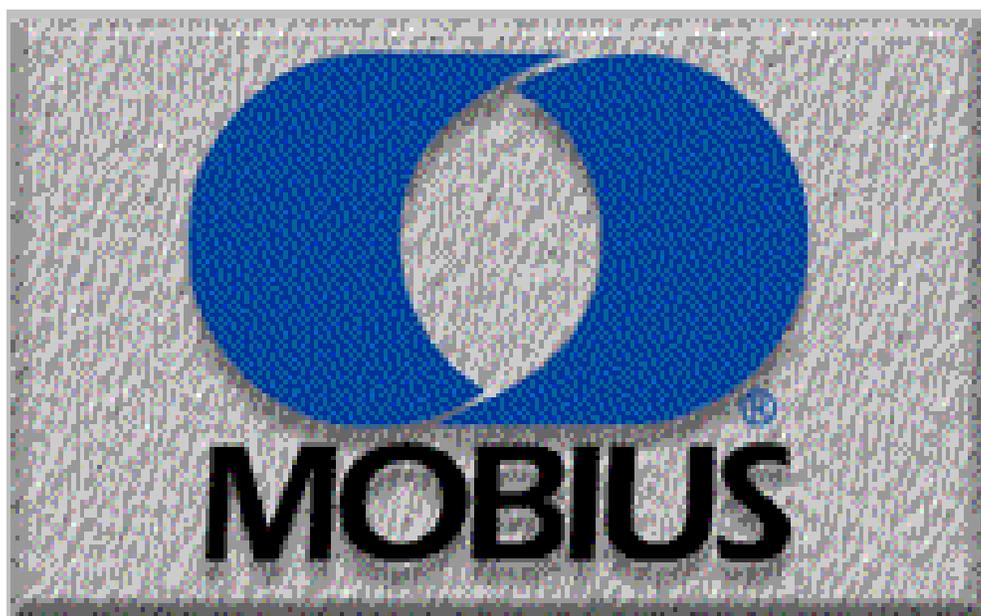


# DocumentDirect 2.3

## User Manual



**Training**

**November 2002**

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## Document Direct Reports

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Batch Reports are predefined reports that run nightly on the mainframe at the Department of Technology and Information.

Batch reports are executed with a standard set of parameters that are set and maintained by the Operations support group.

Once they are executed, they are available for authorized users to access. The tool used for batch reports is DocumentDirect.

After completing this lesson, you will be able to:

- Access DocumentDirect Reports
- View DocumentDirect Reports Online
- Print DocumentDirect Reports
- Create Policies

## Accessing DocumentDirect Reports

*DocumentDirect* is an application that archives batch reports, which have been run on a programmed schedule, nightly or periodically. The reports are available to be printed the morning after being run and archived.

### Navigation Steps:

- Click on the Mobius Icon on your desktop  
**NOTE: Mobius may be on the Desktop Toolbar if it has been installed in your PC Startup Directory.**
- DocumentDirect will be launched
- Click on the second icon on the toolbar which will launch Document explorer
- Click on mainframe reports



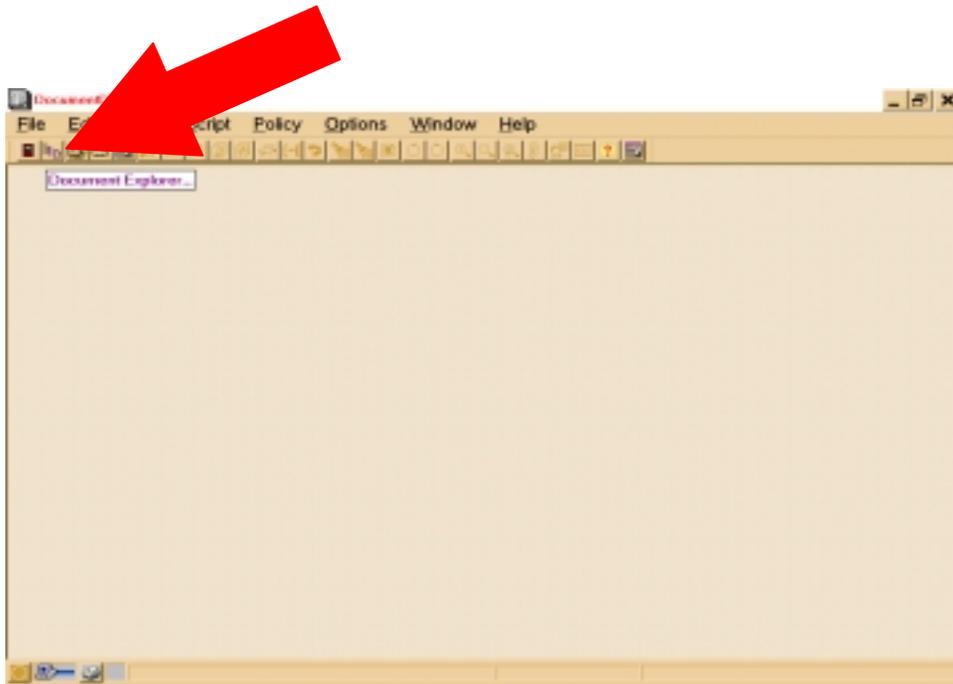
## Launch Document Direct

In order to run reports; the *DocumentDirect* application must be launched by clicking on the second icon (Document Explorer).



### Activity:

- Upon launching *DocumentDirect*, the *DocumentDirect* screen will appear



### NOTES:

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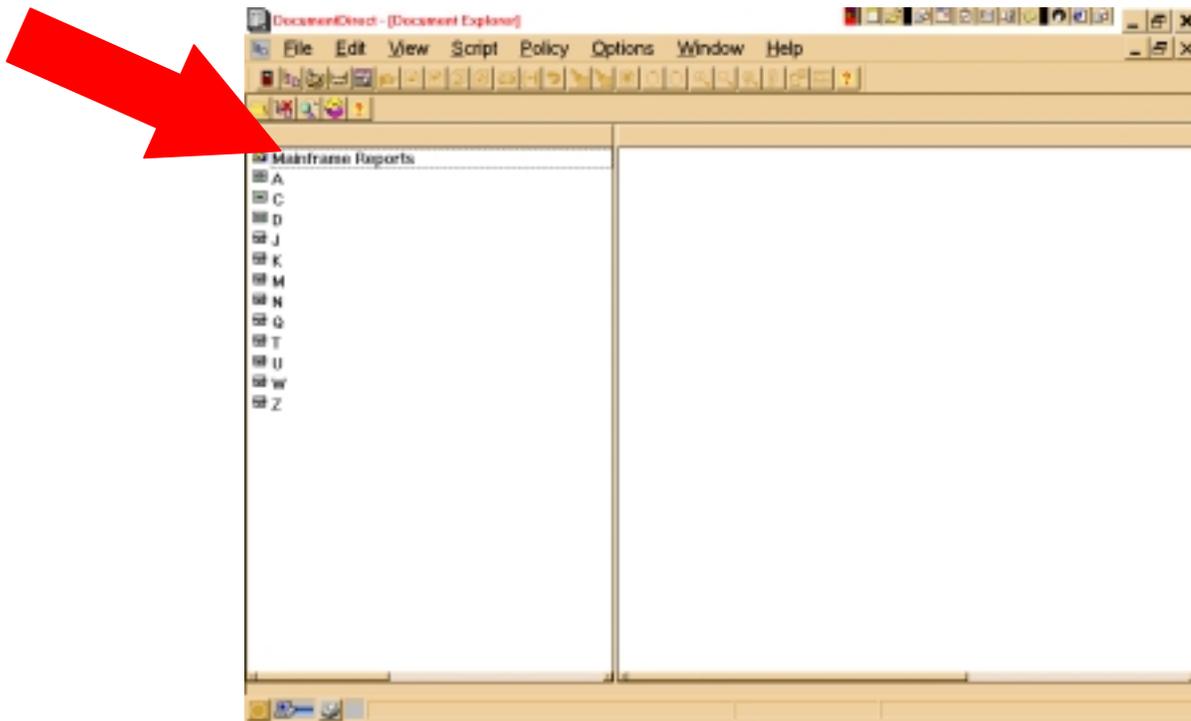
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## Document Explorer- Accessing Reports

View the list of reports by double clicking on Mainframe Reports.

### Activity:

- Double Click on Mainframe Reports



### NOTES:

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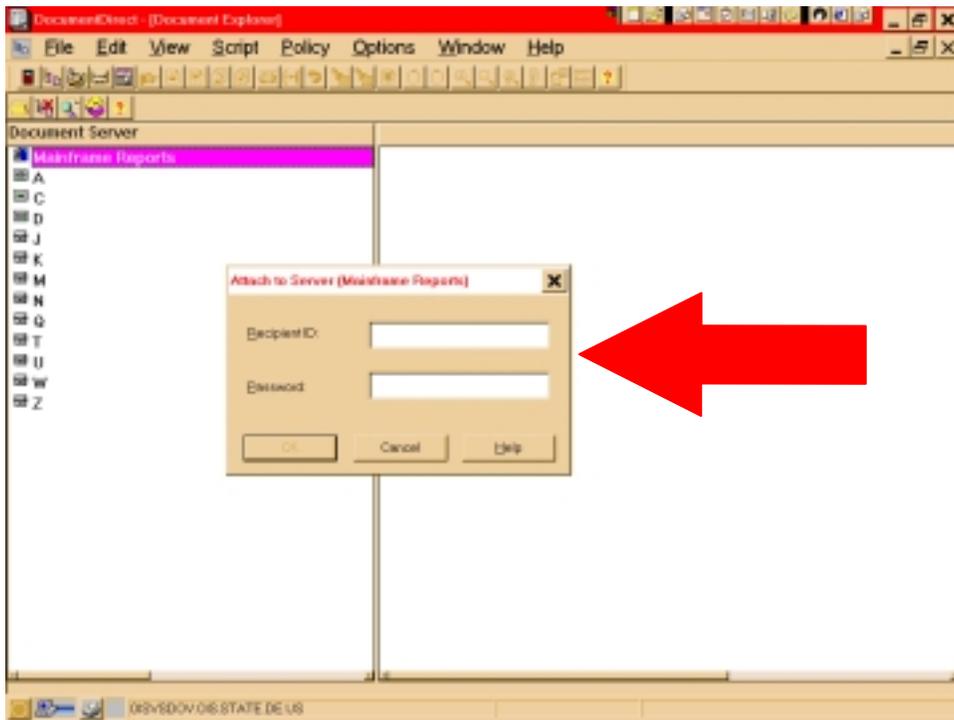
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## Document Explorer- Accessing Reports (continued)

### Activity:

- Type in your ACF2 userid and password.

Example (OISOHAG)



### NOTES:

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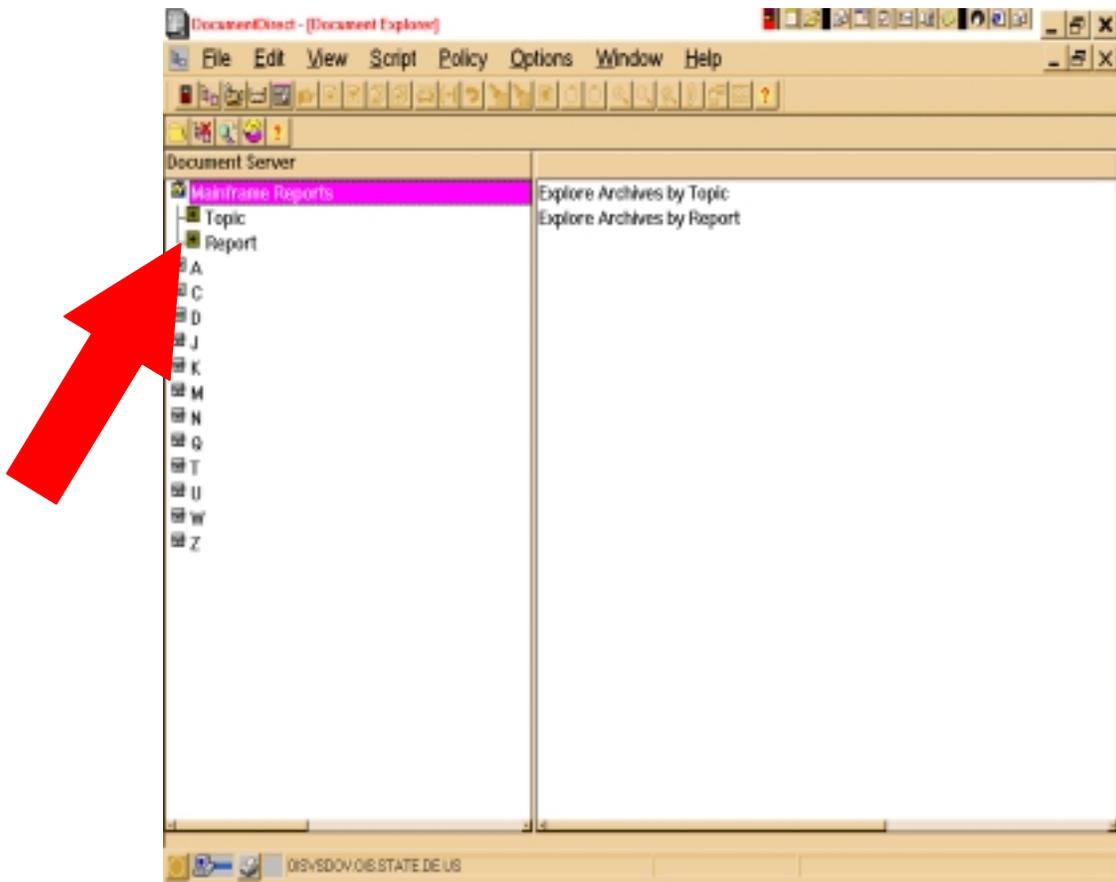
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## Document Explorer- Accessing Reports (continued)

View the list of reports by clicking the plus sign to the left of the word report.

### Activity:

- Click on the plus sign to the left of the word report.



### NOTES:

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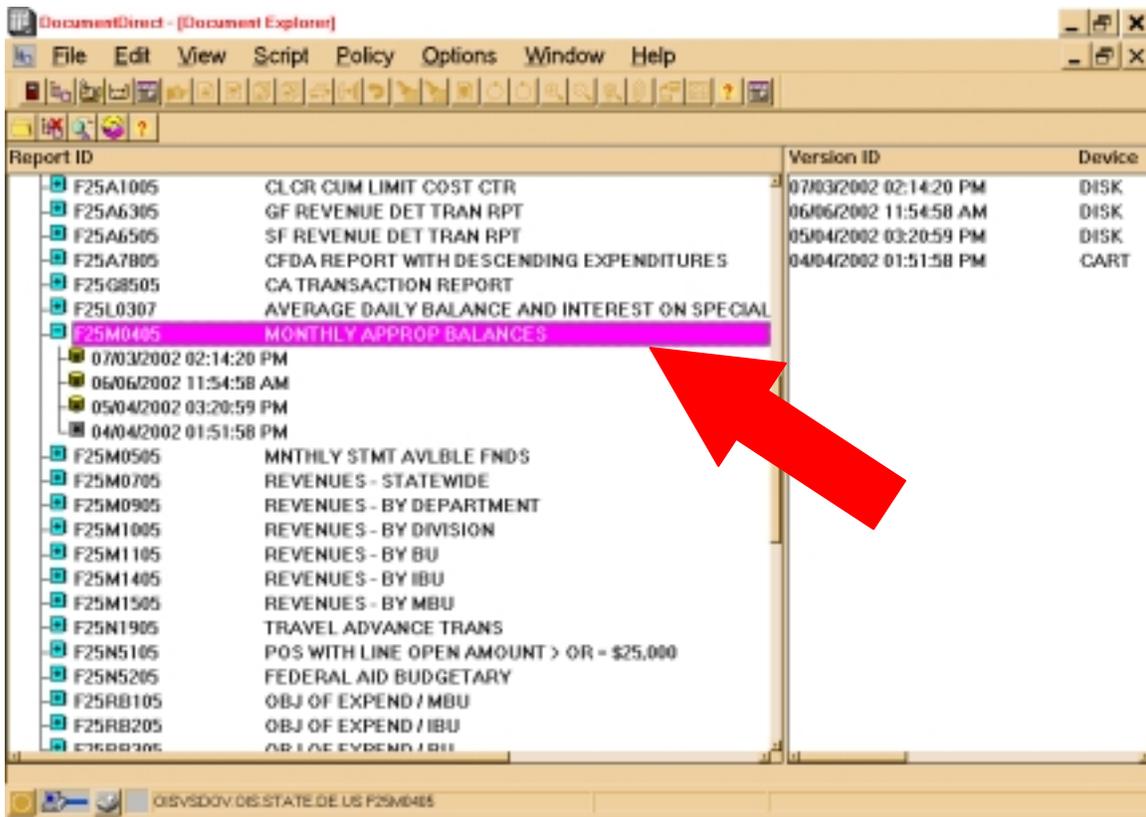
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## Document Explorer- Accessing Reports (continued)

By clicking on the plus sign to the left of the report name, a list will appear with at least one line under the report name, with a date and time. Each additional line is an archived version of the report.



### NOTES:

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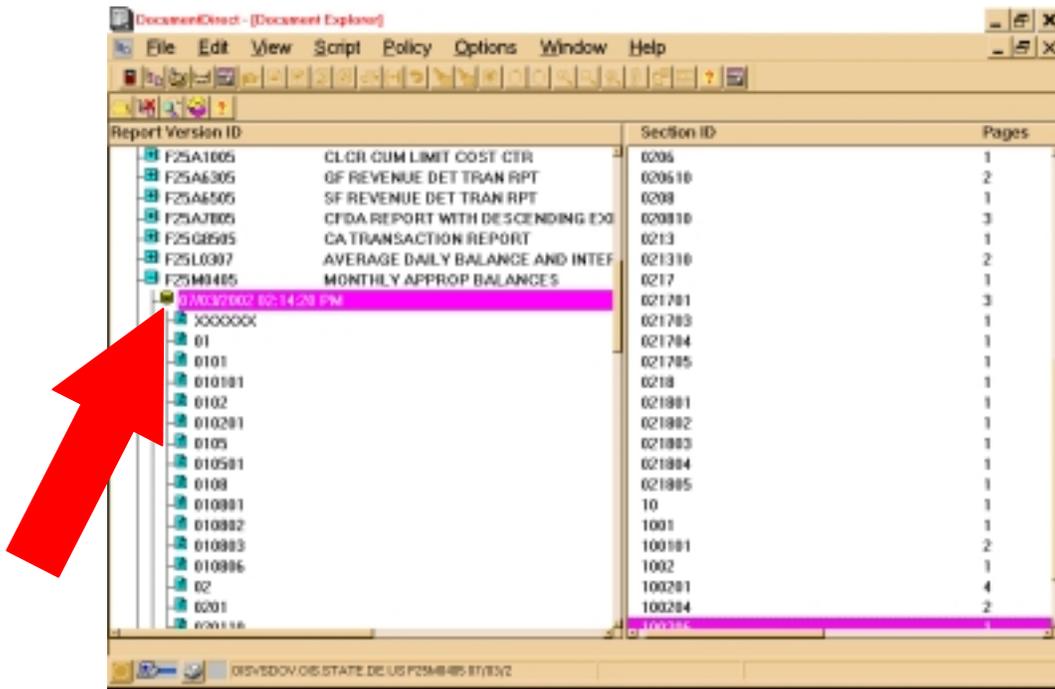
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## Document Explorer- Accessing Reports (continued)

When you click on the plus sign to the left of one of the available report versions, the right side of the window will list each department for which you have security access and the number of pages for that department/section to the right.



### NOTES:

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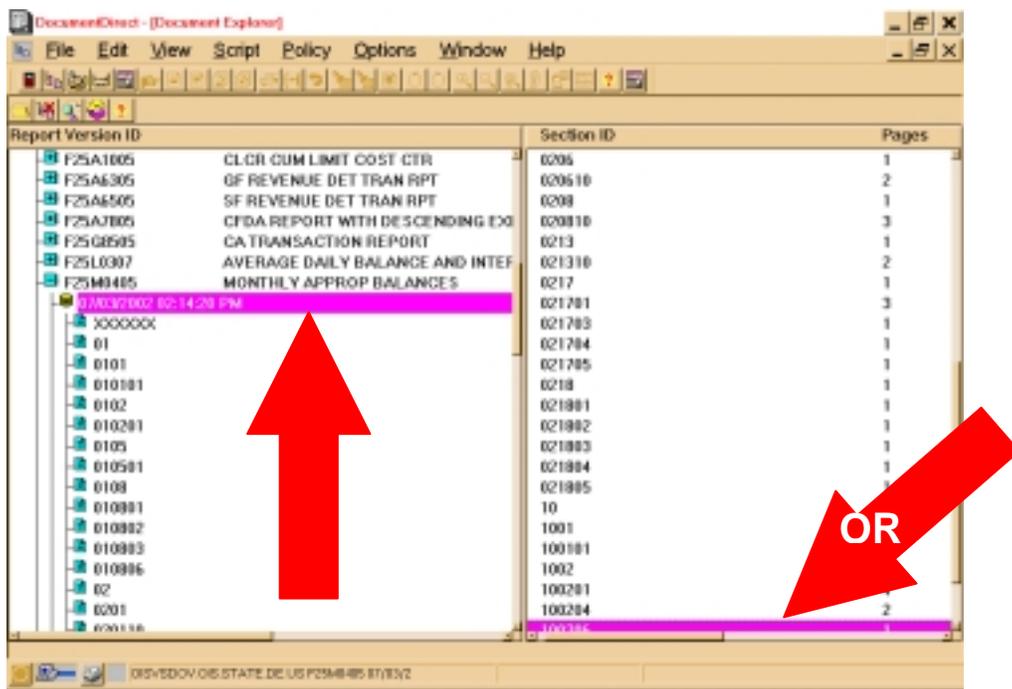
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## Document Explorer- Accessing Reports (continued)

From the *DocumentDirect* – (Document Explorer) screen, there are two options for viewing:

1. Double click the report version on the left side of the window; or
2. Double click one of the sections in the right panel



### NOTES:

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## Document Explorer – Icons



**Open:** Open a selected Document



**Exit:** Closes the Document Explorer window



**Locate:** Locate Documents



**Refresh:** Refreshes the view of the selected list item



**Help:** Access Document Explorer Help

### NOTES:

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## Document Direct Reports – Icons



**Exit:** Closes DocumentDirect and return to Desktop



**Document Explorer:** displays the list of reports and allows viewing of the reports



**GoTo:** Go directly to a specific page



**Previous:** Go back one page



**Next:** Go forward one page



**Print Current Page:** Prints current page.  
To print a section or entire report – select File, Print



**Copy to Clipboard:** Copies selection to Clipboard



**Undo Last Action**



**Find:** Find specific text in the document



**Find Next:** Repeat the find operation

## Document Direct Reports – Icons (continued)



**Clear View:** Clears current page



**Rotate Counterclockwise:** Rotates the document counterclockwise



**Rotate Clockwise:** Rotates the document clockwise



**Enlarge:** Zoom in to enlarge the document content



**Reduce:** Zoom out to reduce the document content

### NOTES:

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## Viewing DocumentDirect Reports

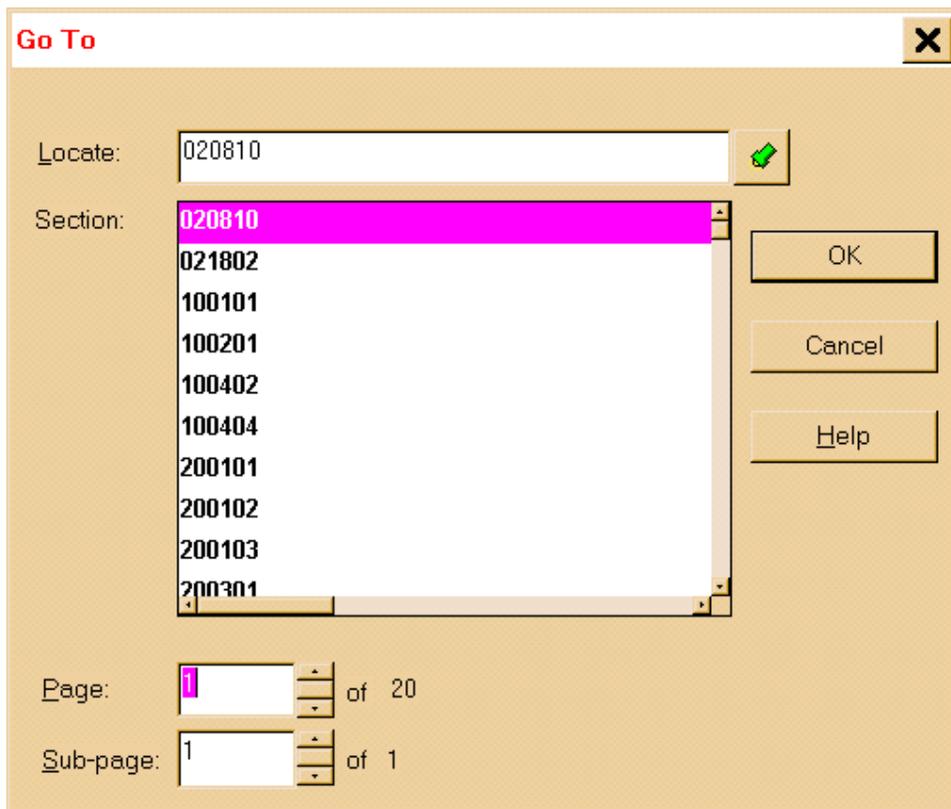
### Moving Around

GoTo Feature



The GoTo feature displays a specific section, page, and sub-page.

When you click on the GoTo icon, the following dialog box appears:



**Go To** [X]

Locate: 020810 [✓]

Section: 020810  
021802  
100101  
100201  
100402  
100404  
200101  
200102  
200103  
200301

Page: 1 of 20

Sub-page: 1 of 1

OK  
Cancel  
Help

## Viewing DocumentDirect Reports (continued)

GoTo feature



<b>Locate:</b>	<p>Specify the report section you want to locate. If you do not specify a section, you go to the first section on the list.</p> <p>If you enter the first few characters of the section name and click the Flashlight button, GoTo will locate the section name most closely matching what you entered in the Locate field.</p>
<b>Section:</b>	<p>A list of available document sections. To go to a specific section, select the section name and click OK or double click section name.</p>
<b>Page:</b>	<p>Select the page number you want to go to.</p>
<b>Sub-Page:</b>	<p>Select the number of the sub-page you want to go to.</p>

### NOTES:

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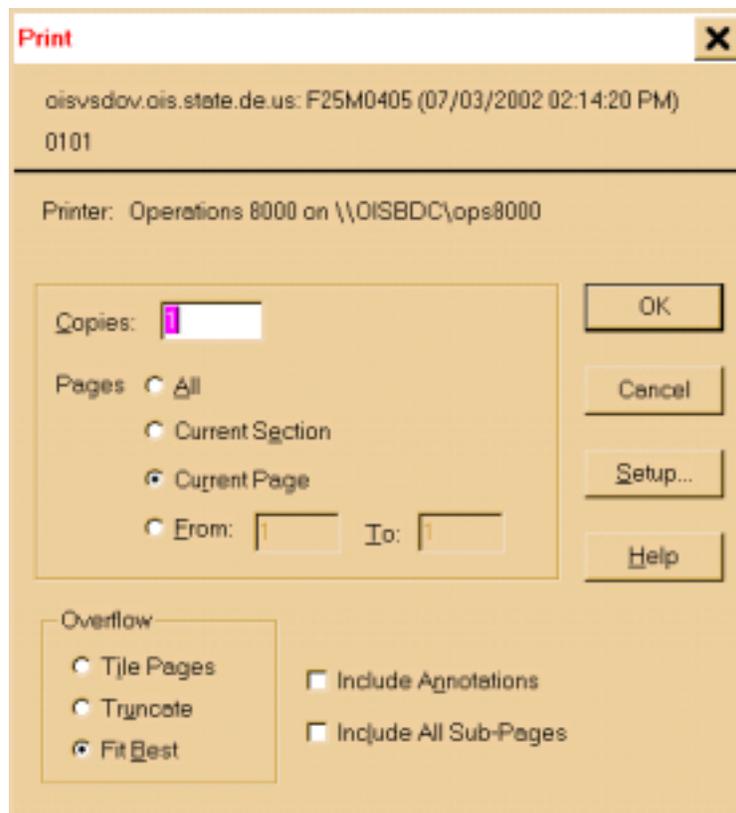
## Printing DocumentDirect Reports

To print a report you must first display the report you wish to print. The report cannot be printed directly from the Document Explorer listing.

### To Print a Report

- Display the report you wish to print
- Click File
- Click Print

The following dialog box appears.



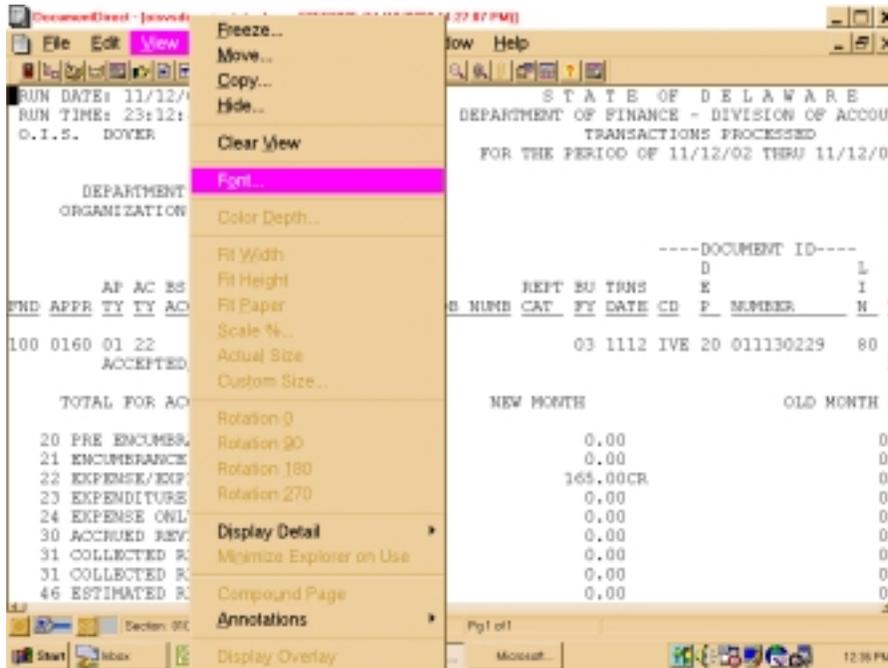
### Activity:

- Select the desired options
- Click OK

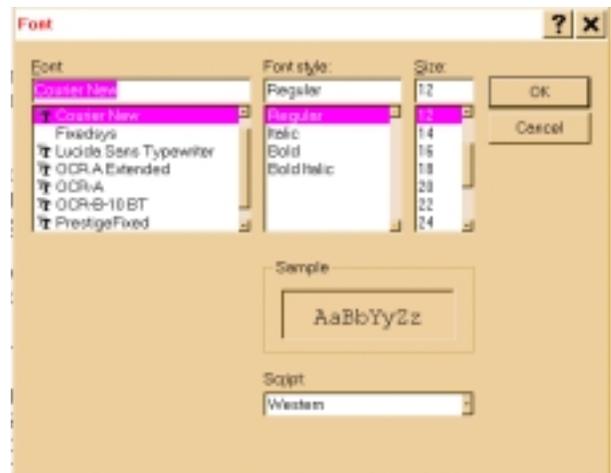
# DTI

## DocumentDirect 2.3 User Manual

Perform the following **ONLY** if printed reports or columns are out of alignment.



1. Click on **View**
2. Select **Font**
3. Select a font that has **TT** beside it. This is a True Type font.
4. Select **OK**



Report alignment should be okay.

## Printing DocumentDirect Reports (continued)

### Print Dialog Box Options

- Copies:** Controls the number of copies printed.
- All:** Print all pages in the report.
- Current Section:** Print all pages in current section..
- From:** The number, relative to page 1 you want to print.
- To:** The number, relative to page 1 you want to print.
- Tile Pages:** Print overflow text on successive pages.
- Truncate:** Discard i.e. do not print, overflow text.
- Fit Best:** The report is scaled so that it fits as much of the printed page as possible.
- Include Annotations:** Print the document with all attached annotations.