



User Guide
Webdocs for IBM i 4.0
Insite



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Webdocs for IBM i

Webdocs for IBM i works like a filing cabinet that allows users to store, manage, and share documents across your network.

To access Webdocs, first you must download and install HelpSystems Insite on a Windows® or Linux® system. Then, open it in a browser and point it at your existing WebDocs host systems. No updates are needed to the Robot products you currently have running on your IBM i.

This guide is document version . For more information on document version, see Document Conventions and Symbols below.

[What Is in This Guide](#)

[About HelpSystems Document Management](#)

[What Is Not in This Guide](#)

[Document Conventions and Symbols](#)

[Contacting HelpSystems Document Management](#)

Accessing this Guide

This guide is meant to be used as a reference tool. Therefore, it's organized so the sections match the options in the product. To access this guide, click the help icon  on any page in Webdocs.

Additional Help

If you don't find the answers you need in this guide, try looking under the Support tab on the [HelpSystems website](#). There you can find help through Live Chat, many support topics and videos, and the contact information for Technical Support.

What Is in This Guide

This administrator guide provides detailed information on how to manage documents, users, and groups in WebDocs - iSeries Edition.

Here is what this guide includes:

- **Section 1** [Preface](#) describes this administrator guide, how to find the information you need, and how to contact RJS Software Systems.
- **Section 2** [Introducing Webdocs](#) describes WebDocs - iSeries Edition, shows you where to find

installation and licensing instructions, and introduces the WebDocs interface.

- **Section 3** [Setting Up Webdocs](#) shows you how to set up users, groups, folders, Document Types, and permissions.
- **Section 4** [Setting Up Other Options](#) shows you how to set up auditing, searching, routing, distribution, and other options.
- **Section 5** [Maintaining Webdocs](#) shows you how to manage WebDocs once it is set up.
- **Appendices** The [appendices](#) provide additional reference information on troubleshooting, data areas, database physical files, commands, exit points, NFS shares, and integration with other applications.

About HelpSystems Document Management

HelpSystems Document Management helps companies go paperless by automating business processes and digitally managing the entire lifecycle of their business information.

We provide solutions that help you capture, manage, distribute, and route documents digitally, and we provide you with the tools you need to keep that information safe and secure. Learn about HelpSystems Document Management at <http://www.helpsystems.com/rjs>.

What Is Not in This Guide

This administrator guide does not describe:

- Configuration and use of individual document input equipment (i.e., faxes or scanners). See the manufacturer instructions for help.
- Use of individual web browsers.
- iSeries commands other than those for WebDocs - iSeries Edition.
- How to write exit programs.
- How to install or upgrade WebDocs - iSeries Edition. For installation and upgrade information, see <http://support.rjssoftware.com/product/webdocs-iseriedition#install-upgrade>.
- How to plan your WebDocs - iSeries Edition set-up to meet your organization's business needs. For planning information, [contact RJS Software Systems](#) for a copy of the *WebDocs Workbook: A Planning Guide for Both WebDocs iSeries and WebDocs Windows*.
- How to set up single sign-on. For information on single sign-on, [contact RJS Software Systems technical support](#).
- How to use WebDocs - iSeries Edition. For user tasks, see the *WebDocs - iSeries Edition User Guide*: <http://support.rjssoftware.com/product/webdocs-iseriedition#documentation>.
- How to install, configure, or use any of the HelpSystems Document Management applications that work with WebDocs - iSeries Edition. For administrator and user guides for other applications, see <http://support.rjssoftware.com/product/webdocs-iseriedition#documentation>.

Document Conventions and Symbols

The following document conventions are used throughout this manual:

- In step-by-step procedures, the following are bolded: buttons, options, and keys that you press.
- In step-by-step procedures, words, letters, numerals, or symbols that you type into a text box or field are in both bold and italic type.
For example: Type ***GO RJSIMAGE*** on a command line.
- IBM hardware can be noted as AS/400, iSeries, or i5. For simplicity, all references in this guide use *iSeries* unless referring to a specific server model.
- For simplicity, all references to the IBM operating system in this guide use *OS/400* unless referring specifically to *i5/OS*.
- Typically with Webdocs, as with most software applications, there are several ways to accomplish the same thing. This guide shows one simple way to perform an action.
- RJS Software Systems is referred to as *RJS Software* in every section of this guide except the preface and index.
- WebDocs for Insite is referred to as *Webdocs* in every section of this guide except the preface.

Contacting HelpSystems Document Management

Please do the following before contacting HelpSystems Document Management for technical support:

- Check this guide's table of contents and index for information that addresses your concern.
- Gather and organize as much information as possible about the problem.

Telephone

Sales/Technical Support:
800-328-1000

General:

952-736-5800

Fax:

952-736-5801

(available business days 8:00
am. to 5:00 p.m. Central Time)

Email

Technical support:
support.rjs@helpsystems.com

Sales:

info.rjs@helpsystems.com

Website

Company:
<http://www.helpsystems.com/rjs>

Technical support:

<http://support.rjssoftware.com>

Introducing Webdocs for IBM i

This section provides a summary of Webdocs for IBM i (referred to as simply *Webdocs*) and is divided into the following topics:

[About Webdocs](#)

[Installing and Licensing Webdocs](#)

[Planning for a Successful Set-Up](#)

[Webdocs Concepts](#)

[Basic Document Flow Using Webdocs](#)

[Accessing the Webdocs Main Menu](#)

About Webdocs

Webdocs is document management software. Like a filing cabinet, Webdocs is where you go to quickly find documents, work with them, and then return them for others to use.

But Webdocs is much more than a filing cabinet. With Webdocs you can:

- Access your files from anywhere you have access to the network.
- Make documents accessible across your organization's network.
- View documents from any web browser.
- Secure documents and manage document access.
- Store documents in their native file format. WebDocs does not convert files to a proprietary file format or to binary large objects (BLOBs).

For example: PDF documents are saved with a PDF file extension. Microsoft Word documents are saved with a DOC or DOCX file extension. And so on.

- Upload documents from most standard scanners, including TWAIN-compliant products, Kofax-compliant products, multi-function copier devices, and scanner devices.

[Contact HelpSystems Document Management](#) to learn about [RJS Imaging Scan Workstation](#), which was specifically designed to scan paper documents for WebDocs.

- Assign up to ten administrator-defined search keys for each Document Type.
- Set up document routes for approval, rejection, or transfer.
- Reduce your paper usage.
- Create customized programs to integrate WebDocs with your existing applications.

Webdocs Concepts

The following terms have special definitions in Webdocs. To learn more, see the *Webdocs Workbook: A Planning Guide for Both Webdocs iSeries and Webdocs Windows*. To get a copy, [contact your HelpSystems Document Management project team or technical support](#).

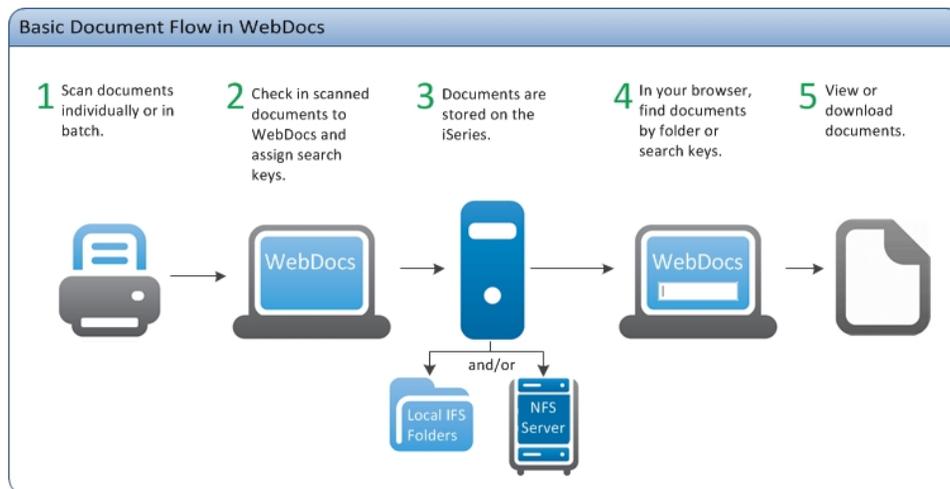
Concept	Definition
Document Type	<p>A category that contains different kinds of related documents.</p> <p>For example: AP or HR.</p>
Folder	<p>Where documents are stored for security. Users and groups have permissions to work with specific folders.</p> <p>Note: In Webdocs, folders are not the primary way to search for documents. Webdocs uses search keys and Document Types to search for documents instead.</p>
Group	<p>A collection of users.</p> <p>Groups' permissions define what their users can do with documents.</p> <p>In Webdocs, you first create a user with the group name, and then convert that user into a group.</p>
Route	<p>The path documents take from one user's WebDocs inbox to another user's inbox. Documents move along routes either via user approvals or automatically via exit programs.</p>
Search Keys (also called index keys, indexes, or metadata)	<p>What you use to look up documents.</p> <p>For example: Dates, names, or numbers.</p>
Title	<p>HelpSystems Document Management recommends that you use this as a sub-type within a Document Type. See the <i>Webdocs Workbook</i> for more about titles.</p> <p>For example: Invoice, purchase order, or receiving document.</p> <p>You can use titles in other ways in your implementation.</p>
User	<p>An account for one person.</p> <p>Users can be put into groups and have permissions at the user and group level that define what they can do with documents.</p>

Basic Document Flow Using Webdocs

As you use Webdocs you will find that the majority of your activity consists of four simple functions:

- Uploading documents.
- Identifying Document Types and search keys.
- Searching and retrieving documents.
- Viewing documents.

The diagram below summarizes these functions.



Most Webdocs activity consists of four simple functions:

- **Uploading documents:** Adding documents is extremely flexible. Webdocs can store any data type by default. Document sources include, but are not limited to, electronic documents currently stored on local PCs, faxes, email, scanned documents, or iSeries spool files. You can also use additional document sources such as digital cameras, electronic data interchange (EDI), or electronic forms output.

By default, documents are stored on the IFS on your iSeries local file system.

- **Entering search criteria:** When documents are uploaded, they are assigned to a folder and a Document Type. They are also assigned a title, date, and search-key values. System administrators can assign up to 10 search keys for each Document Type. These search-key values are used to retrieve that document in searches.
- **Searching for and retrieving documents:** Users can search for documents by Document Type, date, title, and search keys. You can also set up two other optional search features. If you set up [link searching](#), you can also search using alternate search keys. If you set up [full-text searching](#), you can search the text of documents that were scanned using OCR.
- **Viewing documents:** Document viewing is as simple as selecting to view the document from a list of documents: either the results of a search or a list of documents in a folder.

Documents open in the client application associated with that document format: Microsoft Word

for DOC files, Microsoft Excel for XLS files, Adobe Acrobat for PDFs, and so on. RJS Software has an optional PDF and TIFF viewer, called [RJS Imaging Client](#), that fully integrates with Webdocs.

Logging In To Webdocs

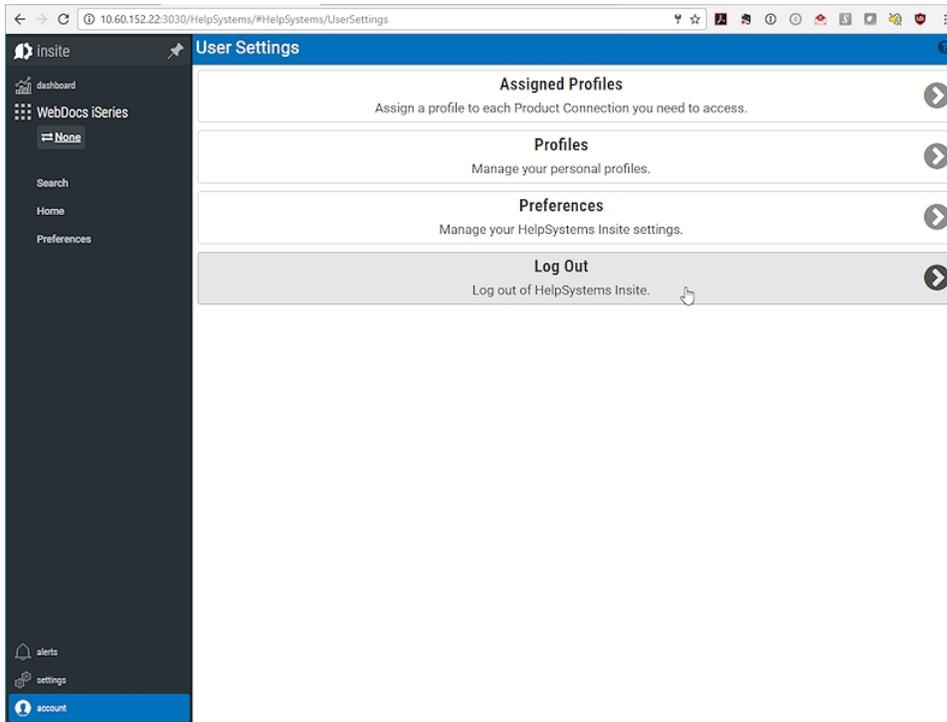
Before you log in to Webdocs, get your user name and password from your system administrator. Your system administrator will have set up your permissions in Webdocs. If you cannot access a document or a feature that you need, contact your system administrator.

To access Webdocs from a web browser:

1. Open a browser and type your Webdocs for IBM i URL.
The log-in page displays.



2. In **Username**, type your Webdocs user name. **Note:** The user name is case-sensitive.
3. In **Password**, type your Webdocs password. **Note:** The password is case-sensitive.
4. Click **Login**.
Webdocs for IBM i displays.
5. When you want to log out, click **Account/Log Out** in the bottom-left of the navigation panel, and select Log Out from the main display.



The log-in page displays again.

Touring Webdocs

Webdocs for IBM i runs in a web browser window, so the interface will probably be immediately familiar to you. As with other Windows applications, navigate by clicking the mouse or by entering information via the keyboard.

The Webdocs for IBM i window is divided into two parts: the left side and the right side.

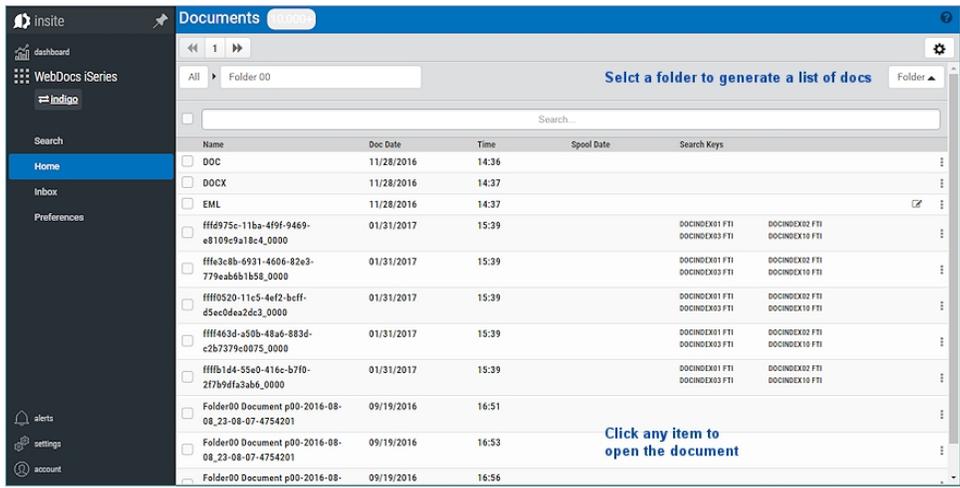
- The left side is for navigation. Use this section to initiate searches, work with document folders and inboxes, and log out of Webdocs.
- The right side is for working with documents. This is where you select documents from lists, identify document index information, and perform many other functions.

There are two main kinds of windows that display on the right side: List windows and Detail windows.

Note: Do not worry if some of the links or buttons pictured below do not display on your screen. Your company may not use all of the Webdocs features or you may not have security access to certain functions. The picture below is a sample of a User with full security rights for a company that uses all of the Webdocs features.

List Windows

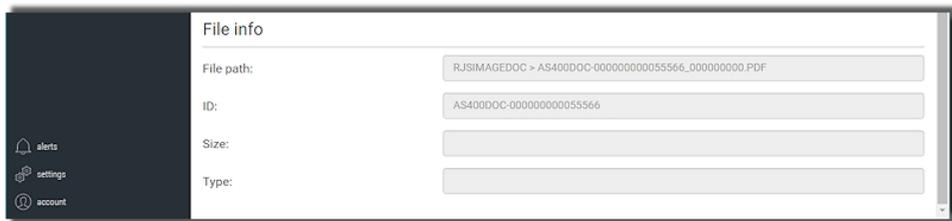
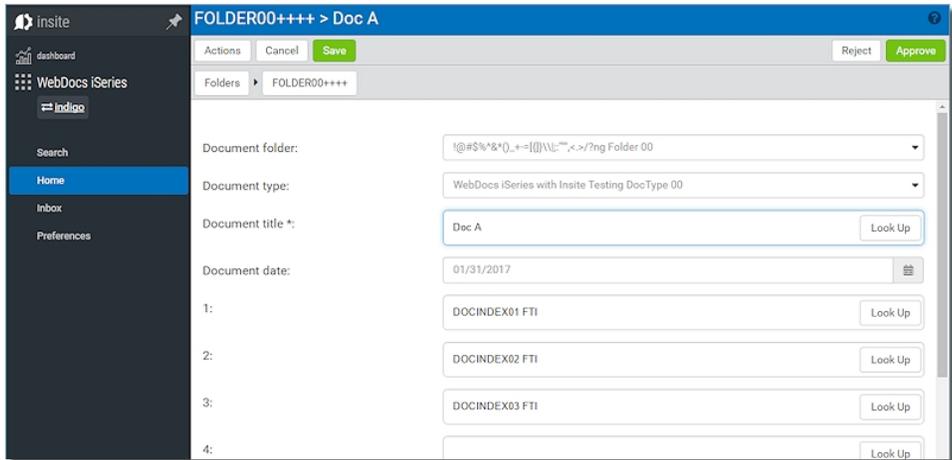
List windows display sets of documents: usually the contents of a Folder, Inbox, or the results of a search. This is usually where you select one or more documents for further action.



Documents in the selected folder

Detail Windows

Detail windows display information about a document. Detail windows are generally your starting point for working with a document: whether it be to view, route, research, or revise a document.



Using Webdocs for IBM i

This section shows you how to add, find, edit, and otherwise work with documents in Webdocs.

[Finding Documents](#)

[Changing Document Information](#)

[Editing Documents](#)

[Routing Documents](#)

[Adding Document Notes](#)

Finding Documents

Webdocs may contain thousands or even millions of documents. There are three ways to search Webdocs: Document, [Link](#), and [Full Text](#). Contact your Webdocs administrator to find out which searches you should use.

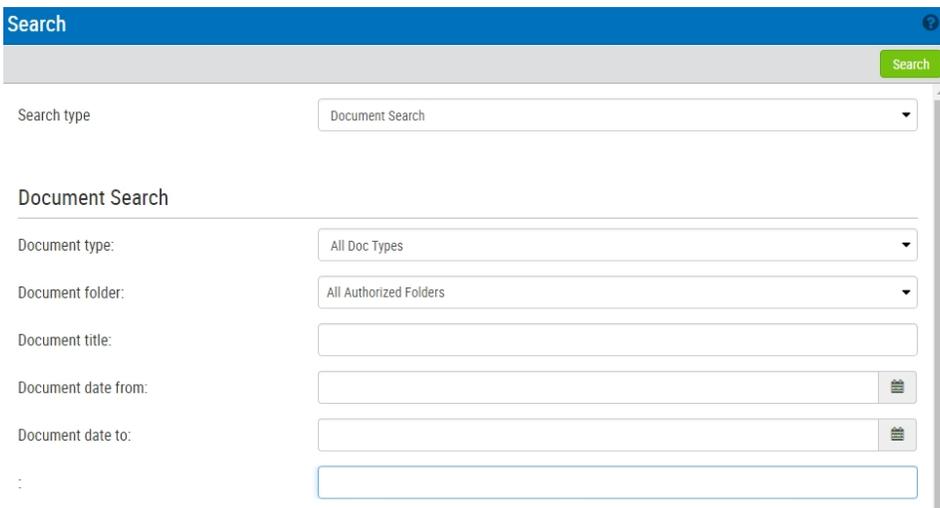
Document Search

Document Search is the default Webdocs search feature. It is installed with Webdocs. Use Document Search to find documents using the document information: the folder, the Document Type, the title, the date, or any of the search keys.

You can use the document search to search for documents based on the fields that were entered when the document was uploaded. You may want to do this to find a particular document, or just to see how many documents match certain criteria.

When you use the document search, Webdocs searches through folders and Document Types to which you have access rights. It will not return documents in folders or Document Types to which you do not have access rights.

Perform a Document search using the following steps:



The screenshot shows a web application window titled "Search". At the top right, there is a green "Search" button. Below the title bar, there is a "Search type" dropdown menu currently set to "Document Search". Underneath, the "Document Search" section contains several input fields: "Document type:" with a dropdown menu set to "All Doc Types"; "Document folder:" with a dropdown menu set to "All Authorized Folders"; "Document title:" with a text input field; "Document date from:" with a date input field and a calendar icon; "Document date to:" with a date input field and a calendar icon; and a final empty text input field at the bottom.

1. Click **Search** on the Insite left side-bar.
2. Select the **Document** search type
3. Type the text to search for in one or more of the search fields.

Note:

- Use * or % for multiple wildcard characters, and _ or ? for a single wildcard character.
For example: "J*ne" finds Jane, June, Jeanne, Jacqueline, and Joanne. "J_ne" only finds Jane and June.

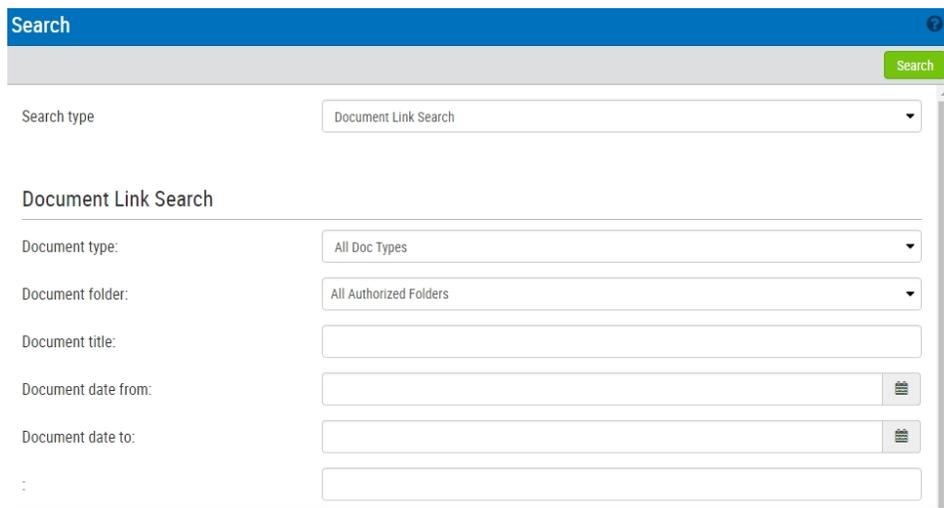
4. Click **Search** .

The search results display.

Link Search

Link Search provides an alternate way to search for documents. With link search, Webdocs searches alternate sets of index values. The link search keys are customized to hold values that show how documents are associated with other documents at your company. This means that you can find sets of related documents, not necessarily documents that only have matching search keys.

When you use Link Search, Webdocs searches through Folders and Document Types to which you have access rights. It will not return documents that are in Folders or that are of a Document Type to which you do not have access rights.



The screenshot shows the Search interface with a blue header bar containing the word "Search" and a search icon. Below the header is a search type dropdown menu set to "Document Link Search". Underneath, there is a section titled "Document Link Search" with several input fields: "Document type:" set to "All Doc Types", "Document folder:" set to "All Authorized Folders", "Document title:" (empty), "Document date from:" (empty), "Document date to:" (empty), and a colon followed by an empty field.

For example: If you work in the Accounts Receivable department of a large company, you might have an Invoice and a Check Document Type. The invoice number may not appear in the index fields for the checks, but it may be stored as a link search key for checks. If you did a link search on the Invoice number, the search would return the original Invoice along with all documents associated (i.e., "linked") with that invoice.

Note: Your system administrator must set up link search before you can use it.

Perform a Link search using the following steps:

1. Click **Search** on the Insite left side-bar.
2. Select the **Document Link** search option.
3. Type the text to search for in one or more of the search fields.

Note:

- Use * or % for multiple wildcard characters, and _ or ? for a single wildcard character.
For example: "J*ne" finds Jane, June, Jeanne, Jacqueline, and Joanne. "J_ne" only finds Jane and June.

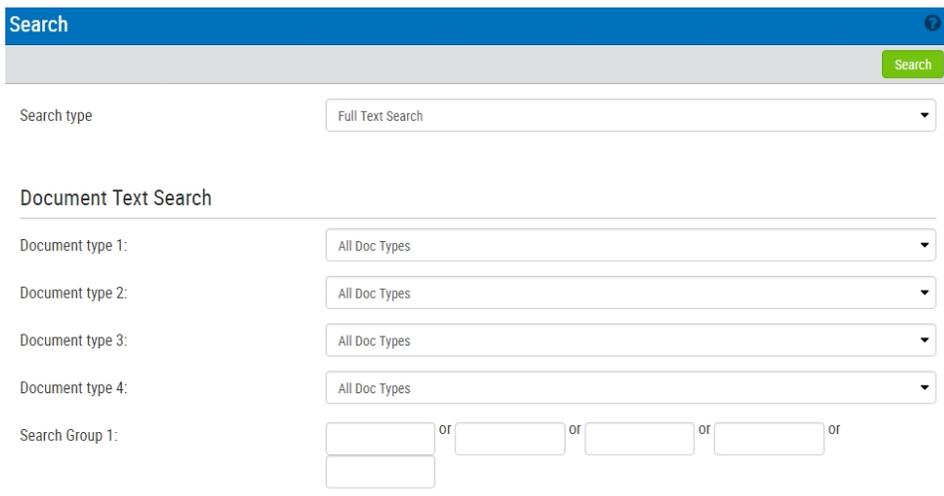
4. Click **Search** .

The search results display.

Note: If a search finds more than one match per document, click **ShowDup**  and **HideDup**  to show or hide the duplicate matches.

Full Text Search

Full-Text Search is another alternate way to search for documents. With full-text search, Webdocs searches through the full text database that is created automatically when TIF and PDF files are scanned using Optical Character Recognition (OCR). Full-text search also searches for character strings in Word, Excel, and PowerPoint documents.



The screenshot shows a search interface with a blue header labeled "Search" and a green "Search" button. Below the header, there is a "Search type" dropdown menu set to "Full Text Search". Underneath, there is a section titled "Document Text Search" with four "Document type" dropdown menus, each set to "All Doc Types". At the bottom, there is a "Search Group 1" section with four input fields separated by "or" labels.

Note: Your system administrator must set up full-text search before you can use it.

Perform a Full Text search using the following steps:

1. Click **Search** on the Insite left side-bar.
2. Select the **Full Text** search option.
3. Type the text to search for in documents.

4. Click **Search** .

After you find a document:

- To [view a document](#), click **View** at the beginning of the document's row.
- To view a document's information, click the Document Description.

Viewing Documents

When you view a document in Webdocs, the document opens in the application associated with that document. For example, Microsoft Word documents open in Word. PDF documents open in Adobe Acrobat.

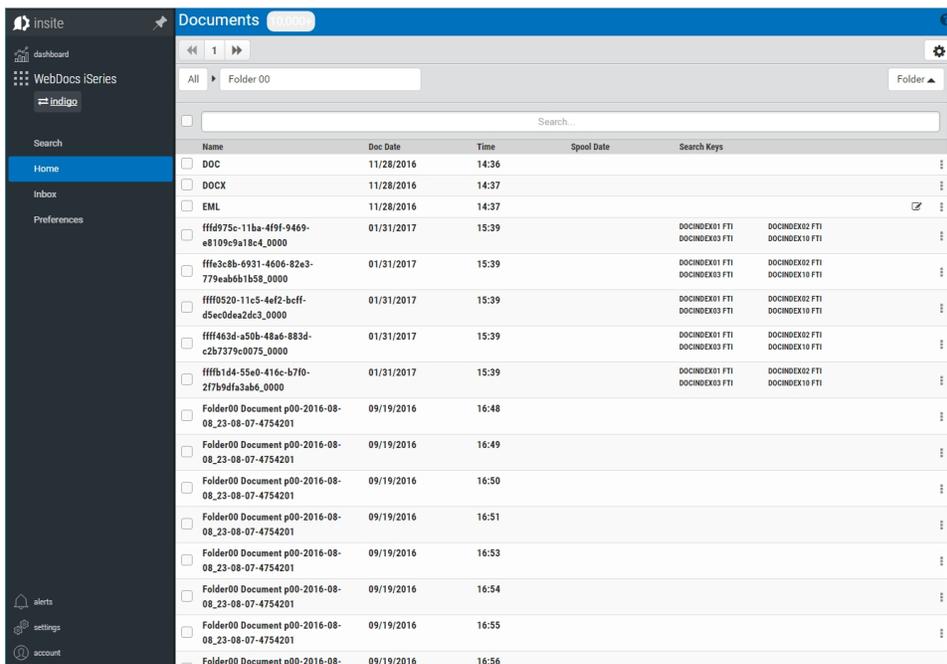
You can view a document from:

- Any list window (for example: a folder list or search results).
- The Document Details.

Viewing a Document from a List Window

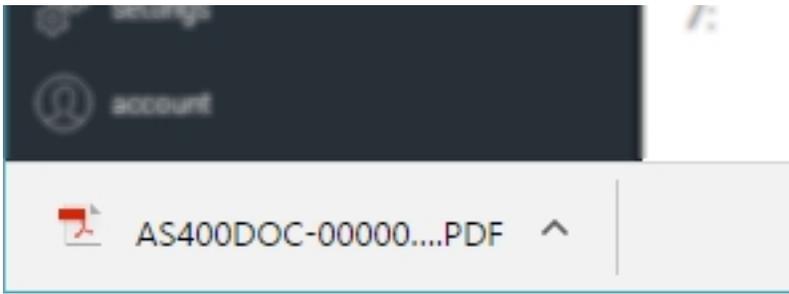
To view a document from Folder or from a Search Results Window:

1. Find a document.



2. Click the Document Name to view the document.

In most browsers, the "File Download" icon will appear at the bottom of the screen.



3. Click the file icon to view the document.

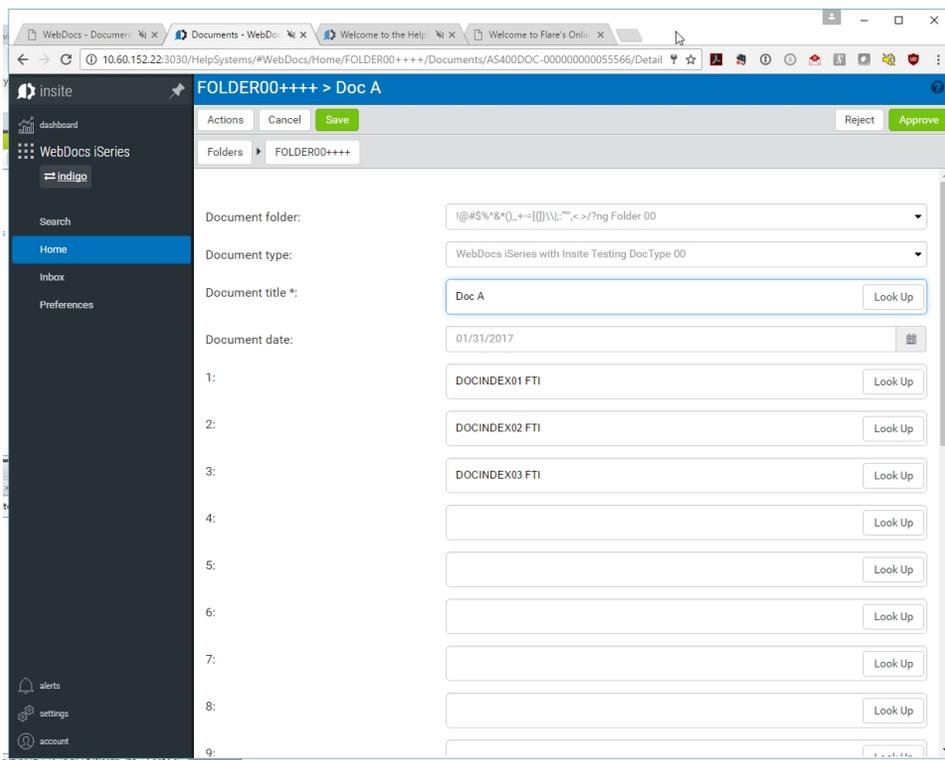
The document opens in the application associated with that Document Type. If the application is not already running, it will be started.

Note: Do not worry about the WebDocs document name (in this example it is AS400DOC-000000000000197.doc). Webdocs assigns a name for internal tracking purposes. You do not need to know or remember this name.

Viewing a Document from a List Window

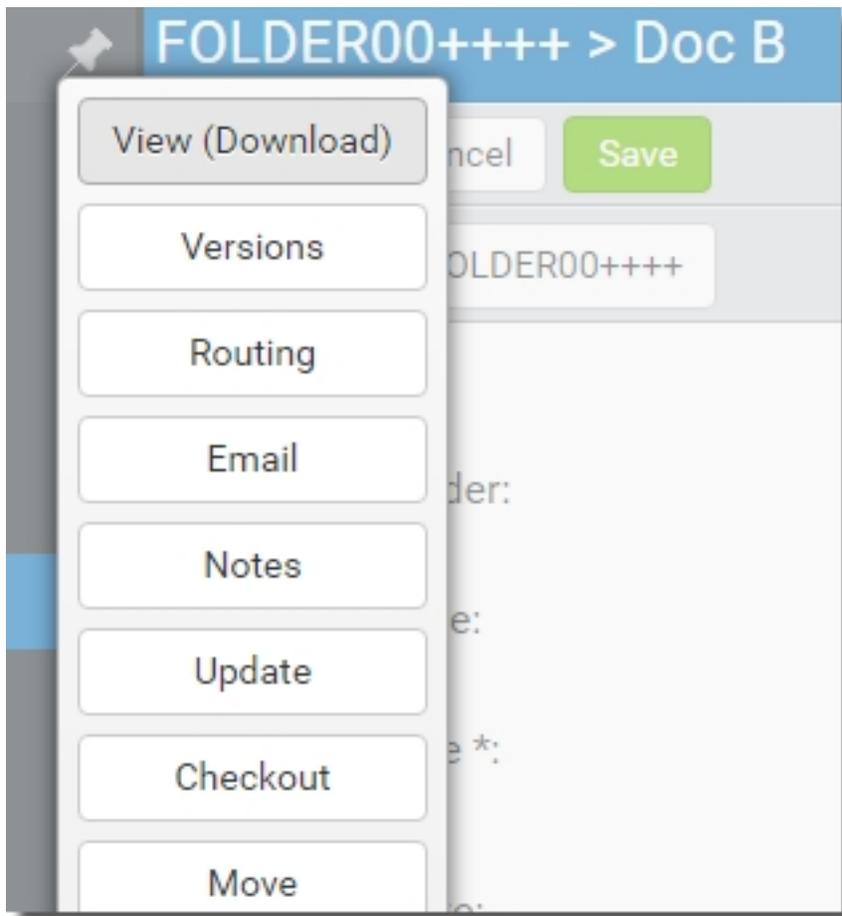
To view a document from Folder or from a Search Results Window:

1. Display the "Document Details" window for the document you want to view..

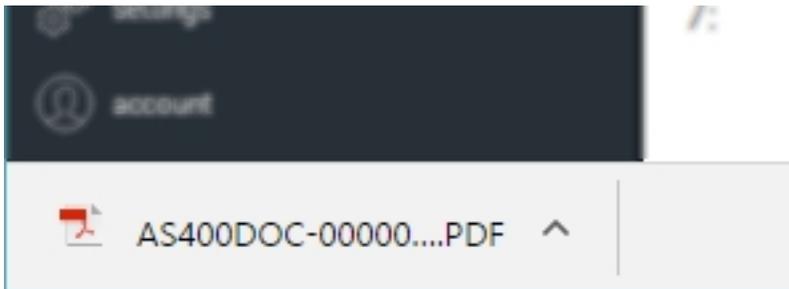


2. Click the **Actions** button.

3. Select **View (Download)** from the menu.



In most browsers, the "File Download" icon will appear at the bottom of the screen.



4. Click the file icon to view the document.

The document opens in the application associated with that Document Type. If the application is not already running, it will be started.

Note: Do not worry about the Webdocs document name (in this example it is AS400DOC-000000000000197.doc). Webdocs assigns a name for internal tracking purposes. You do not need to know or remember this name.

With the document open in View mode, you can:

- Use **File\Save As** (or similar menu options) to save a copy of the document to a new location outside of Webdocs.
- Check out and update the document. (see [Editing Documents](#)).

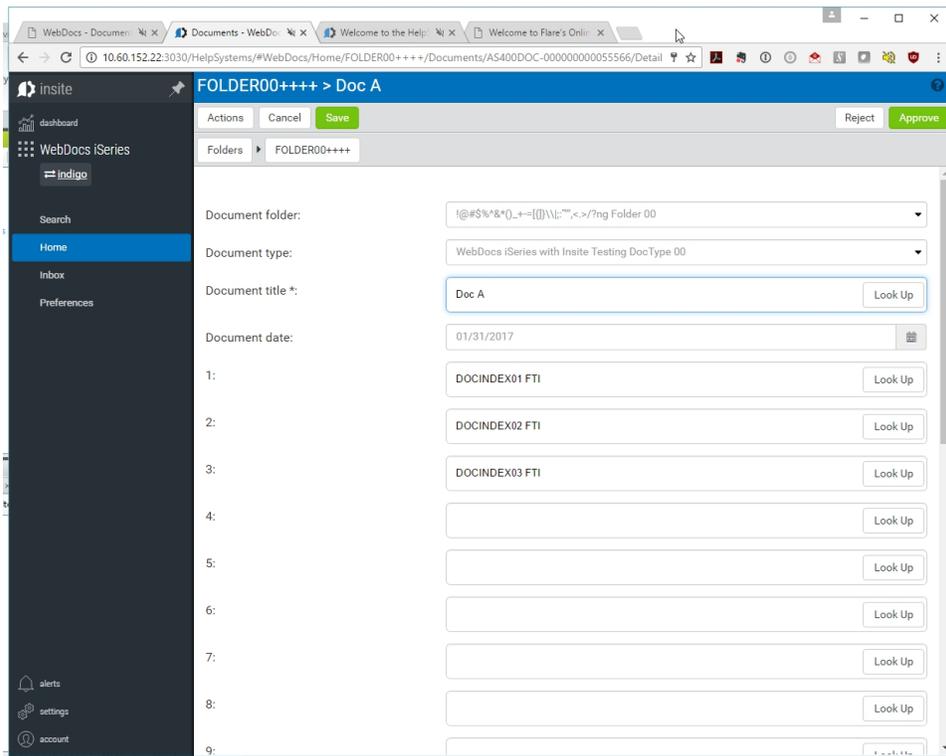
- If your company uses the Microsoft Office Add-Ins component, you can check out the document from Microsoft Word or Microsoft Excel. For more information, see [Checking Out Open Documents](#).

Changing Document Information

When a document is added to Webdocs, the document is assigned a Document Type, title, and search keys so that Webdocs users can [find it](#).

To change a document's information:

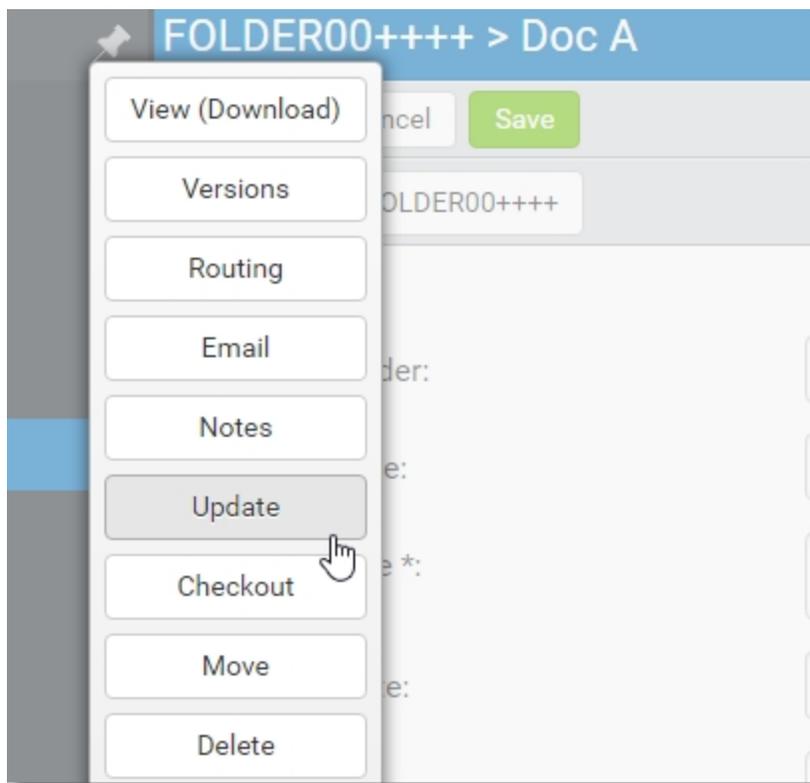
1. Display the "Document Details" window for the document.



2. Change any information you need to.

Note: Changing the Document Type usually also changes the names of the search keys.

3. Click the **Actions** button.
4. Select **Update** from the menu.



A confirmation message displays, and the document's information is updated.

Note: If your organization is [using link search](#), the self-referencing link for this document is not updated and still contains the original document information. However, a new link is created with the new document information.

Routing Documents

Webdocs uses routing to automate the manual process of moving a document from person to person for approval. Your Webdocs administrator may have set up routes for your organization or department.

This topic is divided into the following:

[Adding a Document to a Route](#)

[Using Your Routing Inbox](#)

Adding a Document to a Route

To add a document to a route so that other users can approve it:

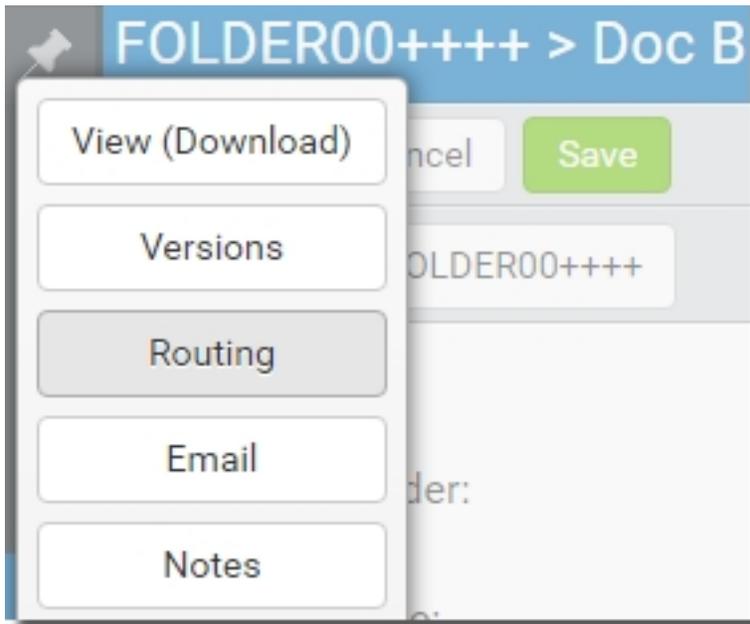
Note: Before you begin, make sure your administrator has told you which routes to use.

1. [Display the document information](#) for the document to route.
2. Click the **Actions**

Actions

button.

3. Select **Routing** from the menu.

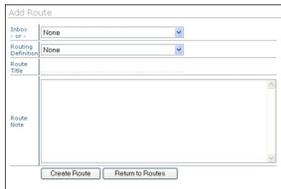


The route list for the document displays.



4. Click **Add Route**.

Add Route displays.



5. Fill the routing information, based on the following descriptions:

Field

Description

Inbox

To send the document to one inbox, choose which inbox to send it to.

Routing Definition

Note: If you choose an inbox and a route, the document is sent to the inbox, not the route.

If you are routing the document, choose the route to add the document to.

Note: You must also set **Inbox** to **None**.

- Route Title** (Optional) If you are routing the document, type a title that displays on this document's routing list. If you leave the title blank, it uses the default title *Document Route*.
- Route Note** (Optional) If you are routing the document, type a note for the route. Other users on the route can see this note.
For example: Special considerations, concerns, instructions, or so on.

6. Click **Create Route**.

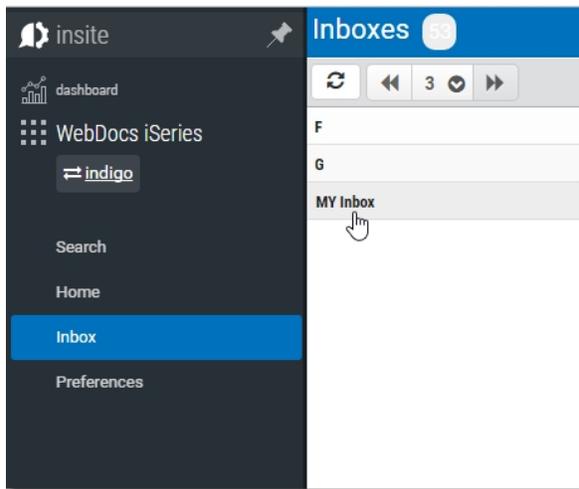
The document displays in the inbox of the first person on the route.

Using Your Routing Inbox

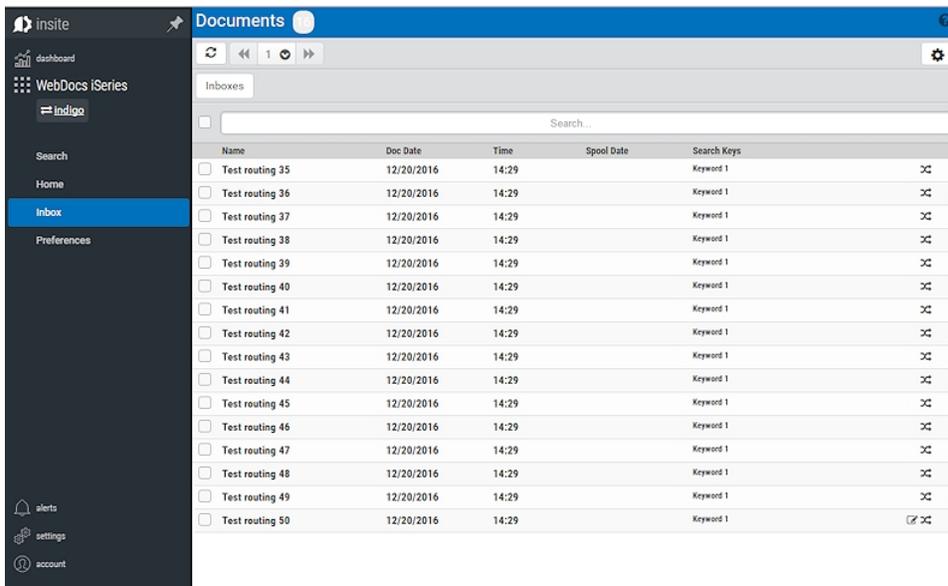
If your administrator has assigned you to a route, any documents you need to approve display in your routing inbox. Depending on how your administrator has set up Webdocs , you may receive a notification email when you have a new document in your inbox or you may need to check your inbox regularly.

To work with documents in your routing inbox:

1. Click **Inbox** or another inbox you are working with.

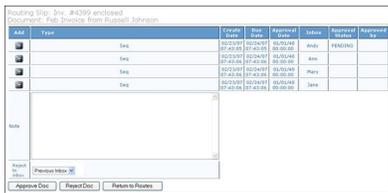


The inbox displays.



2. Decide whether to approve the document:

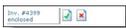
- a. Click **View** (on the left side of the window) to look at the document.
- b. Click the Document Description to display the document information.
- c. Click **Routing Slip**  to view the route the document is on.



3. (Optional) In **Note**, include a note for this route.

4. Choose whether to:

Note: There is also a set of buttons to the bottom-left of the document information that you can use to quickly approve or reject the document.



- **Approve Doc** - Send the document to the next inbox on the route.
- **Reject Doc** - Return the document to the previous inbox on the route.
The document is sent to the step you chose, and it is no longer in your routing inbox.
- Add an inbox to the route - Click **Add** on the step to add an inbox to, choose the inbox to add, and click **Insert Inbox**.

Note: When you add an inbox, it is added *after* the step you click.

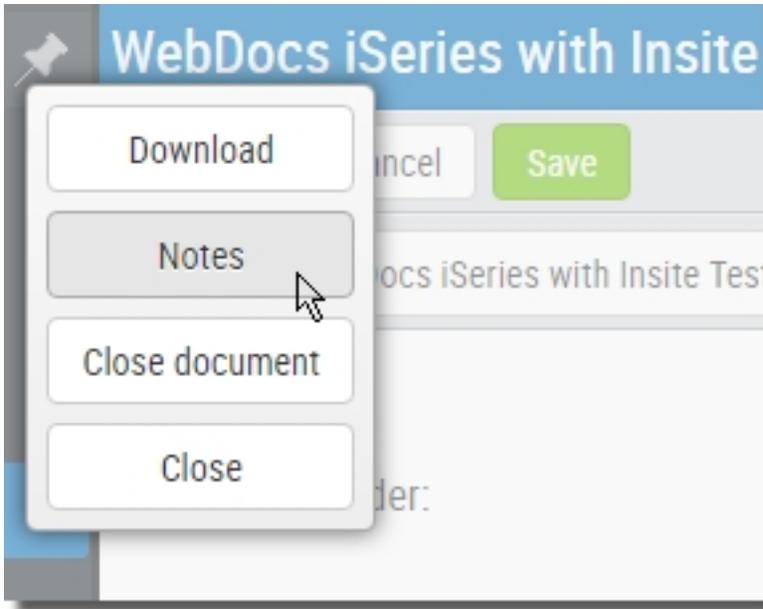


Adding Document Notes

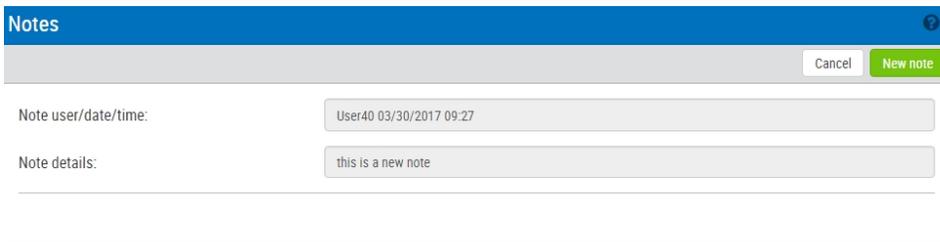
Webdocs lets you add notes to documents that only specific groups of users can see.

To add a note:

1. Display a document's information.
2. Press the **Actions**  button.

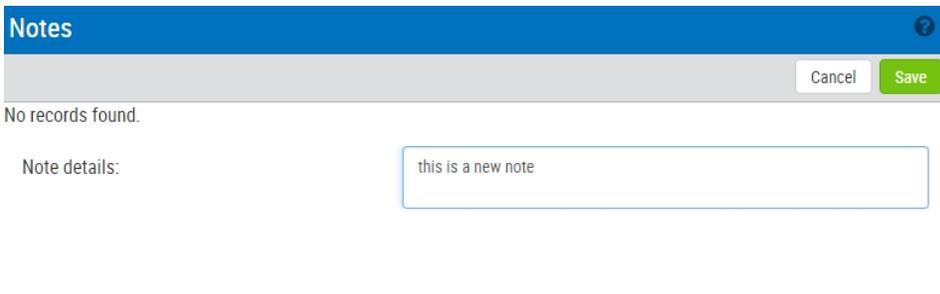


Document Notes displays.



3. Click **New Note**  button.

Enter Note Text displays.



4. Type the note.

5. Click **Save** .

The note is added, and it displays in Document Notes.

Other Help

For help with other Insite components and products supported by HelpSystems Insite, refer to the following resources:

PowerTech Authority Broker Administrator's Guide

AutoMate Ops Console User Guide

HelpSystems Insite User Guide

PowerTech Network Security Administrator's Guide

PowerTech Password Self Help for Insite User Guide

Robot Network for Insite User Guide

Robot Schedule for Insite User Guide

Vityl Analytics for Insite User Guide

Vityl IT & Business Monitoring for Insite User Guide

Webdocs for Insite User Guide

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