madicon InfoStore 3 - Manual

Version 3.0 - © Ingenieurbüro Manfred Dillmann - www.madicon.de

⚠️ **Important**
If you have used **madicon InfoStore** in a version < 3 so far, you **must not** perform a design update under any circumstances!

The internal structure of the application has changed with version 3 and therefore you have to start with an empty database of version 3 and import the documents from an older version. The exact procedure is described in chapter 9. Configuration.

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1. Introduction

Thank you for your interest in the **madicon InfoStore** application!

The instructions for using the software, which are available to you in the form of this manual, have deliberately been kept quite short. Who has the time today to read several hundred pages in a manual? Therefore, you will find here a compact guide to the use of the software.

If you still miss explanations or you don't understand settings correctly, please ask via eMail to software@madicon.de - I will then extend these instructions accordingly.

I wish you much pleasure and maximum benefit when using **madicon InfoStore**!

Manfred Dillmann

2. Copyright and limitation of liability

The program madicon InfoStore and the documentation belonging to the program are subject to the sole copyright of the manufacturer.

3. Program idea

Every active IT user collects or generates any amount of "information" himself in the course of time. Whether this is text information, graphics, Internet downloads or the like is irrelevant.

The problem is basically "finding" a certain piece of information at a later time (...hmmm, somewhere I had this file stored?).

Here HCL Notes/Domino with its document-oriented database structure (you can store pretty much anything in Notes) offers an ideal starting platform. What is still missing is a suitable application that enables structured storage of your information.

This application exists now: **madicon InfoStore**!

4. Features

- Complete functionality in a single .NSF file

- Classification of the created documents through the (adaptive) `Categories` and `Sub Categories` fields. This allows easy retrieval of the documents through a categorized view.

- Assignment of `tags` for easier retrieval of documents in the context of a full-text search.

- Clear display of the saved documents in different views sorted by Category, Category/Modification, Tags, Title, Attachments, Modification, Document Size and Creator. Display of the number and size of the file attachments saved in the documents in the views.

- Storage of any information accepted by Notes (texts, tables, graphics, embedded objects, file attachments) in the documents.

- Direct overview of file attachments (summary with number and size sum of files or detailed overview with file name and size) in the open document.

- Document history with the last 10 modification times and person who made the changes.

- Creation of a mail with automatic generation of the document link - so other people can be easily informed about new/changed documents.

- Creation of a mail with complete content from the `Title` and `Content` fields.

- Import of mails from the own or foreign (access ensured) mailboxes.

- Additional authors, read access restriction and content encryption can be specified per document.

5. License

> The application **madicon InfoStore** will be offered as freeware from 08 January 2016.

The completely free use applies to both private and commercial use.

A sale of the software as well as the distribution on data carriers or distribution on e.g. download portals is expressly prohibited.

📌 If you are interested in the application in open design (e.g. to make your own customizations), you can purchase this variant. You can find more details on the madicon InfoStore product page.

6. Navigation in the application

After opening the madicon InfoStore application, you will see the navigation located on the left side of the screen. The navigation points lead you either to views (listing of saved documents) or open (navigation point `Configuration`) directly a form on the screen.
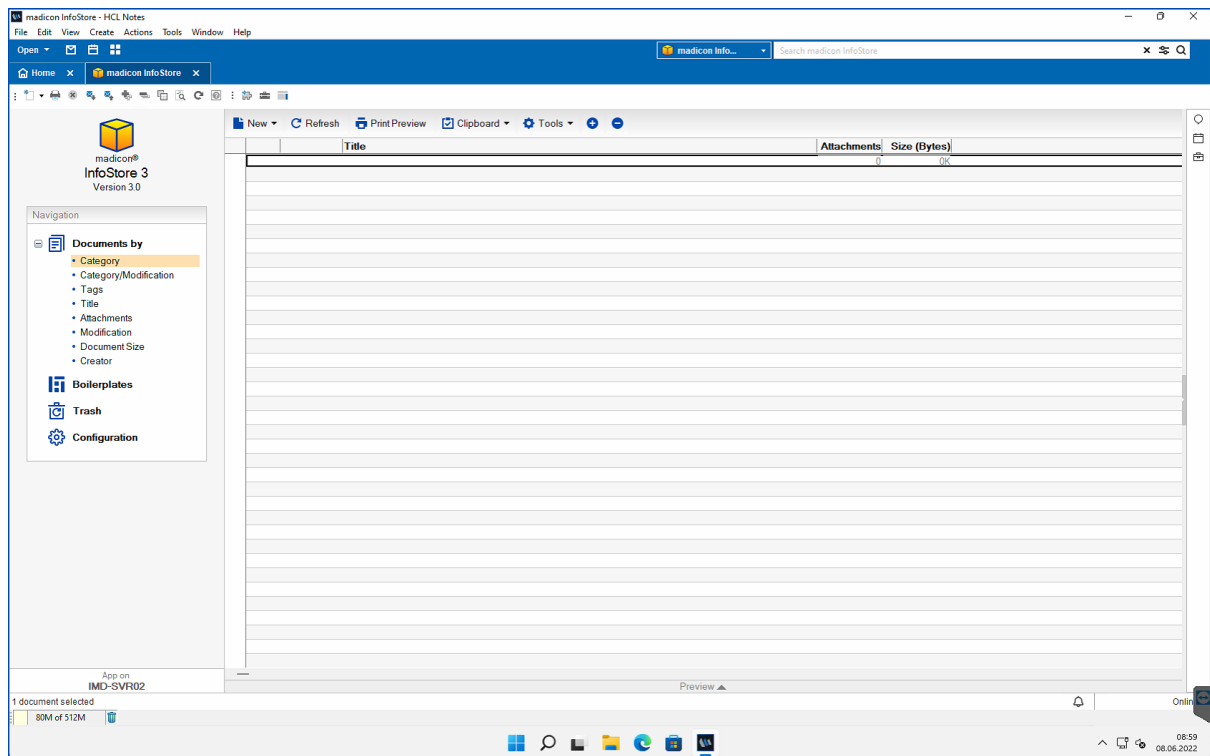
💡 The `Configuration` navigation item (various settings for use) may not be displayed for you. This navigation point can be hidden by the application manager.
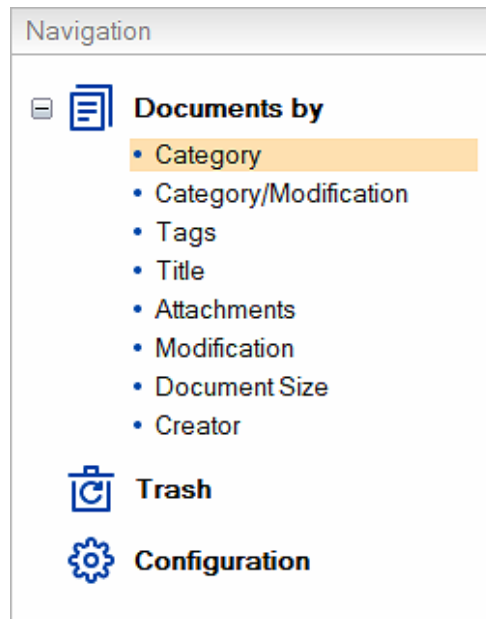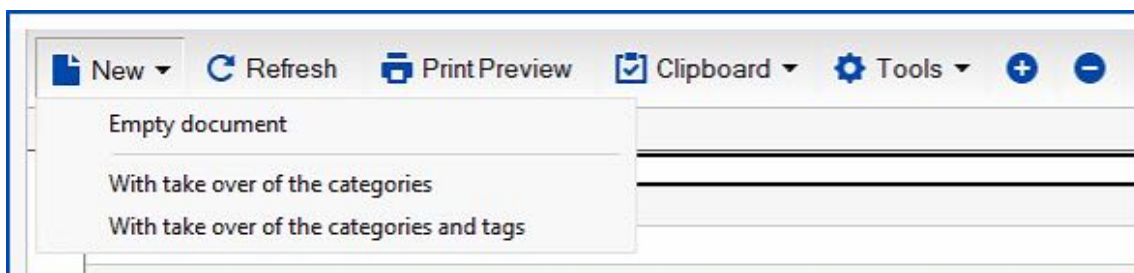
Through the different views, the stored documents are listed according to different sorting characteristics. By selecting the right view, you can quickly find the desired document.

7. Documents

7.1. Create documents

To create new documents use the `New` action.

The following options are available:

- `Empty document` - No transfer of categories or tags from a previously selected document

- `With take over of the categories` - Transfer of categories from a previously selected document

- `With take over of the categories and tags` - Transfer of categories and tags from a previously selected document

Now the form opens:
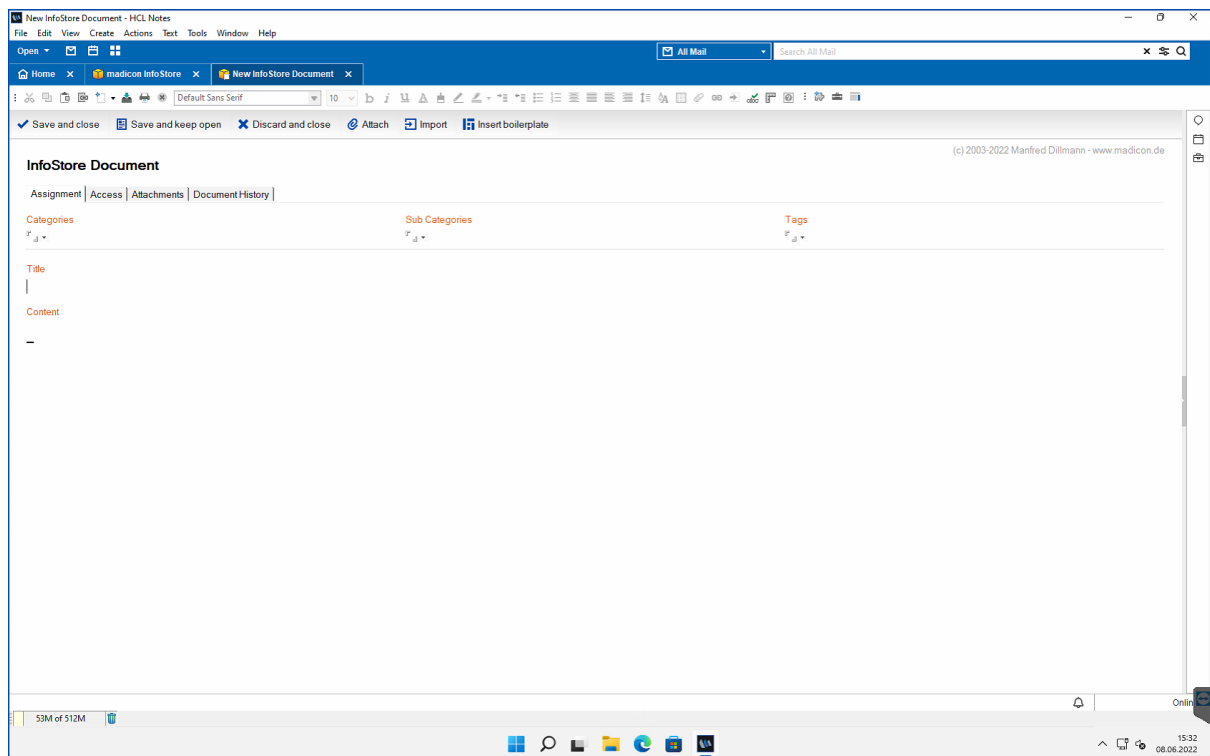
The `Title` field describes the document (this information is displayed in the views) and the `Content` field records the content. You can capture formatted text, images, file attachments, tables, etc. as content.

💡 If you enter a date in the form yyyy-mm-dd in the `Title` field, the documents will be displayed in the views sorted chronologically correctly.
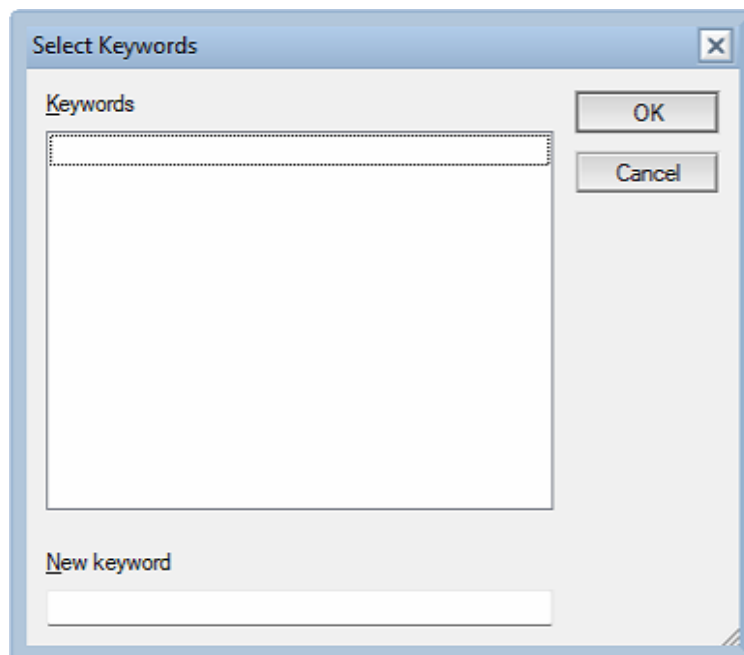
The following tabs are available in the upper area.

7.1.1. Tab: `Assignment`

On this tab you will find the `Categories` , `Sub Categories` and `Tags` fields. These fields allow you to categorize or tag the documents to easily find them later in the corresponding views.
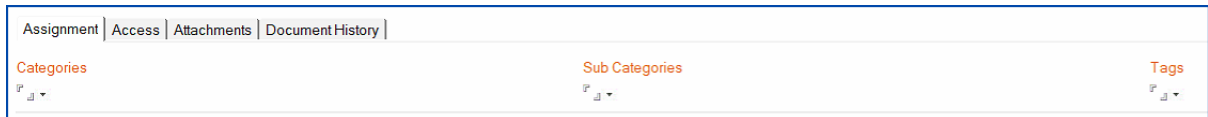
If you click on the small arrow on the right of one of the fields, the following dialog will appear:

If no document exists yet, the list of `Keywords` is empty. You can enter a new keyword at the bottom of the dialog.

> 💡 Categories over several levels can also be entered in the `Sub Categories` field. Separate the categories with a backslash (\).
> Example: **Cars\Inspection**

A document with content might look like this:

> 💡 To import or attach files, use the `Import` or `Attach` actions, respectively.

7.1.2. Tab: `Access`

On this tab you can control whether there are additional authors for the document you created, whether the document is visible only to selected people and whether the content (`Content` field) should be encrypted.

`Created by`

The document was created by this person and can be edited later only by this person.

The persons or groups selected here can edit the document later in addition to the creator.

If this option remains disabled, there is no restriction on read access. Once the option is enabled, the document will be displayed only to the creator, authors and named people/groups.

The entire content of the `Content` field is encrypted with the current user ID. Thus, only this person can see the content.

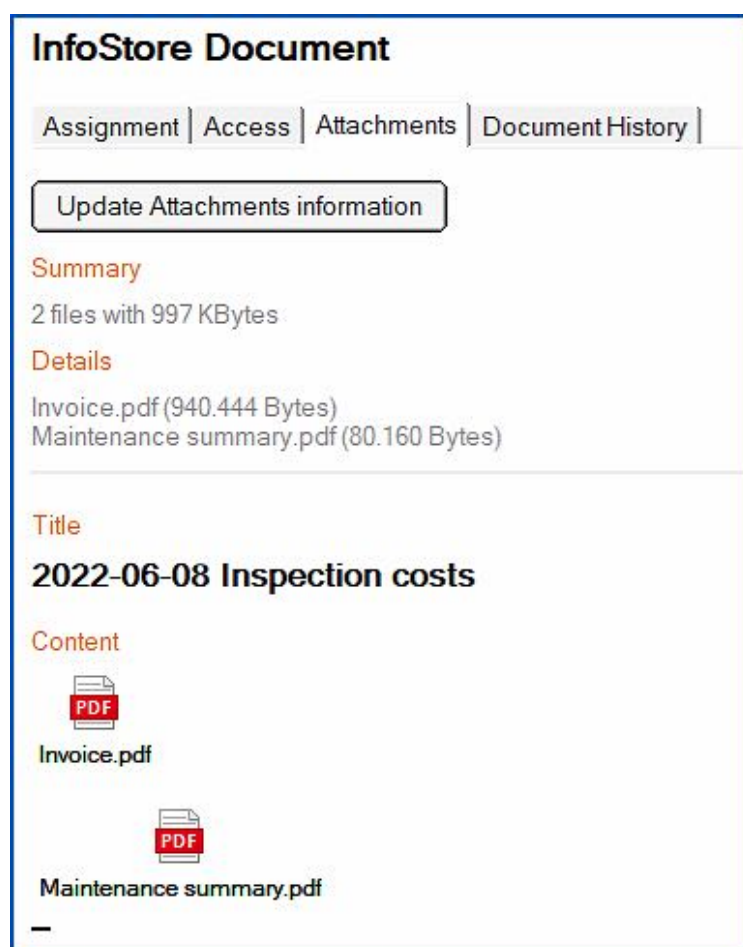If attachments exist in a document or read access has been restricted or encryption is present, this is marked accordingly in the views. If you hover the mouse pointer briefly over one of the icons, an explanation is displayed in plain text.

7.1.3. Tab: `Attachments`

This tab is about file attachment details.

You can update the displayed information (if, for example, more file attachments are added) at any time by clicking the `Update Attachments information` button.

7.1.4. Tab: `Document History`

On this tab the time of creation and the last 10 changes are displayed - always with date/time and the person who made the changes.
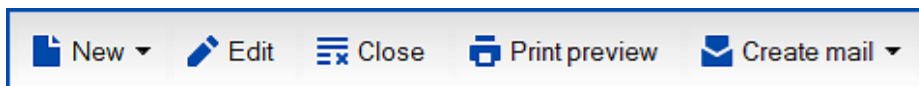

7.2. Actions available in documents

At the top of the screen you will find Actions - these differ when you read or edit a document.

7.2.1. A document is read

The following actions are displayed.

Action: **New**

The following options are available:

- `Empty document` - No transfer of categories or tags from the opened document

- `With take over of the categories` - Transfer of the categories from the opened document

- `With take over of the categories and tags` - Transfer of categories and tags from the opened document
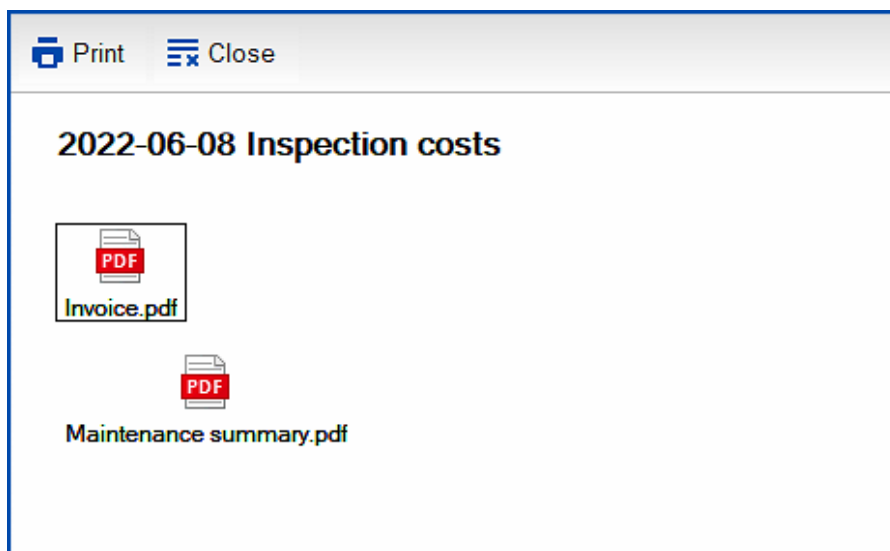
Action: **Edit**

It will switch to the edit mode.

Action: **Close**

The document is closed and the previously selected view is displayed.

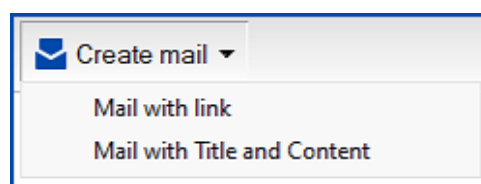Action: **Print preview**

This action displays the document with a form reduced to the `Title` and `Content` fields.

Through the Actions `Print` available in this form you can print the document and close it through `Close` .

Action: **Create mail**

Option: `Mail with link`

A new mail will be created with a link to this document:

The title to the InfoStore document and the link will be attached to the bottom of the mail.
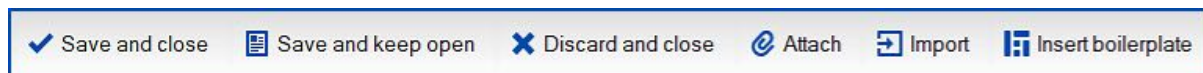
Option: `Mail with Title and Content`

A new mail will be created with the title and full content.

The title and content will be attached to the bottom of the mail.

7.2.2. A document is edited

The following actions are displayed.

Action: **Save and close**

The document is saved and closed. If mandatory fields have not been filled in, you will be notified.

Action: **Save and keep open**

The document is saved - but remains open in read mode. If mandatory fields have not been filled in, you will be notified.

Action: **Discard and close**

The document is closed without confirmation and all changes are discarded.

Action: **Attach**

A dialog opens for selecting one or more files. These are appended to the current position of the cursor in the `Content` field.

If the cursor is not in the `Content` field, you will receive an error message.

Action: **Import**

A dialog opens for selecting one or more files. These are imported into the `Content` field at the current position of the cursor.

If the cursor is not in the `Content` field, you will receive an error message.

Action: **Insert boilerplate**

This action allows you to insert a previously created template (text module) at the current cursor position. You can find more information in the following chapter.

If the cursor is not in the `Content` field, you will receive an error message.

7.3. Boilerplates (text modules)

7.3.1. Create Boilerplates

If you repeatedly create InfoStore documents with similar content (tables, special formatting, default texts, etc.), you can create templates and insert them into an InfoStore document with a click.

Select the `Boilerplates` item in the application navigation and click on the `New Boilerplate` action.

Specify a title and create the desired template in the `Content` field. In the `Content` field, all possible contents accepted in a richtext field can be stored.

In the above example, a "Horizontal Rule" has been inserted with modification of various properties. This can be inserted into the `Content` field in an InfoStore document with just a few clicks.
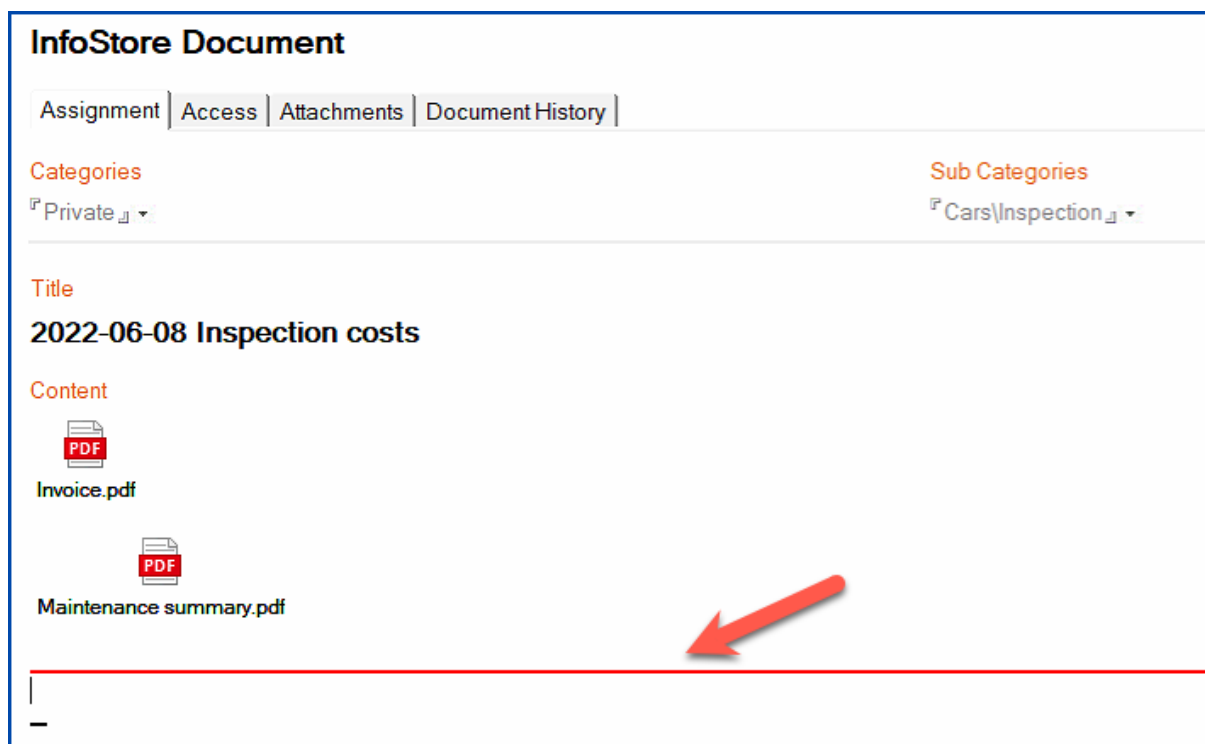
Another example:

7.3.2. Use Boilerplates

Create a new InfoStore document or open an existing one in Edit mode. Place the cursor at the desired position in the `Content` field.

Now click on the `Insert boilerplate` action.
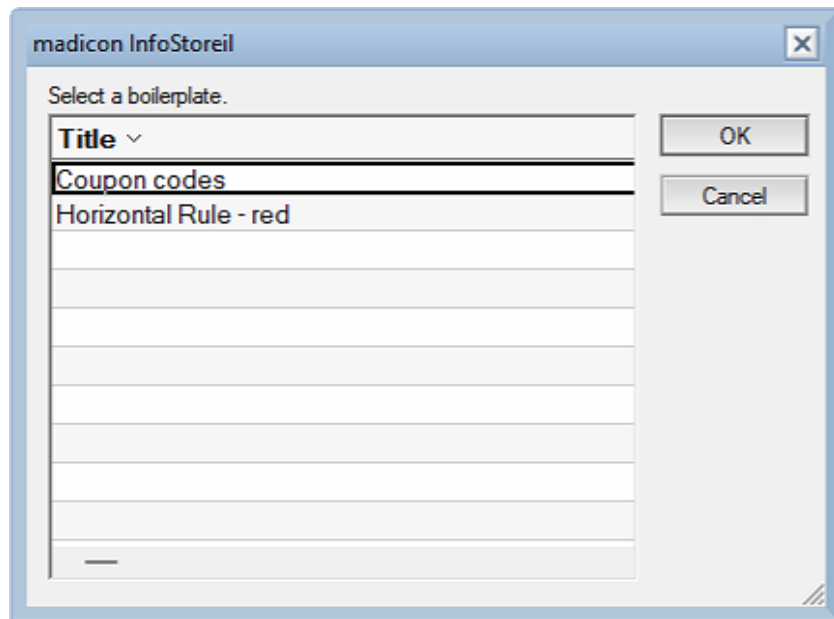
Select the desired Boilerplate and confirm the dialog by pressing the OK button. The template is inserted at the cursor position.

8. Views

8.1. Display of documents in categorized views

At least one entry in the `Categories` field is required in each InfoStore document - but no entries in the `Sub Categories` field.

If a document has been created in the above form, the `Category` view will show the following:

By clicking on the icon to the left of the category name, you can expand or collapse categories.

If there are a large number of documents, the `Expand all (+)` and `Collapse all (-)` actions are helpful. The actions available in views are presented in the next chapter.

8.2. Actions available in views
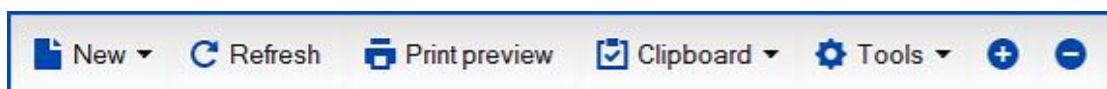
💡 The `Expand all (+)` and `Collapse all (-)` actions are available only in categorized views.

Action: **New**

Create new documents with or without taking over the categories and/or tags from a previously selected document.

Action: **Refresh**

The display of documents will be updated. After one click you will see all documents available for you.

Action: **Print Preview**

This action applies to a document previously selected in the view. The details of the usage are described in the chapter of the same name for the documents (Action: Print preview).

Action: **Clipboard**
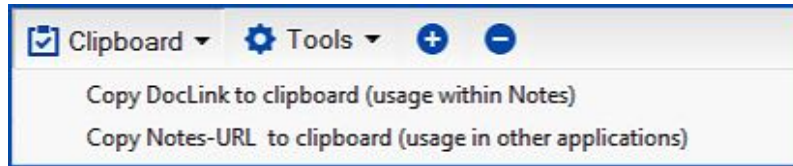
Option: `Copy DocLink to clipboard (usage within Notes)`

A link common in Notes is copied to the clipboard. This link can be pasted into a richtext field (e.g. into the body field of a mail) in any Notes application.

Option: `Copy Notes-URL to clipboard (usage in other applications)`

A Notes-URL link is copied to the clipboard in the following form.

```
notes://IMD-SVR02@IMD/__C125885B00265693.nsf/0/4AEC0E78945A5C4CC125885B00394173?OpenDocument
```
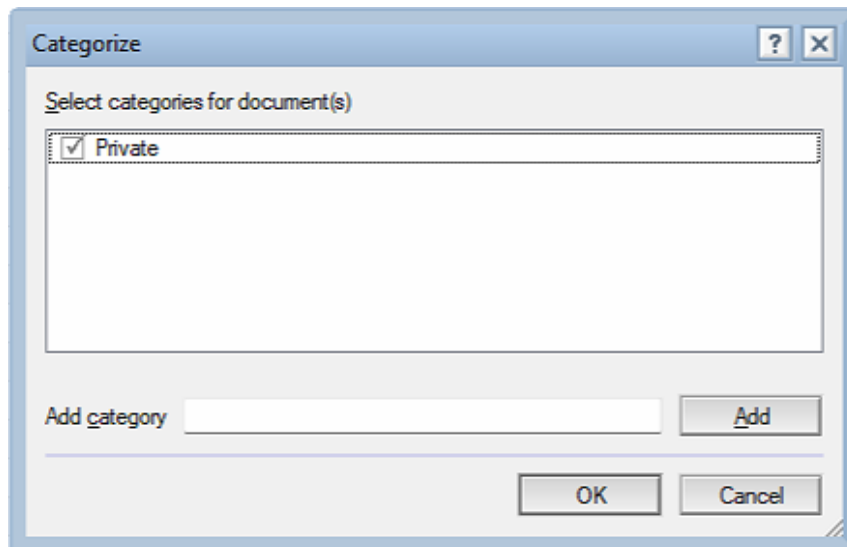
Such a link can be inserted in any application - clicking on such a link will open the corresponding document in the Notes client.

Action: **Tools**
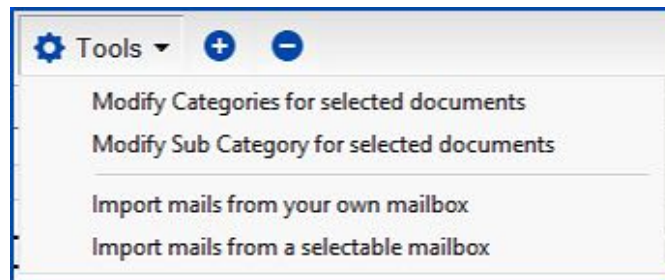
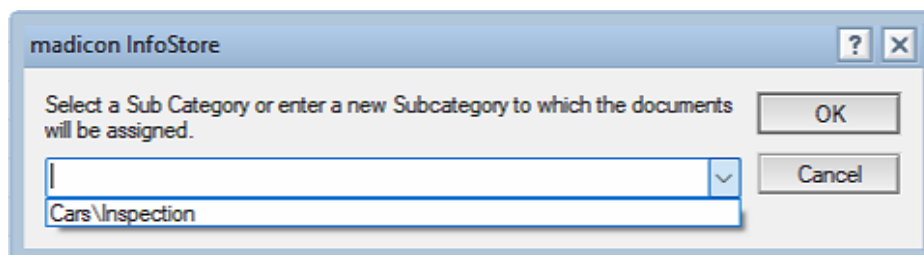Option: `Modifiy Categories for selected documents`

For previously selected documents, the content of the `Categories` field can be changed.

You activate desired categories or you can add a new category.

Option: `Modify Sub Category for selected documents`

For previously selected documents, the content of the `Sub Categories` field can be changed.


The subcategories matching the `Categories` field are displayed for selection. Alternatively, you can enter a new subcategory directly into the field. Basically, only one subcategory can be assigned at a time - if you want to assign multiple subcategories, you need to open the document and switch to Edit mode.

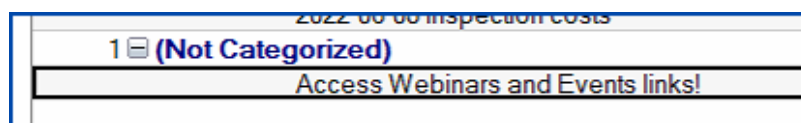Option: `Import mails from your own mailbox`

The mails from the inbox of your mailbox will be displayed and you can select any number of mails.
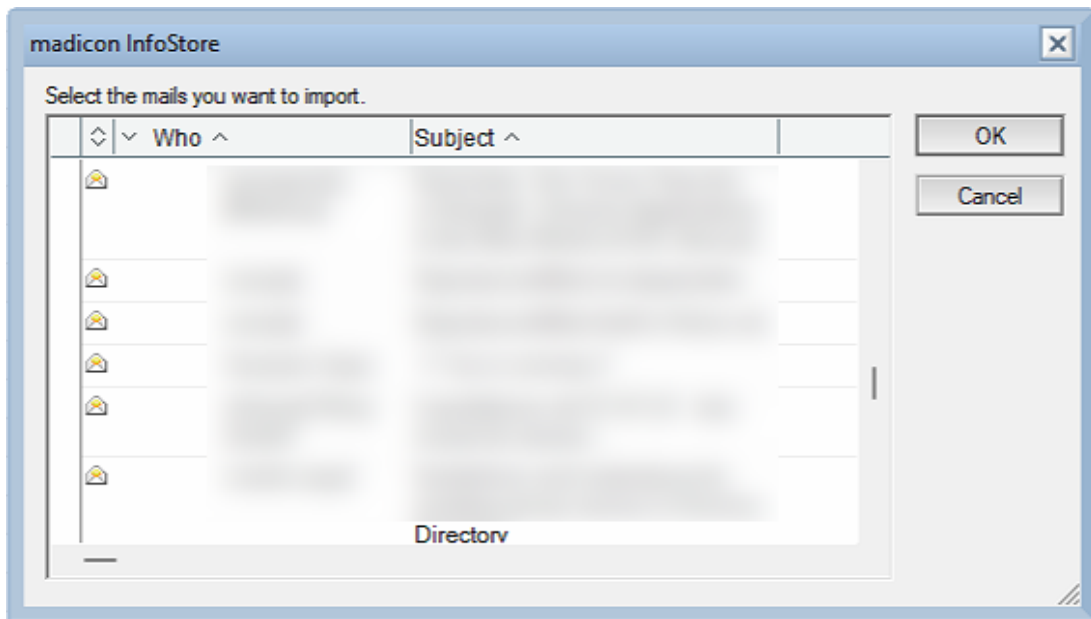
Confirm the dialog by clicking the `OK` button.
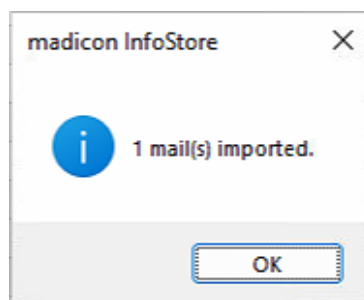
After the import has been performed, this is indicated by a corresponding dialog. The new documents are displayed as `(Not Categorized)`.

Option: `Import mails from a selectable mailbox`

The import from a selectable mailbox is analogous to the import from your own mailbox. You must first select the desired user in an additional step.
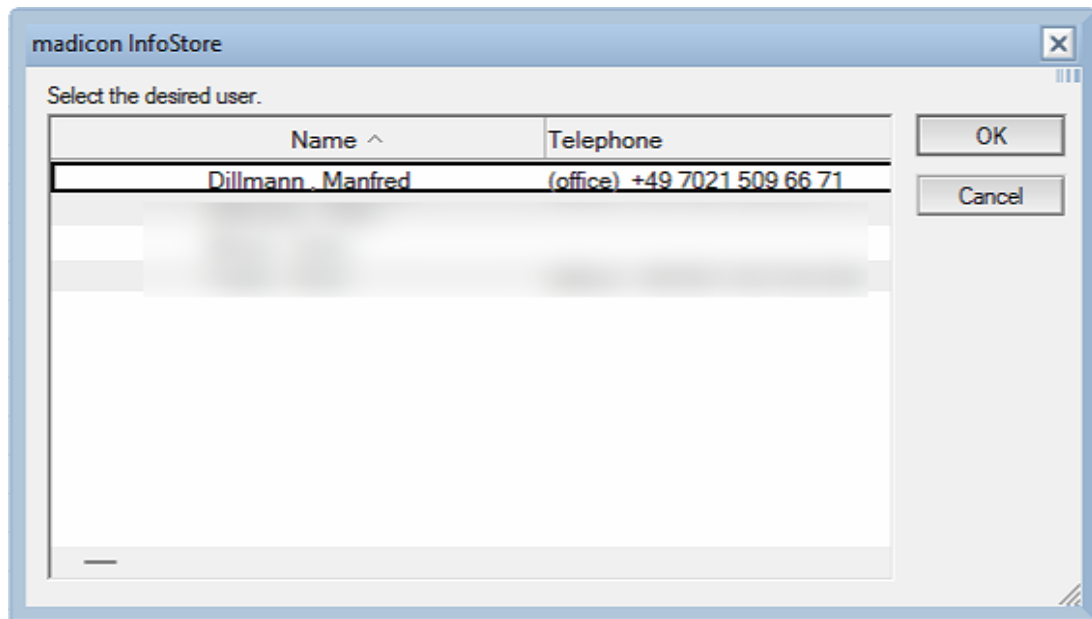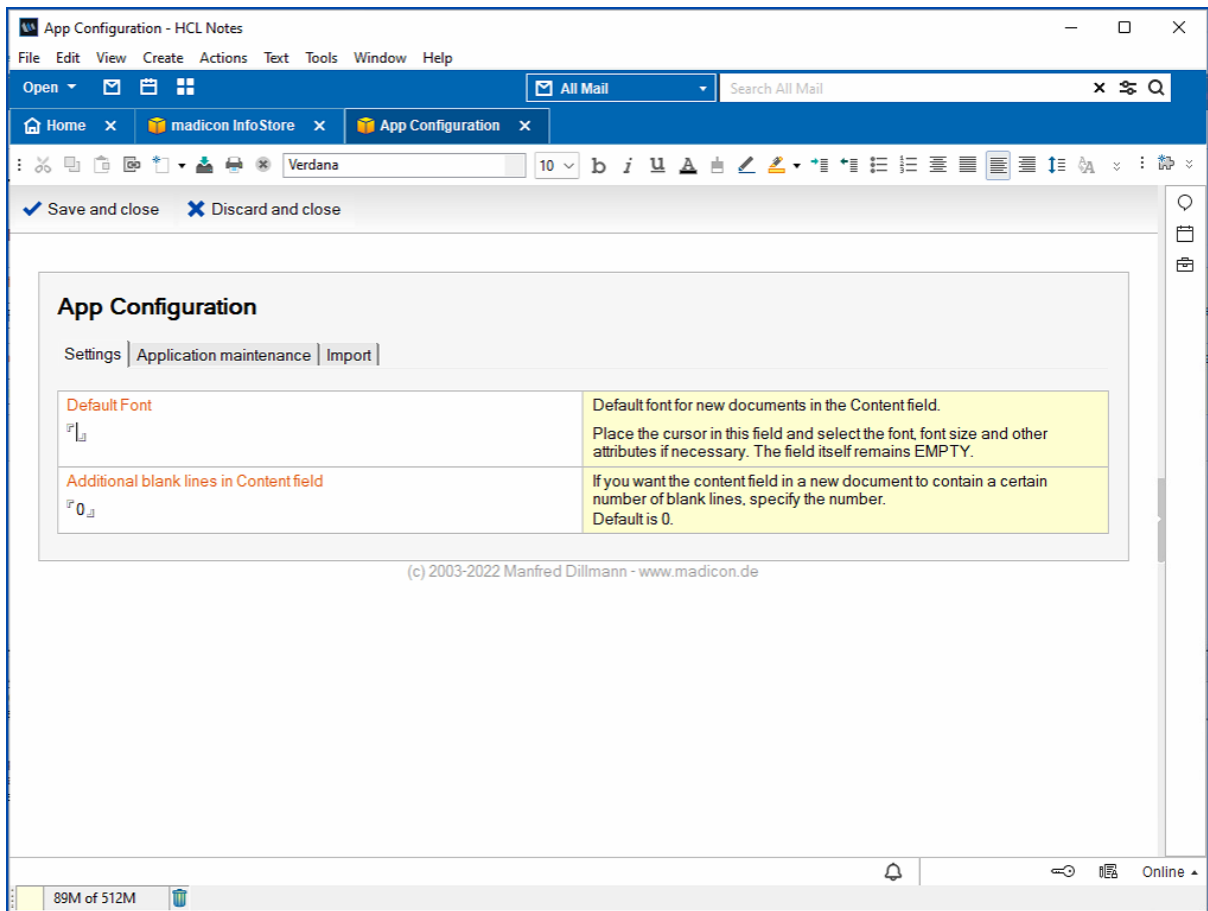
Action: **Expand all (+)**

All existing categories and subcategories will be expanded to show all documents.
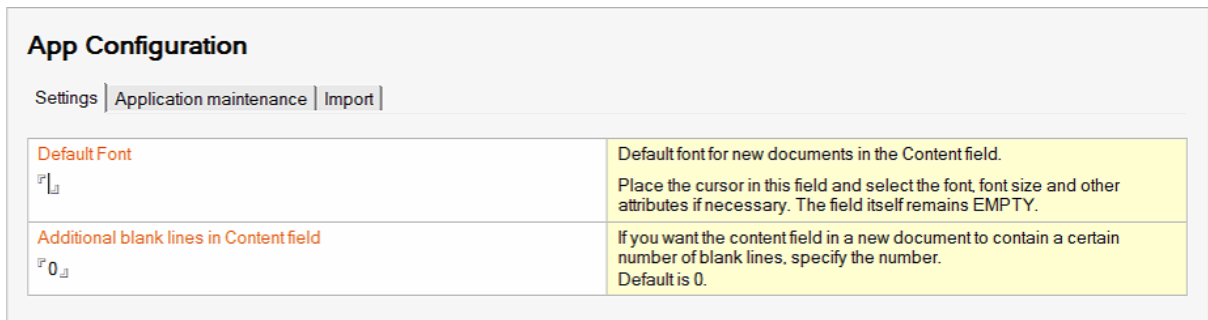
Action: **Collapse all (-)**

All existing categories and subcategories are collapsed and thus only the categories are displayed.

9. Configuration

The `Configuration` navigation item takes you to special settings that are generally not accessible to users (control via the ACL role `[AppManager]`). The tabs described below are available.

9.1. Tab: `Settings`

`Default Font`

On this tab, you can set a default font for the `Content` field for newly created documents - this default font applies to InfoStore documents and Boilerplates. Details on how to do this can be found to the right of the field.

`Additional blank lines in Content field`

If the `Content` field is to contain additional blank lines for newly created InfoStore documents, you can specify this here. This setting does **not** apply to boilerplates.

9.2. Tab: `Application mantenance`
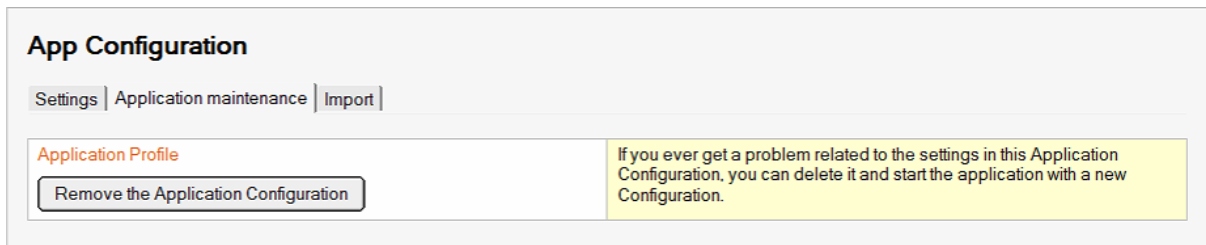
By clicking the `Remove the Application Configuration` button you can reset all settings. After one click you will see the following dialog:
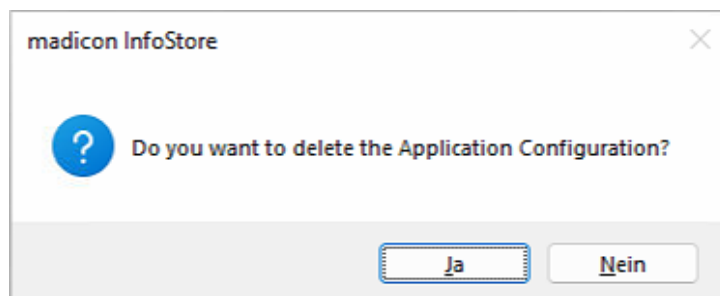
If you confirm this dialog with the `Ja` (=Yes) button, the configuration form is closed and you return to the previously used view.
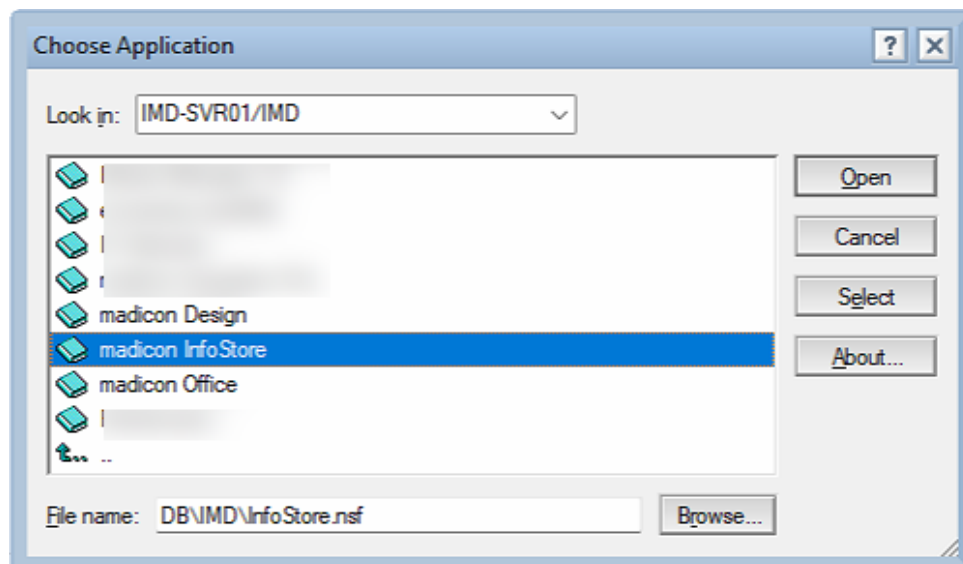
9.3. Tab: `Import`

> ⚠️ **Important**
>
> If you have used **madicon InfoStore** in a version < 3 so far, you **must not** perform a design update under any circumstances!
>
> The internal structure of the application has changed with version 3 and therefore you need to start with an empty version 3 database and import the documents from an older version.
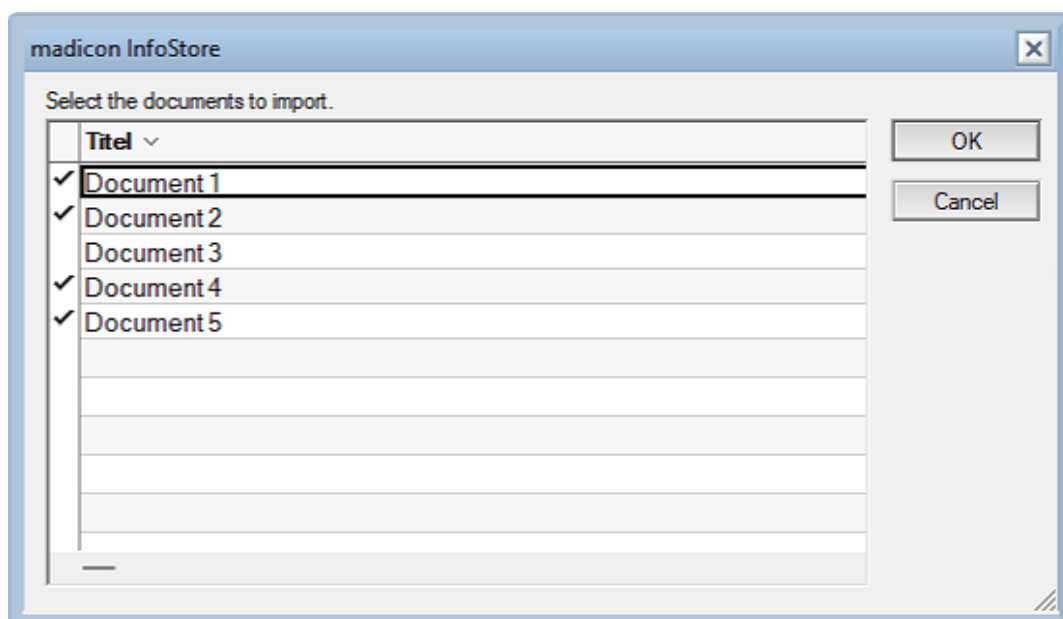
Click the **Import** button.

In this dialog, select the desired Domino server in the upper area and then an InfoStore application version < 3. Confirm the dialog by clicking the `Open` button.
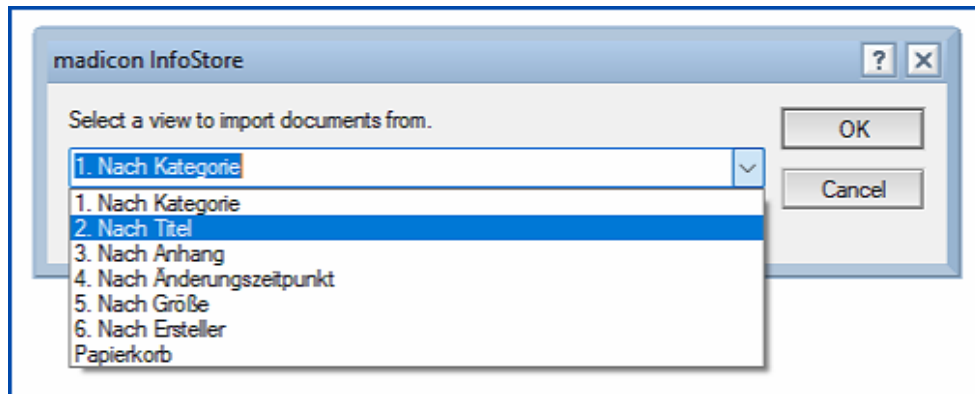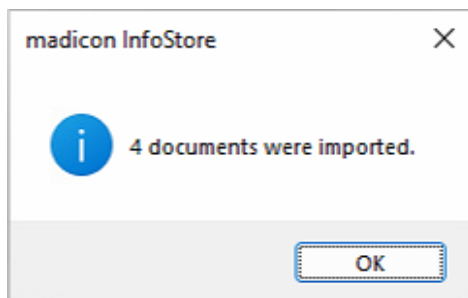

The available views are now displayed. Select the desired view and confirm the dialog by clicking the `OK` button.

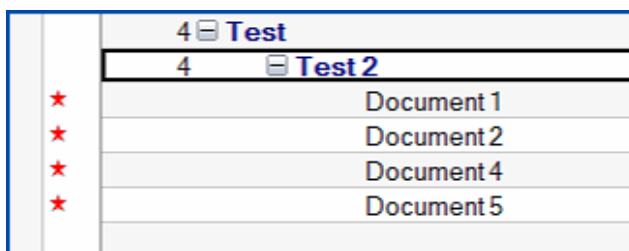💡 The key combination `Ctrl + a` selects all documents.

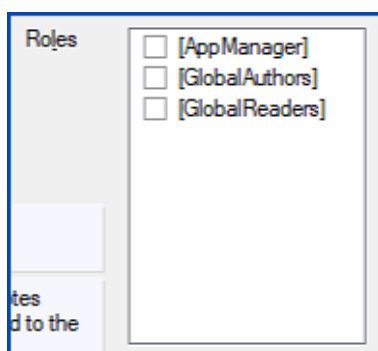Confirm the dialog by clicking the OK button.

After performing the import, this dialog is displayed. The imported documents are indicated by a red star (= unread mark).

10. Administrative settings

madicon InfoStore requires only a few administrative settings - these are implemented in the ACL (Access Control List) of the application.

10.1. ACL-Roles

There are three roles in the ACL with the following meaning:

- **[AppManager]**
  This role ensures that the `Configuration` navigation item is displayed.

- **[GlobalAuthors]**
  This role allows people with the `Author` access level to edit all documents. In addition, documents that have read access enabled are also displayed (see: Restrict read access).

- **[GlobalReaders]**
  This role ensures that all documents are always displayed - even those with read access enabled (see: Restrict read access).

10.2. ACL-settings for users
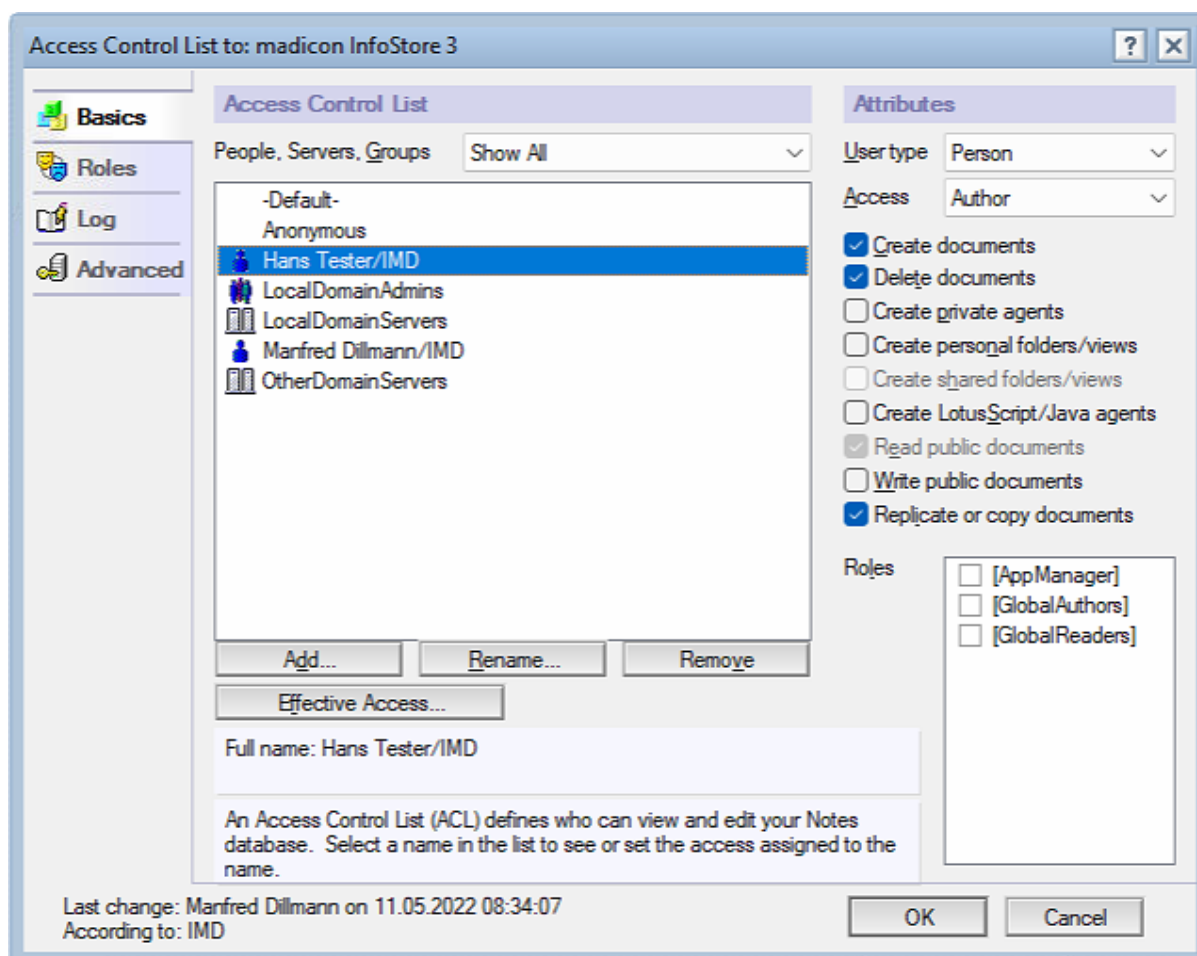
Users get the `Author` access level.

10.3. ACL-settings for administrators
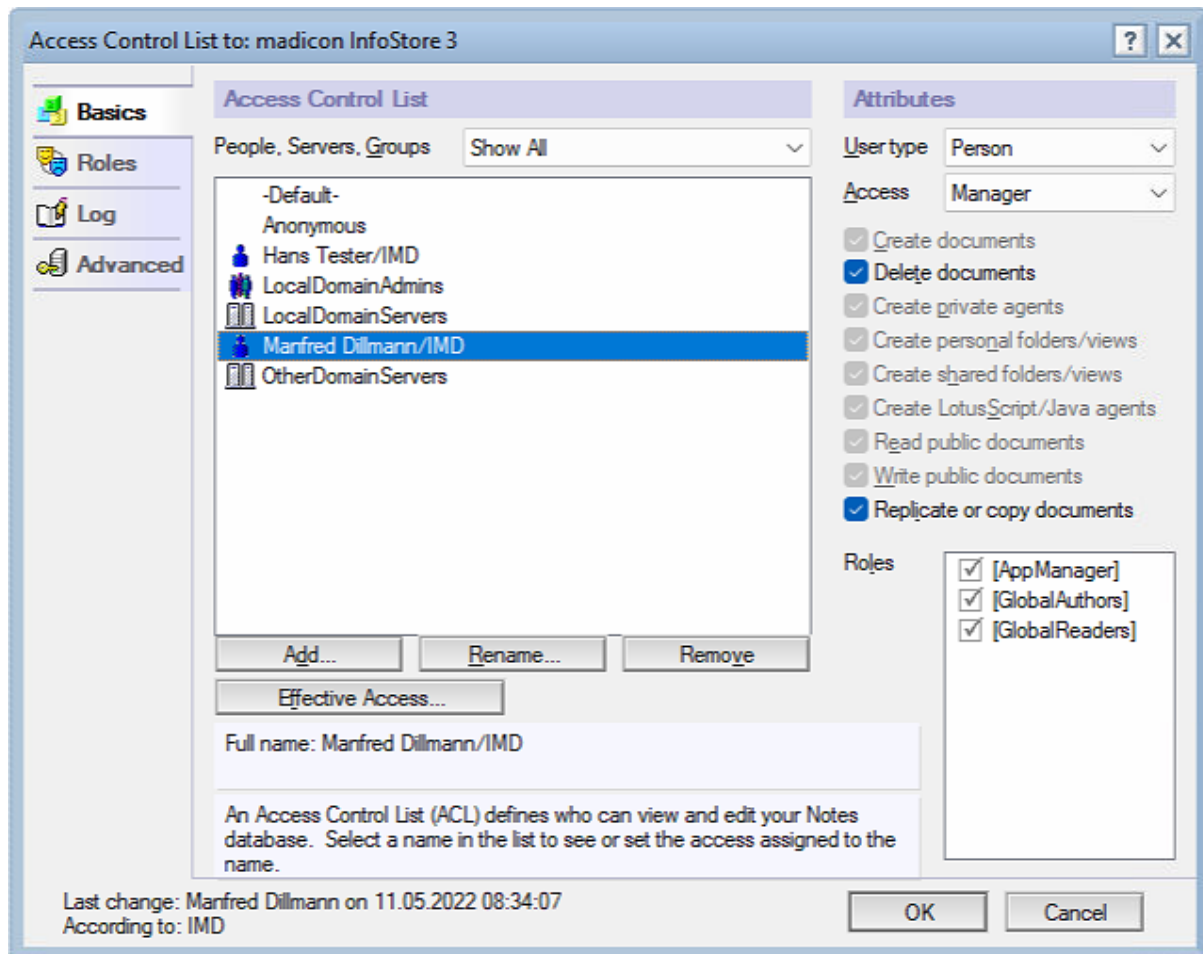
Administrators are given the `Manager` access level. In addition, at least the `[AppManager]` role should be activated so that access to the `Configuration` navigation item is possible.