a fully qualified name, which consists of the recipient's name or alias, domain, and organization. For example:

John Smith:Los Angeles:Xerox

Fully qualified recipient names cannot have extra spaces before or after any of the individual parts, or they are rejected as invalid. Extra spaces, however, can occur before the recipient's fully qualified name. If there is more than one recipient, recipient names must be separated by a new line or a comma.

Mail recipients may be individual users or a mailing distribution list.

Distribution lists

Generally, mail is addressed and sent to an individual, but in some cases a message may need to be sent to several individuals (for example, to all the marketing managers in a branch office). You do this either by entering all the names in the recipient area or by addressing mail to a distribution list.

A distribution list is composed of the names of a group of individuals who are registered and are designated as a user group. User groups are created by the System Administrator.

When a distribution list is used, the Mail Service breaks down the list into individuals to determine the users on the list. It also creates and sends an electronic copy of the mailed icon to each member named on the distribution list.

Note: Only one copy of the icon is stored per Mail Service. Recipient copies are made when each of the members retrieve their mail from the Mail Service.

Mail folders

You copy Blank Mail Folder icons (Figure 6-3) to the desktop from the Basic Icons divider in the Workstation divider of the directory and use them to store retrieved mail.

Figure 6-3 **Blank Mail Folder icon**

Mail folders function the same as regular folders, plus they allow you to perform the same mailing functions as the inbasket, with the following exceptions:

- [New Mail] menu item is not in the mail folder.

- Mail folders cannot be used to poll the Mail Service for new mail.
- Any object can be moved or copied to or from the mail folder.

You can name mail folders to reflect the type of mail being stored in the folder (for example, Active mail, Personal mail, Travel mail, and the like).

You should move/sort retrieved mail into mail folders for storage. You can use multiple mail folders to accommodate several different types of mail.

Cover sheets

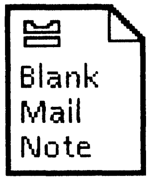
All mailable icons have cover sheets that can be displayed when the icon is opened on the desktop. Cover sheets appear at the top of the object and contain information about the icon (for example, who sent the icon, the date it was sent, and who received copies). It also contains an area for a note to be added by the sender. Display of cover sheets is controlled through the icon window's floating items auxiliary menu.

The To, From, Copies, and Answer To fields in a cover sheet can each hold approximately 333 fully qualified names. The mail note field can hold 8000 characters; the subject field can hold 100 characters; if the character count exceeds the maximum allowed for a field, the extra characters are highlighted for deletion. The Subject field, which is also the icon label, cannot be empty.

Mail notes

Unless the content of the message dictates otherwise (the need for graphics, multiple fonts, or large documents), Mail Note icons (Figure 6-4) are used for sending messages to all users who have access to electronic mail. This allows the 6085/8010 user to communicate with other networked users, including networked 860s, 820s, IBM PCs, and users of the Interactive Terminal Service (ITS).

Figure 6-4 **Blank Mail Note icon**

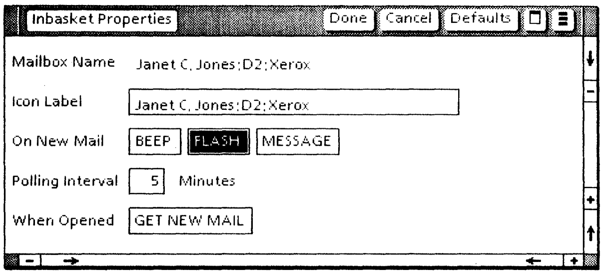


You access blank mail notes by selecting [New Form] in the Inbasket window menu, or by copying them from the Basic Icons divider in the directory. Mail notes contain the same fields as cover sheets.

Inbasket properties sheet

You use the Inbasket properties sheet (Figure 6-5) to specify properties related to new mail. You display the Inbasket properties sheet by selecting the inbasket and pressing <PROP'S>.

Figure 6-5 **Inbasket properties sheet**



Properties

Mailbox Name
Contains the name of the user for whom the inbasket retrieves mail. The name is in read-only format and is the name of the user currently logged on to the workstation.

Icon Label
Changes the inbasket's icon label. The icon's default name is the user's fully qualified name.

On New Mail
Specifies how the workstation notifies you when new mail is detected by the inbasket. Choices are:

[Beep]
The workstation provides an audible tone when it detects new mail.

[Flash]

The inbasket flashes when it detects new mail. [Flash] is the default setting.

[Message]

The message area displays a message, indicating new mail is available.

Note: One, two, or all choices may be selected at any given time. The inbasket always changes its shape to an inbasket with mail when it detects new mail, regardless of this option.

Polling Interval

Specifies the length of time, in minutes, between polling. The minimum polling interval that you can specify is 3 minutes; the maximum is 15; the default is 5 minutes. When no new mail exists, the inbasket polls at the specified polling intervals. When new mail is detected, the inbasket then polls at three times the original polling interval specified. Once new mail is retrieved from the Mail Service, the inbasket reverts back to the original polling interval specified.

When Opened

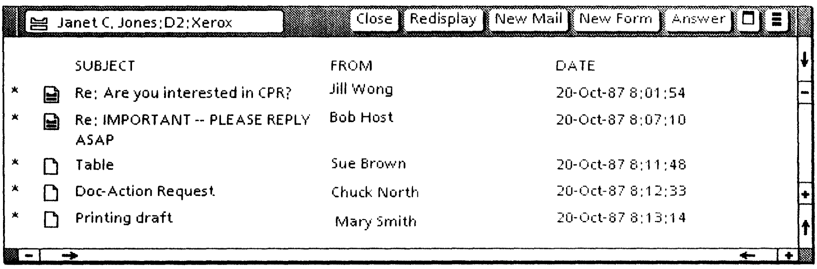
[Get New Mail]

Specifies that the inbasket automatically attempts to retrieve new mail when it is opened. This is an accelerator for opening an inbasket and then selecting [New Mail]. When the Inbasket icon is selected and <OPEN> is pressed, the message "Retrieving new mail" displays in the message area on the desktop. Once new mail is retrieved from the Mail Service, a message indicating the number of new items retrieved to the inbasket displays in the message area.

Inbasket window

Selecting an inbasket and pressing <OPEN> displays the Inbasket window (Figure 6-6). It provides a listing of mailed objects received by the inbasket. Objects are listed in the order in which they are received.

Figure 6-6 **Inbasket window**



Inbasket window commands

[Close]
  Closes the inbasket, and returns it to icon form.

[Redisplay]
  Redisplays all the objects currently available in the Inbasket window.

[New Mail]
  Retrieves new mail from the Mail Service and then displays it in the opened Inbasket window.

  If the Mail Service is not functioning and new mail cannot be retrieved, a message displays in the message area on the desktop.

[New Form]
Creates a copy of the blank mail note, and opens it on the desktop.

[Answer]
Responds to a previously sent message. Selecting the message and then selecting this option creates a mail note and opens it on the desktop. Sections of the mail note fill in automatically with information from the original message. The filled-in sections include: From, Subject, In Reply To, To, and Copies.

This option ensures that the response goes to the recipients of the original message.

[Forward]
Forwards the message selected in the inbasket to other recipients. Selecting this option creates a copy of the original object and opens it on the desktop. The information from the original message appears in the opened object's Note field. If the object is open inside the inbasket, the inbasket automatically closes it and creates the forwarded object.

[Discard]
Deletes the currently opened or selected message, and opens the next message. Selecting this option allows you to read and delete mail messages without going through a multi-step process.

If there are no additional mail messages, the selected or opened mail message is deleted, and the opened inbasket displays.

Note: [Discard] does not appear when the object that is opened is contained within another object.

[Show Cover Sheet]
Displays the mailing cover sheet when the icon is opened.

Additional window commands

The following commands appear when new mail is opened.

[Close All]
Closes the open mail messages in the inbasket as well as the Inbasket window.

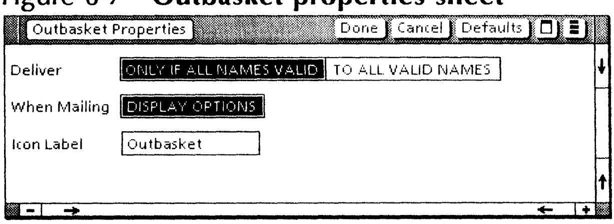
[Show Next]
Closes the mail message currently opened and opens the next one listed in the Inbasket window.

[Show Previous]
Closes the mail message currently opened and opens the previous one listed in the Inbasket window.

Outbasket properties sheet

The Outbasket properties sheet (Figure 6-7) allows you to change the outbasket **Icon Label**. You display the Outbasket properties sheet by selecting the outbasket, and pressing <PROP'S>.

Figure 6-7 **Outbasket properties sheet**



Properties

Deliver
Allows you to control what happens to the message being sent, if the Mail Service

determines that any local recipient name is invalid. Choices are:

[Only If All Names Valid]
Mails the object only if all specified recipient names are valid user names. If any of the recipient names are invalid, the mailing process is stopped. The default option is [Only If All Names Valid].

[To All Valid Names]
Mails the object to all valid names, even if invalid recipient names are present. Invalid recipient names appear in the message area of the desktop. The Mail Service only validates local recipient names.

Note: If objects are moved or copied to an outbasket with [To All Valid Names] selected, and the recipient names are all invalid, the objects <u>will not</u> be returned to the desktop.

When Mailing
Controls whether or not the Mailing option sheet displays when an object is placed in the Outbasket icon.

[Display Options]
Opens the option sheet each time an object is placed on the outbasket, thus allowing the options to be changed before the object is mailed. If [Display Options] is not selected, the object is mailed using the information contained in the cover sheet of the mailed object. [Display Options] is the default option.

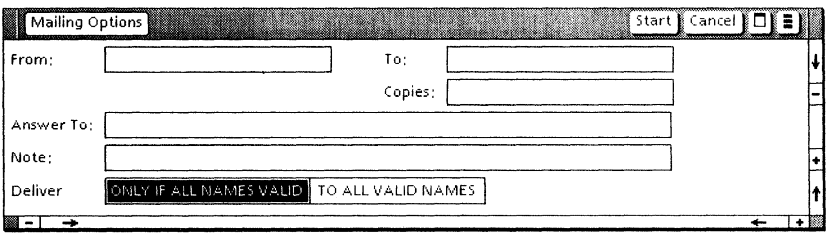
Icon Label
Changes the outbasket's icon label. (Think of it as naming the outbasket.) The icon's default name is Outbasket.

Mailing options sheet

The Mailing options sheet (Figure 6-8) appears when an icon(s) is moved or copied to the Outbasket icon. The options on this sheet specify the fully qualified names and addresses of the mail recipients for the specific icon(s) being mailed. The fully qualified names and addresses entered on the option sheet are not applied to the originals of copied icons.

Note: If [Display Options] is not selected on the outbasket property sheet, the Mailing options sheet is not displayed.

Figure 6-8 **Mailing options sheet**



Mailing options sheet window commands

[Start]
Closes the Mailing options sheet and attempts to send the object in the outbasket to the recipients.

[Cancel]
Closes the Mailing options sheet and cancels the mailing of the object in the outbasket.

Options

From

Specifies who is sending the message, if the sender is not the user currently logged on.

To

Specifies recipient names. A single name, multiple recipient names, and/or distribution lists, separated by commas, spaces, new lines, or new paragraphs, can be entered. Pressing <NEXT> advances the caret to the **Copies** box.

Copies

Specifies the names of recipients to receive copies. This option is used in exactly the same way as the **To** option.

Note: To receive a copy of the message, you must add yourself in the **To** or **Copies** boxes.

Answer to

Specifies the names of the individuals and/or distribution lists to whom a response is sent. This can contain just your name, everyone who received the original message, and/or any number of recipients.

Note

Allows you to enter a short message explaining what the item contains, the purpose of the message, or any other information that is needed by the person receiving it.

The **Note** box holds approximately 8000 characters; if the file contains more characters, the extra characters are highlighted for deletion.

Deliver

[Only If All Names Valid]

Mails the object only if all specified recipient names are valid user names. If any of the recipient names are invalid, the mailing process is stopped. [Only If All Names Valid] is the default setting.

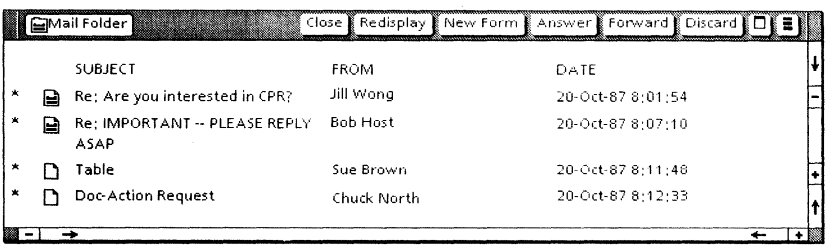
[To All Valid Names]
Mails the object to all valid names, even if invalid recipient names are present. Invalid recipient names appear in the message area of the desktop.

Mail Folder window

The Mail Folder window (Figure 6-9) provides a listing of mailed objects contained in the mail folder.

You display the Mail Folder window by selecting the Mail Folder icon on the desktop and pressing <OPEN>.

Figure 6-9 **Mail Folder window**



Mail Folder window commands

The Mail Folder window contains the same commands as the Inbasket, with the exception of [New Mail]. You cannot retrieve new mail in the mail folder.

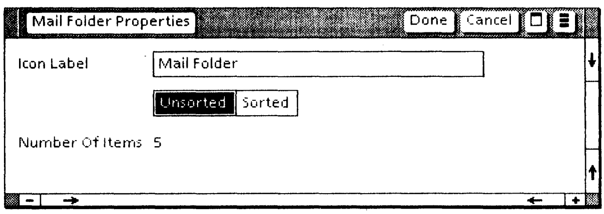
Window contents—main display

When the mail folder is opened, its contents display. The contents of the mail folder is described in terms of the following information: Subject, From, and Date, as illustrated in Figure 6-9.

Mail Folder properties sheet

You use the Mail Folder properties sheet (Figure 6-10) to specify sort order properties for mail objects. You access the Mail Folder properties sheet by selecting the mail folder and pressing <PROP'S>.

Figure 6-10 **Mail Folder properties sheet**



Properties

Icon Label

Changes the mail folder's icon label. (Think of it as naming the mail folder.)

[Unsorted]

Instructs the system not to sort the folder objects.

If you select [Unsorted], the items are listed in the same order they were filed. You can move the icons manually, until the desired order is reached.

The system automatically places new items added to the folder according to the sort order you specify. [Unsorted] is the default.

[Sorted]
Instructs the system to sort the folder objects in either ascending or descending order.

When you select [Sorted], the following additional options appear for specifying the order.

[By Subject] [A-Z] [Z-A]
Sorts the folder, by subject names, in ascending ([A-Z]) or descending ([Z-A]) order.

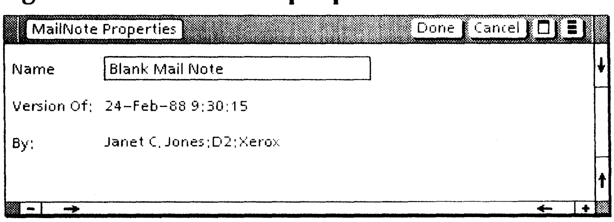
Number of Items
Displays the number of objects contained in the folder.

Mail Note properties sheet

The Mail Note properties sheet (Figure 6-11) lists information about the Mail Note icon.

You display the Mail Note properties sheet by selecting a mail note and pressing <PROP'S>.

Figure 6-11 **Mail Note properties sheet**



Properties

Name

Allows you to name the Mail Note icon. To change the name, you edit the text in the field in the usual way (select it, delete it, type new text).

The following features are in read-only format and are provided by the system automatically. They cannot be changed.

Version of

Provides the date and time of the most recent modification.

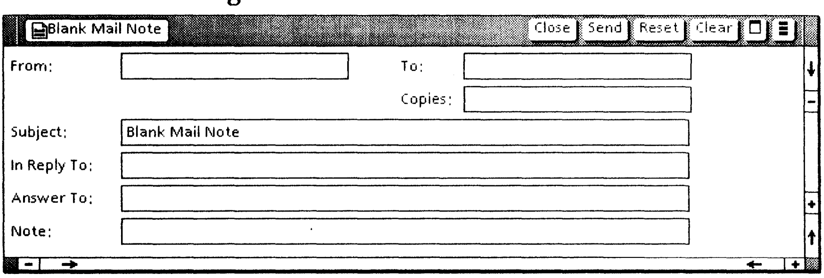
By

Provides the name of the user who last modified the mail note.

Mail Note window

You display the Blank Mail Note window (Figure 6-12) by selecting the mail note and pressing <OPEN>.

Figure 6-12 **Blank Mail Note window**



Mail Note window commands

[Close]
Closes the mail note, and applies any changes made since it was opened.

[Send]
Sends the contents of the mail note to the designated recipients without copying or moving it to the outbasket. [Send] is removed from the window menu once the operation is completed. The sending of a mail note is a background process. This allows you to complete other operations while the mail note is being sent.

[Reset]
Resets the values of all mail note fields to those present, either when the mail note was initially opened or (if the mail note was successfully sent) to those values present at the time of the last [Send]. If [Send] was not available in the window menu, it now reappears.

[Clear]
Clears all of the fields in the mail note. If [Send] was absent from the menu, it reappears.

Mail Note properties

The Mail Note properties sheet contains the same properties as the Mailing options sheet described earlier. It also contains the following properties:

Subject
Specifies the topic of the message, as well as the name of the mail note icon. It appears on the icon, in the title area of the mail note, and in filing windows.

In Reply to
Specifies the names(s) of the individual(s) to whom the message is responding.

Retrieving mail

1. Select the inbasket and press <OPEN>.

2. Select [New Mail].

   Mail retrieval is a background process, allowing you to complete other operations while the inbasket is retrieving new mail. You are notified when the new mail is retrieved. All new mail listed in the inbasket window displays an asterisk (*) next to the icon until it is opened.

Reading mail

1. Select the desired object.

2. Press open.

   You can read only one object in an inbasket or mail folder at a time. Subsequent objects are read by closing the opened object, and selecting and opening the next object.

3. When a mailed object is opened in the Inbasket or Mail Folder window, select [Show Next] or [Show Previous] to read mail in sequential order (in the order they appear in the inbasket or mail folder).

Note: If a folder is opened within several other folders and/or in the inbasket, [Show Next] and [Show Previous] apply to the innermost folder, unlike [Answer], [Forward], and [Discard] which deletes the root level icon in the folder or inbasket.

Comment: If the mailed object is not in Xerox ViewPoint format, only the cover sheet attached to the object displays. The window appears gray until the icon is converted to the appropriate format using the converter icon.

Deleting mail

1. Select the object.
2. Press <DELETE> or select [Discard]

   Selecting [Discard] in the window menu deletes the object and opens the next piece of mail. Pressing <DELETE> deletes the selected object. <DELETE> is commonly used to delete a selection that contains more than one object. Both <DELETE> and [Discard] may require a confirmation in the message area on the desktop.

Note: If [Never] is selected in the Wastebasket property sheet, the object will automatically be placed in the wastebasket. Objects remain in the wastebasket until [Purge Wastebasket] is selected in the desktop auxiliary menu. For information on the wastebasket facility, refer to the *General User Reference* volume of the *VP Series Reference Library*.

Answering mail

1. Select the mail icon to be answered.
2. Select [Answer].

   A copy of an opened mail note appears on the desktop. The following fields are automatically filled in with information from the original message: Subject, In Reply To, From, To, and Copies. You can add or delete recipients as needed.

3. Enter the message in the Note field, making changes to the filled in areas if necessary.

4. Close the mail note and copy it to the outbasket or select [Send] in the window menu.

5. If copied to an outbasket and the Mailing option sheet displays, select [Start]. If [Display Options] is not selected on the Outbasket property sheet, the message is sent immediately, using the information in the mail note.

Forwarding mail

1. Select the object you want to forward.

2. Select [Forward] in the inbasket or Mail Folder window.

   An opened copy of the entire message appears on the desktop. (If the message selected is not a 6085/8010 object, selecting [Forward] places a copy of the object with the name "forwarding: object name" on the desktop unopened. The object must be copied or moved to an outbasket to be mailed.)

3. Enter the information in the appropriate fields, along with a message in the Note field, if desired.

4. Close the object and move or copy it to the outbasket. If the object is a mail note, select [Send] in the window menu to automatically send the mail note.

5. If the option sheet is displayed, select [Start].

Printing mail

1. Select the object in the inbasket or Mail Folder window.
2. Press <MOVE> or <COPY>, as appropriate, and select the desired Printer icon.
3. If the Printer option sheet appears, select the appropriate options and then select [Start].

Sending mail

1. Select the object.
2. Press <MOVE> or <COPY>, as appropriate, and then select an outbasket.
3. If the Mailing options sheet appears, fill it out and then select [Start]. If the option sheet does not display, the mail is sent as designated on the cover sheet(s).

Notes: If [Display Options] is selected in the Outbasket property sheet, the Mailing options sheet appears whenever a data icon is moved or copied to the outbasket icon; otherwise, the Mailing options sheet is not displayed.

While the outbasket contents are being sent to the Mail Service, you cannot do other operations.

If more than one object is moved or copied to the outbasket at a time, all objects are sent to those recipients listed on the Mailing options sheet.

Using cover sheets to mail objects

1. Select [Show Cover Sheet] in the object's window auxiliary menu.
2. Enter the appropriate information in the cover sheet. The name entered into the subject field becomes the mail note subject as well as the icon's label.
3. Close the object, and move or copy it to the outbasket. If the Mailing options sheet appears, select [Start]. If the option sheet is not displayed, the mail is sent as designated on the cover sheet.

Using mail notes

Mail notes, used strictly for sending messages with 8000 characters or less, contain the same fields as a cover sheet.

- To obtain a mail note from the inbasket:

  1. Select the inbasket, press <OPEN>.
  2. Select [New Form] (or select [Answer] if you are answering a previously mailed icon). An opened mail note appears on the desktop.
  3. Enter the information in the appropriate boxes.
  4. Select [Send] in the window header to automatically send the mail note. The mail note can also be sent by closing and moving/copying it to the outbasket.

- To obtain a mail note from the Directory icon:
  1. Open the Directory icon, the Workstation divider, and the Basic Icons Divider.
  2. Copy the Blank Mail Note icon to the desktop.
- To use an existing mail note:
  1. Select [Clear] in the window header to automatically clear the contents of the mail note.

Setting up mail folders on the desktop

1. Open the Directory icon to display the list of dividers.
2. Open the Workstation divider and the Basic Icons divider.
3. Copy the mail folder to the desktop.

Storing mail in mail folders

1. Copy a mail folder from the Workstation divider in the directory.
2. Move your mail into the folder.
3. Name the folder to represent the stored mail.

Moving mail

1. Select the icon in the inbasket window.
2. Press <MOVE> or <COPY>, as appropriate, and place the object in the desired location, either on the desktop or in another container.

Notes: Copying leaves a copy of the object in the inbasket. Moving it removes the object from the inbasket.

Objects cannot be moved or copied into the inbasket.

Exchanging non-6085/8010 icons as mail

Although non-6085/8010 users cannot read 6085 and 8010 objects in ViewPoint format, it is possible to exchange objects with non-6085 users. You use the Converter icon to process non-6085 formats into ViewPoint format, and vice versa.

You must convert objects to the appropriate format before sending them to non-6085 users. Mail received from non-6085/8010 users can be opened and the cover sheet displayed without being converted. To read the contents of the mail object, however, it must be converted to ViewPoint format.

Converting non-6085/8010 icons

1. Move or copy the icon to the Converter icon.
2. Select the appropriate destination type. Once a document is converted, a copy of the document in 6085 format appears on the desktop.

The *File Conversions Reference* volume of the *VP Series Reference Library* contains detailed information on converting non-6085/8010 icons.

Sending mail to 6085/8010 and non-6085/8010 users

1. Unless the contents of the message dictates otherwise (the need for graphics, multiple fonts, or large documents), mail note icons should be used for sending messages to all users who have access to electronic mail. This allows the 6085/8010 user to communicate with other networked users, including networked 860s, 820s, IBM PCs, and users of ITS.

2. If you need to send objects to both non-6085/8010 users and 6085/8010 users, convert the objects to the non-6085/8010 users format; 6085/8010 recipients can then convert the objects back to ViewPoint format.

Part 3

VP Long Document Options: Shared Books

7. Overview of Shared Books

The Shared Books application, which is part of *VP Long Document Options,* is a publication management tool that allows several users to share a book. A shared book includes the features you expect in a book, such as pagination across document boundaries and generating one index for several related documents. It has additional features as well.

A shared book is modeled after the "job docket" used by publishing houses. A job docket is a large envelope that holds all the necessary material for a project: a draft of the text, illustrations, correspondence, and other information needed to produce a publication.

A shared book is like the job docket envelope and can hold all the information needed to prepare a multiple-part document, such as this reference volume.

An extension of the book feature of Document Editor, a shared book:

- Allows a group of people (writers, editors, artists, and so on) to share documents
- Holds many kinds of ViewPoint objects (documents, graphics, and files)
- Prevents two users from editing the same document at the same time
- Keeps track of the current revision of the documents it contains and always provides the most recent version

- Stores older revisions of the documents, which are available if needed
- Allows pagination, as well as table of contents and index generation, across document boundaries
- Excludes all designated supporting materials from operations that affect the entire publication
- Provides access control for the shared book and the documents it contains

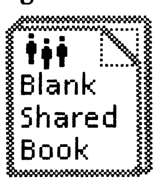
Key concepts of Shared Books

Be sure you understand the key concepts in this section before you use Shared Books.

Blank Shared Book icon

The Blank Shared Book icon (Figure 7-1) looks like the Book icon with three people on the cover.

Figure 7-1 **Blank Shared Book icon**



The "real" remote shared book

The "real" shared book is stored in a remote file drawer. You retrieve information from the remote shared book, work on it on your own desktop, and then store information back into the remote shared book. This information is immediately available to every other user.

Since the remote shared book is a "multi-user object," it only permits Shared Book operations (activities that you perform on the remote shared book) to occur one at a time. For example, two users cannot store information simultaneously. One of them "gets control" of the shared book while the other one waits until the shared book is free again.

Usually the wait is short because most operations complete quickly. There are times, however, when a shared book can be "in use" for a long time. For example, paginating a shared book with many large *entries* (ViewPoint objects stored in the shared book) might take several minutes.

There are other times, though, when an extended "in use" message indicates a problem that prevents all the users from performing any operation.

You can easily find out whether the "in use" message is for a normal, lengthy operation or a problem. The message includes the name of the person who has control of the shared book and the length of time the shared book has been in use. Consult this user before assuming that a problem exists.

The local copy of the shared book

The shared book which appears on your desktop when you create a new shared book, or retrieve an existing one, is your *local copy* of the shared book.

The local copy contains information that you retrieve from the remote shared book. For example, when you open an entry for the first time, it is copied to your workstation and stored in your local copy of the shared book. A small symbol appears in the Shared Book window to indicate the entry has a local copy.

Every time you open the entry (or perform some other Shared Book operation on it), the Shared Books application provides you with the most recent revision of the entry from the remote shared book. Your local copy of an entry is *up-to-date* when it is the most recent revision. When an entry is *out-of-date*, you cannot perform Shared Book operations on it until it is updated. For example, if you try to open an out-of-date entry, Shared Books will update it, and ask you to try again.

When you edit an entry, you edit your local copy of it. Then, you store your changes to the remote shared book by saving the entry. This entry now replaces the old one in the Shared Book window. Another user can open the entry and see your changes.

The changes you make to a local copy of the shared book do not affect the other users or the remote shared book until you save your changes.

Locks

You *lock* entries to prevent another user from interfering with your work. An entry must be locked before it can be saved to the remote shared book. Only the person who has it locked can save it. When the entry is saved to the remote shared book, the lock is released, and then, another user can lock the entry.

Shared Books uses another lock to prevent simultaneous operations. For example, when you save an entry, the entire shared book is locked until the operation completes. No one else can perform a Shared Book operation until the shared book is released.

The Librarian data base

The *Librarian data base* is a record-keeping system that keeps track of the lock.

Each shared book, and each entry within it, has a *libject* stored in the Librarian data base. The libject works like a library card. When you lock an entry, Shared Books fills out the libject and "checks it out" for you. If another user tries to lock that entry, Shared Books looks at the libject, notices that it is already checked out, and prevents that user from locking the entry. When you unlock the entry, Shared Books "checks in" the libject, making the entry available again.

Coordination of activities

Activities which affect the remote shared book must be coordinated to prevent loss of information. For example, you should never delete the shared book from the remote file drawer without the knowledge and consent of the other users. Other activities, such as managing access lists and recovering a damaged shared book, must be done on one desktop with the cooperation of all the users.

Detectable failure

Occasionally, a system failure occurs: your workstation malfunctions or a power outage causes a failure of Network Services. If this should happen during a Shared Book operation, the shared book may become "damaged" and is no longer usable.

This damaged condition means that information was lost when the system failure occurred. It protects you from the possibility of using erroneous data and forces you to recover the shared book to a known state.

Alternate views of the shared book

There are three different ways to look at a shared book: the folder of remote files, the Shared Book window, and the folder of local files. The Shared Book window is your usual view of the shared book. Sometimes, however, it may be necessary to use the folders of local or remote files to view the shared book.

The folder of remote files

The folder of remote files contains a list of all the versions of all the entries in the remote shared book. This is a complete view of the contents of the remote shared book. You use the folder of remote files to retrieve an earlier revision of an entry, to continue work when the Librarian Service is temporarily unavailable, and to recover entries if the shared book becomes damaged.

The folder of remote files is available to all users of the shared book. Everyone sees exactly the same entries listed in the folder window.

The Shared Book window

The Shared Book window lists one version (the most recent one) of each entry in the remote shared book. This is a partial view of the contents of the remote shared book. Under normal circumstances, you use the Shared Book window to look at the contents of a shared book.

The Shared Book window provides information about the entries. You can find out which entries are locked, which entries have copies on your workstation, and whether an entry you have edited has been saved to the remote shared book.

The Shared Book window also provides commands to manipulate the entries. You use these commands to lock an entry, to open its Entry Details option sheet, and to save the entry to the remote shared book and unlock it.

The Shared Book window is available to all the users of the shared book. Everyone sees the same information with only minor differences. For example, the color of the lock (black or gray) depends on whether you (black lock) or someone else (gray lock) has locked the entry.

The folder of local files

The folder of local files lists the copies of entries that are stored on your workstation. When you open an entry listed in the Shared Book window, it is copied to your workstation from the remote shared book, and stored in your folder of local files. You use the folder of local files to delete local copies of entries that you no longer want on your workstation, to continue work when the File Service or Librarian Service is temporarily unavailable, and to recover entries if the shared book becomes damaged.

Your folder of local files is unique to your workstation. It is available to you, but not to the other users.

Table 7-1 shows how a shared book looks to two different users.

There are five entries in the shared book: A, B, C, D, and E. Entry A has three versions, A.1, A.2, and A.3; entry C has two versions, C.1 and C.2.

Both users have the same entries in their respective Shared Book windows, A.3, B.1, C.2, D.1, and E.1. Two of the entries are locked by User A (A.3 and D.1) and one is locked by User B (B.1).

User A has edited entry D.1, but has not saved it to the remote shared book, so User A sees this entry listed in the Shared Book window with a + sign attached to it. The + sign on entry D.1

does not appear in User B's Shared Book window because User B does not have a direct connection to User A's workstation. User B can only get information from the remote shared book, and there, the entry is still D.1.

When User A saves D.1+ to the remote shared book, a new version of entry D (D.2) will appear in the remote shared book. Then, when both user's Shared Book windows are redisplayed, entry D.2 will replace D.1.

Table 7-1 **Alternate views of the shared book**

User A		**Folder of remote files (remote shared book)**	**User B**	
Folder of local files	**Shared Book window**		**Shared Book window**	**Folder of local files**
		A.1		
		A.2		
A.3	*A.3	A.3	*A.3	
	‡B.1	B.1	‡B.1+	B.1+
		C.1		
	C.2	C.2	C.2	C.2
D.1+	*D.1+	D.1	*D.1	D.1
	E.1	E.1	E.1	

* Locked by User A

‡ Locked by User B

\+ Edited, but not yet saved to the remote shared book

8. Using a shared book

A typical project using a shared book might consist of the following phases:

- Creating the shared book and adding ViewPoint objects to it
- Revising and editing
- Creating an index and a table of contents
- Printing the finished document

Key concepts of using a shared book

When Shared Books is loaded and running in your application loader, the Shared Book icon appears in the Basic Icons divider which is in the Workstation divider of the directory.

Access rights

Your ability to create a shared book depends on your *access rights* to the file drawer where it is to be stored.

Since Shared Books extends access rights to objects stored in a file drawer, your ability to use an existing shared book depends on both your access rights to the file drawer and your access rights to the shared book and its contents.

In general, you need read, write, add, and remove access rights to create a shared book and to perform Shared Book operations on the remote shared book.

If you do not know what your access rights to the file drawer are, do one of the following:

- Open the property sheet of the file drawer and look for your name, or the name of your user group, under "Access Rights: User." Your access rights will be listed following your name.
- Consult your project leader or System Administrator.

If you do not know what your access rights to the shared book are, open the Shared Book properties sheet and check the access list, or ask your project leader.

If you need to obtain appropriate access rights to the file drawer, consult your project leader or System Administrator.

If you need to obtain appropriate access rights to the shared book, consult your project leader.

If you do not need to restrict access to the shared book, do not do so. Refer to the section titled "Access control" in Chapter 9 for more information about access rights and when to apply them to a shared book.

Your attempt to perform a Shared Book operation will fail if you do not have appropriate access rights to the shared book. If you suddenly find that you can no longer perform Shared Book operations that affect the remote shared book and there is no obvious reason why (for example, the shared book is not in use or the Librarian Service is not offline), you should immediately find out what your access rights are. Ask another user to open the Shared Book properties sheet and the Entry Details option sheets and check the access lists. Your access rights could have been changed or even removed.

Librarian Service

The *Librarian Service* which contains the Librarian data base you use with Shared Books must be available to you on your network. Consult your project leader or System Administrator if you are not sure you have access to the Librarian data base you need.

Unique name for the shared book

Each shared book must be uniquely identified. It must have a unique name or be located in a different file drawer from another shared book with the same name. If you try to create a new shared book using the name of an existing shared book, the Shared Books application will retrieve the existing shared book instead.

Always use the exact name of the shared book when it was created to retrieve a local copy. The spelling, punctuation, and spacing must be identical. If the name is even slightly different, Shared Books will try to create a new shared book instead of retrieving the existing one.

Your local copy of the shared book

You need a copy of the shared book on your workstation. This copy is your *local copy*, and is sometimes referred to as an *instance* of the shared book. You use this copy to access the remote shared book. There are two ways to retrieve a copy of a shared book:

- Fill in the boxes of the Blank Shared Book properties sheet (Figure 8-1), and a copy of the shared book is retrieved to your desktop. When you open the Shared Book window (Figure 8-3), a list of the most recent revisions of the entries appears. An entry is not actually copied to your desktop until you open it. At that time, a tiny workstation icon appears in the Shared Book window, indicating that you now have a local copy of that entry.

- Open the remote file drawer in which the shared book is stored, and copy the shared book directly to your desktop. All the versions of all the entries that the shared book contains are copied. The Shared Book window still shows a list of the most recent versions of the entries, but all of them now have tiny workstation icons. The folder of local files contains every entry that was copied. A large shared book can take up many disk pages; be sure you have enough free disk pages available before you copy a shared book from the remote file drawer.

You need enough disk pages on your workstation to hold the shared book. **Total Disk Pages** on the Shared Book properties sheet as shown in Figure 8-1 tells you how many disk pages the local copy of the shared book currently occupies. To free up space on your workstation, you can delete from the folder of local files the copies of those entries that you do not want. This will not affect the remote shared book.

Do not delete entries from the Shared Book window; this <u>will</u> affect the remote shared book. Refer to "Using the folders of local and remote files" in Chapter 9, and "Deleting an entry from the remote shared book" later in this chapter, for information and procedures.

Entries

Once you have created a shared book, you will want to add entries to it. An entry is a ViewPoint object that is stored in a shared book: a document, a spreadsheet, a bitmap canvas, a mail note, and so on.

To add an entry, you copy or move an object into the Shared Book window. The window contains a list of the entries in the shared book and information about them. You perform operations on the entries from inside the window.

An entry that is added to your local copy of the shared book is automatically added to the remote shared book. It is not automatically added to local copies of the shared book on the desktops of the other users. However, the next time the other users perform a Shared Book operation on their local copies, their Shared Book windows will be updated to reflect the new entry.

You can move entries around inside the Shared Book window, replace existing entries with different ones using the same name, and change the name of an entry.

Most ViewPoint objects can be entries in a shared book. Only two kinds of objects are not allowed in a shared book:

- Containers
- Reference icons

If you are not sure that the object is permitted in the shared book, try to add it. Shared Books will not let you add an object that is not permitted.

Size limitations

While there are no explicit limitations imposed by Shared Books on the size of a shared book or the size of an entry, there are two practical limitations. The most important limitation is the free space available on the File Service. The other limitation has to do with the number of Shared Book disk pages available for storing information about the shared book.

Free space on the File Service

Shared Books requires enough free space on the File Service to store the shared book, which can never exceed the space available. The application also requires some free "working" space to handle normal Shared Book operations. The shared book may become unusable if there is not enough free space to store it, or not enough working space available during a Shared Book operation.

The amount of working space required by normal Shared Books operations varies depending on the size of the shared book. A shared book with many large entries requires more free space than a shared book with a few small entries. You should have a minimum of 250 free disk pages, and you may need as many as 1000 free disk pages. As a general rule, the larger the number of Shared Book Pages, the more free space you will need on the File Service.

The **Size** option in the File Drawer window tells you how large the shared book is.

If other clients of the File Service use up the available free space without your knowledge and the shared book becomes unusable (damaged), you must recover it.

If you know that the File Service is running short of space, you can free up space on the file server, or, if necessary, relocate the shared book to a different File Service. Refer to "Relocating the shared book to a new file server" in Chapter 9 for this procedure.

Shared Book Pages

The number of Shared Book Pages is the other limit on the size of the shared book. The Shared Book properties sheet contains an item called **Shared Book Pages** as shown in Figure 8-1. These are the disk pages that are used to store information about the shared book and its entries, such as the name and the access list.

There are 128 Shared Book Pages available for <u>each</u> shared book. When all 128 disk pages are filled up, you cannot add any more entries to the shared book.

Only the number of entries and the length of their names and the length of their access lists affect the Shared Book Pages. (The size of the entries, that is the number of disk pages the entries themselves occupy, is not a factor.) Shorter names and access lists allow you to place more entries in the shared book.

Ordinarily you would never fill up the Shared Book Pages. For one thing, when you have added so many entries that the Shared Book Pages begin to fill up, performance of the shared book may slow down. If this should happen, you should split the shared book into two or more smaller shared books.

The entry lock

Before you edit an entry, you lock it. The lock gives you the use of that entry until you unlock it.

While you have an entry locked, other users:

- Can open the entry and read it, copy it to the desktop, and delete the local copy
- Cannot save edits to the remote shared book or delete the entry from the remote shared book

Cooperative use of the entry lock

Everyone who uses a shared book should be considerate of the other users and not leave entries locked unnecessarily.

While it is possible to continue working even when the entry you want to use is locked by someone else, it is inconvenient. You may not be able to work directly in the shared book and you may have to merge your changes with those of the person who has the entry locked.

Always save and unlock entries promptly when you are finished with them, and remember to leave entries unlocked whenever you are away from work for an extended period of time (for example, when you are on vacation).

All operations that affect the entire (closed) shared book leave entries locked when the operation is completed. The user who initiates the operation has to unlock the entries to make them available to other users. For example, if you paginate the entire shared book, the body entries are automatically locked for you and left locked after pagination is finished.

Access rights and the entry lock

Some users' access rights to the shared book and the file drawer in which it is stored may be limited to read-only access. If your access rights are limited in this way, you can perform certain Shared Book operations that do not change the remote shared book. For example, you can lock an entry, open it, and edit your local copy of the entry. However, you cannot save your changes to the remote shared book.

Do not lock entries if your access rights are limited to read only. Locking them can interfere with the work of users who have broader access rights. If you should inadvertently lock an entry, refer to the section titled "Unlocking entries" later in this chapter for the procedure to unlock it.

Two ways to lock an entry

You can use the [Lock] command in the header of the Shared Book window, or you can use the [Lock] command in the Entry Details option sheet. If you use the Entry Details option sheet, you can also leave a note and a reason for locking the entry. If you use the [Lock] command in the Shared Book window header, you can always open the Entry Details option sheet later and add a note or reason.

If two or more people try to lock the same entry at the same time, only one of them will "get control." The others will see messages that say the entry is already locked.

You lock the entry before you open it.

You can set the automatic edit mode in the User Profile so that an entry will be in Edit mode when you open it. However, you still must lock it first. Refer to the *General User Reference* volume for information about the User Profile.

Unofficial entries

While the lock prevents you from editing a ViewPoint document that is not locked or is locked by another user, other entries, such as mail notes and bitmap canvases, can be edited when they are unlocked. You cannot save them to the remote shared book, however. Editing an entry without locking it creates an "unofficial" entry (sometimes referred to as an "illegitimate" entry).

The unofficial entry remains in your folder of local files and causes an error condition when you perform a Shared Book operation. The unofficial entry must be removed before you can perform the operation again. For example, if you paginate a closed shared book that contains an unofficial entry, the operation is canceled when the Shared Books application encounters the unofficial entry. You have to determine which entry is unofficial and then remove it from your local copy of the shared book before you paginate again.

You also create unofficial entries when you use more than one local copy of the shared book. Suppose you have two local copies of the same shared book on your desktop. One day you edit an entry in copy A, and save it to the remote shared book. The next day you inadvertently edit the same entry in copy B, but do not save it to the remote shared book. The entry in copy B is now an unofficial entry.

An unofficial entry is a local copy of an entry that meets the following two conditions:

- It is not locked by you (although it may be locked by someone else).
- It has a create date (displayed in the folder of local files) that is more recent than the create date of the "official" entry (displayed in the Shared Book window).

Unofficial entries can occur if you:

- Edit an unlocked entry.
- Use two (or more) local copies of the same shared book on your desktop on one workstation, or you use two or more local copies of the same shared book on your desktops on different workstations.

You can easily avoid the problem of unofficial entries by following these guidelines:

- Always <u>lock</u> an entry before editing it.
- Never use more than <u>one local copy</u> of a shared book at any time, on any workstation.

Editing an entry on the desktop

It is possible to copy the entry to your desktop without locking it, edit it there, and then copy it back into the shared book. If the entry is not locked, another user might edit it at the same time. When you copy your changes back into the shared book, they would replace the changes made by the other user without either of you knowing about it; or you might not be able to copy your changes back into the shared book because another user still has the entry locked.

If you edit an entry on your desktop, rather than inside the Shared Book window, <u>always</u> lock it first and leave it locked until you copy your changes back into the shared book. This is almost as safe as editing the entry within the Shared Book window.

Methods for deleting entries and shared books

You can delete an entry from the remote shared book, or you can delete just your local copy of the entry. Similarly you can delete the remote shared book, or just your local copy of the shared book.

When you delete an entry from the remote shared book, it is deleted from your local copy of the shared book as well as the remote shared book. It is not deleted from the local copies of the shared book that are on the workstations of the other users. However, the other users cannot open the entry because it is no longer displayed in the Shared Book window. In order to remove the entry completely, it must be deleted from the local copy (the folder of local files) of the shared book of all users.

To delete your local copy of an entry from the folder of local files, see "Using the folders of local and remote files" in Chapter 9 for information and procedures.

When you delete the remote shared book, it is deleted from your workstation and the file drawer. The local copies are not deleted from the workstations of the other users. In order to remove the shared book completely, it must be deleted from the desktops of all users.

You can delete your local copy of the shared book from your desktop without affecting the remote shared book. You may wish to do this to free up disk space.

Methods for sending a shared book to someone else

The two ways you can give a shared book to someone who does not have a local copy are described below. Of course, the recipient must have appropriate access rights to the file drawer and the shared book and its contents in order to use the shared book.

You can give the recipient the name of the shared book and its remote location so that the recipient can retrieve a copy.

You can mail a shared book the same way you mail other ViewPoint objects. However, you should mail an "empty" copy of the shared book, that is, a shared book that contains no local copies of the entries. There are two reasons:

- All local copies of entries will be mailed along with the shared book. This means that an older version of an entry could be mailed along with the current one. Also, the additional copies of the entries could put a heavy burden on the mail servers and swamp the recipient's workstation.
- Access rights only apply to the remote shared book, not to your local copy. If you mail a shared book containing local copies of the entries to someone who does not have access rights to some of these entries, that person could read them anyway. The person cannot read these entries when you mail an empty copy of the shared book.

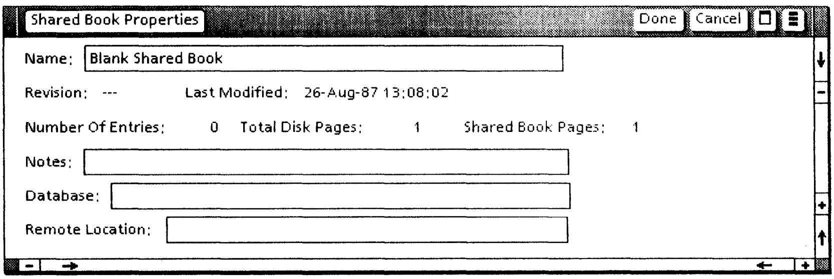
You cannot use a Reference icon to point to a remote shared book. Although you can fill out a Reference icon that will turn into an icon that looks exactly like a shared book, it cannot make the necessary connection to the Librarian Service.

This icon will not behave like a shared book: It will not open, and the shared book pop-up menu will not display. When you open the property sheet, the Reference icon property sheet displays (not the Shared Book properties sheet).

The Blank Shared Book properties sheet

Associated with each blank shared book is a property sheet (Figure 8-1).

Figure 8-1 **Blank Shared Book properties sheet**



The Blank Shared Book properties sheet contains the following information:

Name
The name of the shared book. This name appears on the Shared Book icon and as the title of the Shared Book window.

Revision
The current revision number of the shared book. Not used until a shared book is created.

Last Modified
The date of the latest revision of the shared book. Not used until a shared book is created.

Number of entries
The number of entries the shared book contains.

Total Disk Pages
The size of the shared book in disk pages. The sum of the sizes of the local entries plus the Shared Book Pages.

Shared Book Pages
The number of disk pages used in keeping track of the name and access list of each entry in the shared book. The maximum is 128.

Notes
Information about the shared book entered by users.

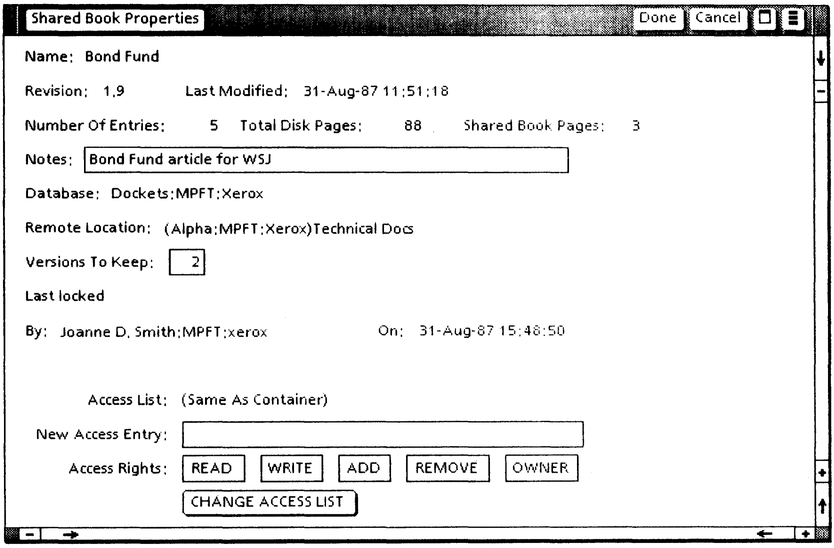
Database
The fully qualified name of the Librarian data base. The data base name can be automatically filled in for you if you add the [Librarian] option to your User Profile.

Remote Location
The pathname of the file drawer, and folders, if any, where the shared book is to be stored.

The Shared Book properties sheet

The new shared book has a property sheet (Figure 8-2) that you use to set the number of revisions of each entry the shared book will keep, to make notations about the shared book, and to change access rights (of individuals or groups of users) to the shared book.

Figure 8-2 **Shared Book properties sheet**



The Shared Book properties sheet contains the same information as the Blank Shared Book properties sheet and the following additional information:

Revision

The current revision number of the shared book.

The number to the left of the period is the major revision number. Each time you save an entry using [Save Major Revision], 1 is added to the major revision number and the minor revision number is changed to 0.

The number to the right of the period is the minor revision number. Each time you save an entry using [Save Minor Revision], 1 is added to the minor revision number. (The major revision number is not changed.)

Versions to Keep

The number of revisions of each entry to be kept by the shared book. The default is [2], which means the shared book keeps the current version of an entry and the most recent previous version. If you want to keep the most recent version and the 3 previous versions, change **Versions to Keep** to [4].

Last locked

By

The name of the person who opened the property sheet.

On

The date and time the property sheet was opened.

Access List

The names of the individuals or groups of users who have access rights to the shared book. The default is (Same As Container). The access list of the file drawer is the default access list of the shared book.

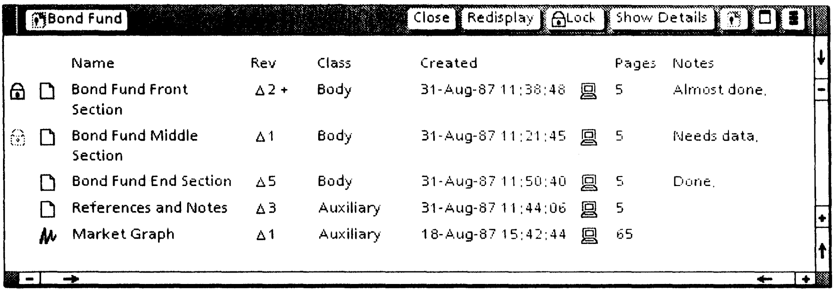
The following items are used to change the access list or to change access rights. Refer to the sections titled "Access control" and "Changing the access list" in Chapter 9 for more information and procedures.

New Access Entry
Access Rights
[Change Access List]

The Shared Book window

Associated with each shared book is the Shared Book window (Figure 8-3).

Figure 8-3 **Shared Book window**



The Shared Book window contains the following information:

[Lock]
Locks the entry that you have selected.

A tiny lock icon appears in the first column of the Shared Book window when the entry is locked. A heavy black icon means the entry is locked by you. A light gray lock means the entry is locked by another user.

A heavy black question mark appears in place of the lock icon whenever the Librarian data base is unavailable.

[Show Details]
Opens the Entry Details option sheet (Figures 8-6, 8-7, and 8-8).

Shared book auxiliary menu
The shared book auxiliary menu is shown in Figure 8-4. The shared book auxiliary menu commands are illustrated in Figure 8-5.

Figure 8-4 **Shared book auxiliary menu in the Shared Book window header**

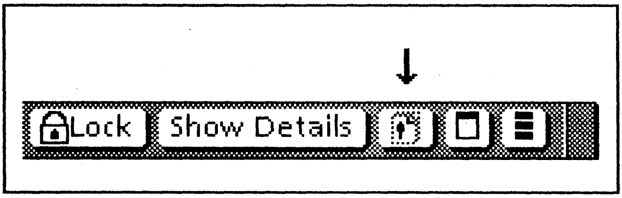
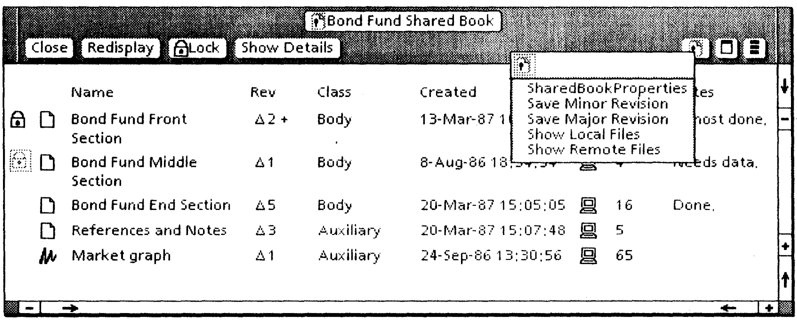


Figure 8-5 **Shared Book window with shared book auxiliary menu**



[Shared Book Properties]
Displays the Shared Book properties sheet.

[Save Minor Revision]
Saves an entry to the remote shared book, unlocks the entry, and updates the minor revision number, which appears on the Shared Book properties sheet.

For example, after you edit an entry, you select [Save Minor Revision] to save it. The revision number of the shared book changes from 1.0 to 1.1. Editing and saving that entry again, or editing and saving any other entry using [Save Minor Revision], changes the revision number to 1.2.

[Save Major Revision]
Saves an entry to the remote shared book, unlocks the entry, and updates the major revision number, which appears on the Shared Book properties sheet.

For example, after you edit an entry, you select [Save Major Revision] to save it. The revision number of the shared book changes 1.2 to 2.0.

[Show Local Files]
Displays the folder of local files.

[Show Remote Files]
Displays the folder of remote files.

Name
The name of the entry. This name appears in the entry header.

Rev
The current revision number of the entry. Each time the entry is saved to the remote shared book, 1 is added to this number. The small triangle means "change," for example, "change 1" or "change 2." This revision number also appears on the Entry Details option sheet.

Class
Classification of the entry. See the Entry Details option sheet, below, for more information.

Created
The date and time of the latest revision of the entry that was saved ("created") to the remote shared book.

The tiny workstation icon appears when the entry has a local copy on the workstation.

Pages
The size of the entry in disk pages.

Notes

Displays the contents of the **Notes** box of the Entry Details option sheet.

Three question marks appear, instead of the notes, when the Librarian data base is unavailable.

The Entry Details option sheet

After an entry has been added to the shared book, you can change some of its options using the Entry Details option sheet. You can change these options only when the entry is locked by you.

You use the Entry Details option sheet to lock the entry, to change the class of the entry, to leave notes about the entry and the reason it is locked, to cancel changes to the entry or the Entry Details option sheet, and to change the access list.

The Entry Details option sheet (Figures 8-6, 8-7, and 8-8) appears in one of three versions, depending on whether or not the entry is locked and who locked it.

Figure 8-6 Entry Details option sheet for an entry that is locked by you

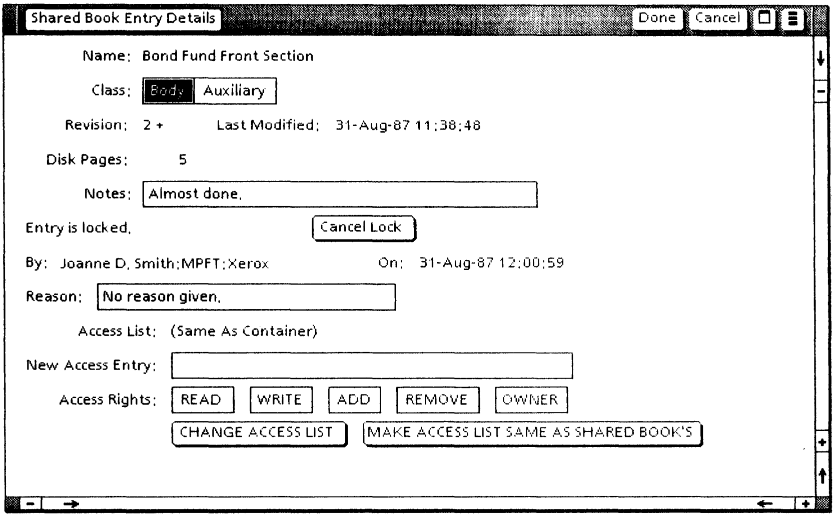


Figure 8-7 Entry Details option sheet for an entry that is not locked

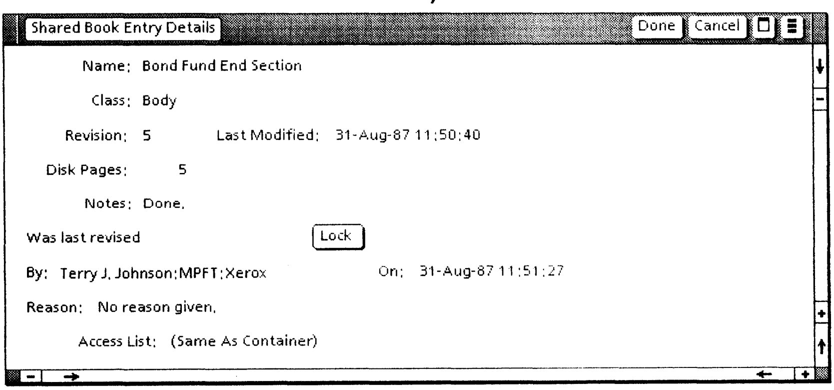
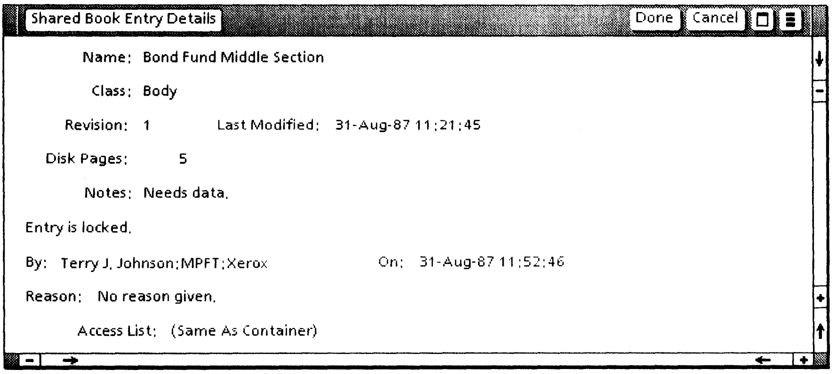


Figure 8-8 **Entry Details option sheet for an entry locked by another user**



The Entry Details option sheet contains the following information:

Name

The name of the entry. This name appears in the entry header.

Class

The classification of the entry. The default is [Body].

[Body]

Usually text and illustrations, front matter, and back matter that you want to appear in the final publication.

[Auxiliary]

Usually supporting material that should not appear in the final publication.

Revision

The latest revision number of the entry. Each time the entry is saved to the remote shared book, 1 is added to this number, which also appears in the Shared Book window.

Last Modified

The date and time of the last revision.

Disk Pages

The size of the entry in disk pages.

Notes

Information about the entry, entered by the user. This field is editable only when the entry is locked by you.

[Lock] / [Cancel Lock]

Command to lock and cancel the lock on an entry.

[Lock]

Locks the entry. Appears only when the entry is not locked.

[Cancel Lock]

Cancels changes to the entry and the Entry Details option sheet. Appears only when the entry is locked by you.

Note: Neither [Lock] nor [Cancel Lock] appear when the entry is locked by another user.

Entry is locked

"Entry is locked" appears when the entry is locked by you or by another user.

Was last revised

"Was last revised" appears whenever the entry is not locked.

By

The name of the last person to have locked the entry.

On

The date and time the entry was last locked.

Reason

Information about why the entry was locked, entered by the user. This box is editable only when the entry is locked by you.

Access List

The names of the individuals or groups of users who have access rights to the entry. The default is (Same As Container). The access list of the shared book is the default access list of the entry.

The following items are used to change the access list or to change access rights. These items appear only when the entry is locked by you. Refer to the sections titled "Access control" and "Changing the access list" in Chapter 9 for more information and procedures.

New Access Entry
Access Rights
[Change Access List]
[Make Access List Same As Shared Book's]

Creating a shared book

You must have appropriate access rights to the file drawer to create a new shared book, to retrieve an existing shared book, and to use the shared book. You must also have appropriate access rights to the shared book and its entries. Refer to the sections titled "Access control" and "Changing the access list" in Chapter 9 for information and procedures.

1. Copy the Blank Shared Book icon from the Basic Icons divider to your desktop.

2. Select the icon and open the Blank Shared Book properties sheet.

3. Type the name of the shared book in the **Name** box.

   Note: "Blank Shared Book" is a reserved name and <u>must</u> be changed. The name cannot exceed 100 characters.

   Refer to Figure 8-9 for an example of a properly filled in Shared Book properties sheet.

4. Type any notation you wish in the **Notes** box. Notes are optional and can be changed later.

5. Type the fully qualified name of the Librarian data base into the **Database** box, using the following format:

   DataBaseName:Domain:Organization

   Consult your System Administrator for the fully qualified name of the appropriate Librarian data base. Consult your project leader for the pathname of the file drawer.

   The information in the **Database** box can be automatically filled in from the [Librarian] section of the User Profile. See "Setting the

Librarian User Profile option" later in this chapter for information and procedures.

6. Type the pathname of the remote location (file drawer, and folders, if any) in the **Remote Location** box, using either of the following formats:

   (FileService:Domain:Organization)File Drawer

   (FileService:Domain:Organization)File Drawer/Folder

   Do not use any other delimiters, such as square brackets ([ ]) or angle brackets (< >), in this box.

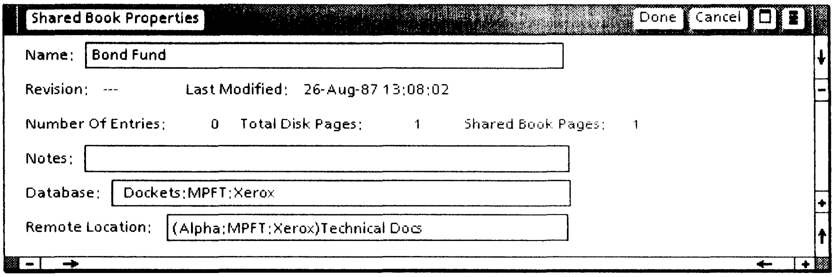
   Folders are optional. You can use several levels of folders, but they must always be separated by slashes.

   Do not use any of the following characters in the names of file drawers or folders: slash (/), apostrophe ('), asterisk (*), or pound sign (#).

   If you enter the name of a folder that does not exist in the file drawer, Shared Books will create the folder and place the shared book in it.

   The new shared book will be given the revision number 1.0.

Figure 8-9 **Shared Book properties sheet filled in to create a shared book**



7. Select [Done].

   If you get an error message that includes the words "insufficient access rights," you may have used an incorrect remote location. Check the spelling and pathname, correct as necessary, and repeat steps 6 through 8.

8. Select [No] if the prompt in the message area says "The Shared Book already exists on the File Server. Confirm to create a local instance of it." You have used the name of an existing shared book. Choose another name for your shared book, and repeat steps 3, 7, and 8.

   Select [Yes] when prompted to "Confirm to create a new Shared Book."

Note: If you should experience a workstation failure (for whatever reason) while Shared Books is in the process of creating a new shared book, the resulting shared book may not be usable. The remote shared book may not exist, or if it does exist, an attempt to retrieve a new copy of it may give you an "internalization error" message.

If this should happen, you will have to create the shared book again: First, delete the unusable shared book from your desktop; second, delete the remote shared book from the file drawer; third, create the shared book again.

Procedures for deleting the shared book from your desktop and deleting the remote shared book are explained in the following sections of this chapter: "Deleting the local copy of the shared book" and "Deleting the remote shared book."

Setting Shared Book properties

You cannot open the Shared Book properties sheet when the shared book is "in use," that is, while another user is performing a Shared Book operation. However, the shared book is not "in use" while the Shared Book property sheet is open.

For example, if you open the Shared Book properties sheet, and, meanwhile, another user edits and saves an entry, you will not be able to apply the changes you made to the property sheet because your local copy of the shared book is now out-of-date. Therefore, you should coordinate these changes with the other users.

1. Select the Shared Book icon and press <PROP'S>, or open the Shared Book window, select the shared book auxiliary menu, and select [Shared Book Properties].

2. Type any notation you wish in the **Notes** box. Notes are optional and can be changed at any time.

3. Change **Versions to Keep**, if you wish. You can change this number at any time.

   CAUTION: Changing **Versions to Keep** to a smaller number may cause previous versions of an entry to be deleted the next time you use [Save Minor Revision] or [Save Major Revision] to save an edited entry.

4. Change the **Access list**, if necessary.

   CAUTION: Do not attempt to change the **Access list** until you have read and understood the sections in Chapter 9 titled "Access control" and "Changing the access list."

5. Select [Done].

Retrieving a shared book with the Blank Shared Book properties sheet

1 2 3...

You must have appropriate access rights to the file drawer to retrieve an existing shared book and to use the shared book. You must also have appropriate access rights to the shared book and its entries. Refer to the sections titled "Access control" and "Changing the access list" in Chapter 9 for information and procedures.

Never use more than one local copy of the shared book.

1. Copy the Shared Book icon from the Basic Icons divider to your desktop.

2. Select the Blank Shared Book icon and open the Blank Shared Book properties sheet.

3. Type the name of an existing shared book in the **Name** box.

   Use the same spelling, spacing, and punctuation that was used to create the shared book.

   Refer to Figure 8-10 for an example of a properly filled in Shared Book properties sheet.

   Note: The name of the Librarian Service data base is not required to retrieve a shared book.

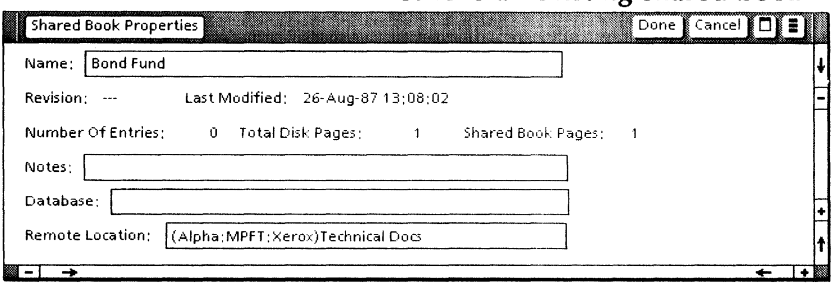
4. Type the pathname of the remote location (file drawer, and folders, if any) of the shared book in the **Remote Location** box, using either of the following formats:

   (FileService:Domain:Organization)File Drawer

   (FileService:Domain:Organization)File Drawer/Folder

   Any notes you type in the **Notes** box will be replaced by the notes already in the property sheet of the shared book when it is retrieved.

Figure 8-10 **Property sheet filled in to retrieve an existing shared book**



5. Select [Done].

6. Select [No] if the prompt in the message area says "Confirm to create a new Shared Book." You have incorrectly typed the name or the remote location. Check spelling, spacing, and punctuation in the **Name** box and the **Remote Location** box, correct as necessary, and repeat steps 5 and 6.

   Select [Yes] when the prompt says "The Shared Book already exists on the File Server. Confirm to create a local instance of it."

Note: You must have at least read access rights to the shared book in order to retrieve it. If you do not have proper access rights to the shared book, an error message will appear in the message area. The Blank Shared Book properties sheet will stay open and may be used again. However, if you select [Cancel] to close the property sheet, the Blank Shared Book icon becomes unusable, and you must delete it from your desktop and get another Blank Shared Book icon. (For information about access rights refer to the section titled "Access control" in Chapter 9.)

If the shared book does not exist, you may have been given incorrect information about the name of the shared book or its remote location (check this information and try again). There may have been a problem when it was created, and you may have to create it again. Refer to the procedure titled "Creating a shared book" earlier in this chapter for instructions.

Copying a shared book from the remote file drawer

Be sure you have enough disk pages to hold the entire shared book. The File Drawer window displays the size of the remote shared book in disk pages when you have the **Size** option enabled. Refer to the "Filing" chapter in this volume for information about enabling the **Size** option using the Folder/File Drawer Display option sheet or the User Profile [Folder] option.

1. Open a path to the remote file drawer.

2. Copy the shared book to your desktop.

To delete any entries that you do not need from your workstation, refer to the procedure titled "Deleting entries from the folder of local files" in Chapter 9.

Adding an entry

You cannot add an entry to a closed shared book. This is different from the book feature of Document Editor

Note: When you copy a ViewPoint object into a shared book, the original ViewPoint object remains selected (highlighted) on your desktop. The new entry in the shared book is not selected.

1. Open the shared book.

2. Copy or move the ViewPoint object into the Shared Book window. You can copy the object from your desktop, a floppy disk, or a file drawer.

   The entry is stored in the remote shared book, in your folder of local files, and locked.

   For convenience, add the entries in the order in which you want them to appear in the publication. To rearrange them, refer to "Moving entries around in the Shared Book window," later in this chapter.

3. Unlock the entry if you do not plan to use it. (Refer to the procedure titled "Saving and unlocking an entry" for the usual procedure to unlock the entry.)

Note: If you have add access rights to the shared book without also having remove access rights, you can add an entry to the shared book, but the previous version may not be deleted. When the number of revisions stored in the remote shared book equals Versions to Keep (on the Shared Book properties sheet), you may see a message that includes the words "access rights insufficient." If this happens, redisplay the Shared Book window to determine if the entry was added to the shared book. Refer to the section titled "Access control" in Chapter 9 for more information about access rights.

If you have read-only access rights to the shared book, the entry you add is stored only in your local copy of the shared book, not in the remote shared book. You can delete this entry from your folder of local files. Refer to "Deleting entries from the folder of local files" in Chapter 9 for this procedure.

Setting entry details options

It is not necessary to have a local copy of the entry to use the Entry Details option sheet.

You can change the Entry Details option sheet only when the entry is locked by you.

You can view, but not change, the Entry Details option sheet when the entry is not locked or when it is locked by another user.

Do not confuse the Entry Details option sheet with the property sheet of a ViewPoint object, which is not available to an entry in the Shared Book window. Refer to "Changing the name of an entry" later in this chapter for the procedure to use the property sheet of the ViewPoint object.

1. Open the shared book and select an entry in the Shared Book window.

2. Select [Show Details] in the Shared Book window header to open the Entry Details option sheet.

3. Select [Lock] on the Entry Details option sheet.

   Note: [Lock] does not highlight when selected; watch the message area carefully.

The option sheet changes, making some read-only boxes now editable.

[Cancel Lock] appears instead of [Lock] when the entry is already locked by you. [Lock] and [Cancel Lock] take effect immediately; you do not have to select [Done].

4. Select [Auxiliary] if the entry is a supporting document that you do not want included in the final publication.

   Select [Body] if the entry is text material that you want included in the final publication. [Body] is the default.

5. Type any notation you wish in the **Notes** box. Notes are optional and can be changed at any time the entry is locked by you.

6. Type any notation you wish in the **Reason** box. Reasons are optional and can be changed at any time the entry is locked by you.

7. Select [Done].

   Note: The entry remains locked until you unlock it. Refer to the procedure titled "Saving and unlocking an entry" later in this chapter for the usual method of unlocking entries.

Canceling changes to an entry

Use the following procedure if you want to:

- Cancel changes (edits) to the entry that have not yet been saved to the remote shared book.

- Cancel changes you have just made to the Entry Details option sheet (before you select [Done]).

- Unlock an entry without saving your edits.

You cannot cancel changes (to the entry) that have been saved to the remote shared book, or changes to the Entry Details option sheet after you select [Done].

Note: Select [Cancel] in the option sheet header if you want to cancel only the changes you just made to the Entry Details option sheet.

CAUTION: Do not use [Cancel Lock] if you have made changes (edits) to the entry that you want to keep, but have not yet saved to the remote shared book. You will lose your changes if you cancel the lock before you save them to the remote shared book. Refer to "Saving and unlocking an entry" later in this chapter for the usual method of unlocking an entry.

1. Open the Entry Details option sheet, if it is not already open.

2. Select [Cancel Lock].

   Note: [Cancel Lock] does not highlight when selected; watch the message area carefully.

3. Select [Yes] to cancel your changes to the entry, cancel your changes to the Entry Details option sheet, and unlock the entry. [Cancel Lock] takes effect immediately. You do not have to select [Done]. The version of the entry that is in the remote shared book is now available for your use.

   Select [No] to stop the [Cancel Lock] command.

4. Select [Done] to close the Entry Details option sheet.

Locking and editing an entry

You can view, but not edit, an entry that is a ViewPoint document when it is not locked or is locked by another user.

You can edit other objects without locking them, but you cannot save them to the remote shared book.

Be safe: Always lock an entry before editing it.

1. Open the shared book.

2. Select a entry.

3. Select [Lock] in the Shared Book window header, <u>or</u> select [Show Details] in the Shared Book window header and lock the entry using the Entry Details option sheet. (Fill in the **Notes** and **Reason** boxes, if you wish.) Close the option sheet.

   You can lock a group of entries when you use [Lock] in the window header.

4. Open the entry and select [Edit], if necessary.

5. Edit as you would edit any VP object.

6. Use [Save] and [Save&Edit] in the usual way to save your changes.

   Note: [Save] and [Save&Edit] <u>do not</u> save the entry to the remote shared book. Refer to the section titled "Saving and unlocking an entry" for the procedure to save an entry to the remote shared book.

7. Close the entry.

Unlocking entries

There are several ways to unlock entries, depending on the situation. When you want to unlock an entry, these guidelines will help you decide which procedure to use.

The choice of procedure depends on whether you have edited an entry, whether you want to keep your changes, and what your access rights are.

- If the entry is locked by you and:
  - You have not made any changes to the entry, refer to the procedure titled "Saving and unlocking an entry," below, for instructions (the [Save Minor Revision] command).
  - You have made changes that you do not want to keep, refer to the procedure, earlier in this chapter, titled "Canceling changes to an entry" for instructions (the [Cancel Lock] command).
- If the entry is locked by you and you have made changes to it that you do want to keep, use the diagram in Figure 8-11 to help you decide which procedure to use. Your access rights to the shared book affect what you can do.
  - If your access rights are not limited, you can save your changes to the remote shared book if you wish to do so. Refer to the procedure titled "Saving and unlocking an entry," below, for instructions.
  - If your access rights are limited, you cannot save your changes to the remote shared book. You must use another method to keep them. Refer to the

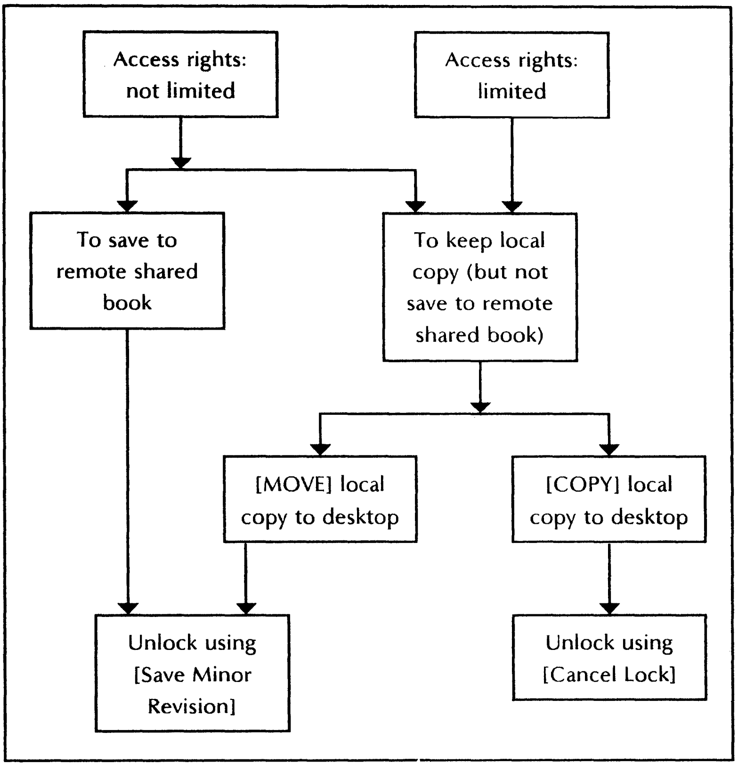
procedure titled "Unlocking entries without saving to the remote shared book," below, for instructions.

- If the entry is locked by someone else, open the Entry Details option sheet to determine who has the entry locked.

  - If the entry is locked by another user who is available to unlock it, ask that user to unlock the entry for you. (The other user should read these guidelines before deciding how to unlock the entry.)

  - If the entry is locked by another user who is not available to unlock it for you, refer to the procedure titled "Unlocking entries left locked by absent users" in Chapter 9 for instructions.

Figure 8-11 **Unlocking entries while retaining your changes**



By following the arrows on the right-hand side of the diagram in Figure 8-11, you can see that a user with limited access rights has two choices: moving the local copy of the entry to the desktop and then doing a [Save Minor Revision] to unlock it, or copying the local copy of the entry to the desktop and then canceling the lock.

A user whose access rights are not limited can unlock the entry by saving it to the remote shared book (left-hand side of the diagram), or by the same methods available to the user with limited access rights.

Saving and unlocking an entry

Use this procedure to save entries to the remote shared book and unlock them. This is the usual method for unlocking an entry.

You can also use this procedure to unlock entries that have not been edited. The revision numbers do not change, and nothing is stored in the remote shared book, but the entry is unlocked.

1. Open the shared book.

2. Select the entry or entries you wish to save.

   Note: It is not necessary to select any entries.

   If you do not select any entries, all the entries that are locked by you will be saved and unlocked. Entries that are not locked and entries that are locked by other users will be skipped.

   If you do select entries, they must be locked by you. Only entries you select will be saved and unlocked.

3. Select the shared book auxiliary menu in the Shared Book window header and select either [Save Minor Revision] or [Save Major Revision].

   [Save Major Revision] requires confirmation.

   The edited entry is saved to the remote shared book and unlocked. The revision number in the Shared Book window is updated.

Unlocking entries without saving to the remote shared book

Use one of these procedures to unlock entries without saving them to the remote shared book. These procedures are primarily for users with limited access rights who have inadvertently locked entries.

Do not use Method 1 if your access rights permit you to save changes to the remote shared book. Step 3 will save your edits to the remote shared book and that may not be what you intended.

CAUTION: You lose your edits when you unlock an entry without either saving it to the remote shared book or first copying it to your desktop.

Method 1

The first part of this procedure unlocks entries that have not been edited (steps 1 to 3). The second part unlocks edited entries (steps 4 to 8).

1. Open the shared book window.
2. Select the entry or entries you want to unlock.

   Do not select any entries if you want to unlock every entry that is locked by you.
3. Open the shared book auxiliary menu in the Shared Book window header, and select [Save Minor Revision].

   The entries that had not been edited are unlocked, but they are not saved to the remote shared book.

   Edited entries are still locked. Unlock them now using steps 4 to 8, below.

   You are about to delete the local copy of an entry that has been edited. If you want to keep a copy of your changes to this entry, you must copy it out of the shared book. Refer to the section titled "Copying an entry out of the shared book" later in this chapter for the procedure to do this.
4. Select the entry you want to unlock.

5. Open the Entry Details option sheet by selecting [Show Details] in the Shared Book window header.

6. Select [Cancel Lock].

7. Select [Yes] in the message window when asked to confirm.

   The local copy of the entry is deleted and the entry is unlocked.

8. Repeat steps 4 to 7 for each entry that you want to unlock.

Method 2

Canceling the lock on many entries can be tedious. Method 2 is quicker than Method 1 but must be used with caution so that you do not lose by mistake any changes you have made to an entry.

Refer to the sections titled "Using the folders of local and remote files" and "Deleting entries from the folder of local files" in Chapter 9 for more information.

CAUTION: Be careful not to delete an entry which contains edits you want to keep.

1. If you want to keep a copy of your changes to the entries you are about to delete, you must copy them out of the shared book. Refer to the section titled "Copying an entry out of the shared book" later in this chapter for the procedure to do this.

2. Open the Shared Book window.

3. Open the folder of local files.

4. Select and delete the local copies of the entry or entries you want to unlock.

5. Close the folder of local files.

6. Select the entry or entries you want to unlock.

   Do not select any entries if you want to unlock every entry that is locked by you.

7. Open the shared book auxiliary menu in the Shared Book window header, and select [Save Minor Revision].

   The entries are unlocked, but they are not saved to the remote shared book.

Deleting an entry from the remote shared book

CAUTION: Deleting an entry from the remote shared book removes it from the remote shared book without a trace. Be sure that you have a backup copy, or that you and your co-workers no longer need the information it contains, before proceeding.

1. Notify the other users and be sure no one else has the entry locked.

2. Open the shared book, if it is not already open.

3. Select and lock the entry.

4. Press <DELETE> and confirm.

5. Close the shared book, if desired.

   The other users should delete their local copies of the entry.

If you accidently delete an entry, it can be copied back into the shared book from another user's folder of local files. Refer to the section titled "Copying or moving entries from the folder of local files" in Chapter 9 for this procedure.

Deleting the local copy of the shared book

CAUTION: Save the entries you have locked before you delete the local copy of the shared book or you will lose any changes you have made.

1. Select the closed Shared Book icon.
2. Press <DELETE>.

   Note: This does not affect the remote shared book.

Deleting the remote shared book

CAUTION: Deleting the remote shared book removes it from the file drawer without a trace. Be sure that you have a backup copy, or that you and your co-workers no longer need the information it contains before, proceeding.

Note: Do not use any other procedure to delete the remote shared book. All other procedures may waste unrecoverable space (a few disk pages for each shared book entry) in the Librarian data base.

1. Notify the other users, and have them save and unlock any entries they have locked and then delete their local copies of the shared book.
2. Open the shared book on your desktop.
3. Lock and delete all the entries from the Shared Book window.

   Note: Be sure you have deleted all the entries before going on to the next step.
4. Close the shared book.

5. Open the remote file drawer.
6. Select the shared book in the file drawer, press <DELETE>, and confirm.
7. Close the file drawer, if desired.
8. Delete the local copy of the shared book from your desktop.

Manipulating entries

Use these procedures to manage entries and recover from mistakes.

Replacing an existing entry

When you replace an existing entry, the new entry becomes the most recent version in your local copy of the shared book.

In the Shared Book window, the revision number of the entry has a + added to it if its create date is <u>different</u> from that of the original entry.

If the create date of the original entry in the shared book is more recent than the object you want to replace it with, you must confirm the replacement, and you have the opportunity to cancel the replacement operation if you wish.

The new entry is not automatically stored in the remote shared book, so you must save it. Refer to the section titled "Saving and unlocking an entry" earlier in this chapter for instructions.

If **Versions to Keep**, on the Shared Book properties sheet, equals 2 or more, the old entry is retained in the remote shared book, but revisions previous to that one may be deleted.

The shared book cannot contain two or more entries with the same name.

Compare icon types (file types) before you replace an entry. For example, be sure you are not replacing an entry with an Interpress master of that entry by mistake.

Note: When you copy a ViewPoint object into a shared book to replace an entry, the original ViewPoint object remains selected (highlighted) on your desktop. The new entry is not selected.

1. Create a ViewPoint object on your desktop with the same name as the entry you wish to replace.

2. Open the shared book.

3. Select the entry you wish to replace, and select [Lock] in the Shared Book window header.

   Replacement fails if the entry you select is not locked or if it is locked by another user.

4. Copy or move the ViewPoint object from your desktop into the Shared Book window.

   If you make a mistake, you can recover the entry you just replaced. Do not save the new entry to the remote share book. Refer immediately to the note at the end of this procedure for instructions.

5. Change the **Class** of the entry, if desired. The new entry retains the class of the entry it replaces, until you change it. Refer to the section titled "Setting entry details options" for this procedure.

6. Save and unlock the entry, if desired.

Note: To recover the entry that you just replaced:

1. Select [Show Local Files] in the shared book auxiliary menu in the Shared Book window header.

The folder of local files displays.

2. Find the two entries with the same name in the folder of local files window, and determine which is the original entry and which is the new entry.

   The entry with the older create date is probably the original entry.

   The entry with the more recent create date is probably the new entry.

3. Select the original entry, and copy or move it to your desktop (use the <COPY> or <MOVE> key).

4. Select the new entry, and move it to your desktop or delete it from the folder window (press <DELETE>).

5. Repeat the procedure titled "Replacing an existing entry," above, using the entry that is now on your desktop to replace the entry that appears in the Shared Book window.

Changing the name of an entry

You cannot edit the property sheet of a ViewPoint object while the object is stored in a shared book. Use this procedure to edit the property sheet.

Note: When you copy a ViewPoint object into a shared book, the original ViewPoint object remains selected (highlighted) on your desktop. The entry in the shared book is not selected.

1. Open the shared book.
2. Select and lock the entry.
3. Copy the entry to the desktop.
4. Open the property sheet.

5. Change the name of the entry.
6. Close the property sheet.
7. Copy the entry back into the shared book at the desired location.
8. Delete the original entry.
9. Inform the other users of the change.

CAUTION: While most entries have cover sheets, you cannot use them to change the names of entries. If you edit an entry, and then try to change its name with the cover sheet, you may lose your changes when, for example, you close the entry, and open it again.

If this happens, recover the changed entry using a combination of the procedure described above and the procedure titled "Preserving changes to an unofficial entry" later in this chapter.

- Begin with the procedure titled "Preserving changes to an unofficial entry" later in this chapter. Perform steps 1 through 3.
- While the entry in question is on the desktop, perform steps 4 through 6 in the procedure described above, "Changing the name of an entry."
- Return to the procedure titled "Preserving changes to an unofficial entry," and perform steps 4 through 7.

Moving entries around in the Shared Book window

You cannot move an entry that is locked by another user.

Note: When you move an entry to another position in the Shared Book window, the original position remains selected (highlighted) on your desktop. The new position of the entry is not selected.

1. Select the entry or entries you wish to move.
2. Press <MOVE> and select the destination within the Shared Book window.

   The remote shared book is also updated.

Copying an entry out of the shared book

Note: It is not necessary to lock the entry to copy it out of the shared book. You should do so, however, if you plan to edit the entry and then put it back into the shared book.

Unless you have a local copy of the entry, you cannot copy it out of the shared book.

Method 1

Use this method when the entry is not locked or is locked by you.

1. Open the Shared Book window.
2. Select and lock (if appropriate) the entry or entries you wish to copy out.
3. Press <COPY> and select a destination outside the Shared Book window.
4. Close the shared book, if desired.

Method 2

Use this method when the entry is locked by another user.

1. Open the Shared Book window.
2. Select the entry you wish to copy out.
3. Open the entry to retrieve a new local copy, if necessary, and close the entry.
4. Open the folder of local files.

5. Select the the entry you wish to copy out (choose the highest version number if there is more than one).

6. Press <COPY> and select a destination outside the folder of local files and outside the Shared Book window.

7. Close the folder of local files (and shared book, if desired).

Preserving changes to an unofficial entry

Use this procedure if you want to save changes you made to an entry you did not lock.

CAUTION: Do not lock the entry until you have copied it to your desktop. Your unofficial version could be deleted if you lock the entry before you copy it out of the folder of local files.

1. Close the entry. Leave the Shared Book window open.

2. Select the shared book auxiliary menu, and select [Show Local Files].

3. Select the entry in the folder of local files and copy it to your desktop. Close the folder window.

4. Lock the entry in the Shared Book window.

5. Select [Yes] when you are asked if you want to replace the entry with the "...checked-in version from the File Server."

   Now you have your edited copy of the entry on the desktop and the original version in the Shared Book window.

6. To get your edits into the shared book, do one of the following:

   - If you are certain that no one else has edited the entry since you did, copy or move it from your desktop into the Shared Book window.

- If someone else has edited the entry, open the entry in the Shared Book window and the version on the desktop. Copy your changes, one by one, into the entry in the Shared Book window.

7. Save the entry to the remote shared book.

Removing an unofficial entry

To locate and remove the unofficial entry, or entries, use one of the following procedures:

Method 1

1. Open the Shared Book window, if necessary.
2. Open each entry in the shared book. Official entries will open normally. Unofficial versions will not open; instead, you will see a message that says:

   "Your entry is newer than the official version on the File Server. Confirm if you want to replace your copy? [Yes / No]"

3. Select [Yes] to delete the unofficial entry in the local copy of the shared book, and replace it with the official entry from the remote shared book.

   Select [No] if you do not want to replace the unofficial entry.

4. Repeat steps 2 and 3 until you have removed all the unofficial entries.
5. Close the Shared Book window, if desired.

Method 2

1. Open the Shared Book window (if necessary) and the folder of local files.

2. Compare the create date of each entry in the folder of local files with the create date of the entry in the Shared Book window.

   An unofficial entry (in the folder of local files) has a more recent create date than the official entry (in the Shared Book window).

   Note: Any entry that is locked by you is an official entry in your local copy of the shared book. Be sure you do not remove an official entry by mistake.

3. Select the unofficial entry in the folder of local files, and move it to the desktop (press <MOVE>) if you want to preserve your changes, or delete it (press <DELETE>) if you do not want to preserve your changes.

4. Repeat steps 2 and 3 until you have removed all of the unofficial entries.

5. Close the folder of local files, and the Shared Book window (if desired).

Note: When someone replaces a remote entry with an older version of the entry, and you immediately copy the shared book from the file drawer (instead of retrieving it with the Blank Shared Book properties sheet), the shared book may behave as though it has an unofficial entry. You may see the following message:

"Your copy of the < > has been edited. Do you want to replace it with the checked-in version from the File Server?"

In this case, select [Yes] to retrieve the official version of the entry from the remote shared book.

However, you may see this message:

"Shared Book contains an illegitimate entry. Operation canceled."

In this case, you must determine which entry is unofficial, and remove it from your local copy of the shared book. Use either Method 1 or Method 2.

Note: If you use Method 2, the version of the entry which you want to keep has the higher version number and the older create date. Delete or move the version of the entry with the lower version number and the newer create date.

Mailing a shared book

You cannot show the coversheet of a shared book. You fill out the mailing address at the time you move or copy the shared book to your outbasket.

Recipients of the shared book will not be able to read any note you attach to the shared book at mailing time because they cannot open the cover sheet. However, you can place a message in the **Notes** box of the Shared Book properties sheet if you wish.

1. Save the entries that you have locked or you will lose any changes you have made.

2. Open the folder of local files.

   CAUTION: If you delete an entry that you have edited, but have not saved to the remote shared book, you will lose your changes.

3. Delete all the entries.

4. Close the folder of local files.

5. Mail the Shared Book icon following the procedures for mailing ViewPoint objects in the chapter titled "Mailing" in this volume.

Setting the Librarian User Profile option

Refer to the *General User Reference* volume for detailed information about your User Profile and other procedures for editing it.

In addition to the [Librarian] option, you can also set the [Documents] and [Folder] options.

Follow this procedure to set your User Profile so that the fully qualified name of the Librarian data base is automatically copied into the Blank Shared Book properties sheet.

1. Open your User Profile and the User Profile copy source document.

2. Copy the [Librarian] User Profile entry from the User Profile copy source document into your User Profile as shown in Figure 8-12.

Figure 8-12 **[Librarian] section of the User Profile copy source document**

```
[Librarian]
Database:
```

3. Type the fully qualified name of the Librarian data base after the word "Database:" as shown in the example in Figure 8-13.

Figure 8-13 **Example of an edited [Librarian] section of the User Profile**

```
[Librarian]
Database: Dockets:MPFT:Xerox
```

4. Close your User Profile and the User Profile copy source document.

   The [Librarian] option is enabled. It is not necessary to log off and log on.

9. Managing a shared book

A shared book, like everything else that is used by many people, must be well managed to be most useful.

Key concepts of managing a shared book

Most of the procedures in this chapter should be performed by one person with the cooperation of the other users.

The shared book coordinator

The project leader should appoint a coordinator to oversee activities which require the cooperation of all users. For example, the procedure for rebuilding a shared book must be done on one desktop with the help of the other users.

The coordinator's responsibilities should include the following:

- Coordinating work to prevent simultaneous edits when entries cannot be locked
- Recovering a damaged shared book
- Deleting the remote shared book
- Creating a major revision
- Archiving the shared book
- Relocating the shared book to a different file server

- Controlling access lists
- Contacting the System Administrator

The coordinator's responsibilities might also include maintaining the following:

- Ground rules for using the shared book
- Naming conventions for entries
- The Shared book properties sheet
- The Entry Details option sheets
- Pathnames to the File Service and Librarian Service
- The group file drawer

When File or Librarian Services are unavailable

When the File Service or the Librarian Service is not available, you can still perform some Shared Book operations. Tables 9-1 and 9-2 summarize the operations you can perform when one, or both, of these services is off-line.

Use the folders of local and remote files to retrieve copies of the entries.

You cannot lock entries when the Librarian Service is unavailable. Be sure you coordinate your work with the other users.

You cannot open an entry if the File Service is unavailable and your local copy of the entry is out-of-date. You cannot retrieve an up-to-date copy of the entry until the File Service is restored.

You cannot open an entry if it is not local and there is not enough disk space for it on your workstation.

Table 9-1 **Operations on a shared book**

Shared Book operation	File Service off-line	Librarian Service off-line	Both services off-line
Create	No	No	No
Retrieve	No	Yes	No
Open	Yes*	No	No
Delete local copy	Yes	Yes	Yes
Delete remote shared book	No	No	No
Use local files	Yes	Yes	Yes
Use remote files	No	Yes	No
<PROP'S>	Yes*	No	No
Edit property sheet	No	No	No
Paginate, table of contents, index, print	Yes†	No	No

* Only if the local copy of the shared book is up-to-date

† Only if the local copy of the shared book is up-to-date, and the local copies of the entries are up-to-date

Table 9-2 **Operations on an entry**

Shared Book operation	File Service off-line	Librarian Service off-line	Both services off-line
Lock	Yes*	No	No
Unlock	Yes*	No	No
Open	Yes†	No	No
Add	No	No	No
Open Entry Details option sheet	Yes*	No	No
Edit Entry Details option sheet	No	No	No
Edit entry	Yes†	Yes*	Yes†
Save entry	No	No	No
Move entry within shared book	No	No	No
Copy entry out of shared book	Yes†	No	No
Delete local copy of entry	Yes	Yes	Yes
Delete remote entry	No	No	No
Use local files	Yes	Yes	Yes
Use remote files	No	Yes	No
Paginate, table of contents, index, print	Yes†	No	No

* Only if the local copy of the shared book is up-to-date

† Only if the local copy of the shared book is up-to-date, and the local copy of the entry is up-to-date

Recovery of a damaged shared book

The Shared Books application uses create dates to maintain the integrity of the data stored in a shared book. It compares the dates stored in several system files each time a Shared Book operation is performed. If these dates do not match when they should, it is assumed that a problem occurred which compromised the transfer of information to or from the shared book, and the shared book is declared damaged.

The most obvious problem, of course, is a system failure while you are performing a Shared Book operation. For example, you usually know when your workstation malfunctions or when the network is not functioning properly.

There are some other, less obvious conditions, that can make a shared book unusable.

For example, the File Service and the Librarian Service are backed up on a regular basis, and sometimes, they are restored from the backup copy. Suppose the File Service was backed up on June 10th, and you made changes to the shared book on June 11th. Then, on June 12th, for some reason, the File Service was restored from the June 10th backup copy. The shared book with your June 11th changes is gone, replaced by the June 10th version.

Now, it is June 13th, and you want to do some more work on the shared book. You open an entry, and Shared Books starts checking the dates. According to the File Service, the last revision of the shared book was on June 10th, but according to the Librarian Service, your last revision was June 11th. The dates do not match, and the shared book is damaged.

The shared book also becomes unusable if the Librarian Service starts its backup while you are performing a Shared Book operation. Avoid using a shared book around midnight because that is when the Librarian Service normally does its backup. If the Librarian Service has trouble doing its backup, it retries every 30 minutes until it is successful. This could continue into the daytime hours.

When the shared book is damaged, you must perform the recovery procedures before you can use it again. Sometimes only your local copy is affected, and you do not have to restore the remote shared book. In some cases, the remote shared book will be left locked, and you will have to request the assistance of the System Administrator. In other cases, you will be able to perform all the procedures yourself. In the case of a network failure, of course, you have to wait until the network is back in service before you begin the recovery process.

There are two parts to the recovery procedure:

- Determining that the remote shared book is damaged (sometimes only your local copy is affected)
- Restoring the shared book to a previous, known state

The folders of local and remote files

The folders of local and remote files provide additional views of the shared book. The folder of local files shows you the entries that are on your workstation. The folder of remote files shows you the entire contents of the remote shared book.

Use these folders to recover a damaged shared book or to continue work when the File Service or Librarian Service is off-line.

You can also use the folders of local and remote files to back out of undesirable changes by replacing the latest revision of an entry with an older version.

These folders can be opened two ways:

- From the shared book auxiliary menu in the Shared Book window
- From the shared book pop-up menu

The folder of local files

The folder of local files contains the copies of the entries that are on your workstation. The folder may contain only most recent version of some of the entries, or it may contain all of the revisions of all of the entries, depending on how you retrieved the shared book. When you open the folder of local files, a list of the entries is displayed. You can delete the entries or copy them to the desktop without affecting the remote shared book or the other users' local copies of it.

You can delete or move entries from your folder of local files to free up disk space on your desktop. You can also use this folder to copy back into the shared book an entry that was accidentally deleted by another user.

The folder of remote files

The folder of remote files contains all the versions of all the entries that are being kept in the remote shared book. When you open the folder, a list of the entries is displayed. You can copy them to your desktop without affecting the remote shared book or the other users' local copies of it.

You cannot delete entries from the folder of remote files.

Common characteristics of the folders

There are no property sheets associated with the folders of local and remote files.

You cannot copy or move objects from the desktop into the folders of local and remote files.

You cannot open the entries or their property or option sheets within the folder windows.

Version versus revision

Until now, the terms version and revision have been used interchangeably in the Shared Books reference chapters. However, these terms also have technical definitions that apply to the File Service and to the Shared Books application. You may notice this difference when you compare the folders of local and remote files (Figures 9-4 and 9-5) with the Shared Book window (Figure 8-3). To understand how these terms are used, simply remember that <u>version</u> numbers are maintained by the File Service and by the workstation file system and are not the same as the <u>revision</u> numbers of the shared book and its entries.

The version numbers of the entries in the folder of local files (Figure 9-4) may not match the version numbers of their counterparts in the folder of remote files (Figure 9-5). When copied to the workstation, the entries in the folder of local files are renumbered starting with 1. For example, an entry might be "revision 3" in the shared book and "version 3" in the folder of remote files, while the copy displayed in the folder of local files will likely be "version 1." If multiple versions of an entry are copied, they will be given successive numbers, starting with 1, in the same order in which they were stored in the remote shared book.

This section is the only place in the Shared Books reference chapters where this distinction between revision numbers and version numbers is made.

Guidelines for using a shared book with other VP applications

You can use the following applications with a shared book:

- *VP Footnotes*
- *VP Spelling Checker*
- Index Generator
- Table of Contents Generator

Operations which are performed on a closed shared book should be coordinated with all users. Sometimes these operations are quite lengthy, especially when the shared book is large.

ViewPoint operations with similar behavior

Four tasks that you usually perform when you are preparing a document for publication are:

- Pagination
- Printing
- Index generation
- Table of contents generation

These operations work differently for a closed shared book than for an open shared book.

Keep the following points in mind so that you will not get unexpected results when you perform these operations on your shared book.

Background operations

- The operation runs in the background once the entries have been "acquired" and locked.

- For an open shared book, the entries do not appear "busy" while being operated on in the background.

Disk space

- The operation automatically retrieves those entries that are not already local entries on your workstation.
- If you do not have enough disk space to hold all the entries that are retrieved, the operation terminates.

Locks

- The operation automatically locks the affected entries for you. After the operation is completed, you must unlock those entries that you do not plan to use.
- An entry locked by another user terminates the operation.
- The shared book appears to the other users as if you had locked the entries yourself. They can use the shared book with the usual limitations when entries are locked.
- The operation runs in the background once all affected entries are retrieved and locked.

Closed shared book

- Only body entries are affected. All auxiliary entries are unaffected.
- The operation terminates immediately if a body entry is locked by another user. No other entries will be locked. You get no results.

Open shared book

- Both body and auxiliary entries may be selected, either individually or in a group. The operation will be performed on all of the entries within the selection.

- Only entries within the selection are locked.
- The operation terminates upon encountering an entry, within the selection, that is locked by another user. Only the entries prior to this locked entry are operated on and are left locked. You get partial results.
- The operation processes whatever entries it can acquire from the remote shared book. You get partial results, if the operation cannot acquire or "fetch" all of the entries in a selection.

Only those body entries for which the operation makes sense will be paginated, printed, indexed, or have a table of contents generated. An Interpress master, for example, will never be paginated or indexed, even if it is classified as a body entry and locked. This is true for both open and closed shared books.

Dictionaries

When you use *VP Spelling Checker*, Index Generator, and the autohyphenation feature of Document Editor, you may create customized dictionaries. You can store these user-created, book-specific dictionaries in the shared book so that they are available to all the users.

To use these dictionaries with their applications, you must copy them out of the shared book to the appropriate folder on your desktop, or, in the case of the autohyphenation, to the appropriate folder of the Workstation divider or the Desktop divider.

If you update a dictionary and you want to make these changes available to the other users, you should copy it back into the shared book (refer to the section titled "Replacing an existing entry" in Chapter 8 for this procedure).

Since the default (system generated) dictionaries are available to every user running the application, there is no reason to store these dictionaries in the shared book. Some of these dictionaries (the default Spelling Checker dictionary, for example) cannot be stored in a shared book.

Refer to *Document Editor Reference* volume 4 and the *Document Editor Options Reference* volume for more information about these dictionaries and procedures for using them.

Footnotes

Footnote numbering does not continue across document boundaries in a shared book. The footnotes are numbered separately for each entry in which they are used.

Refer to the *Document Editor Options Reference* volume for more information about footnotes and procedures for using them.

Headings, footings, and page numbers

Set up headings, footings, and page numbers as you would for a book. Refer to the "Page format" and "Pagination" chapters of *Document Editor Reference* volume 3 and the "Books" chapter of *Document Editor Reference* volume 4 for detailed information and procedures.

Headings, footings, and page numbers can continue across body entry boundaries, if you desire.

You must lock an entry in order to edit its Page Format property sheet.

Page numbering and pagination

Page numbering and pagination work in a shared book the same way they work in a book. Keep in mind the following points about pagination:

- For a closed shared book, page numbering can be set to continue from one body entry to the next body entry.
- For an open shared book, page numbering does not continue from entry to entry. Each entry you select is numbered separately, according to its own **Page Numbering** properties.
- Use the [Paginate] command in the desktop auxiliary menu to paginate a closed shared book or a group of entries in the Shared Book window.
- Use any of the pagination commands in the entry header to paginate an individual entry.
- The body entries must be listed in the Shared Book window in the order they are to appear in the finished publication. Otherwise, the page numbering will be incorrect.
- An auxiliary entry will not be included in page numbering, even if it is located between two body entries.
- **Page Numbering** properties need not be set for auxiliary entries unless you plan to print them separately and want the pages numbered.
- The closed shared book can be paginated without setting up **Page Numbering** properties for the body entries.
- Use [Save Minor Revision] or [Save Major Revision] to unlock the entries when pagination is completed. Since pagination

edits the entries, the paginated version is saved.

- For consistency, all users should either turn autohyphenation on or turn it off when working on entries in a same shared book. The autohyphenation feature of Document Editor may slightly alter the page breaks of ViewPoint documents that have previously been paginated without autohyphenation.

Printing

Remember the following points about printing:

- For a closed shared book, only body entries are printed.
- For an open shared book, you can print both body and auxiliary entries. Be sure that the entries you select are not locked by another user.
- You can select [Repaginate] on the Printing option sheet when you copy the entry or closed shared book to the Printer icon. Refer to the section titled "Page numbering and pagination," above, for information about pagination.
- Use [Save Minor Revision] or [Save Major Revision] to unlock the entries after printing is completed.

Creating an index

Refer to the procedures for creating an index in the "Index Generator" chapter of the *Document Editor Options Reference* volume.

- For a closed shared book, Index Generator produces one index document for the entire shared book.

- For an open shared book, Index Generator produces one index document for each entry you select.
- Index Generator places the index document on the desktop, not in the shared book.
- Add the index to the shared book, positioning it where you want it to appear in the final publication.
- If you add an index document for an individual entry to the shared book, be sure to classify it as auxiliary, unless you want it to appear in the finished publication.
- You can store the book-specific inclusion dictionaries, exclusion dictionaries, index tables, and layout guide in the shared book as auxiliary entries. Be sure to copy them to the appropriate locations on your desktop before running Index Generator.
- If you change these book-specific index generator components and wish to make your changes available to the other users of the shared book, copy them back into the shared book (use the procedure in Chapter 8 titled "Replacing an existing entry").
- Paginate the shared book before running Index Generator to ensure correct page references.
- Use [Save Minor Revision] or [Save Major Revision] to unlock the entries after the index is generated.

Creating a table of contents

Follow the procedures in the "Table of Contents Generator" chapter of the *Document Editor Options Reference* volume.

- For a closed shared book, Table of Contents Generator produces one table of contents document for the entire shared book.
- For an open shared book, Table of Contents Generator produces one table of contents document for each entry you select.
- Table of Contents Generator places the table of contents document on the desktop, not in the shared book.
- Add the table of contents document to the shared book, positioning it where you want it to appear in the final publication.
- If you add a table of contents document for an individual entry to the shared book, be sure to classify it as auxiliary, unless you want it to appear in the finished publication.
- You may want to change the page numbering of the table of contents document to make it conform to the shared book.
- Use [Save Minor Revision] or [Save Major Revision] to unlock the entries after the table of contents is generated.

Access control

In order to understand how your access to the shared book and its contents can be controlled, you must understand file drawer access controls and their relationship to shared book access rights, and access lists.

Your ability to perform Shared Book operations depends on your access rights to the shared book.

Controlling user access to the shared book

There are five kinds of access rights: read, write, add, remove, and owner ("change" access).

They are controlled on three levels:

- Access to the file drawer
- Access to the shared book
- Access to the entry

Access rights

Your access to a particular file drawer is controlled by the access list associated with the drawer. The access list is a list of names of individuals or groups of users and their specific access rights to the drawer and its contents. The type of access determines what operations you can perform on the objects within the file drawer. You can have any combination of the five different types of access rights. A user with full access has been given all five access rights. These rights can be described briefly as follows:

read: Allows you to list the contents of a file drawer and copy objects out of it.

write: Allows you to change the characteristics, such as the name or access list, of objects in the file drawer. Along with write access, you also need read access to the drawer so that you can list the current contents of the drawer.

add: Allows you to place new objects in a file drawer or folder. Along with add access, you also need read access to the drawer so that you can list the current contents of the drawer.

remove: Allows you to remove an object from a drawer or folder in the file drawer. Along with remove access, you also need read access to the drawer so that you can list the current contents of the drawer, and write access so that you can change the number of files in the file drawer.

owner: Allows you to change the access list of the file drawer (also known as change access).

These access rights also apply to the shared book. In general, you must have read access to the shared book to be able to open it and view its contents. You need write, add, and remove access to save an entry to the remote shared book. You need write and remove access to delete an entry from the remote shared book. You need owner access to change the access list.

In addition to the access list for the shared book, each entry has its own access list, which can be different from that of the shared book. Generally, you have the same access rights to an entry that you have to the shared book.

Levels of access control

There are three levels of access control. The highest level is access to the file drawer in which the shared book is stored; next is access to the shared book itself; and finally, access to each entry within the shared book.

Access control flows from the highest level to the lowest. Your access rights to the file drawer determine your access rights to the shared book it contains, but your access rights to the shared book do not affect your access rights to the file drawer. For example, although you may have full access rights to the shared book (read, write, add, remove, and owner), you may have only read and write access to the file drawer. Having owner access to the shared book does not give you owner access to the file drawer.

When you create a new shared book, it is automatically assigned the access list of the file drawer where it is stored. This appears on the Shared Book properties sheets:

Access list: (Same As Container).

When you add a new entry to this shared book, it is assigned the access list of the shared book, which appears on the Entry Details option sheet as:

Access list: (Same As Container).

This means that initially everyone with access rights to the file drawer has the same access rights to the shared book and its entries.

The scope of Shared Books access rights

Access rights apply only to the remote shared book and to all versions of the entries in the remote shared book. When you change access rights for an entry, the change applies to all the versions of the entry.

Access rights do not apply to local copies of the shared book. Once an entry is on your desktop, it is no longer affected by File Service access control. For example, if you have read-only access to a shared book and its entries, you can retrieve a new copy of the shared book, open it, copy entries to your desktop, edit the entries, and delete the local copy of the shared book. However, you cannot delete an entry from the remote shared book, save an edited entry, or move entries around within the shared book. In short, you cannot do anything that changes the remote shared book.

The entry lock and access control

Access control does not extend to operations that only use the Librarian Service. The [Lock] command, which requires only the Librarian Service, can be invoked by users with very limited access rights. Even though they cannot change the remote shared book, these users can affect, or control, the remote shared book by locking other users out of an entry or a group of entries.

For example, if you have read-only access rights to the file drawer and the shared book, you can lock an entry. You can then edit the entry in the Shared Book window, change the **Notes** box on the Entry Details options sheet, or copy the entry to your desktop. While the entry is locked, no one can save edits of that entry to the remote shared book. You cannot save your edits because access control applies to saving changes to the remote shared book and you do not have sufficient access rights to save entries.

Users with limited access rights should be advised not to lock entries.

Setting up access rights

You can change the access list of the shared book or of any entry. You can add or delete the names of individuals or groups of users, and you can change the access rights of individuals or groups.

You must be very careful how you set up access rights and how you change them because each of the three levels of access control can override the level below it.

For example, if you have at least write access to the file drawer in which a shared book is stored, you can change the access list of the shared book. In other words, you do not necessarily need owner access to the shared book to change its access list.

This is also true for entries within the shared book. If you have read, write, add, and remove access to a shared book, you can change the access list for any of the entries, and then you can edit, save, and delete them.

The key access rights are read and write. If you have read and write access to the file drawer in which the remote shared book is stored, your access to the shared book cannot be limited because you can change the access list of the shared book. However, if you have only read access to the file drawer, you cannot change the access list of the shared book, and your access to it can be limited.

It is possible to have owner access rights without any of the other access rights. In this case, you can change the access list and can give yourself the other access rights. For example, if you have read access to the file drawer and owner access to the shared book, your access to the shared book cannot be limited (as it was in the previous example).

Access rights and Shared Book operations

Table 9-3 shows the effect of various combinations of access rights on six common Shared Book operations. Combinations that are not listed should not be used.

The access rights listed in the left-hand column of the table are access rights to the shared book, not to its entries. Access rights to entries have little effect on Shared Book operations, except when they occur in certain combinations with shared book access rights. Footnotes 5 and 7 are examples of entry access rights affecting a Shared Book operation.

Read and write access are the basic access rights, and the other access rights should only be used in conjunction with these two. Combinations not shown could lead to problems. For example, If you have write access without read access, your local copy of the shared book could become unusable when you perform an operation that causes it to be updated.

Table 9-3 **Access rights and Shared Books operations**

Access rights to a shared book*	Entry Details optns†	Shared Book Props†	Move entry within	Add entry	Delete entry	Save entry
(none)	No	No	No	No	No	No
R (read-only)	Yes[1]	Yes[1]	No	No	No	No
R W	Yes	Yes[2]	Yes	Yes[3]	Yes[4]	No
R W O	Yes	Yes	Yes	Yes[3]	Yes[4]	No
R W Rm	Yes	Yes[2]	Yes	Yes[3]	Yes[5]	No
R W Rm O	Yes	Yes	Yes	Yes[3]	Yes[5]	No
R W A	Yes	Yes[2]	Yes	Yes	Yes[4]	Yes[6]
R W A O	Yes	Yes	Yes	Yes	Yes[4]	Yes[6]
R W A Rm	Yes	Yes[2]	Yes	Yes	Yes[5]	Yes[7]
R W A Rm O	Yes	Yes	Yes	Yes	Yes[5]	Yes[7]

* Read, Write, Add, Remove, Owner

† Includes changing the access list

Key

1. View only, cannot change
2. Cannot change the access list
3. Cannot save the entry
4. Only if there are no remote copies of the entry
5. Must also have write access to the entry
6. Will get error message because you cannot delete a previous version of the (remote) entry
7. Might get an error message if you do not also have write access to the entry

Implications of using access lists for entries

Before you decide how you will set up the access lists for the shared book and its contents, you must carefully consider the implications of using access lists for the individual entries.

An access list is actually part of the object it protects. For example, if you set up an access list for an entry in the shared book, the access list will travel with it when you copy or move that entry (object) to another location on the same File Service or to another File Service.

Setting up access rights at the entry level presents special problems because you could set up a special access list for a shared book entry, then copy the entry from the shared book and store it in another file drawer. It is possible that no one could remove the entry from the new file drawer because no one has the correct combination of access rights to the file drawer and to the entry.

Furthermore, the one method available to change the access list applies only at the file drawer level, while the shared book entry has its access list set at the object level.

The same thing could happen when relocating a shared book.

It is advisable, therefore, to set up individual entry level access lists only when absolutely necessary.

Preventing unauthorized changes

You can prevent unauthorized changes to the access list of and, therefore, unauthorized access to, a shared book if you set up access rights carefully. You should do this before you announce the existence of the shared book.

The examples that follow will help you understand how to set up access rights. They are merely suggestions and are not the only ways you can set up access rights.

A. If your main concern is to prevent members of the user group from tampering with the shared book access list, you could set up the access lists for the file drawer and the shared book as shown in Figure 9-1.

Figure 9-1 **Example of access rights that prevent internal tampering**

File Drawer:	
Leader	{R W}
Group members	{R}
Non-members	{R}
Shared Book:	
Leader	{R W A Rm O}
Group members	{R W A Rm}
Non-members	{R}

R = read, W = write, A = add, Rm = remove, O = owner (change access)

Since group members have both read and write access to the shared book, they can still change the access lists for the entries. However, they cannot change the access list for the shared book.

While the project leader (with read and write access to the file drawer) can change the access list for the shared book, the project leader cannot change the access list for the file drawer.

The project leader can neither create a new shared book nor delete the existing one. However, if the project leader has full access rights to the file drawer, that is {R W A Rm O}, then neither of these restrictions apply.

If you wish to allow people who are not members of the user group to read the shared book, but not edit it, you can do so by giving them read access to the shared book. You can also give them read access to certain entries and no access to others. (These users will still be able to lock entries, even entries to which they have no access rights at all.) However, you must set up the access list of <u>each entry</u> separately and <u>specify exactly</u> who has access to it. This will only work, of course, if they do not have write access to the file drawer.

B. If your main concern is to prevent people outside the user group from tampering with the shared book access list, you could set up a private file drawer for the user group and set up access rights as shown in Figure 9-2.

Figure 9-2 **Example of access rights that prevent external tampering**

File Drawer:	
Leader	{R W A Rm O}
Group members	{R W A Rm}
Shared Book:	
Leader	(Same As Container)
Group members	(Same As Container)

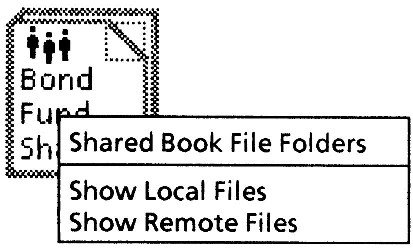
In this example, people who are not members of the group have no access rights at all. If you wish, you can give non-members the same kind of limited access, that is read-only access, as in example A.

C. Security-conscious users could combine examples A and B by setting up a private file drawer with access rights as in example A.

Shared book pop-up menu

Use the shared book pop-up menu (Figure 9-3) to open the folders of local and remote files (Figures 9-4 and 9-5), which are described below.

Figure 9-3 **Shared book pop-up menu**



The folder windows

Figure 9-4 **Folder of local files**

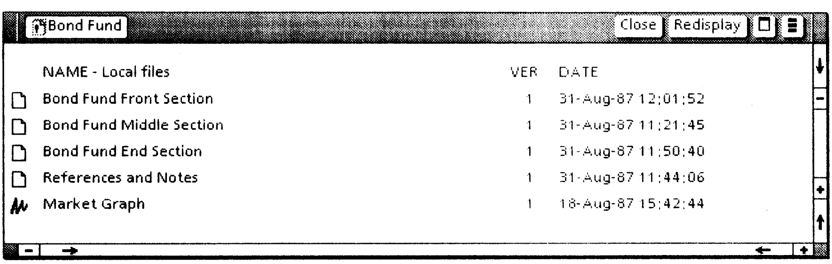
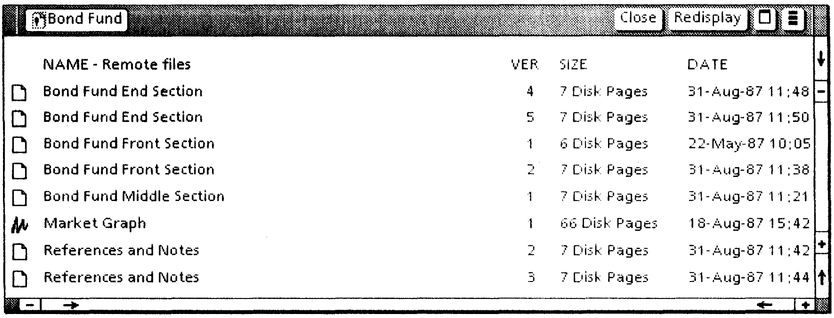


Figure 9-5 **Folder of remote files**



The folders of local and remote files contain the following information:

Name
The name of the entry. This column is always present in the folder window.

Ver
The version number of the entry. (This is not the same as the revision number.) Its presence depends on how the display options are set.

Size
The size of the entry in disk pages. Its presence depends on how the display options are set. In Figure 9-4, the **Size** option is disabled; in Figure 9-5, the **Size** option is enabled.

Date
The date and time the entry version was last modified. Its presence depends on how the display options are set.

Determining whether the Librarian Service is unavailable

If a question mark appears in the lock column of the Shared Book window, it means the Librarian data base is unavailable. This may be a brief interruption of the Librarian Service, or it may be a service failure.

1. Select [Redisplay] in the Shared Book window header.

   If the correct information appears, the Librarian Service is back on-line.

   If the correct information does not appear, go to step 2.

2. Close the Shared Book window and reopen it.

   If the correct information appears, the Librarian is back on-line.

   If the correct information does not appear, notify the System Administrator that the Librarian may be off-line, and go to step 3.

3. Refer to "Using the folders of local and remote files" later in this chapter for the procedures to retrieve an entry when the Librarian data base is unavailable.

Creating a major revision and archiving a shared book

When it is time to create a major revision, it may also be convenient to *archive* (to store a copy for historical purposes) a copy of the shared book.

1. Have the other users save and unlock all locked entries.

2. Paginate the shared book to ensure correct page references.

3. Create an index and table of contents, if desired. Store the resulting documents in the shared book, if desired.

4. Be sure you have edited at least one entry (pagination in step 2 takes care of this), and select [Save Major Revision] in the Shared Book window header, and confirm.

   You can use this method to archive a minor revision, instead of a major revision, by doing a [Save Minor Revision] at this point.

   The revision number for the shared book is updated. The revision number is not updated if you have not saved an edited entry.

5. Create a book or a new shared book, with an appropriate name (containing, for example, the revision number of the old shared book).

6. Copy the entire contents of the shared book you want to archive into the book or the new shared book.

7. If you used a new shared book, unlock all the entries, and close the Shared Book window. Always store the new shared book with all entries unlocked.

If you used a book, move it into a file drawer for storage. (The new shared book is already stored remotely.)

8. Resume work on the individual entries.

Creating a major revision without archiving

The [Save Major Revision] command updates the revision number of the shared book by adding 1 to the major revision number and changing the minor revision number to 0.

1. Have the other users save and unlock all locked entries.
2. Paginate the closed shared book.
3. Create an index and table of contents, if desired.
4. Open the shared book.
5. Store the index and table of contents documents in the shared book, if desired.
6. Be sure you have edited at least one entry (pagination in step 2 takes care of this), and leave all the entries locked.
7. Select [Save Major Revision] in the Shared Book window header, and confirm.

   The revision number for the shared book is updated. The revision number will not be updated if you have not saved an edited entry.

8. Resume work on the individual entries.

Relocating the shared book

You can relocate a shared book to a new File Service or transfer it to a new Librarian data base.

To a new File Service

You can relocate a shared book to a file drawer on a different File Service, but you cannot simply move the shared book to the new location because there is no way to tell the Librarian data base that the shared book has been moved. Instead, you create a new shared book in a file drawer on the new File Service and copy entries from the old shared book into it.

You can use the same name as the old shared book if you do either of the following:

- Create the new shared book on a different File Service from the old one
- Create the new shared book in a different file drawer or divider of the current File Service

Before you begin, be sure you and the other users of the shared book have appropriate access rights to the new file drawer.

1. Create a new shared book in the desired file drawer.
2. Open both old and new shared books.

   Be sure none of the entries in the old shared book is locked by another user.
3. Lock all the entries in the old shared book.
4. Copy entries from the old shared book into the new one.
5. Delete the entries from the old shared book, and then delete the old remote shared book

from the file drawer. Delete your local copy of the old shared book.

6. Notify the other users of the new remote location of the shared book, and have them delete their local copies of the old shared book before retrieving a copy of the new one.

To a new Librarian data base

1. Create a new shared book. Put the name of the new Librarian data base in the **Database** box.

   If the remote location does not change, you must use a different name for the shared book. If the remote location does change, you can use the same name.

2. Open the old shared book and the new shared book.

3. Copy the contents of the old shared book into the new one.

4. Delete the old shared book.

   If the old data base is also being deleted, you can simply delete the shared book from the remote file drawer, and delete all the local copies from users' desktops.

   If the old data base is not being deleted, you must follow the procedure titled "Deleting the remote shared book" in Chapter 8.

Re-establishing the path to the File Service

If the File Service is moved to a new server on the network, it receives a new network address. A local copy of the shared book that is stored on that File Service continues to use the old network address. You will get a message that says, "File Service unavailable. Try again later" each time you try to perform a Shared Book operation.

Use the following procedure to re-establish the connection to the File Service:

1. Boot your workstation.
2. Open the directory and open each level of the network hierarchy until you reach the File Service.
3. Open the File Service icon.
4. Close the entire directory hierarchy (you can select [Close All] in the File Service window header).
5. Resume using the shared book.

Using the folders of local and remote files

Use the folders of local and remote files when the shared book cannot be opened normally and you want to continue work or you need to recover the shared book.

Using the pop-up menu commands

Use the shared book pop-up menu commands when the shared book is closed.

1. Move the pointer to the Shared Book icon.

2. Press and hold down both mouse buttons, or press <SHIFT> while holding down the left mouse button.

   The shared book pop-up menu displays.

3. Select [Show Local Files] to display the folder of local files, or select [Show Remote Files] to display the folder of remote files.

Using the Shared Book window commands

Use the shared book auxiliary menu commands when the shared book is open.

1. Select the shared book auxiliary menu in the Shared Book window header.

2. Select [Show Local Files] to display the folder of local files, or select [Show Remote Files] to display the folder of remote files.

Deleting entries from the folder of local files

CAUTION: Save the entries you have locked before you delete them from the folder of local files or you will lose any changes you have made.

Note: Deleting local entries does not affect the remote shared book or the other users' copies of the shared book.

1. Save and unlock any entries you have locked.

2. Open the folder of local files.

3. Select an entry or entries within the folder of local files.

4. Press <DELETE> and confirm, if necessary.

5. Close the folder of local files.

Copying or moving entries from the folder of local files

You cannot copy, or move, objects into the folder of local files.

Copying or moving a local entry from the folder of local files does not affect the remote shared book or the other users' copies of the shared book.

1. Open the folder of local files.
2. Select an entry within the folder of local files.
3. Press <COPY> or <MOVE>, and select a destination (for example, on the desktop).
4. Close the folder of local files.

Note: If you move an entry out of the folder of local files by mistake (you have unsaved changes, for example), you can restore the entry to the shared book. Refer to the procedure titled "Replacing an existing entry" in Chapter 8 for this procedure.

Copying entries from the folder of remote files

You cannot copy objects into the folder of remote files.

Copying an entry from the folder of remote files does not affect the remote shared book or the other users' copies of the shared book.

You cannot move an entry from the folder of remote files.

1. Open the folder of remote files.
2. Select an entry within the folder of remote files.

3. Press <COPY> and select a destination (for example, on the desktop).

4. Close the folder of remote files.

Recovering a shared book after a system failure

To use the shared book again after a system failure, you must determine whether it is locked or damaged, and, if necessary, restore it to its condition before the failure occurred.

If the remote shared book is affected, no one can use the shared book until it is recovered. If only your local copy is affected, then only your local copy needs to be recovered.

CAUTION: The "in use" message described in step 3 of this procedure is the same message you often see during normal Shared Book operations. Do not ask the System Administrator to unlock the shared book until you have checked with the user whose name appears in this message to see if a normal, but lengthy, Shared Book operation is in progress. Unlocking the shared book during a normal Shared Book operation may damage it.

Recovering from a workstation failure

This procedure assumes that your workstation malfunctioned. Use the procedure to determine which of the following is true and to recover the shared book:

- The remote shared book was left locked and must be unlocked.
- The remote shared book is damaged and needs to be recovered.
- Only your local copy of the shared book is damaged and needs to be recovered.

1. Boot your workstation, if necessary.

2. Open the shared book.

   If it opens, you can use the shared book normally. The remaining recovery procedure is not needed.

   If it does not open, go to step 3.

3. Watch the message area.

   You may see either of the following two messages:

   "Shared Book internalization error."

   "Bond Fund currently in use by Joanne D. Smith, for the last 45 seconds. Please try again. (database: Dockets:MPFT:Xerox, libject name: BC580-0AA00-8661-C89E-2163)."

   If you see the first message, ask another user to open the shared book or to redisplay the Shared Book window if it is already open. The second message should display on the other user's workstation. You need information from this message to complete the recovery procedure.

4. Write down the data base name and the libject name.

   Consult the user whose name appears in the message (this name could be your own). A lengthy, but otherwise normal, Shared Book operation may be in progress.

   When you are certain no one is performing a normal Shared Book operation, ask the System Administrator to unlock the shared book. Provide the Librarian data base name and the libject name. (The remote shared book was left locked and must by unlocked before you can continue this procedure.)

If you see any other message, refer to *QuickFind Reference* volume for an explanation and instructions.

5. After the System Administrator has unlocked the remote shared book, open the shared book on your desktop, again.

   If the shared book opens, you can use the shared book normally. The remaining recovery procedure is not needed.

   If the shared book does not open and either of the following messages appear, go to step 6:

   "ERROR during retrieval. The Shared Book is damaged. Please follow recovery procedures found in your documentation."

   "Shared Book internalization error."

6. Retrieve a new copy of the shared book, using the Blank Shared Book properties sheet.

7. Open the new copy of the shared book.

   If the new copy opens, then just your old, local copy is damaged. Go to step 8 to recover the entries you had locked (your unsaved changes).

   If the new copy does not open, then the remote shared book is damaged and must be restored. Follow the steps in the procedure titled "Rebuilding the shared book," later in this chapter, to complete the recovery of the shared book.

8. Open the new shared book, and open the folder of local files of the old, damaged shared book.

9. Lock the entries in the new shared book that you are going to replace. These are the

entries that you had locked at the time of the workstation failure.

10. Copy the entries you had locked, from the folder of local files of the old shared book into the new Shared Book window, and leave the entries locked.

11. Close the folder of local files, and delete the old copy of the shared book from your desktop.

    Continue editing the entries in the new copy of the shared book, or save them to the remote shared book using [Save Minor Revision].

Recovering from a network service failure

When one of the network services fails during a Shared Book operation, you get a message that includes the words "service problem." Subsequent Shared Books operations produce similar messages or a message that the shared book is damaged. Refer to *QuickFind Reference* volume for information about specific messages.

When the File Service and Librarian Service are on-line again, use this procedure to find out whether you must recover the remote shared book.

1. Retrieve a new copy of the shared book if it is not already on your workstation. Use the Blank Shared Book properties sheet to retrieve it.

2. Open the shared book, or if it is already open, try to redisplay the Shared Book window.

   If the shared book opens or if the operation is successful, you can use the shared book normally. The remaining recovery procedures are not needed.

If the shared book does not open, the remote shared book may be damaged, and you must restore it.

CAUTION: Do not delete your local copy of the shared book. You will need it to recover entries.

3. Ask the System Administrator to unlock the shared book, if necessary. Provide the Librarian data base name and the libject name. Refer to steps 3 and 4 of the procedure titled "Recovering from a workstation failure," earlier in this chapter, for more information.

4. Follow the steps in the procedure titled "Rebuilding the shared book," later in this chapter, to complete the recovery of the shared book.

Rebuilding the shared book

Start here if you know the remote shared book is damaged.

If the remote shared book was left locked by a system failure, the System Administrator must unlock it before you can begin this procedure. Perform steps 1 through 4 of the procedure titled "Recovering from a workstation failure," earlier in this chapter, to obtain the information required by the System Administrator.

You can use the same name for the new shared book if you do any one of the following:

- Delete the damaged remote shared book.
- Create the new shared book on a different File Service.
- Create the new shared book on a different file drawer or divider of the same File Service.

CAUTION: If you delete the damaged remote shared book now, you may lose entries that you will need to recover the shared book.

1. Determine which entries are locked and which users have locked them.

   Ask the other users to compare the create dates of the entries in their folders of local files with the create dates of entries in the folders of remote files. Whenever a local entry is more recent than its remote counterpart, that local entry is probably locked.

   Use the shared book pop-up menu to open the folders of local and remote files if the Shared Book icon does not open normally.

2. Copy the most recent version of each entry to your desktop.

   Get unlocked entries from either the folder of remote files or your folder of local files.

   Get entries that are locked by you from your folder of local files.

   Get entries that are locked by other users from the users who have them locked. Any convenient method can be used to get the entries to you desktop: electronic mail, a common file drawer, a floppy disk.

   Note: Now you can safely delete the remote shared book if you want to use the name again.

3. Create a new shared book.

4. Add the entries to the new shared book.

5. Notify the other users to delete their local copies of the damaged shared book and to begin using the new one.

6. Delete the damaged remote shared book if you have not already done so.

Unlocking entries left locked by absent users

When entries are left locked, no one can use them or perform operations on the entire shared book.

Method 1 is easier than Method 2 because it does not require you to unlock the entries. Try it first. If it does not satisfy your needs, use method 2 to unlock the entries.

Method 1

1. Copy the desired entries from your Shared Book window using the procedure in Chapter 8 titled "Copying an entry out of the shared book."

2. Edit the entries on your desktop. They can be paginated, printed, and so on.

3. When the absent user returns, you must reconcile your changes with the versions of the entries stored in the returning user's folder of local files.

Method 2

1. Obtain the absent user's password, or ask the System Administrator to change it to a password you know.

   Go to step 2 if you plan to use the absent user's workstation.

   Go to step 3 if you plan to use another workstation.

2. Unlock the entries using the following steps:

   - Log on to the absent user's workstation.

   - Copy the locked entries onto the desktop to preserve the current contents.

   - Either save the locked entries to the remote shared book, or cancel their locks using the Entry Details option sheet.

   - Skip step 3.

3. Log on to another workstation.

   - Create a desktop with the absent user's name and password if it does not already exist.

   - Retrieve a new copy of the shared book.

   - Either save the locked entries to the remote shared book, or cancel their locks using the Entry Details option sheet.

   - Delete the desktop, if desired.

4. When the absent user returns, the versions of the entries left on that user's desktop (by step 2) or the versions of the entries left in that user's folder of local files (by step 3) will have to be reconciled with the current versions of the entries in the remote shared book.

   If you used step 3, the copies of the entries that were left in the absent user's folder of local files could become unofficial entries. The returning user will have to perform the procedure in Chapter 8 titled "Removing an unofficial entry," using Method 2 of that procedure.

   The returning user will also have to acquire a new password.

Changing the access list

You set access rights to control, or limit, what your co-workers can do with a shared book.

You use the Shared Book properties sheet to change the access list of a shared book.

You use the Entry Details option sheet to change the access list of an entry. You must lock the entry to change its access list.

You can change the access rights of other users when you are logged on to your own desktop, but you cannot change your own access rights. Someone else can change your access rights for you, or you can change them from another user's desktop.

CAUTION: Do not attempt to change the access list or access rights of a shared book or an entry until you read and understand the section titled "Access control" earlier in this chapter.

Access list properties/options

The Shared Book properties sheet (Figure 8-2) and the Entry Details option sheet (Figure 8-6) contain the following items:

Access List
The names of individuals and groups of users and their access rights. Defaults to (Same As Container).

New Access Entry
Name of the individual or group of users that is being added, deleted, or changed. Filled in by the user.

Access Rights
The five specific access rights: read, write, add, remove, and owner.

[Change Access List]
Command to change the access list.

[Make Access List Same As Shared Book's]
Command to make the access list of an entry identical to the access list of the shared book in which the entry is stored. Appears only on Entry Details option sheet.

Adding a name to the access list of the shared book

The first time the access list of a shared book is changed (usually by adding a name to the access list), the name of the user who makes the change (the logged on user) is also added to the access list with full access rights, {R W A Rm O}.

CAUTION: The first name you add to the access list will replace the default access list, (Same As Container), not add to it, and the default access list is lost. Subsequently, the names will be added to the list.

When you replace the default, (Same As Container), with the name of an individual or a group, access rights are limited to that individual or group. You must then add the name of each user or user group that you want to have access to the shared book. The default access list is gone and you must build a new one. Only the names you add will have access to the shared book.

If you are adding a name that is from your domain and organization, you need not use the fully qualified name. Shared Books will supply your domain and organization by default.

If you are adding a name from a different organization or domain, you must use the fully qualified name.

If you are adding a name that is already on the access list, that user's access rights will be changed to those you select when you add the name this time. You are actually changing access rights. Refer to "Changing the access rights of a current user of the shared book," below, for this procedure.

1. Open the Shared Book properties sheet.

2. Type the name or alias of the individual or group into the **New Access Entry** box.

3. Select the desired **Access Rights**.

4. Select [Change Access List].

   Note: [Change Access List] blinks when selected; it does not highlight.

   The new name appears in the **Access List**. You can make several changes to the access list before selecting [Done]. Select [Change Access List] for <u>each</u> change.

5. Select [Done] to put the changes into effect.

   Note: Select [Cancel] to cancel the changes.

Deleting a name from the access list of the shared book

Deleting all the names on the access list changes the access list to the default, (Same As Container).

If you are deleting a name that is from your domain and organization, you need not use the fully qualified name. Shared Books will supply your domain and organization by default.

If you are deleting a name from a <u>different</u> organization or domain, you must use the fully qualified name.

1. Open the Shared Book properties sheet.

2. Type the name or alias of the individual or group into the **New Access Entry** box.

3. Deselect all the **Access Rights**.

4. Select [Change Access List].

   Note: [Change Access List] blinks when selected; it does not highlight.

   The name is removed from the **Access List**. You can make several changes to the access list before selecting [Done]. Select [Change Access List] for each change.

5. Select [Done] to put the changes into effect.

   Note: Select [Cancel] to cancel the changes.

Changing access rights of a current user of the shared book

If you are changing the access rights for a name that is from your domain and organization, you need not use the fully qualified name. Shared Books will supply your domain and organization by default.

If you are changing the access rights for a name from a different organization or domain, you must use the fully qualified name.

1. Open the Shared Book properties sheet.

2. Type the name or alias of the individual or group into the **New Access Entry** box.

3. Select the desired **Access Rights**.

   CAUTION: If not specifically selected, access rights currently in effect will be deleted.

4. Select [Change Access List].

   Note: [Change Access List] blinks when selected; it does not highlight.

   The new access rights will replace the old access rights in the **Access List**. You can make several changes to the access list before selecting [Done]. Select [Change Access List] for each change.

5. Select [Done] to put the changes into effect.

   Note: Select [Cancel] to cancel the changes.

Adding a name to the access list of the entry

If you are adding a name that is from your domain and organization, you need not use the fully qualified name. Shared Books will supply your domain and organization by default.

If you are adding a name from a different organization or domain, you must use the fully qualified name.

CAUTION: The first name you add to the access list will replace the default access list, (Same As Container), not add to it, and the default access list is lost. Subsequently, the names will be added to the list.

When you replace the default, (Same As Container), with the name of an individual or a group, access rights are limited to that individual or group. You must then add the name of each user or user group that you want to have access to the shared book or the entry. The default access list is gone and you must build a new one. Only the names you add will have access to the shared book.

You must add your name and your access rights to the access list for the entry. Unlike adding names to the shared book access list, your name is not automatically added to the access list for an entry.

1. Open the Entry Details option sheet.

2. Type the name or alias of the individual or group into the **New Access Entry** box, or select [Make Access List Same As Shared Book's] and go to step 5.

3. Select the desired **Access Rights**.

4. Select [Change Access List].

   Note: [Change Access List] blinks when selected; it does not highlight.

   The new name will appear in the **Access List**. You can make several changes to the access list before selecting [Done]. Select [Change Access List] for each change.

5. Select [Done] to put the changes into effect.

   Note: Select [Cancel] to cancel the changes.

Deleting a name from the access list of the entry

Deleting all the names on the access list changes the access list to the default, (Same As Container).

If you are deleting a name that is from your domain and organization, you need not use the fully qualified name. Shared Books will supply your domain and organization by default.

If you are deleting a name from a different organization or domain, you must use the fully qualified name.

1. Open the Entry Details option sheet.

2. Type the name or alias of the individual or group into the **New Access Entry** box, or select [Make Access List Same As Shared Book's] and go to step 5.

3. Deselect all the **Access Rights**.

4. Select [Change Access List].

   Note: [Change Access List] blinks when selected; it does not highlight.

   The name will be removed from the **Access List**. You can make several changes to the access list before selecting [Done]. Select [Change Access List] for each change.

5. Select [Done] to put the changes into effect.

   Note: Select [Cancel] to cancel the changes.

Changing access rights of a current user of the entry

If you are changing the access rights for a name that is from your domain and organization, you need not use the fully qualified name. Shared Books will supply your domain and organization by default.

If you are changing the access rights for a name from a different organization or domain, you must use the fully qualified name.

1. Open the Entry Details option sheet.

2. Type the name or alias of the individual or group into the **New Access Entry** box, or select [Make Access List Same As Shared Book's] and go to step 5.

3. Select the desired **Access Rights**.

   CAUTION: If not specifically selected, access rights currently in effect will be deleted.

4. Select [Change Access List].

   Note: [Change Access List] blinks when selected; it does not highlight.

   The new access rights will replace the old access rights in the **Access List**. You can make several changes to the access list before selecting [Done]. Select [Change Access List] for each change.

5. Select [Done] to put the changes into effect.

   Note: Select [Cancel] to cancel the changes.

Part 4

Object Conversion Utility

10. Using Object Conversion Utility

Xerox ViewPoint provides a conversion utility for converting one version of documents to another version. The Object Conversion Utility eliminates the need for you to retrieve the documents to the desktop, convert them one by one, and store them back on a File Service. The Object Conversion Utility converts a file drawer's contents without your intervention.

When used with a dedicated workstation, multiple users can upgrade file drawer contents without tying up individual workstations.

Note: The Object Conversion Utility is only used to convert 8010 objects to ViewPoint, or one version of VP objects to another version. To convert foreign documents and spreadsheet files to ViewPoint, the appropriate file conversion software package must be purchased. For detailed information on the file conversion packages, refer to the *File Conversions Reference* volume in the *VP Series Reference Library*.

Key concepts of Object Conversion Utility

The Object Conversion Utility converts documents stored in file drawers and generates a log document listing the status of each document.

File drawers

To use the conversion facility, you specify the file drawer that contains the documents to be converted and the file drawer where the converted files are to be stored. (Note: the same file drawer can be used.) This is done using an option sheet that displays when you select [Object Conversion Utility] in the desktop auxiliary menu. The utility then performs the operation (without your intervention) by retrieving the documents from the file drawer, converting them, and then placing them on the File Service in the specified file drawer.

Objects contained in the source and destination file drawers are accessible to all users with read access to the file drawers. Items requiring privacy or security should not be converted using centralized file drawers.

While running, the Object Conversion Utility ties up the workstation. You can stop the conversion process at any time by pressing <STOP>. It will always stop after all the objects in the source file drawer are converted, unless automatic upgrade is selected.

Automatic upgrade

You can elect to have the file conversion facility available at all times by using the automatic upgrade feature. Periodically, the utility polls the source file drawer and upgrades the objects. If it finds the drawer empty, it waits a specified time and rechecks the source file drawer for new objects. When it finds a document in the source file drawer, it upgrades it and then remains idle for the length of time designated by you in the **Polling Interval** option. After the designated time has passed, it will check the file drawer for new documents, upgrade them, and then remain idle again. This procedure continues until you stop the conversion utility and ties up the dedicated workstation during any conversions.

If for some reason the Object Conversion Utility cannot place the object in the file drawer, then the object is placed on the workstation's desktop.

If the conversion utility cannot convert an object, it is left in the source file drawer, and the failure is noted in the Log document.

Log document

Each time the conversion utility is used, a Log document is generated, which contains a list of documents and their status after the conversion. The Log document indicates the time conversion was started, success or failure of conversion for each object, and the time conversion was completed. You can view the log by opening the document.

Files that the converter are unable to convert are left in the source file drawer, so that users won't mistakenly think the files were converted successfully. You should check the log to see if any of these files are present, and then determine why the files were not upgraded. Are the proper up/downgraders loaded? Was there a communications problem with the File Service? Is the file invalid?

Messages

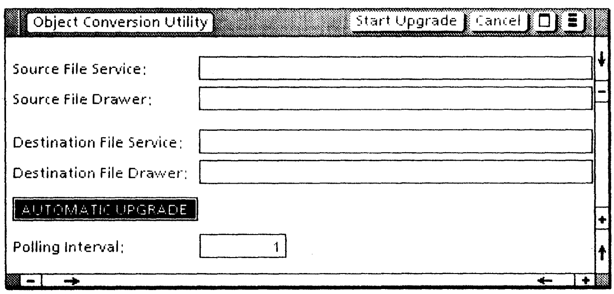
During conversion, the utility posts messages regarding the progress of the upgrade. These include the name of the item currently being converted and any problems encountered. When using automatic upgrade, a message is posted indicating the time that the utility became idle.

Object Conversion Utility option sheet

The Object Conversion Utility option sheet (Figure 10-1) is used to set the source and destination options as well as designate automatic upgrade.

To display the Object Conversion Utility option sheet, select [Object Conversion Utility] in the desktop auxiliary menu.

Figure 10-1 **Object Conversion Utility option sheet**



Window commands

[Start Upgrade]
: Begins the process of upgrading the objects in the source file drawer. This ties up the workstation until the utility is stopped. [Start Upgrade] is replaced by [Stop Upgrade] during automatic conversion.

[Stop Upgrade]
: Causes the automatic conversion of the file drawer to be stopped. This command can be selected only during the idle mode. You may have to press <STOP> first.

Options

Source File Service
Specifies the name of the File Service that contains the source file drawer. If the domain and organization are not specified, the user's domain and organization are used.

Source File Drawer
Specifies the name of the file drawer to be upgraded. You may specify a particular folder in the file drawer by specifying the file drawer name, followed by a slash (/), followed by the folder name.

Note: You must have proper file drawer access, and the Object Conversion Utility must have read/write/add access to the specified file drawer.

Destination File Service
Specifies the name of the File Service that contains the destination file drawer. If the domain and organization are not specified, the user's domain and organization are used.

Destination File Drawer
Specifies the name of the file drawer where the upgraded objects are placed.

Note: The Object Conversion Utility must have add/read/write access to the specified file drawer, and the destination file drawer can be the same as the source file drawer.

[Automatic Upgrade]
Causes the conversion utility to periodically poll the source file drawer and upgrade the objects. If the file drawer is empty, the conversion utility remains idle for the specified time set in the polling interval option. It then polls the file drawer again and upgrades any new objects. This procedure continues until the utility is stopped by the user.

Polling Interval

Specifies the length of time that the conversion utility remains idle before rechecking the source file drawer for new objects. The interval is specified in minutes and must be a number between 1 and 1440 (1 day). This item is visible only if [Automatic Upgrade] is selected.

Note: When using automatic upgrade all text items in the option sheet become uneditable. This prevents users from changing the options during the idle period, and ensures that the option sheet accurately reflects the options being used by the utility.

Activating object conversion

Note: You must have the appropriate ViewPoint up/downgraders loaded to use the Object Conversion Utility. Refer to the 2.0 Release Document for information.

1. Select [Object Conversion Utility] in the desktop auxiliary menu. The Object Conversion Utility option sheet displays.
2. Fill in the name of the source File Service.
3. Fill in the name of the source file drawer. To specify the contents of a folder in a file drawer, first type the file drawer's name, then a slash (/), then the folder's name. Only the folder and its contents are converted.
4. Fill in the name of the destination File Service.
5. Fill in the name of the destination file drawer.

   Note: The source file drawer and destination file drawer may be the same.
6. Select [Start Upgrade].

   Once [Start Upgrade] is selected, the conversion utility upgrades all upgradable objects in the source file drawer and moves the upgraded objects to the destination file drawer.

Activating automatic object conversion

1. Select [Object Conversion Utility] in the desktop auxiliary menu. The Object Conversion Utility option sheet displays.
2. Select [Automatic Upgrade]. The **Polling Interval** option displays.

3. Enter a number between 1 and 1440 to represent minutes.

4. Select [Start Upgrade].

Stopping conversion

1. During normal conversion, press <STOP>.

2. During automatic conversion, press <STOP> or select [Stop Upgrade], which replaces [Start Upgrade] in the option sheet's header area.

Checking the Log document

1. Select the Log document.

2. Press <OPEN>.

A. Unlocking a shared book libject

If your System Administrator is unfamiliar with Shared Books, you may have to supply the following information.

Unlocking a shared book libject

A System Administrator must unlock the shared book libject to make the locked shared book available to users again. The following information is required:

- Librarian data base name
- Libject name

This information is found in the "in use" message that appears whenever you try to perform a Shared Book operation on a shared book that is locked.

To unlock the shared book libject, the System Administrator performs the following steps:

1. Log on to the Librarian Service that supports the database used by the shared book.

2. When enabled, enter **CheckIn Libject**

3. Select the data base.

   For example,

   Dockets:MPFT:Xerox

4. Enter the libject name.

   For example,

   BC580-0AA00-8661-C89E-2163

The Librarian unlocks the shared book.

Index

NOTES

NOTES

Reader's Comments

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____

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____

____

6. Did you find any errors?

Page No. Error

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