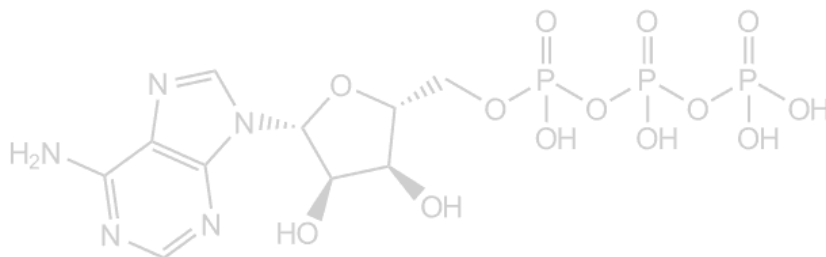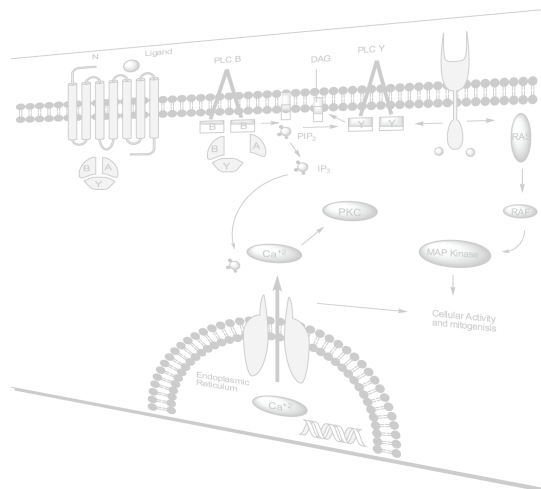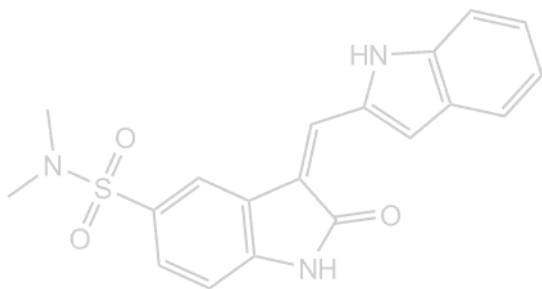# DocManager 11.0

Chem & Bio Office Enterprise 2010
Decision Support Platform
Enterprise 11

User Guide

CambridgeSoft ®

www.cambridgesoft.com

Contents

DocManager 11.0

About this Guide

Welcome to the DocManager User Guide. Inside this guide, you will find a full description DocManager, its features, and complete instructions on how to use them. This guide is available in print, and Web-based format.

Overview

Use DocManager Enterprise to create, store and share chemical documents. DocManager provides structural and text searching capabilities. Using DocManager Enterprise, you can:

- Store documents at a central location and share them with other users.
- Quickly retrieve large amount of data located throughout in stored documents.
- Standardize methods for delivering written information.
- Locate information easily and quickly.

With DocManager's user friendly interface, any new user can begin using it instantly. Using DocManager Enterprise you can create and maintain a secure chemical document repository, add or submit documents over the Web, keep track of the relationships between documents, and quickly search and retrieve documents. The search criteria can be either chemical structure or full text search (exact phrase or word). The documents submitted are stored in the database and all DocManager users with proper privileges can search and view the documents.

The DocManager search feature lets you find specific information quickly and easily. The search can be based on either chemical structure or the content of the document. It supports basic and advanced document searching techniques. Users with proper privilege can remove documents that are no longer used or shared.

You can also integrate DocManager Enterprise with other Enterprise applications such as Inventory Enterprise and Registration Enterprise. As a result, you can easily access linked documents through these applications.

Logging In

To log into DocManager Enterprise:

1. Enter `http://hostname` into the address bar of your web browser where `hostname` is the name of the server on which DocManager Enterprise is installed. The global login page for ChemOffice Enterprise 2010 appears.

   NOTE: If you do not know the name of the server, contact your system administrator.

2. Login as an **admin** user of DocManager Enterprise. The following page appears:
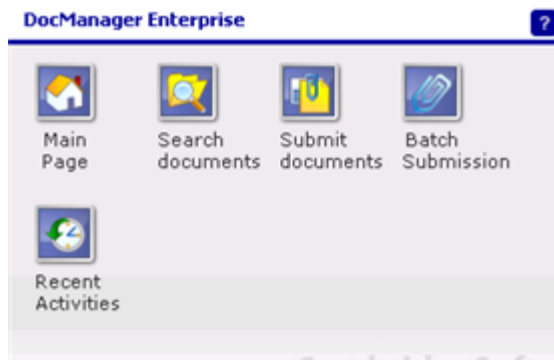
3. Click **Main Page**. The main page of Doc-Manager Enterprise appears:
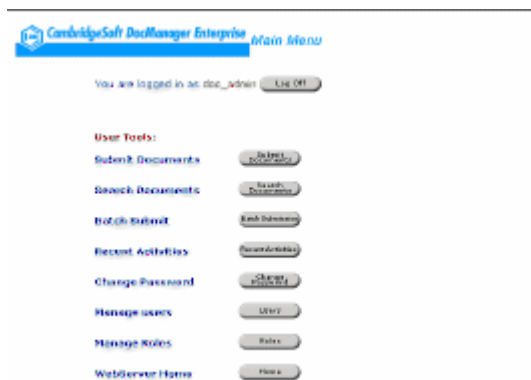
DocManager Basics

ChemOffice DocManager Enterprise allows you to perform the following tasks:

• Create a central storage or repository for storing chemical documents of the entire organization in .doc, .txt, .ppt, .xls, and .pdf formats.

• Search the documents stored in the repository. A Boolean search can be performed over the web by chemical structure or text.

NOTE: PDF documents can not be searched by structure. Furthermore, full text searching is available for PDF documents on systems with Oracle 9i only. This is a limitation of Intermedia, which only supports PDF files of version 4 and below.

• Add or submit documents to the system over the Web. The document submitted is securely stored in a database, indexed by both structure and text for DocManager Enterprise users to search and view.

• Remove documents that are no longer shared.

• Manage users as the system administrator.

Submitting Documents

To submit a document:

1. Login to the Chem & Bio Office Enterprise 2010 as an **admin** user of DocManager Enterprise to display the main page of Chem & Bio Office Enterprise 2010.

2. Click **Submit documents** in the **DocManager Enterprise** section. The **Add Document** page appears:

3. Enter the directory location and file name of the document to be submitted in the **Document** text box. You can also use **Browse** to locate the appropriate document.

4. Click **Submit Now** to submit the document. The **submit documents** page appears with a message that the document was submitted successfully.

Adding Document Details

To add details to a document before submitting it to DocManager Enterprise:

1. Click **Add Document Details** after locating the document in the **Add Document** page. The **Add Document Details** page, containing a preview of the selected document, appears:
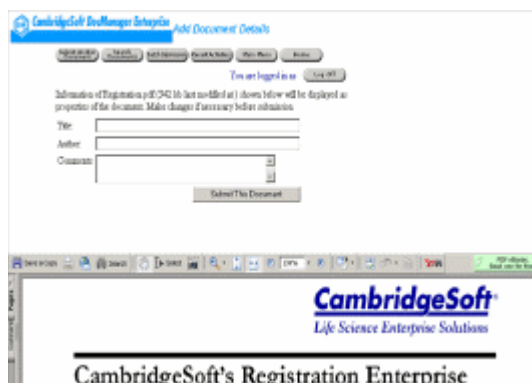
2. Enter the title, author name, and comments for the document being submitted in the appropriate text boxes.
3. Click **Submit This Document** to submit the document to DocManager Enterprise.

Scheduling Batch Submission

The Batch Submission tool allows administrators to schedule the submission of documents in a specified directory. It is recommended that administrators schedule the submission during a low usage period because batch submission decreases the performance of the server.

To schedule a batch submission:

1. Login to Chem & Bio Office Enterprise 2010 as an **admin** user of DocManager Enterprise.
2. Click **Main Page** in the **DocManager Enterprise** section. The main page of DocManager Enterprise appears:
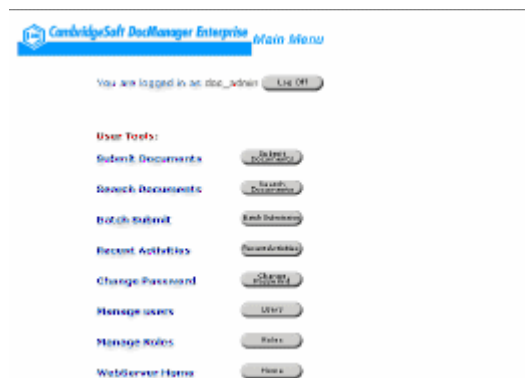
3. Click **Batch Submission**. The **Batch Load Document** page appears:

NOTE: You can also open the preceding page by clicking the **Batch Submission** *link in the DocManager Enterprise section of the Chem & Bio Office Enterprise 2010 home page.*

4. Specify the directory, which contains the documents to be submitted, in the **Load from** text box.
5. Select the appropriate check box to specify the time of day when the submission should take place.
6. Click **OK** to complete the batch submission process.
7. *If you are using Windows 2000*, run file-batchload.exe. The file is located at ChemOffice\DocManager\FileBatchLoad.

NOTE: If y are using Windows 2003 or Windows XP, skip step 7 above.

Viewing Recent Activities

The Recent Activities tool allows administrators to view and sort recent document submissions.

To view recent activities performed by the user:

1. Click **Recent Activities** in the main page of DocManager Enterprise. The **View Recent Activities** page appears:

NOTE: You can also view preceding page by clicking the **Recent Activities** *link in the Doc-Manager Enterprise section of the Chem & Bio Office Enterprise 2010 home page.*

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2. Select the appropriate option to sort the activities.
3. Click **Show Activities** to view the sorted result in the same page.

Searching for Documents

DocManager Enterprise supports both basic and advanced searching for text characters and operators. In addition, it supports structure searching. To perform a simple search with DocManager Enterprise, see *"Performing a Search" on page 5*.

When performing a text search, you need to specify the search criteria by filling in values for the various fields in the query form. When performing a structure search, you need to draw a structure of the compound you are looking for. For more information about draw-

ing structures, see "Drawing Chemical Structures" in the ChemDraw User's Guide.

After entering search criteria, start the search by clicking **Search**.

Performing a Search

To search documents for specific information:

1. Click **Search Documents** in the main page. The **Document Search** page appears:

NOTE: You can also access the Document Search page by clicking the **Search Documents** *link within the DocManager Enterprise section in the Chem & Bio Office Enterprise 2010 home page.*

2. Specify the search criteria by filling-in the various fields. The **Full-Text** text box allows to search exact word or phrases.For more information about drawing structures, please see "Drawing Chemical Structures" in the ChemDraw User's Manual.

3. Click **Search**. The search result appears:
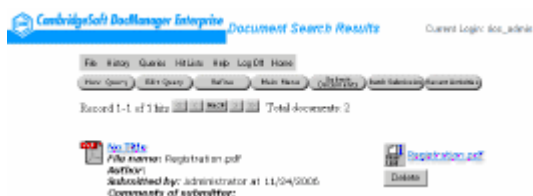
4. Click on the title of the appropriate document to view it in your web browser.

NOTE: You can also save a file displayed in the result by clicking on **DownLoad** *corresponding to the file.*

Basic Text Searching

Basic text searching allows you to find information in the documents stored in DocManager Enterprise. When performing a basic text search operation, you can use a number of special characters to manipulate the search results. For example, you can narrow your search to ensure that the results are less ambiguous, precise, and correct.

DocManager Enterprise supports two types of basic text searching, as follows:

- Exact Phrase Matching
- Wildcard Searching

Exact Phrase Matching

Exact Phrase Matching allows you to retrieve documents that contain the exact text or phrase specified in the search criteria. It is the most simple search, which returns exactly the requested information.

The following table lists a few examples of Exact Phrase Matching:

Searching For...	Returns...
thymidine synthesis	The words thymidine synthesis in that order, with no words between in a document's text.

Searching For...	Returns...
cyclohexane	The word cyclohexane in a document's text.

Wildcard Searching

Wildcard searching is useful when a prefix or a suffix of the desired word or phrase is either unknown or variable. Wildcard searching returns all words containing the word root specified in the search criteria. Wildcard characters can be used in a basic text search when searching for all documents that contain a part of a word. Wildcard Searching typically returns more matches to search criteria than Exact Phrase Matching.

The following table lists a few examples of Wildcard Searching:

Search-ing For...	Returns...
synth*	Any word with synth as the first five letters in a document's text, such as synthesis, synthetic, and syntheses.
*ethane	Any word with ethane as the last six letters in a document's text, such as ethane and methane.

Advanced Text Searching

Advanced text Searching facilitates the usage of specific operators to narrow the search and retrieve precise results.

Escape Characters

In order to perform a search over words or symbols that have special meaning to query expressions, such as & or |, you must escape them. There are two ways to escape characters in a query expression, using the curly brackets, {}and using a back slash, \.

Curly Brackets

Any symbol or string within a set of curly brackets is considered a part of the escape sequence. When you use braces to escape a single character, the escaped character becomes a separate token in the query. The following table lists a few examples of using curly brackets to escape an ampersand (&) and a dash (-):

Instead of	Use
AT&T	{AT&T}
high-voltage	{high-voltage}

back slash

The backlash symbol can be used to escape only a single character or a symbol. Only the character/symbol immediately following the back slash is escaped. The following table lists a few examples of using a back slash to escape an ampersand (&) and a dash (-):

Instead of	Use
AT&T	AT\&T
high-voltage	high\-voltage

The various types of Advanced text searching are as follows:

- ABOUT
- AND (&)
- EQUIValence (=)
- fuzzy (?)

- MINUS (-)
- NEAR
- NOT (~)
- OR (|)
- Soundex (!)
- Stem ($)

ABOUT

The ABOUT operator, when used in an advanced text search or query, retrieves documents that contain information related to a word or phrase. Therefore, rather than searching for documents that contain specific words or phrases, you can search for documents that are about a certain subject, even if that subject is not mentioned explicitly in the document.

The ABOUT operator is useful when you have already built a knowledge base. For more information about building a suitable knowledge base for your installation, see the Oracle 9i Text guide.

The ABOUT operator is used, by entering the word ABOUT in all capital letters followed by the word or phrase on which to search in parentheses.

Searches using the ABOUT operator are always case-sensitive. The text string inside the parentheses is interpreted with respect to case.

For example, if you had added "carbon" and "carbon bi-products from synthesis at 25 degrees Celsius" to your knowledge base, the following table lists how your searches will be interpreted:

Searching For...	Returns...
ABOUT (carbon)	Any word with words related to carbon in the document's text. Matches include coal and diamond.
ABOUT (carbon bi-products from syntheses at 25 degrees Celsius)	Any phrases with words related to "carbon bi-products from synthesis at 25 degrees Celsius" in the document's text.

The ABOUT operator becomes more effective when coupled with other operators, such as AND or NOT.

For example, if you had added "carbon" and "diamond" to your knowledgebase, the table lists how your searches will be interpreted:

Searching For...	Returns...
ABOUT (carbon) AND diamond	Any word with words related to carbon as well as the word diamond in the document's text.
ABOUT (carbon) NOT ABOUT (diamond)	Any word with words related to carbon but excluding the word diamond in the document's text.

NOTE: For advanced Oracle users: The word or phrase specified in an ABOUT query does not have to exactly match the themes stored in

the index. Oracle automatically normalizes the word or phrase before performing lookup in the Text index.

AND

The AND (&) operator, when used in an advanced text search or query, retrieves documents that contain more than one word or phrase. The AND operator is used to search for documents that contain at least one occurrence of each of the terms specified in the query.

The AND operator is used by writing the first term, the word AND or &, followed by another word or phrase.

The following table lists some examples of using the AND operator:

Searching For...	Returns...
carbon AND diamond	Both the words carbon and diamond occurring anywhere within a document's text.
carbon & diamond	Both the words carbon and diamond occurring anywhere within a document's text.
carbon & diamond & graphite	All the words carbon, diamond, and graphite occurring anywhere within a document's text.
thymidine synthesis AND carbon dioxide	Both the phrases thymidine synthesis and carbon dioxide occurring anywhere within a document's text.

EQUIValence

The EQUIValence (=) operator, when used in an advanced text search, allows you to find documents that contain information about words, which are interchangeable or similar. The EQUIValence operator is used to specify an acceptable substitution for a word in a query.

The EQUIValence operator is used by writing EQUIV or =, followed by the phrase on which the search is to be performed.

The following table lists a few examples of using the EQUIValence operator:

Searching For...	Returns...
graphite EQUIV diamond	The words graphite or diamond occurring anywhere within a document's text.
graphite = diamond	The words graphite or diamond occurring anywhere within a document's text.
carbon dioxide = monoxide	The words carbon dioxide, carbon monoxide, or both terms occurring anywhere within a document's text.

NOTE: The EQUIValent operator has higher precedence than all other operators except the expansion operators, such as fuzzy, soundex, and stem.

Fuzzy

The Fuzzy (?) operator, when used in an advanced text search, retrieves documents that contain words similar to the word used in a search. For example, the Fuzzy operator can be used to expand queries to include words that are spelt in the same way as the specified term.

This type of expansion is helpful for obtaining more accurate results when there are frequent spelling mistakes or alternate spellings in the documents.

The Fuzzy operator is used by putting a question mark (?), followed by the word on which to perform a search.

The following table lists a few examples of using the Fuzzy operator:

Search-ing For...	Returns...
?boron	Any word spelt in the same way as 'boron', occurring anywhere within a document's text. Matches include baron.
?read	Any word/words spelt in the same way as 'read', occurring anywhere within a document's text. Matches include read, lead, and real.
?chemist	Any word/words spelt in the same way as 'chemist', occurring anywhere within a document's text. Matches include chemists and chemistry.

MINUS

The MINUS (-) operator can be used to search for documents that contain two terms specified in the query. However, documents containing the second term are ranked lower than documents without the second term. The MINUS operator is useful for lowering the importance of documents that contain a certain term, without neglecting those documents.

The MINUS operator is used by typing the first term, then MINUS or -, followed by another term on which the search is to be performed.

The following table lists a few examples of the MINUS operator:

Searching For...	Returns...
carbon - diamond	Documents containing the words carbon and diamond. Documents with diamond are listed later.
carbon MINUS diamond	Documents containing the words carbon and diamond. Documents with diamond are listed later.
diamond - carbon	Documents containing the words diamond and carbon in them. Documents with carbon are listed later.

NEAR

The NEAR operator is used to specify two terms and search for documents in which the two specified terms appear closely in the document text. The maximum distance between the two terms can be specified.

The NEAR operator is used by typing the first term, followed by NEAR or a semicolon, followed by the second term.

NOTE: NEAR cannot be used in ABOUT queries.

The following table lists an example of using the NEAR operator:

Searching For...	Returns...
carbon NEAR diamond	The words carbon and diamond in documents where these words appear less than 100 words apart.

The default characteristics of the NEAR operator are as follows:

- Search terms are found if they are 100 words apart or less, unless specified otherwise. Only whole numbers between 1 and 100 can be used to specify a particular distance between the terms.
- Search terms are found in any order, unless specified otherwise.

The NEAR operator can be used with other operators, such as AND, OR, and EQUIValence.

The following table lists a few examples of using the NEAR operator in conjunction with the other operators:

Searching For...	Returns...
NEAR ((carbon, diamond), 20, FALSE)	The words carbon and diamond in documents where these words appear less than 20 words apart, in no specific order.

Searching For...	Returns...
NEAR ((carbon, diamond), 20, TRUE)	The words carbon and diamond in documents where these words appear less than 20 words apart, in this specific order.
NEAR ((carbon, diamond), 10) AND benzene	The words carbon, diamond, and benzene in documents where carbon and diamond appear less than 10 words apart and in no specific order.
NEAR ((carbon, diamond = graphite), 10)	The words carbon, diamond, and graphite in documents where carbon and diamond or carbon and graphite appear less than 10 words apart and in no specific order.

NOT

The NOT (~) operator is used in an advanced text search to specify two terms so that the search retrieves documents that contain the first term, but not the second term. The NOT operator is used by typing the term to be searched, followed by the word NOT or ~, followed by the term to be excluded in the search.

The following table lists a few examples of using the NOT operator:

Searching For...	Returns...
carbon NOT diamond	The word carbon in documents where the word diamond does not appear.
carbon ~ diamond	The word carbon in documents where the word diamond does not appear.
carbon NOT (diamond OR graphite)	The word carbon, but not the word diamond or graphite anywhere in the document's text.

NOTE: The NOT operator does not affect other logical operators

OR

The OR (|) operator can be used in an advanced text search to retrieve documents that contain information about the words in a query, but not necessarily all the words in the query. The OR operator is used by typing the first term, followed by the word, OR or the symbol, |, followed by another term.

The following table lists a few examples of using the OR operator:

Searching For...	Returns...
carbon OR diamond	The words carbon, diamond, or both appearing anywhere in the document's text.
carbon	diamond	The words carbon, diamond, or both appearing anywhere in the document's text.
carbon OR diamond OR graphite	The words carbon, diamond, graphite, or any combination of the terms appearing anywhere in the document's text
thymidine synthesis OR carbon dioxide	The words thymidine synthesis, carbon dioxide, or both terms appearing anywhere in the document's text.

Stem

The Stem ($) operator is used in an advanced text search, to retrieve documents that contain words similar to the word used in a search. To use the Stem operator type a dollar sign ($), followed by the word on which the search is to be performed.

Use the stem operator to search for terms that have the same linguistic root as the query term. The Stem operator expands a query to include all terms with the same stem or root word as the search term.

The following table lists a few examples of using the Stem operator:

Searching For...	Returns...
$commit	Any word with the root 'commit' appearing in the document's text. Matches include commits, committing, committee, and committed.
$chemist	Any word with the root 'chemist' appearing in the document's text. Matches include chemist, chemistry, and chemists.

Managing Users and Roles

The usernames, privileges, and passwords for users of DocManager Enterprise are controlled through the Chem & Bio Office Enterprise 2010 global login interface. See the following topics for more information related to managing users and roles in Chem & Bio Office Enterprise 2010 applications:

- Managing Users
- Managing Roles

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