

XEROX



GLOBALVIEW for Microsoft Windows

Link to Visual Recall User Guide

Xerox GLOBALVIEW Applications
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Using Link to Visual Recall

With Link to Visual Recall you can manage your GLOBALVIEW for Microsoft Windows (GVWin) documents using Visual Recall. Visual Recall, from XSoft, is a complete document management system that you use to find, browse, edit, print, and share electronic documents stored on Novell NetWare servers.

To get started using Link to Visual Recall, you first archive your GLOBALVIEW documents to the Windows file system. With your documents located in a Windows directory, you then store information about the documents in a Visual Recall repository called a *cabinet*. When you need to work with a document again, you use Visual Recall to find it.

The *Link to Visual Recall User Guide* explains how to set up and use the Link to Visual Recall application. This guide assumes you are familiar with Microsoft Windows, GLOBALVIEW for Microsoft Windows, and Visual Recall, as it does not provide detailed information on these applications. References to the appropriate user guides are given so you can learn more about the features described in this guide.

Setting up Link to Visual Recall

Before using the Link to Visual Recall application, the following software must be installed on your personal computer:

- GLOBALVIEW for Microsoft Windows version 2.1

Make sure the following applications are running:

- GV Write
- Link to Visual Recall
- PC File Access
- Converters or downgraders, as needed

Refer to the *GLOBALVIEW for Microsoft Windows Installation Guide* for installation instructions.

- Visual Recall version 2.0

Refer to the *Visual Recall Cabinet Administration and Installation Guide* for installation instructions.

Editing your VRECALL.INI file

After installing the necessary software, you need to edit the Handlers section of your VRECALL.INI file. This file is located in your Windows directory.

To edit your VRECALL.INI file:

1. Open the file in a Windows text editor, such as Notepad.
2. Locate the Handlers section and increase the handler count by one. For example, if the previous count was 2, you would change it to 3, as shown below.

Count=3

3. Add the following handler line to the end of the section:

HandlerX=GVHNDL.DLL

where X is the same number used for the count in step 2.

4. Save your changes and close the file.

Storing GLOBALVIEW documents in the Windows file system

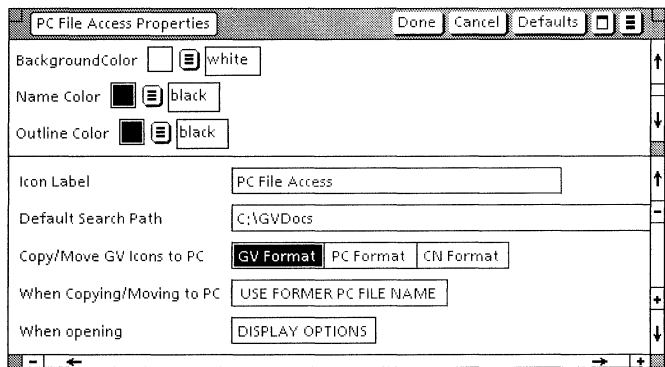
Before you can *index* GLOBALVIEW documents into Visual Recall cabinets, you must store the documents in your Windows file system. You use the GLOBALVIEW application PC File Access to copy or move your documents to a local or network drive.

After you have stored your documents in the file system, you must keep them in that location. Otherwise, Visual Recall will not be able to access the documents for document management tasks.

To store GLOBALVIEW for X Windows (GVX) or Xerox GLOBALVIEW (XGV) documents in your Windows file system, you must first convert them to GVWin format. Copy the documents to your GVWin workspace, then open and close each document to convert it.

To store GLOBALVIEW documents in your file system:

1. Copy a PC File Access icon to your GLOBALVIEW workspace.
2. Set the PC File Access properties to include:
 - The full pathname of the directory in which you want to store the documents
 - GV Format for the Copy/Move GV Icons to PC option



3. Select the GLOBALVIEW documents you want to store.
 - ◆ **Note:** You cannot select a folder that contains documents.◆
4. Press COPY or MOVE, then select the PC File Access icon.

For more information on PC File Access, see chapter 10, "Exchanging files," in the *GLOBALVIEW for Microsoft Windows Workspace User Guide*.

Indexing GLOBALVIEW documents into Visual Recall

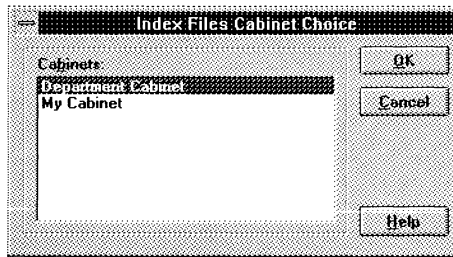
After your documents are located in a directory in your file system, you *index* them into a Visual Recall cabinet. When you index a document, Visual Recall stores information about the document (its content, the set of assigned properties and property values, and the document's location) in the cabinet's databases. Your document remains in its location in your file system.

The easiest way to index documents is to drag and drop them from their location in the Windows File Manager to Visual Recall. You can index documents into the cabinet created when you installed Visual Recall software (*My Cabinet*) or into another cabinet at your site.

◆ **Note:** Visual Recall does not index the document's cover sheet.◆

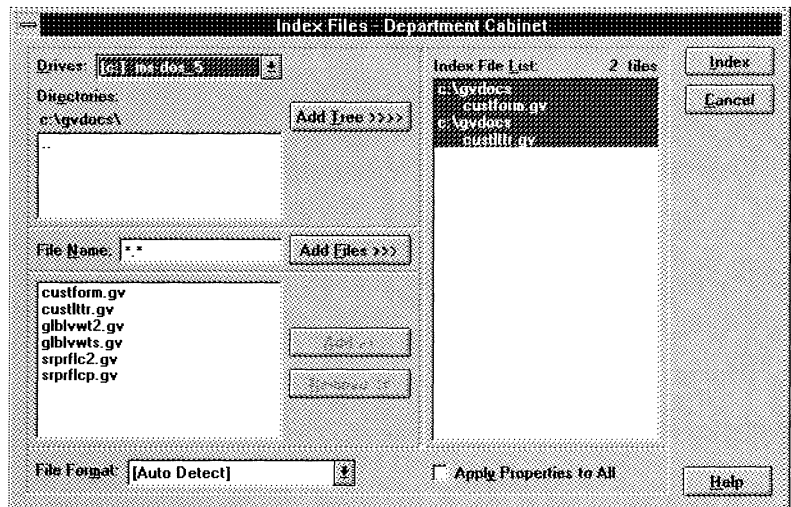
To index GLOBALVIEW documents into a Visual Recall cabinet:

1. If Visual Recall isn't running, double-click its application icon to start it.
You can keep the Visual Recall window open or minimize it.
2. Open the Windows File Manager.
3. Navigate your file system to locate the directory in which you stored the GLOBALVIEW documents.
4. Select the documents you want to index.
5. Drag and drop the documents to the open Visual Recall window or to the minimized Visual Recall window (icon).
6. In the Index Files Cabinet Choice dialog box, select a cabinet for the documents.



7. Select the OK button.

The documents you selected appear in the Index Files dialog box.



8. In the File Format list box, make sure Auto Detect is selected.

This option indexes each document separately.

9. Select the Index button.

10. In the Indexing Completed window, select the OK button.

See chapter 3, "Indexing files," in the *Visual Recall User Guide* for more information on indexing files and documents into cabinets.

Searching for GLOBALVIEW documents

You can search for any GLOBALVIEW document indexed into a Visual Recall cabinet. After Visual Recall finds the document, you can easily browse its contents, as well as edit and print it.

To find a document, you first choose the cabinets to search and then define a search criteria.

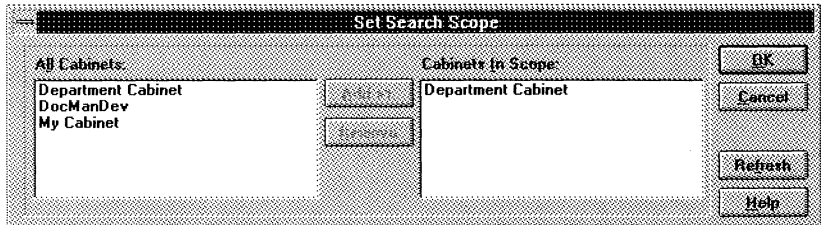
Choosing the cabinets to search

You can search one or more cabinets to find the documents you want. The list of cabinets you want to search is called the *search scope*.

To choose the cabinets to search:

1. If Visual Recall isn't running, double-click its application icon to start it.
2. Do one of the following:
 - On the Search pane toolbar, select the Set Scope button.
 - Select Set Scope in the Visual Recall Search menu.

The Set Search Scope dialog box appears.



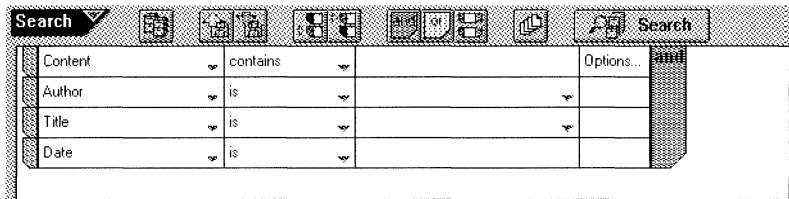
3. To add a cabinet to the search scope, do the following:
 - a. In the All Cabinets list box, select the cabinet or cabinets you want to add.
 - b. Select the Add button.

4. To remove a cabinet from the search scope, do the following:
 - a. In the Cabinets In Scope list box, select the cabinet or cabinets you want to remove.
 - b. Select the Remove button.
5. Select the OK button.

Defining the search criteria

You can find documents based on one or more properties (such as Author, Title, or Date), text (a single word, a group of words, or a phrase), or a combination of properties and text. You define one or more *search terms* in the Visual Recall Search pane to specify your search criteria.

The Visual Recall Search pane shows a default group of search terms. Each search term consists of a *property*, an *operator*, and a *value*. You can specify a value for one or more of the default terms or define your own search terms.



To search for GLOBALVIEW documents:

1. Do one of the following:
 - Review the group of default search terms and decide which search term property you want to use in your search.
 - ◆ **Note:** You use the Content property to search for documents that contain a specific word, group of words, or phrase.◆
 - Select one of the default properties to display the drop-down list box, then select the property you want.

2. If you want to use a different operator, select the Operator box next to the property you chose, then select an operator from the drop-down list box.
3. Select the Value box for the search term.
4. Do one of the following:
 - In the drop-down list box, select the value you want.
 - Type the value you want.
5. Repeat steps 1 through 4 for each additional search term you want to define.
 - ◆ **Note:** Visual Recall ignores incomplete search terms.◆
6. To execute the search, do one of the following:
 - On the Search pane toolbar, select the Search button.
 - Select Search in the Visual Recall Search menu.

Visual Recall executes the search and displays the found documents in the View pane.

Chapters 4 and 6 in the *Visual Recall User Guide* provide more information on executing searches and viewing search results.

Browsing GLOBALVIEW documents

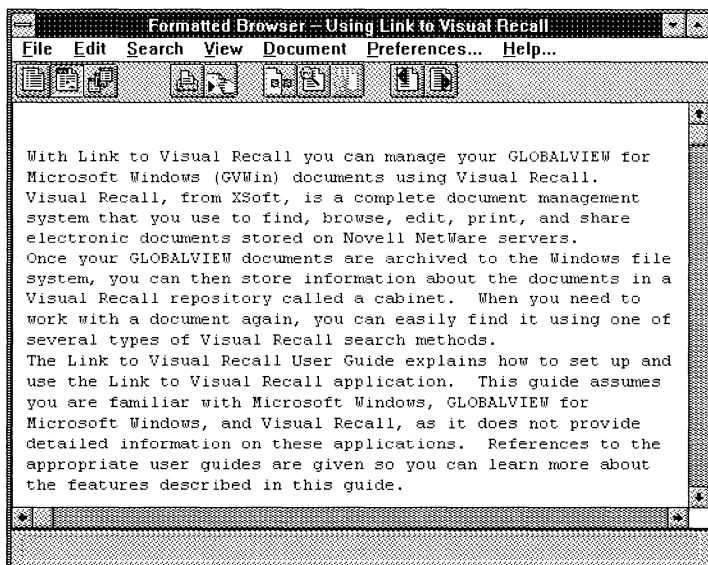
You can browse, or view the contents of, a GLOBALVIEW document found in a search. Using Visual Recall *browsers*, you can view either the unformatted text from a GLOBALVIEW document or the fully formatted document.

To browse an unformatted document, GLOBALVIEW software does not need to be installed on your PC. However, to browse a GLOBALVIEW document with all of its formatting characteristics intact, GLOBALVIEW software must be installed and running, and you must be logged on to GLOBALVIEW.

To browse GLOBALVIEW documents:

1. In the Visual Recall View pane, double-click the GLOBALVIEW document you want to browse.

Visual Recall displays the document's text in the Formatted browser window.



2. To browse a formatted GLOBALVIEW document, do one of the following:
 - On the browser toolbar, select the Native Browser button.
 - Select Native Application in the Visual Recall View menu.

The document opens in your GLOBALVIEW workspace. After you've browsed the document, you can close it, then switch to Visual Recall.

Editing GLOBALVIEW documents

To edit a document in Visual Recall, you check it out, which prevents other users from editing it. When you are finished editing a document, you then check it back into its cabinet. Visual Recall creates a new version of the document and it is once again available for editing.

To ensure that Visual Recall maintains the current contents of a document, you should not edit the document from outside Visual Recall. Should you edit the document in GLOBALVIEW without checking it out of its Visual Recall cabinet, you will need to rename the document and index it.

To edit a GLOBALVIEW document indexed into a Visual Recall cabinet, GLOBALVIEW software must be installed and running on your PC, and you must be logged on to GLOBALVIEW.

To edit a GLOBALVIEW document:

1. In the Visual Recall View pane, select the document you want to edit.
2. Do one of the following:
 - On the View pane toolbar, select the Check Out button.
 - Select Check Out in the Visual Recall Actions menu.

The document's icon appears in the Visual Recall Work pane. The icon includes a pencil graphic and the document title in red letters. The document icon in the View pane includes a lock graphic, indicating that other users cannot edit the document.

3. Do one of the following:
 - In the Visual Recall Work pane, double-click the checked-out document.
 - Select Edit Document in the Visual Recall Actions menu.

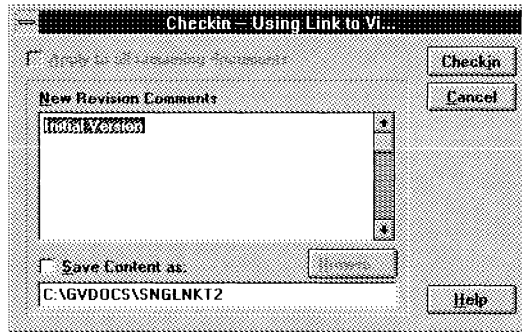
The document opens in your GLOBALVIEW workspace.

4. Select Edit, if necessary, and revise the document.
5. Save your changes and close the document.
6. Switch to the Visual Recall window.

The document's icon is selected in the Work pane.

7. Do one of the following:
 - On the View pane toolbar, select the Check In button.
 - Select Check In in the Visual Recall Actions menu.

8. In the Checkin dialog box, type any revision comments for the document.



9. Select the Checkin button.

Visual Recall creates a new version of the document and checks it into the cabinet. The revised GLOBALVIEW document is stored in its location in your Windows file system.

In Visual Recall, the latest version of a document appears as a white document icon; the previous document version appears as a gray document icon. See chapter 11, "Managing documents," in the *Visual Recall User Guide* to find out more about document versions.

Chapter 9, "Editing documents," in the *Visual Recall User Guide* provides more information on editing documents.

Printing GLOBALVIEW documents

If you have a printer connected to your computer or network, you can print any GLOBALVIEW document from Visual Recall. You can print a document located in the Visual Recall View or Work pane, or displayed in a browser.

To print a document, Visual Recall displays your GLOBALVIEW workspace so you can print the document using a printer icon in your workspace. Therefore, make sure GLOBALVIEW is running and you are logged on to your workspace.

To print a GLOBALVIEW document:

1. Do one of the following:
 - In the Visual Recall View or Work pane, select the document you want to print, then select Print in the Visual Recall Actions menu.
 - ◆ **Note:** You can select one document only.◆
 - In the Visual Recall browser window, select Print in the File menu.

Your GLOBALVIEW workspace displays. The mouse pointer shape appears as a small document icon, which represents the document you want to print.

2. Select the printer icon you want to use.
3. If the Printing option sheet appears, select the options you want, then select Start to print the document.
4. To use Visual Recall again, switch to the Visual Recall window.

See chapter 12, "Printing documents and books," in the *GLOBALVIEW Write and Draw User Guide* for more information on printing.

