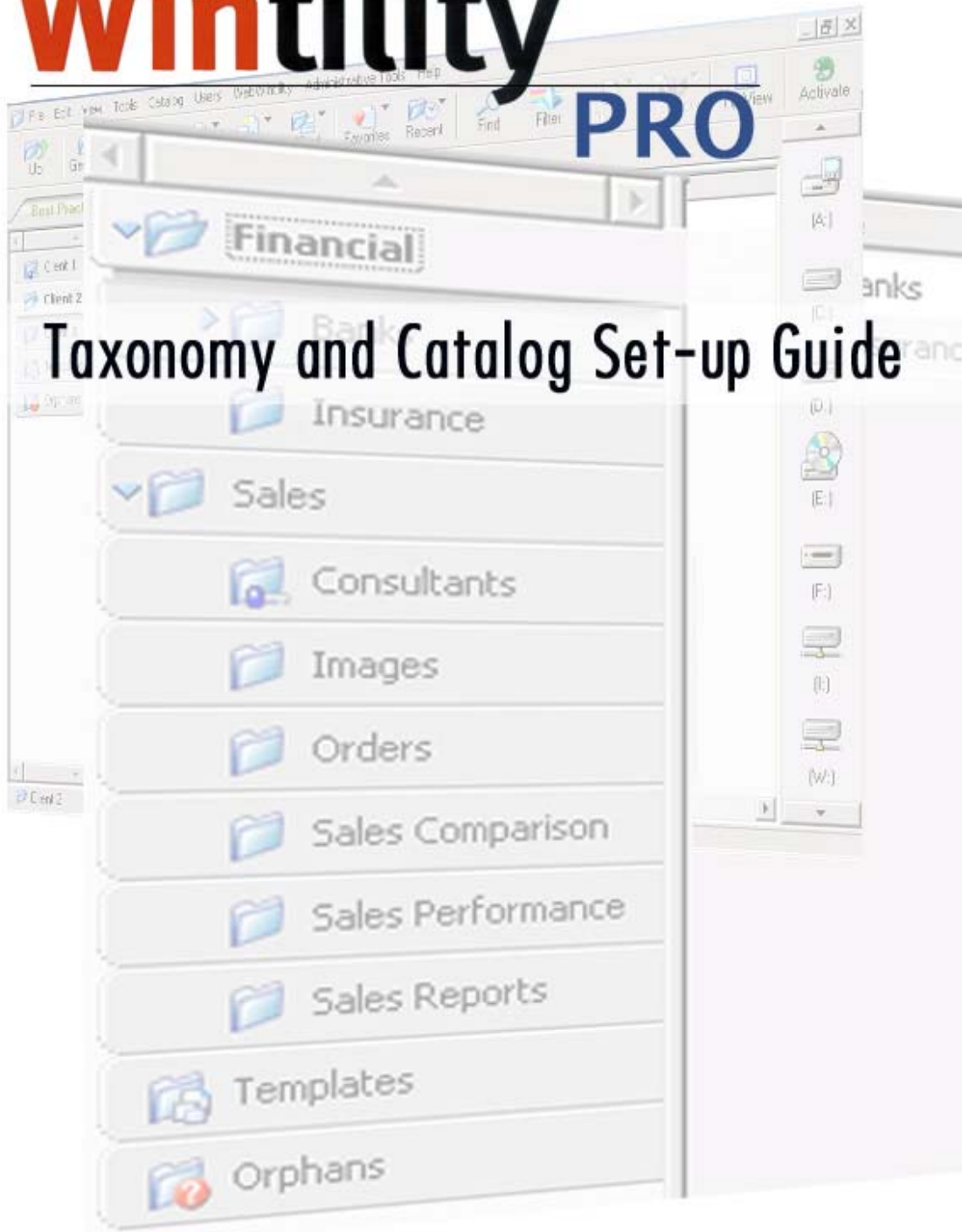


Wintility

PRO

Taxonomy and Catalog Set-up Guide



This guide attempts to help you create a taxonomic structure to meet your company needs and organize your documents using Wintility Pro.

Remember that there is no one right way to configure Wintility Pro. This guide presents the methods that our customers and consultants have developed, but each work environment is different and presents different challenges and opportunities.

We strongly recommend reading this document before implementing the software. If you have any questions, feel free to discuss them with our staff or our authorized resellers.

This document is divided into two sections – “Organizing the past” and “Future procedures”. The first task for most users is to organize the abundance of accumulated unstructured information in their company/department/workgroup, or the legacy. Unless you are starting completely from scratch or disregarding existing documents, both sections will apply to you.

PART I: ORGANIZING THE PAST

For as long as we have had folders and subfolders in file systems, we have been categorically organizing content. It is very common that an organizational system that once worked well grows uncontrollable and impossible to manage.

These folders, however, can be a useful starting points for building taxonomies because they tend to reflect the way at least some users organize their work.

It's important to remember that some folders are created for ad hoc tasks, some are used simply to share files much like an ftp site, and some are no longer used but continue to exist.

Nonetheless, within this framework you can find elements of organizational structures that reflect existing business processes.

Depending on your goals for your document organization/management project, you will want to consider the following questions:

1. What are you looking to do with the software?
 - a. Create a knowledge base with selected information.
 - b. Structure all the department/company documents.

The difference between creating a knowledge base and organizing everything in the department is simple: a knowledge base consists of only the information relevant to a single heading, such as Best Practices, ISO documentation, etc. whereas overall organization falls under various headings.

2. How are your documents structured now?
 - a. By client
 - b. By department
 - c. By vertical markets
 - d. By document type
 - e. By year

3. What is the problem with the existing structure?

a. Too much information, not categorized in an intelligible way.

- i. Consider an overall division using one of the structures mentioned in question 2 combined with divisions in alphabetical order. For example, Clients>a-c, d-f, etc.
- ii. Consider a typical hierarchy system using four or five general divisions that become more specific (see figure 1.1).

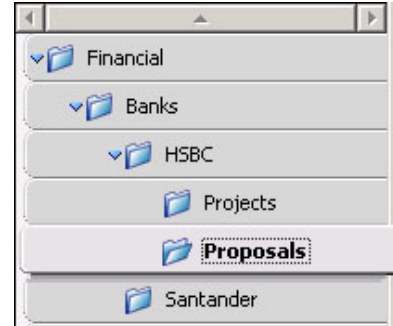


figure 1.1

b. The organizational structure doesn't correspond with the company processes.

- i. Decide how the company "works". Is the method based on specific projects? Or general procedures/processes? If the answer is "both" - can it be unified? Is it a requirement to maintain two separate sections?
- ii. Consider listing the principal company procedures/processes and breaking them down. For example, home loan approval has various stages, you could break the process down into groups and include pertinent information in each:
 - 1. Home Loans
 - a. Application
 - b. Verification
 - c. Sanction
 - d. Closed
 - e. Disbursed
 - f. Re-evaluation

- c. Users can't find what they are looking for because of a lack of standardization.
 - i. Consider using some of the standard nomenclature of the Industry standard vocabularies to divide the categories (see figure 1.2). You will still need to decide which will be the principal Headings in your Catalog structure.
- 4. What documents and information would you like to store?
- 5. What is important to find?
 - a. You may want to say everything, however, some items can be considered "high-traffic" and need to in a prime location or a separate Group.
- 6. How does the user group search for information? Are there special terms or a general nomenclature?
- 7. Do users start by looking for client, process, date, etc.?

Some Industry Standard vocabularies:

- **MeSH thesaurus** (Medical Subject Headings) - for medical research
- **IPTC** (International Press Telecommunications Council Subject Codes) - used to classify or businesses by their products or services.
- **UNSPSC** (Universal Products and Services Codes) – used to classify products and services
- **NAICS** (North American Industr Classification System) - has replaced SIC codes
- **ISO - 3166** - Geography Categories - 800 countries and cities throughout the world.
- **CRISP**- Computer Retrieval of Information on Scientific Projects

figure 1.2

- a. Decide on the principal way people search for information and use this as a starting point.

After answering these questions, you should be able to develop an outline of the Groups and subgroups you want to create to best organize your information. If you're still not sure about the structure, don't worry. You can easily go back and change information at any time.

When creating your initial structure and capturing certain documents, remember that you are only creating references - and not moving the documents physically. The entries you create within Wintility will be a direct link to the document in its physical location. The document will open in the original format from the original location.

You can opt to leave the documents dispersed throughout the LAN. In the final step of this process you can physically move the documents to desired locations if you choose.

Both of the following procedures can be used to construct a new taxonomic structure using Wintility Pro.

Method A is recommended when organizing all documents of a department/company. Method B is recommended when constructing a knowledge base.

Method B differs from Method A by using keywords as the basis for document organization. Method A imports all documents you would like to organize into the Wintility Pro environment at once. You then filter them using the find/filter tools and organize them accordingly. Using Method B, you will assign keywords to specific Groups and capture documents that match the assigned keywords.

After examining the previous questions and determining how you would like to structure your documents, we recommend creating a draft of the Group hierarchy to create within Wintility Pro.

This can be altered at any time, but it is best to include as much detail as possible in the structure.

Essential concepts

Catalog:

A Catalog is an area within the Wintility Pro environment in which you develop a structure that will attend to the needs of your workgroup/department /company.

You will create a logical structure for your documents.

For example, a Catalog can represent:

- An entire company with departmental subdivisions.
- A single department and its subdivisions.
- A project or group of projects.
- A single or multiple processes (Credit approval, procurement)
- A single subject heading (Best Practices, Vertical markets).

You can divide your Catalog into Groups based on any type of criteria and can add and remove them as needed.

In figure 1.3, each tab shown represents a separate Catalog.

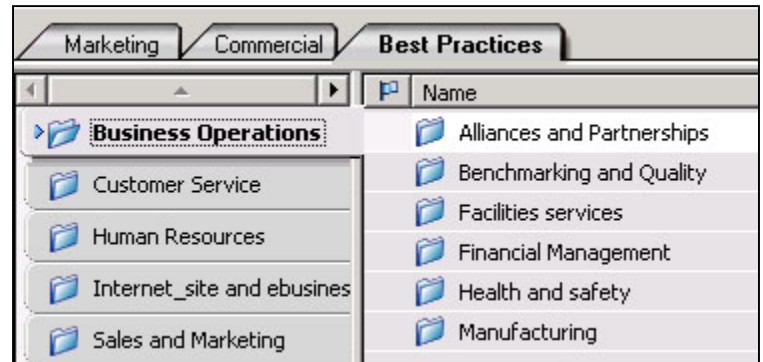


figure 1.3

Group:

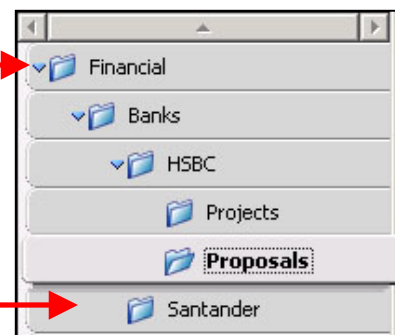
A Group is an item that let you separate your documents logically as opposed to physically. Your documents are separated and stored physically in Windows Explorer, but logically in Wintility. The blue folder icon represents a Group. They can correspond to a process, category.client, etc.

Main Group

Higher level Groups are usually more general and lower levels are subsets of higher levels.

Subgroup:

Represented by a folder icon and corresponds to a dependant process or sub-category.



To remove Groups from the Catalog, right click on the Group and go to "uncatalog". You can add Main Groups and subgroups at any time.

Keywords:

If a document contains the specified keyword(s) in the marked locations, it will be brought into the corresponding Group.

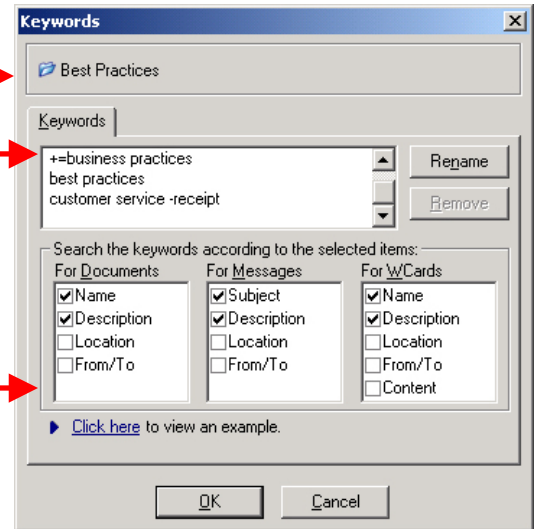
You can create any type of keyword combination using the Keyword Guide below.

By right clicking on a Group>**Keywords**, you can assign an unlimited number of terms.

Group →

Keyword field →

For each type of document Wintility will search the selected fields for →



They can include folder paths, numbers, phrases, and partial words. These terms will determine how your documents are captured.

Keyword Guide

+	The target must contain this word or string of characters
-	The target must not contain this word or string of characters
- +	The target must contain exactly this word or string of characters
- =	The target must not contain exactly this word or string of characters

+word: the target must contain the set of characters "word". Includes all locations where "word" is found. For example, documents containing the term "password" will be captured as well.

+word+pass: the target contains both sets of characters "word" and "pass" in any order. Includes all locations where "word" and "pass" are found. For example, documents containing the term "password" will be captured along with documents containing "bypass the word". Do not include a space between the words or they will be considered separate.

+word-pass: the target must contain the set of characters "word" but not "pass". For example, documents containing the term "password" would not be captured because of the presence of the string "pass". However, "wording" would be picked up. Do not include a space between the words or they will be considered separate.

+ =word: the target must contain exactly the whole string "word".

- =word: the target must not contain the exact string "word".

Remember:

- Wintility considers partial words, so to remove or include an exact part of a word, it is important to include **+ =** or **- =**.
- Do not put a space between the sign and the word.
- Only include a space between separate keywords, these words will be treated as an "And" statement.
- Searching the name field considers the document extension (.doc, .pdf, etc.)
- The default document description is composed of the initial 256 characters of a document. This usually is the title and first paragraph.

Uncatalog vs. Delete:

When you want to remove an item from the Wintility Catalog, you must right click on it and go to **Uncatalog**.

If you delete an item, it will actually be deleted, not only removed from your Catalog.

Structuring a new taxonomy

Method A- Cataloging all documents

Opening an empty Catalog is the first step to developing a new organizational structure and taxonomy.

STEP 1: Open a new Catalog

In the Wintility Pro main screen, go to **Catalog>New** and choose the following options:

Screen 1: Give the Catalog a name and assign the location where it will be saved (remember you are saving the Catalog structure, not the documents that will reside within it.)

For all group members to have access to the Catalog, you must save the Catalog files in a shared network location.

Screen 2: Choose the type of documents to include in the Catalog.

Screen 3: In the "Where to search" field, choose all the drives and networked areas that contain documents that you would like to organize. When you choose to monitor or not monitor a drive or folder, its sub-folders are automatically included.

For example, if you choose to monitor LOCAL DISK (C:) and choose not to monitor "C:\Windows" this means that "C:\", "C:\Program Files", "C:\My Documents", will also be monitored, while "C:\Windows", "C:\Windows\Temp", "C:\Windows\System", will not.

Remember, Wintility will pick up all documents that match the extension that you chose in the previous step.

Screen 4: On the first run through, don't select the e-mail option. You can return to add it in later if you would like to include mail messages in your Catalog.

Screen 5: Choose the option "I prefer to begin with an Empty Catalog".

Screen 6: Don't assign a password, you can assign a password later if you would like.

Screen 7: Press finish.

A Catalog will appear with the selected name and two Groups: Templates and Orphans.



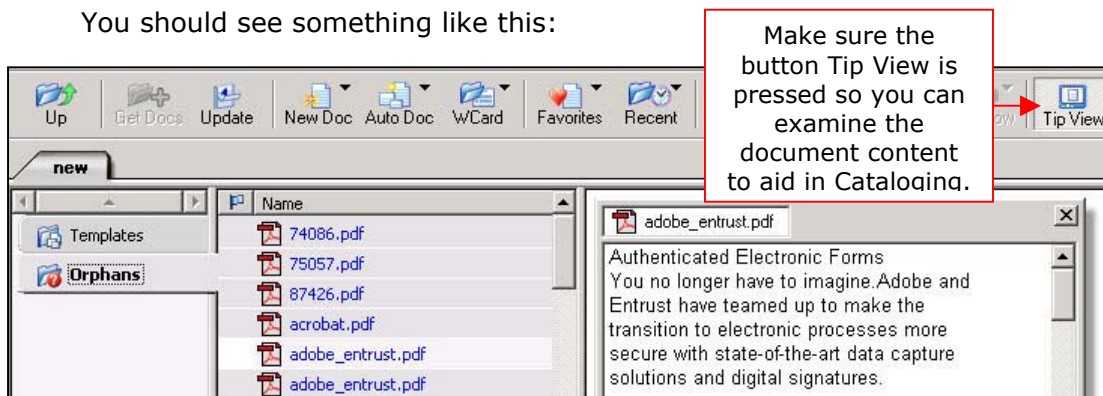
STEP 2: Updating the Catalog

Press the Update button on the top bar.
Leave the "All Catalog" option checked.

A window will appear to show Wintility is processing the request and picking up documents from the selected areas. This may take some time depending on how many documents there are.

STEP 3: Index text content

When the task is finished, click on the Orphans Group.
You should see something like this:



Go to **Tools>text content search index**. Performing this process will create a "list" of all the words included in your documents and will enable you to search their contents. This may take some time depending on the number of documents.

STEP 4: Setting up the initial structure and taxonomy

Create the initial structure for your documents using the **File>New>Main Group** and **File>New>Group** commands to create Groups and construct your Catalog.

To save time, you can copy entire sections of your structure. Right click on the target Group>**copy**. This will copy the Group and subgroups. Click on the area where you would like to place the structure and right click>**paste**. You can add or remove Groups at any time.

Create two additional Main Groups - one named "To be filed" and another named "To be excluded".

STEP 5: Finding and Filtering Documents

Now that you have your structure established, you should have a good idea of what types of documents should go into each Group and subgroup.

You can now use the find and filter tools, to search documents by name, date, text content, file extension, etc.

Make sure:

- You are searching in the "Orphans" section of your Catalog (figure 1.4).
- You have "build a list of occurrences" marked in the "Method" field (figure 1.4).

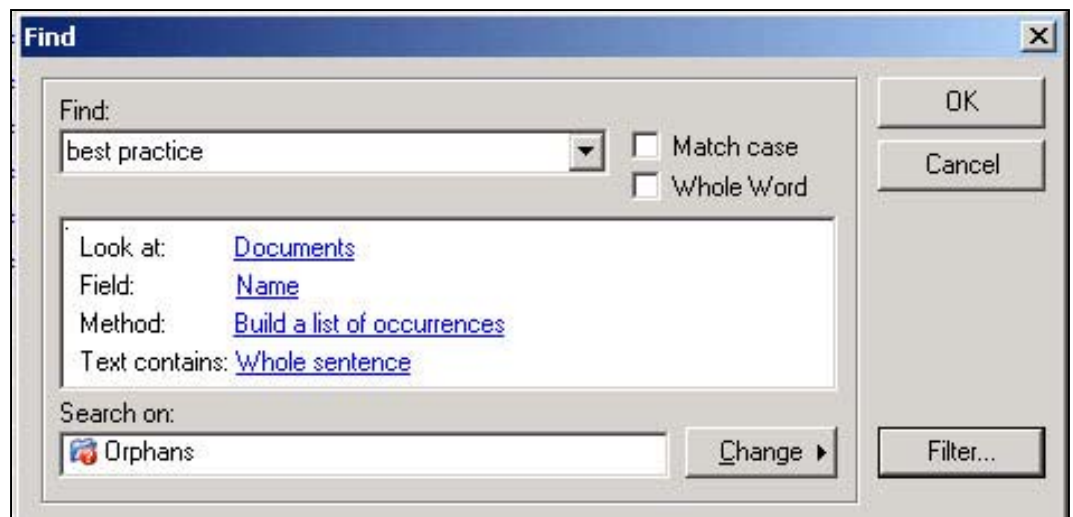


figure 1.4

The documents that match your search will appear in the window (figure 1.5).

You can move each document one at a time or, if you are sure they belong to the Group press CTRL+A and drag all of them.

They will then be removed from the Orphans Group.

As you repeat and refine this process, it is important to keep a list of your searched terms. In the next stage, these terms can be used as keywords to assign to Groups and capture future documents.

For documents that can't be categorized into any of the existing Groups, you can place them in the "To be filed" or "To be excluded" folder and decide what to do with them later.

>>> It is a good idea to Backup the Catalog from time to time. Go to **Catalog>Backup**.

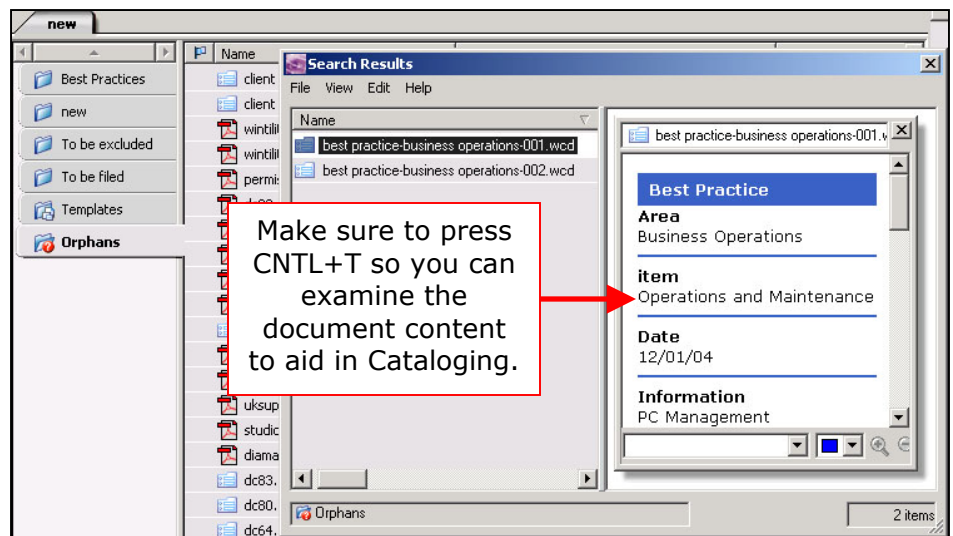


figure 1.5

STEP 6: Physically moving documents

Now that your documents are logically organized, moving them physically is easy.

Option 1 –

Click on the document Location field in the Wintility screen (fig.1.6). Enter the desired path and folder (fig.1.7)& (fig.1.8).

The document will be moved to the physical location in the LAN (fig. 1.9).

If the area doesn't exist, you will be asked if you would like to create it.

Name	Location
compliance overview.doc	c:\mkt\auditing
digital signatures.doc	i:\marketing
procedure regulations 2002.pdf	c:\aes chemicals
hipaa white paper.pdf	c:\mkt\auditing
best practice-business operations-001.wcd	d:\auditing
best practice-business operations-002.wcd	c:\company knowledge base
header_pdf.jpg	d:\auditing
sarbanes oxley.doc	i:\marketing

figure 1.6

Name	Location
compliance overview.doc	c:\mkt\auditing
digital signatures.doc	i:\marketing
procedure regulations 2002.pdf	c:\aes chemicals
hipaa white paper.pdf	c:\mkt\auditing
best practice-business operations-001.wcd	d:\auditing
best practice-business operations-002.wcd	c:\company knowledge base
header_pdf.jpg	d:\auditing
sarbanes oxley.doc	i:\marketing

figure 1.7

Name	Location
compliance overview.doc	c:\mkt\auditing
digital signatures.doc	i:\marketing
procedure regulations 2002.pdf	i:\mkt\regulations
hipaa white paper.pdf	c:\mkt\auditing
best practice-business operations-001.wcd	d:\auditing
best practice-business operations-002.wcd	c:\company knowledge base
header_pdf.jpg	d:\auditing
sarbanes oxley.doc	i:\marketing

figure 1.8

Name	Location
compliance overview.doc	c:\mkt\auditing
digital signatures.doc	i:\marketing
procedure regulations 2002.pdf	i:\mkt\regulations
hipaa white paper.pdf	c:\mkt\auditing
best practice-business operations-001.wcd	d:\auditing
best practice-business operations-002.wcd	c:\company knowledge base
header_pdf.jpg	d:\auditing
sarbanes oxley.doc	i:\marketing

figure 1.9

Option 2: If you have many documents in the same location to be moved, you can use the find tool configured as in figure 1.10.

In the Find field, enter the exact path of the documents to be moved.

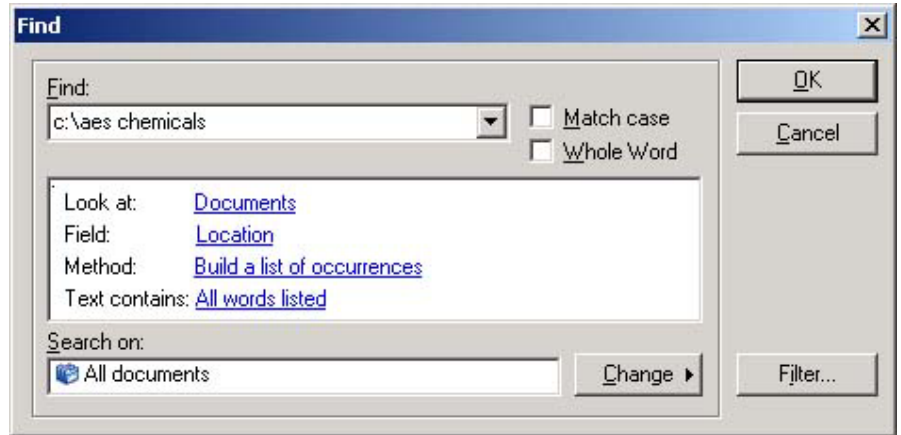


figure 1.10

In the search results window, highlight all the documents to be moved and right click **>Replace**.

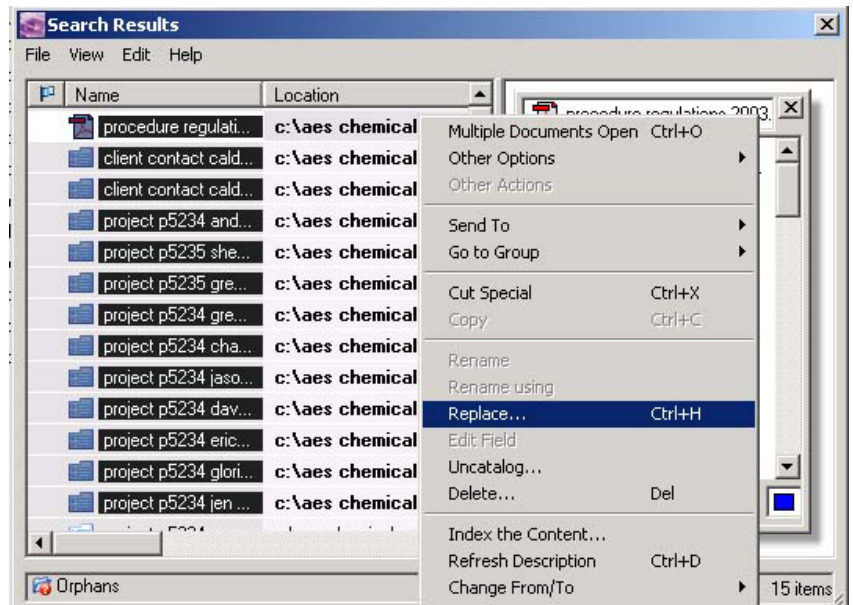


figure 1.11

In the Find what field, enter the documents current path and in the Replace with field, enter the desired path.

You can repeat this process as often as necessary.

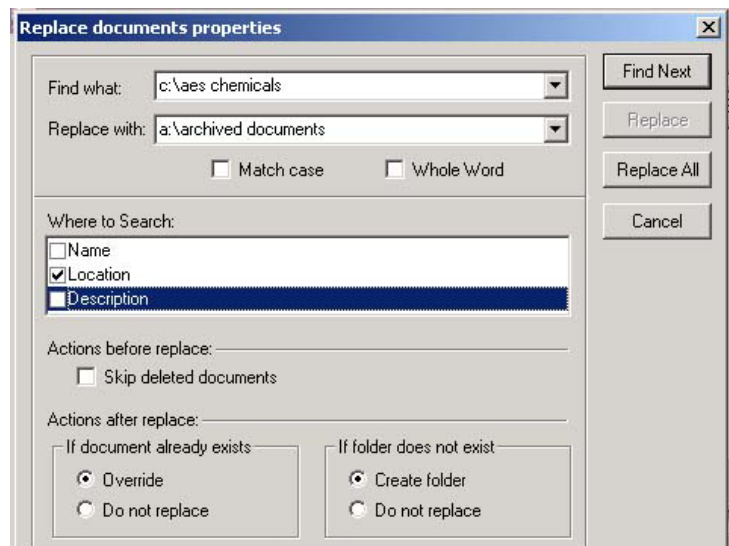


figure 1.12

E-mail messages can also be included in your Catalog. There are no special configurations to include mail from your personal mailbox. However, to open mail from other users mailboxes, make sure that:

- The mailbox files are shared (figure 1.13).
- Each mailbox that will have messages included in the Catalog must be configured through the Wintility client installed in that computer.

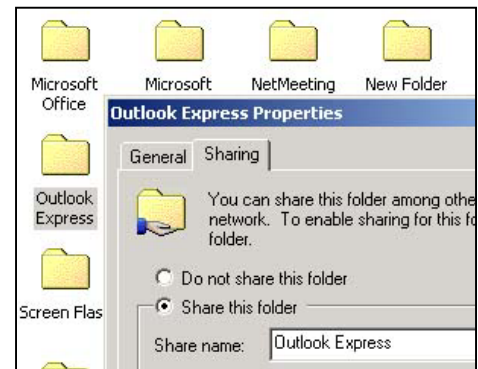


figure 1.13

To include messages go to **Tools>Document Settings>Where to search>messages**, and mark the mailboxes that will contribute messages.

Repeat the process from Step 2 until you have placed the newly included messages in the correct Groups.

Method B- Constructing a Knowledge Base

Opening an empty Catalog is the first step to developing a new organizational structure and taxonomy.

STEP 1: Create a new Catalog

In the Wintility Pro main screen, go to **Catalog>New** and choose the following options:

Screen 1: Give the Catalog a name and assign the location where it will be saved (remember you are saving the Catalog structure, not the documents that will reside within it.)

For all group members to have access to the Catalog, you must save the Catalog files in a shared network location.

Screen 2: Choose the type of documents to include in the Catalog. It is recommended that the first time you only select one extension, for example .pdf. You can return to this screen and add more later.

Screen 3: In the "Where to search" field, leave the default selected and go forward.

Screen 4: On the first run through, don't select the e-mail option. You can return to add it in later if you would like to include mail messages in your Catalog.

Screen 5: Choose the option "I prefer to begin with an Empty Catalog".

Screen 6: Don't assign a password, you can assign a password later if you would like.

Screen 7: Press finish.

A Catalog will appear with the selected name and two Groups: Templates and Orphans.

STEP 2: Develop the initial Group structure

Each Wintility Group will correspond with a section/division of your Knowledge base and its subdivisions.

Create the initial structure for your documents using the **File>New>Main Group** and **File>New>Group** commands to create Groups and construct your Catalog.

Create two additional Main Groups - one named "To be filed" and another named "To be excluded".

STEP 3: Designate organizational rules

Now that you have created the backbone of your organizational structure, you will need to put the documents in the correct location. To do this, you need to assign keywords to each Group (for a full description, see page 7).

It is recommended that you preform this procedure one Group at a time to ensure that the correct documents are captured.

1. Start with the last level of subgroups and work your way to the top (figure 1.14).

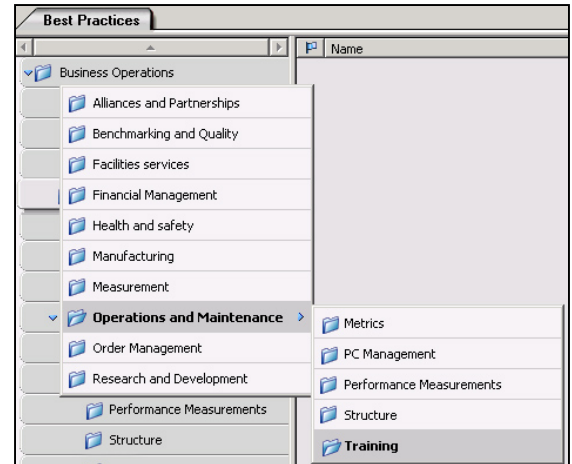


figure 1.14

2. Right click on the target Group>**keywords** (figure 1.15).

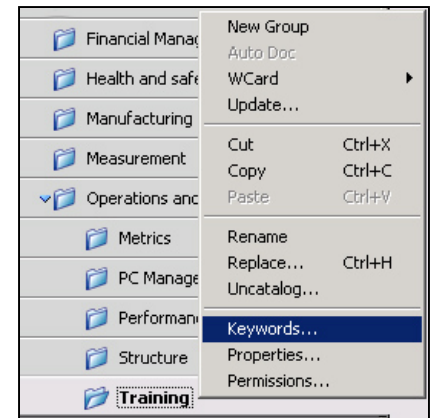


figure 1.15

3. Enter the keywords for that Group in the Keywords field (figure 1.16).

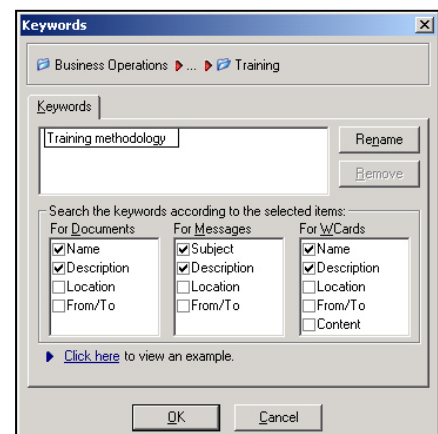


figure 1.16

You can include as many keywords as necessary. Each line represents a separate search. If one of the keywords matches the document it will be brought into the Group.

If you're not sure which keywords to include in a certain Group, leave it blank and go onto the next. The objective is to understand the keyword concept, because it will be the basis for future document organization.

STEP 4: Choose where to search

Now that you have created your Group structure and assigned keywords to a Group(s), you will designate which locations of the network contain documents to include in your Catalog.

Go to **Tools>Document Settings>Where to search.**

You will see this screen:
You may want to remove your C: drive that is automatically brought into the Catalog scope.

Be aware that if you choose to monitor (consider) LOCAL DISK (C:) and choose not to monitor "C:\Windows" this means that "C:\", "C:\Program Files", "C:\My Documents", will also be monitored, while "C:\Windows", "C:\Windows\Temp", "C:\Windows\System", will not.

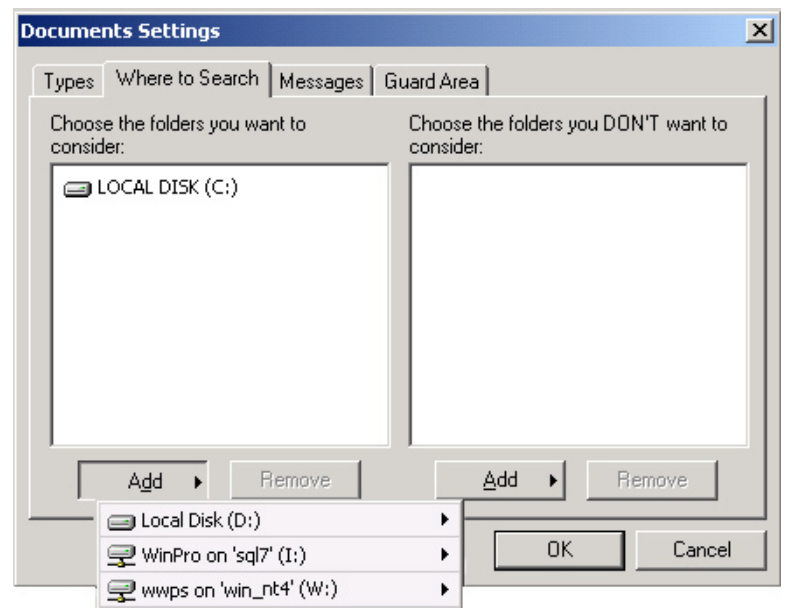


figure 1.17

Using the Add button, select the locations on your network that contain the documents you would like to capture (figure 1.17).

These selections are valid for the entire Catalog, not just a single Group.

STEP 5: Capture your documents

After assigning keywords and assigning the areas to search, you must "Update" the Catalog.

This means the Wintility Pro agent scans the drives that you marked in the previous step and looks for documents that contain your keywords in their name and/or description (The first 256 characters of the text) field. If a match is made, the document is brought into the Group in your Catalog.

Remember, you are not moving the documents from their physical location yet. You are simply creating references and organizing them logically.

In the final step, you can physically move the documents within the network to meet your needs. This doesn't affect their placement in the Wintility Pro Catalog.

Click on the target Group.

Press the "Update" button at the top of the screen.



Keep the configuration as you see in the screenshot in figure 1.18.

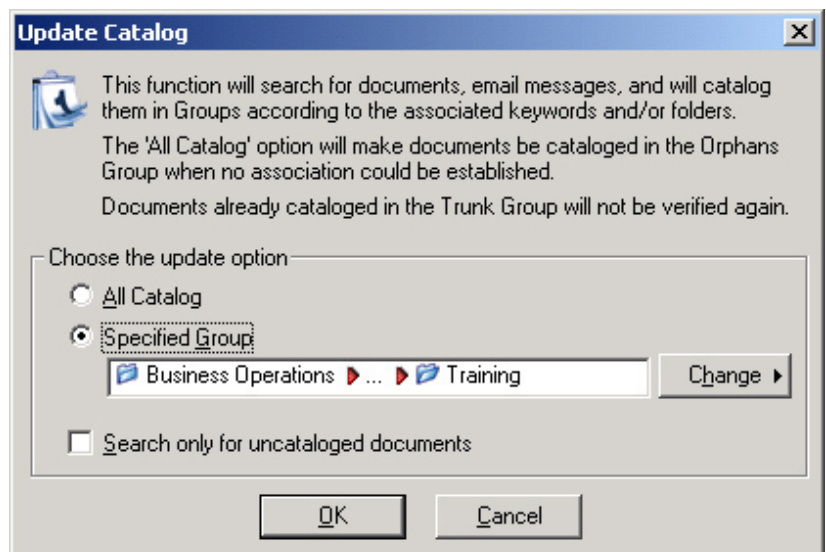


figure 1.18

The newly captured documents are [listed in blue](#) to help you identify them.

If you accidentally updated the Catalog with the "All Catalog" option checked, you will have many documents in the special Group called "Orphans". This is an area where documents fall when they don't have keywords connecting them to a Group. The best thing to do in this case is go the "Orphans" group and highlight all of the documents> **right click> Uncatalog.**

>>> It is a good idea to Backup the Catalog from time to time. Go to **Catalog>Backup.**

STEP 6: Analyze Cataloged documents

You will now verify that the documents captured are consistent with the keywords assigned to the Group.

Remember to keep the Tip View window open so you can examine the content of the document if you have any doubts.

Here is the recommended process:

1. Starting with the first newly Cataloged document (indicated in blue), check if the document is coherent with the Group subject.
2. If it is correct, go on to the next document.
3. If it would be better in another Group, drag and drop it to the correct one.
4. If it should be in more that one group, press CTRL and drag the document to the Group. It will then be referenced in both without duplicating the document.
5. If you are not sure where it belongs, drag and drop it to the "To be filed" Group
6. If you would like to exclude it, drag and drop it to the "To be excluded" Group.
7. Go on to the next document and repeat the process.

If you add another keyword to this Group and run the "Update" function, use the Filter tool. It displays only the most recently Cataloged documents and makes it easier to examine each. Configure as shown in figure 1.19:

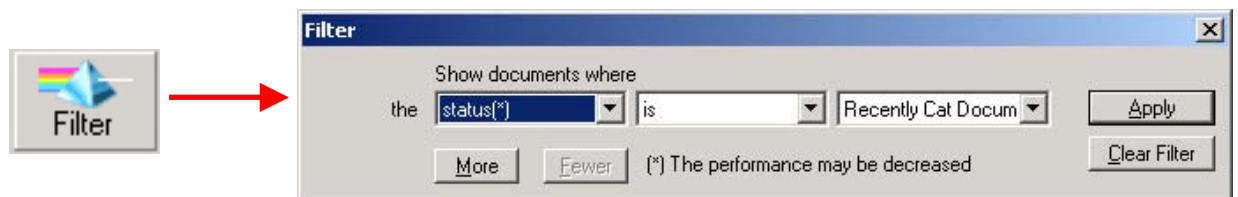


figure 1.19

STEP 7: Evaluate results

If you have assigned keywords to all the necessary Groups, you can simply repeat steps 5-6 until you have captured all the documents that will be cataloged using keywords.

If you still have documents needing to be cataloged - go to Step 8.

If you began capturing only one document format, go back to **Tools>Document Settings>Types** and select the next document format to capture (.doc, .xls, etc.). Go through steps 5-6 until you have included all the formats necessary.

STEP 8: Check over

If you have captured all possible documents using keyword associations and there are still some that haven't been included, you can:

1. Capture the remaining documents from the designated drives and bring them into the Catalog by pressing the "Update" button with the "All Catalog" option selected. These documents will automatically fall into the "Orphans" Group, then you can:
 - a. Drag and drop them from the "Orphans" Group and Catalog them manually (see Method A).
 - b. Change the Catalog rules (change/add a Group keyword or the network location searched) so the document(s) is included in the correct Group.

After doing so, you will need to "Update" the Catalog again. Configure the "Update" tool as shown in figure 1.20.

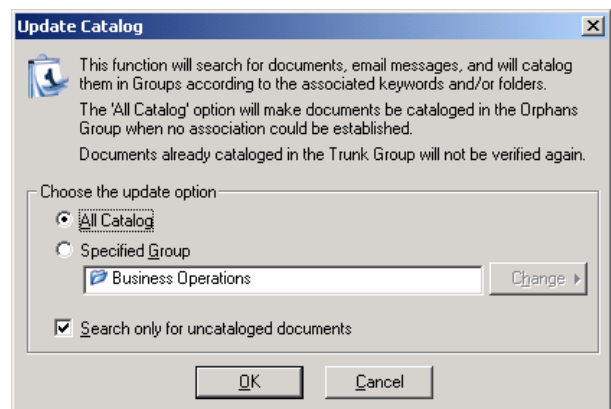


figure 1.20

- c. Change the name, location or description of the document to match the keywords you have assigned to your Groups. Run an "Update" as shown in figure 1.20.

2. If there are only a few documents that have not been brought into the Catalog. Go to the Wintility bar and navigate to the location. Drag and drop the documents into the correct Group (figure 1.21).

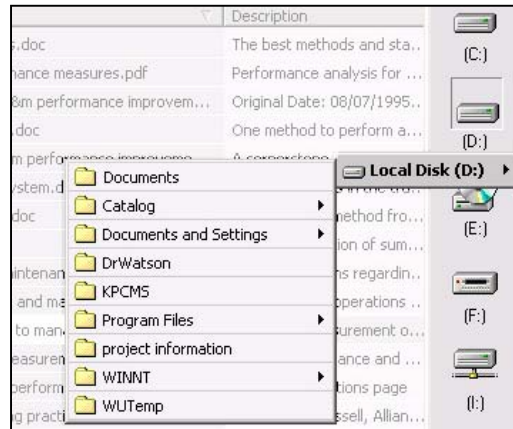


figure 1.21

STEP 9: The home stretch

When you have finished the above steps and your Catalog is completed, there are three final actions to take.

1. Backup: program Catalog backup by going to **Catalog>Backup**.
2. **Compress** your Catalog by going to **Catalog>Compress**. This optimizes performance.
3. Index the text to enable full text searches. This could take some time depending on how many documents are in your Catalog. Go to **Tools>Text Content Search Index**.

OPTIONAL STEP 10: Moving documents in the network

If you would like to physically rearrange the documents in your network, see page 12. This will **not** affect your Wintility Pro structure. If you would like to include mail messages in your Catalog, see page 14.

PART II: FUTURE PROCEDURES

Now that you have passed the most laborious part of your organization process, you only need to configure a few things to begin working more efficiently. However, to better understand how Wintility Pro will simplify creating and saving documents, let's start by looking at the way you probably work today.

To create new information, you probably open a blank document or an existing document to use as a model, fill in the content, decide on a name and then save it to either your computer or a designated place/repository in the network. This process is generally repeated for all members of your workgroup, department or company.

Now, imagine 20 users trying to name and save all their documents in a way that others can find and retrieve them without assistance.

Even if you settle on a standard system, how sure can you be that everyone is following the procedures? The more that is left for users to decide, the more chance for error.

As more rules and nomenclature accumulate, your attention is diverted from your main tasks to filing and organizing loads of documents.

Wouldn't it be great if you only had to worry about the document content? You wouldn't need to fret about what to name it, if it needs a sequential number or if the place you're saving it in is the correct one.

Even though today's procedures imply the opposite, you usually have a reason for opening a document. So, it would make more sense for you to simply click on the type of document you want to create and it is opened, named, saved and referenced in the correct location automatically. This is the procedure you will develop with Wintility Pro.

Two tools will automate the process of creating and saving new documents - Auto doc and Group properties. You will construct a loop that connects them and creates a fail-proof, automatic organization procedure. This system categorizes the documents as they are created and reduces the responsibility that is placed on the document author.

The tools

Auto doc - The main objective of Auto Doc is to make sure everything is named and saved correctly so that nothing gets lost.

An Auto Doc is essentially a standardized name and save location that you assign to a type of document.

To create an Auto Doc, you construct the name of the document based on elements such as date, time, user name, etc. You also assign where it will be saved within the network and what type of document it will open.

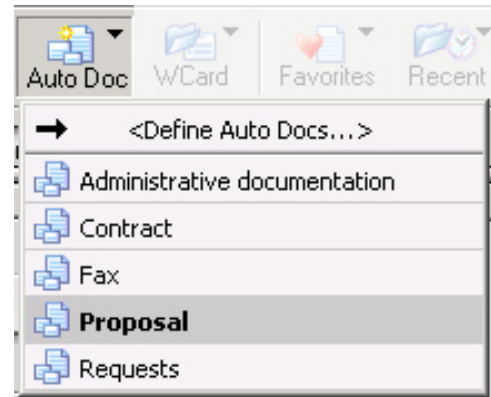


figure 2

To activate a specific Auto Doc you simply click on its name. (see figure 2).

The document that is opened when you click on the icon can be:

- A pre-established template (for example, a Word document with your letterhead and signature included, etc.)
- A blank document using a specific program (for example, a blank Word document, a blank Excel chart).
- A blank document using a program chosen on the spot (a window will appear asking which program you would like to use).

Group Properties –

Every Group has 5 unique Properties (figure 2.1). They help you define which documents will be captured and brought into that Group. The two Properties we will be focusing on are Keywords and Auto Doc.

+ Keywords: If you organized your documents using Keywords, you probably accessed this area and understand that the keywords are one of the properties. If not, see page 7 of this document for a full explanation.

+ Auto Doc/WCard: You can choose to automatically name a document based on information included in this area. Because this is an advanced topic, it will be explored further on.

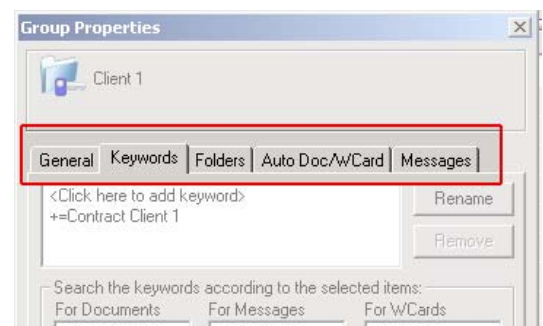


figure 2.1

Initial Considerations

First, decide what kinds of Auto Docs you would like to create. Consider what types of documents you/your workgroup uses most. Contracts? Price lists? Proposals? Memos? Technical specifications? Remember that you can make any type of document into an Auto Doc, so you don't need to limit yourself. You are simply creating a naming pattern.

Next, decide how you would like these documents to be named. You can construct a name using the following types of information (figure 2.2):

- **Fixed:** This word or phrase will appear in the documents name and cannot be altered by user.
- **Variable:** This information is entered each time a new document is created. A prompt, such as "Client name", "Project subject", etc will appear so the user enters the desired information.
- **Group Text:** The Auto Doc "searches" in a Group's Auto Doc/WCard properties to see if it contains a word or phrase to include in the document's name.
- **Time:** Includes the time the document was created in the name.
- **User Property:** Login, Full name, Description or Phone extension of the document creator is included in the name.
- **Sequential:** A sequential number becomes part of the document's name. Wintility automatically controls the numerical sequencing.

In figure 2.2, The name has been created using a fixed text "Contract", a variable text that prompts the user to enter the client name, a sequential number and the date.

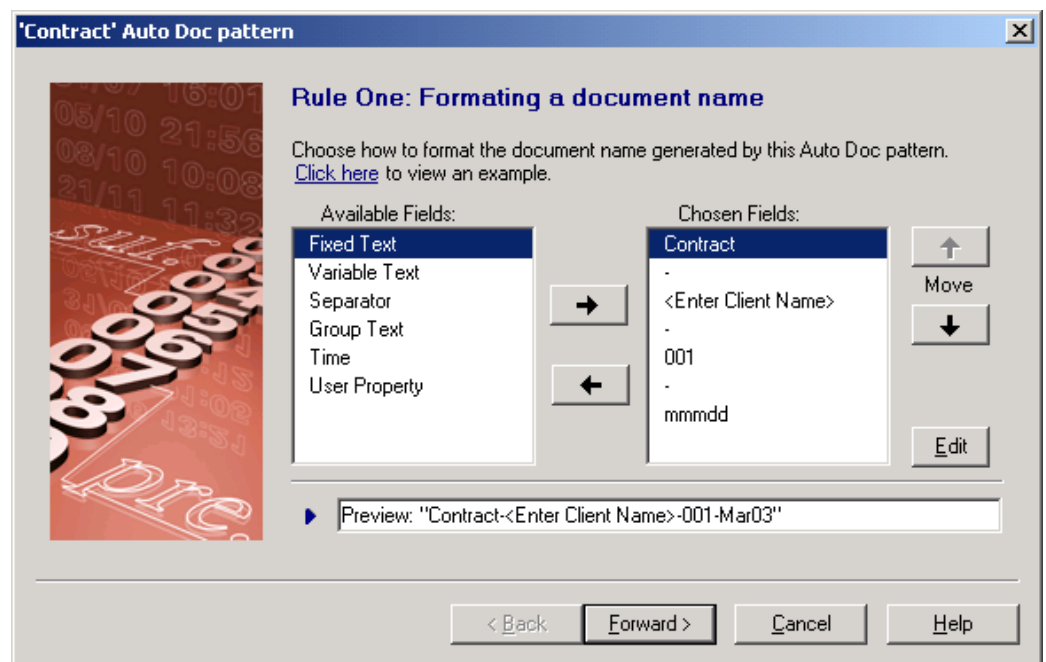


Figure 2.2

Finally, keep in mind that you will “connect” the document name to the Wintility Group using keywords. **So, one of your Group’s keywords must be present in the name of the Auto Doc.**

Using Figure 2.2 and Figure 2.3 as examples, you right click on the “**Client 1**” **Group>Keywords** and assign keywords that are (or will be, in the case of the Client Name) in the name of the Auto Doc.

If you don’t create this “connection”, the document you create using this Auto Doc will go the Orphans Group.

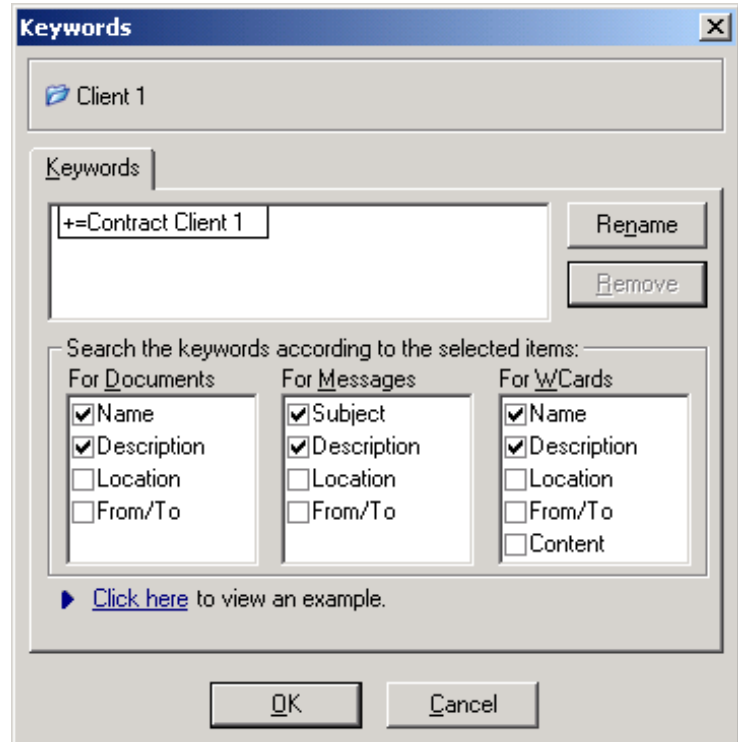


figure 2.3

Set up procedure

STEP 1: Catalog Templates

Any documents that you would like to use as templates need to be cataloged in the Templates Group in Wintility (Figure 2.4).

STEP 2: Create an Auto Doc

Go to the Auto Doc button>Define Auto Docs and press the New button.

- Give the Auto Doc a Name - This is how it will appear in the drop down menu.
- Construct the way the document will be named - You must include a word that will also be used as a keyword in a Group.
- Choose a template.
 - o "Based on an existing template" will use the documents in the Templates Group.
 - o "Based on the application selected at runtime" will assign the naming and saving rules you have created to whichever type of file you choose to open.
 - o "Based on the application selected below" will open whichever program you assign.
 - o "Based on an existing template defined in a reference Group" is explained later in Optional Advanced Options.
- Choose where to save document
 - o Assign a location in your computer or on the network to save the document.
 - o "In a location defined in a reference Group" is explained later in Optional Advanced Options.

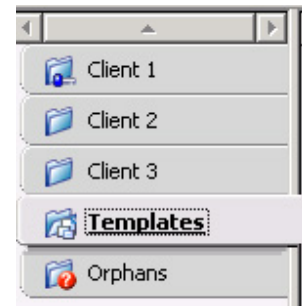


figure 2.4

STEP 3: Assigning Keywords

Right-click on the Group where the Auto Doc documents will be cataloged > **Keywords**.

Choose one of the words that make up (or will make up in the case of variable text) the Auto Doc name that you just created, and place it in the keywords field (figure 2.5). It is a good idea to review the keyword rules on page 7.

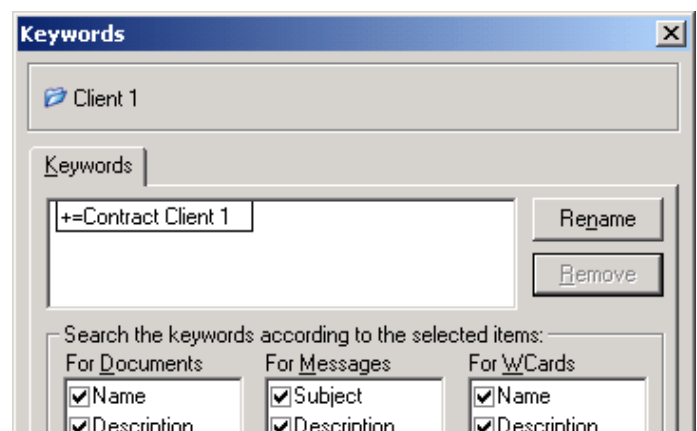


figure 2.5

You can cross reference documents by putting a keyword in more than one location.

This is useful if you want to, for example, keep a contract together with the rest of a Client's information as well reference it in another area dedicated to only contracts.

STEP 4: Verify Auto Doc

- Go to the Auto Doc button and click on the one you just created.
- Fill in the dialogue box and click "Go".
- Check if the correct document is opened. Close the document and it
- Go to the Recents button (see figure 2.5) and right click on the document > **Go to Group** to see where the document is listed.

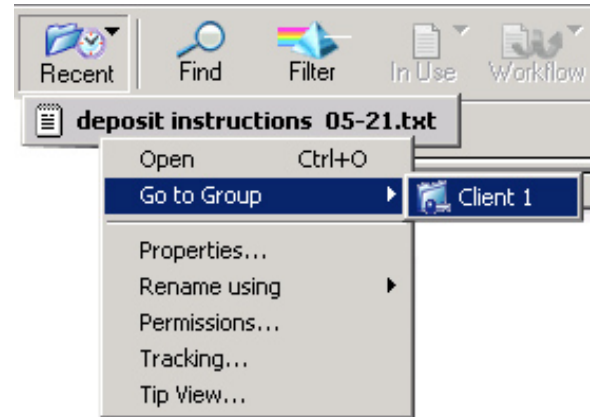


figure 2.5

If the document is not where it should be:

- + Verify that your Keywords match a word in the Auto Doc name or description.

Advanced Options:

Auto Doc/WCard Group properties –

You can assign a Group/ Groups a word or phrase to be automatically included in the name of the Auto Doc. Right click on your Group > Properties > tab Auto Doc/WCard.

In other words, when you include <Group Text> in your Auto Doc, it "searches" in the Group's Auto Doc/WCard properties to see if it contains a word or phrase to include in the document's name.

In figure 2.6, the Auto Doc would find the word "Client 1" and place it in the <Group Text> space in the document name.

The field "Save the new document..." allows you to save all documentation created using this Auto Doc in a specific, separate area on the network.

The "Seq # and Template..." field lets you assign a separate sequential number to the documents created using the Auto Docs listed in the box.

This is best explained with an example. Let's say you have a Catalog with a separate Group for each of your clients. You probably send each of them various letters, faxes and proposals.

Because these are documents common to each client, it is easier to simply click on a client Group, open the Auto Doc and that client's name is automatically inserted into the document name.

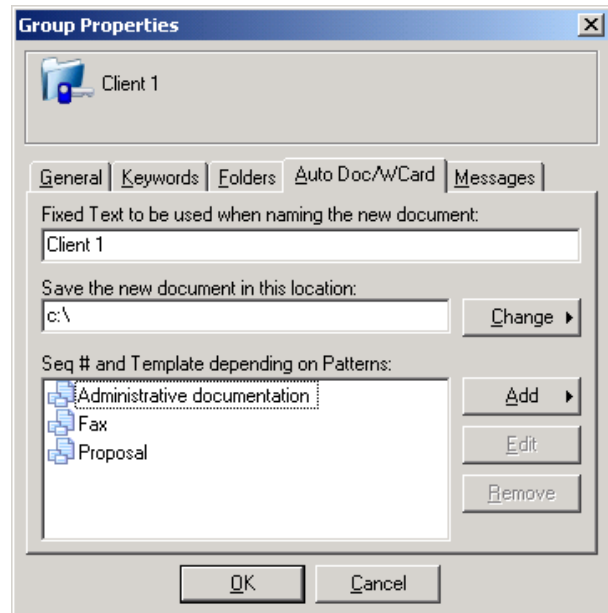


figure 2.6

If you included a sequential number in the name of a document (which is recommended), it will continue counting each time you use the Auto Doc, regardless of which Client or area it is for. So, you can have "Fax_Client 1_001", "Fax_Client_2_002", "Fax_Client_6_003", etc. It doesn't matter if the Auto Doc is created for separate Groups, the sequence continues.

If you write hundreds of proposals a day, it is easier to keep an individual sequence for each client.

You can do this by including your Auto Doc templates in the "Seq # and Template..." field. Then, for each client Group, you will have "Fax_Client_1_001", "Fax_Client_2_001" and "Fax_Client_6_001".

Finishing touches

Assigning Auto Doc naming standards to documents created outside Wintility –

It is inevitable that you will receive documents and e-mails from people outside the office. It is easy to apply your Auto Doc rules to any document so your information remains uniform and easy to find.

Simply bring them into your Catalog, right click > **Rename using** (Figure 2.7). Select the Auto Doc name that you would like to apply to the document.

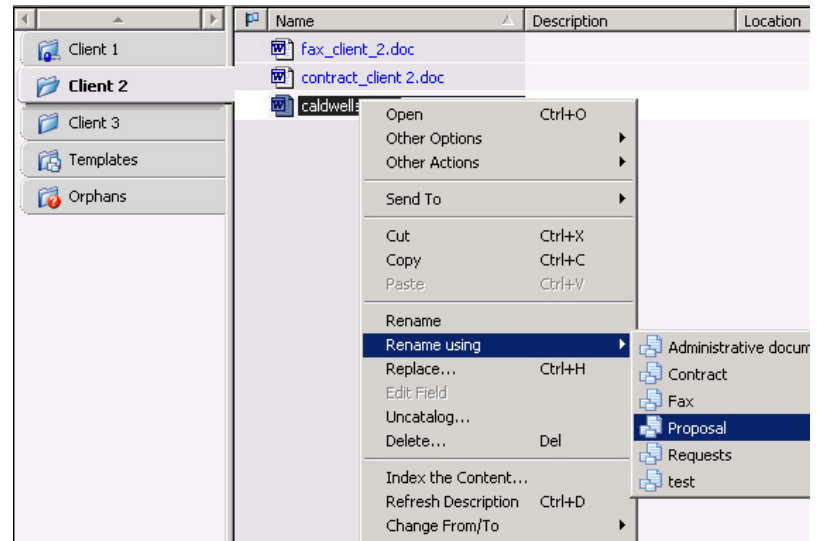


figure 2.7

The name of the document is changed in the network and in the Wintility Catalog.

Creating Multiple References –

One of the things that distinguishes Wintility is the ability to reference documents in multiple locations without duplicating the document. For example, you can include a document in the Client Group as well as the Contract models Group for easy reference for all.

To include a document(s) in more than one Group, with the **CTRL** button pressed, drag and drop the document(s) to the desired Group. You can include the document in as many Groups as necessary without duplicating the document.

This concludes the Wintility Pro Taxonomy and Catalog set-up Guide. If you have any questions or concerns, feel free to contact any of our authorized resellers or PX Technologies directly.

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