

docmoto



DocMoto Client Preferences

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Introduction

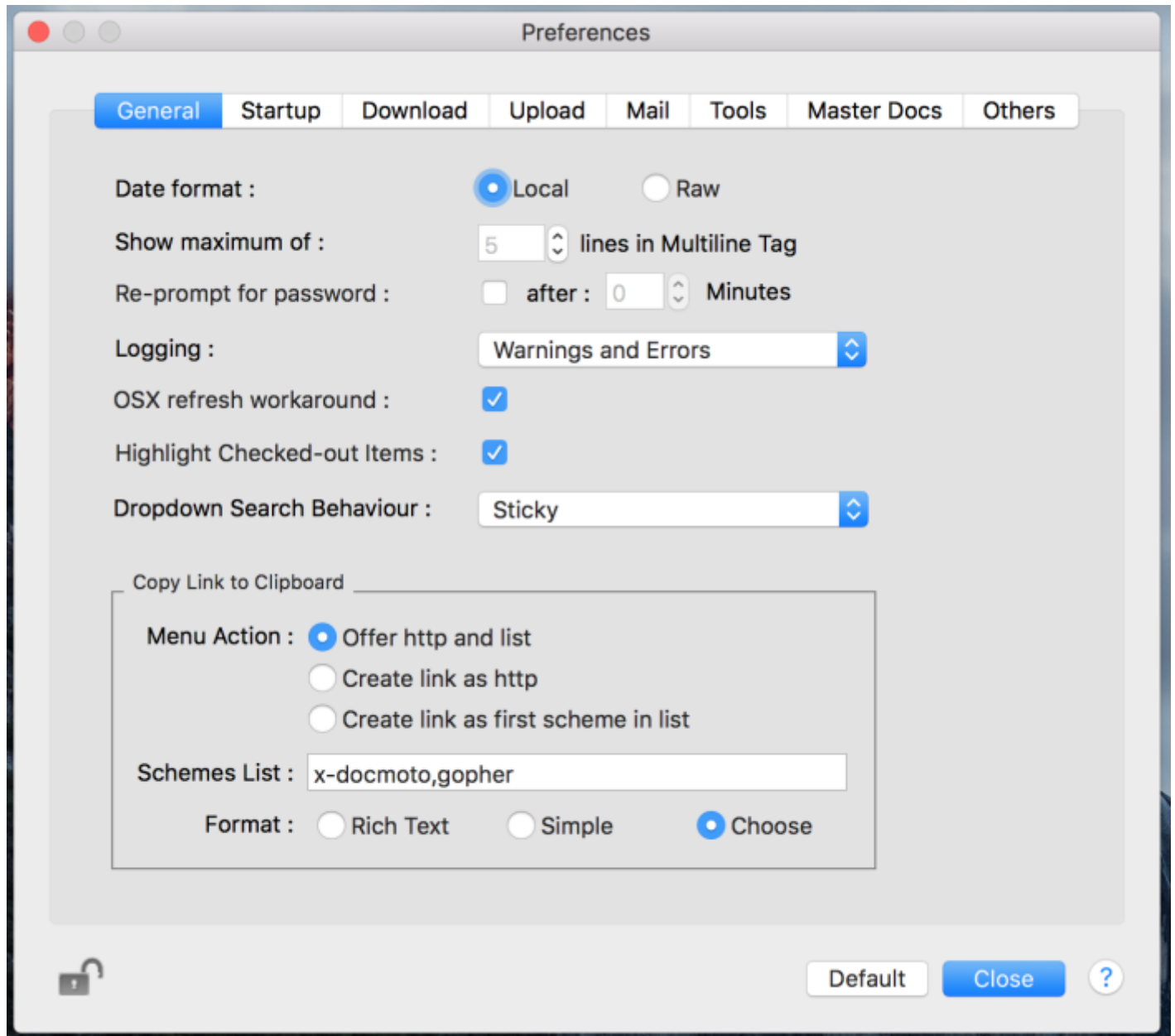
This document is designed to guide users through the various options available in their DocMoto Client preferences.

Preferences control DocMoto's settings and subsequently behaviour. Preference settings can be locked by an administrator to prevent users without administrator privileges making changes.

DocMoto Client Preferences

To open the DocMoto Client preferences, select the “**Preferences**” option from the “**DocMotoClient**” menu. All DocMoto user interfaces have help files associated to the interface in question. The help files are opened by selecting the “?” icon in the bottom right hand corner.

General (Tab):



Date Format:

Controls the display format for all dates.

- **Local** – Switches all the dates to a local view
- **Raw** – Switches all dates to universal time. Ideal for installations that span international time zones.

Show maximum of:

Controls the number of lines shown within a tag that supports multiple line display.

Re-prompt for password:

Controls the period before an inactive workstation is logged out.

If left unselected “**Named**” users are logged out after 12 hours and “**Floating**” users are logged out after 30 minutes.

Logging:

Controls the level of logging made by the DocMoto Client.

- **Full** – Logs all messages and indicates source file and line numbers where an error has occurred.
- **Debug** – Logs all debug information.
- **Information** – Logs information, warning and errors.
- **Warnings and Errors** – Logs warnings and errors.
- **Errors Only** – Logs errors.

OS X refresh workaround:

Provides a system level workaround preventing the DocMoto Client entering an endless loop. Applies to OS X 10.10 and greater.

Highlight checked-out items:

Provides an alternative method to identify checked-out files within the interface.

Documents checked-out to the logged in user are shown in **bold** text. Documents checked-out to another user are shown in **grey**.

Dropdown search behavior:

Controls the search dropdown interface behaviour.

- **None** – No dropdown is shown.
- **Default** – A dropdown is displayed but is removed if the currently selected folder item has changed.
- **Sticky** – A dropdown is displayed but it is not removed if the currently selected folder item is changed. Instead the search results are re-displayed for the newly selected item.

Copy Link to Clipboard:

Controls the scheme (prefix) and formatting of links offered to the user when creating links to documents (all link schemes) and folders within the DocMoto repository.

- **Menu Action** – Controls the “Copy to Clipboard” menu.
 - **Offer http and list** – A user can choose between creating an http link and any values in the “Schemes List”.
 - **Create link as http** – An http link will automatically be created. The user will have no other choice.
 - **Create link as first scheme in list** – Automatically creates a link using the first scheme in the list. The user will have no choice.
- **Schemes List** – A comma separated list of schemes that can be offered to the user: e.g. x-docmoto, gopher.
- **Format** – Controls any formatting applied to links copied to the clipboard. ***See Additional Notes.**
 - **Rich Text** (Title and Link) – The link is a fully formed URL.
 - **Simple** – The link is completely un-formatted.
 - **Choose** – Allows the user to choose the format “on-the-fly”.

*Additional Notes:

DocMoto links can be pasted into any OS X application that supports paste. Note that not all applications will treat a DocMoto link as a hyperlink. Some applications simply treat it as text. If users are prone to using more the one application for communication (i.e. email, instant message) and require documents stored in different areas of DocMoto to be [linked together](#), then the “**Format**” should be set to “**Choose**”. Included below is a summary on third party applications and the links and formats they support.

Email Clients:

Apple Mail - supports the following links:

x-docmoto (Rich Text)
 gopher (Rich Text)
 http & https (Rich Text)

MS Outlook - supports the following links:

x-docmoto (Rich Text)
 gopher (Rich Text)

Browser based Mail Clients - i.e. Gmail & MS Outlook - supports the following links:

gopher (Rich Text)

Office Suites:

iWorks:

- Pages (All links & all formats)
- Numbers (All links & all formats)
- Keynote (Does not support any DocMoto links. Only supports webpage links)

MS Office:

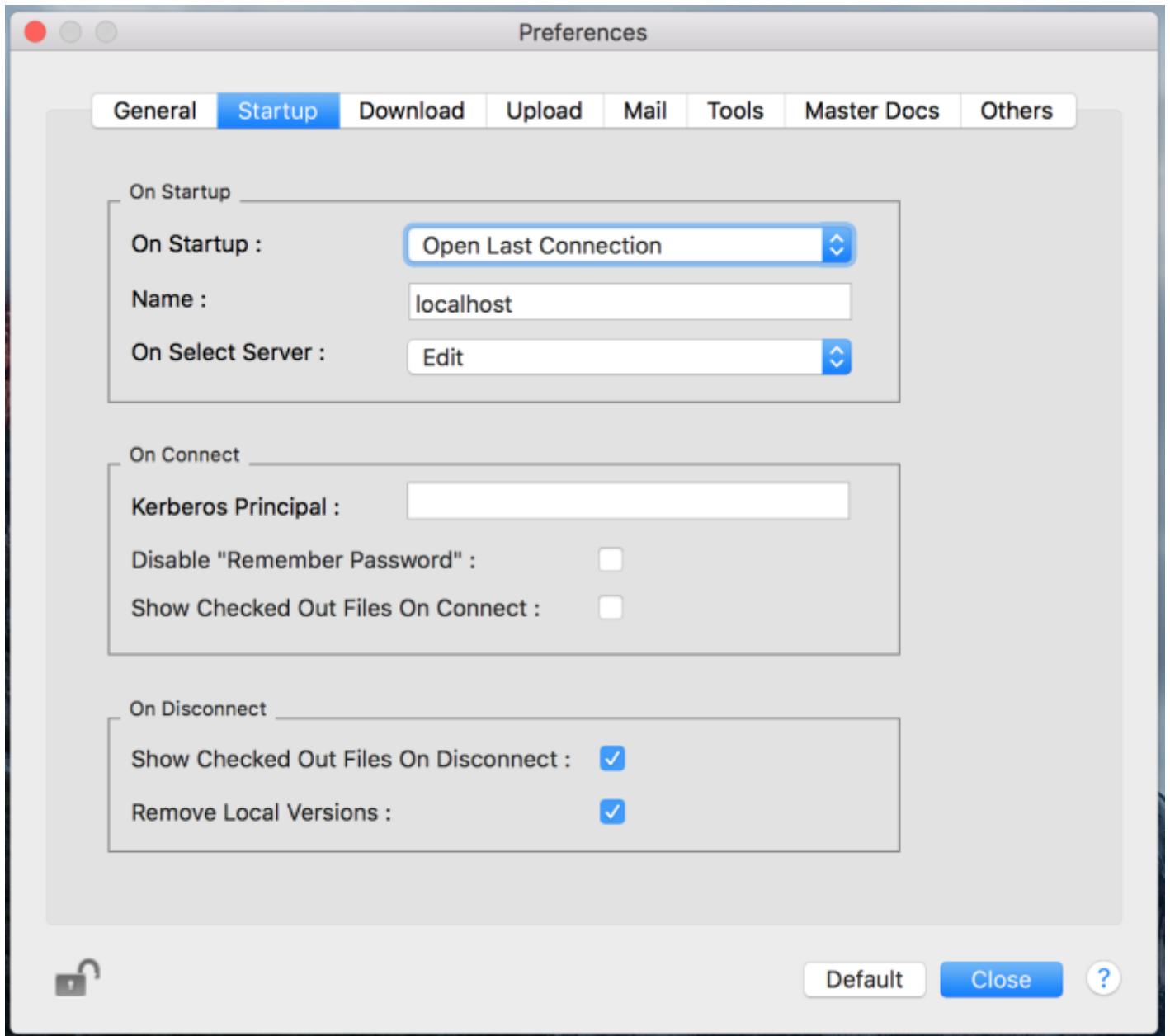
- Word (gopher - Rich Text)
- PowerPoint (Does not support any DocMoto links. Only supports webpage links)
- Excel (gopher - Rich Text)

Messaging Services:

Slack - supports the following links:

x-docmoto (Simple)
http & https (Simple)
gopher (Simple)

Startup (tab)



On Startup:

Controls the DocMoto Client's behaviour on initial startup.

- **Show Logo** – The Client opens but does not attempt to connect to the DocMoto Server.
- **Open Last Connection** – The Client will attempt to re-establish that last server connection.
- **Open Specific Connection** – The Client will attempt to connect using the connection specified within the 'Name' field.

Name:

Determines the name that appears in the server connection list.

On Select Server:

Controls the DocMoto Client behaviour on selecting a server within the server list.

- **Connect** – The Client will attempt to connect to the selected server without displaying the connection details.
- **Edit** – The Client displays the connection details for the selected server.

Kerberos Principal:

Generally left blank as Kerberos authentication automatically identifies the Kerberos principal. This field should be only completed if you wish to force a Kerberos principal.

Disable “Remember Password”:

For use by administrators only. When selected the DocMoto Client does not offer users the option to remember their password.

This feature is designed for workstations that are used by multiple users, (such as a scanning station) where it is important that a user does not inadvertently log in as somebody else.

Show Checked Out Files On Connect:

If selected will display all files previously checked out to the current user when they log back in.

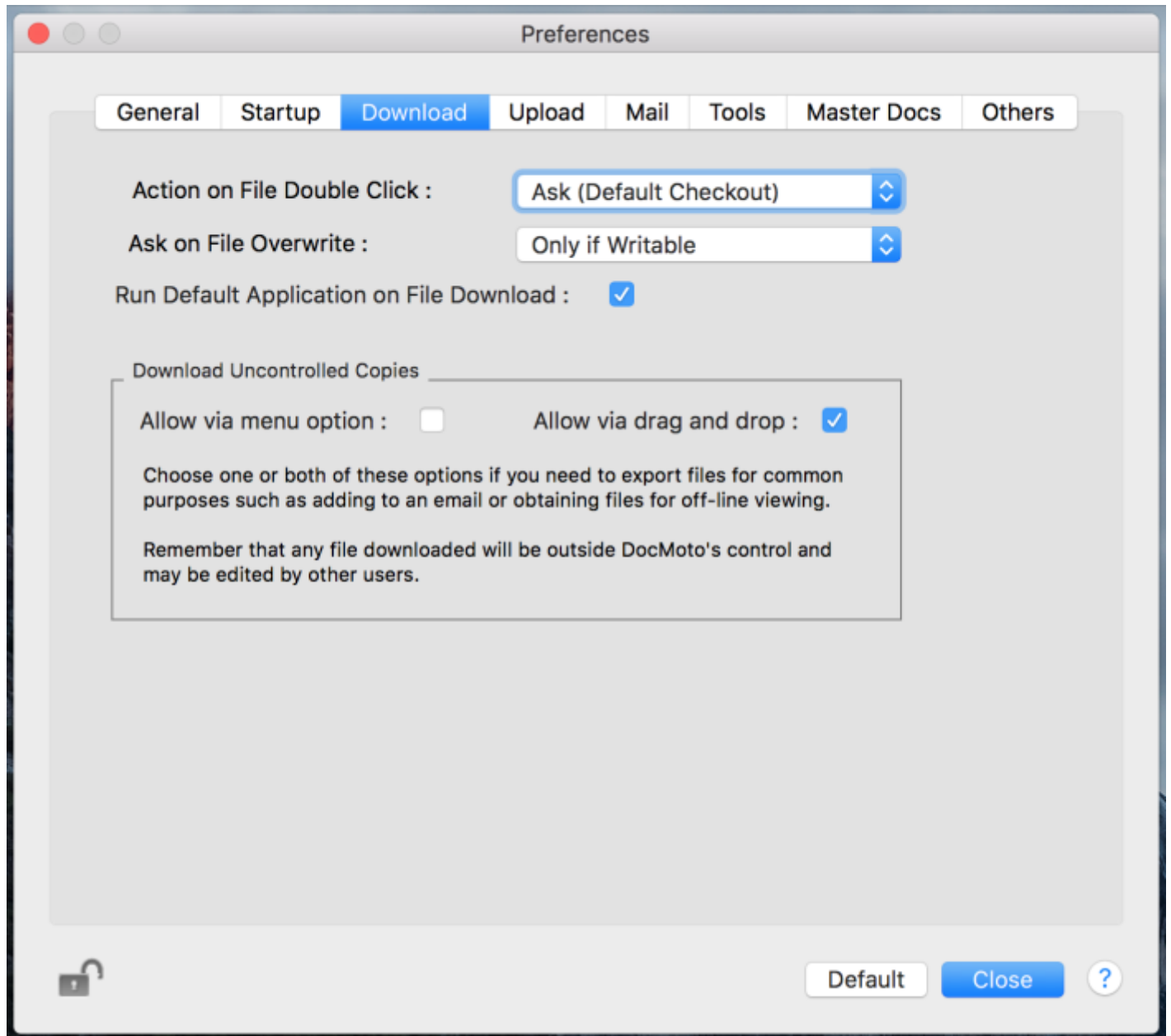
Show Checked Out Files On Disconnect:

If selected will display all files checked out to the current user when they log off.

Remove Local Versions:

Causes files that have been downloaded during the session to be removed on disconnect. Checked-out files are not removed.

Download (tab):



Action on File Double Click:

Controls the DocMoto Client's behaviour when a user double clicks on a file.

- **Ask (Default Checkout)** – The Client will prompt the user whether they wish to view or checkout the file. Check-out is the default.
- **Ask (Default Download)** – The Client will prompt the user whether they wish to view or check-out the file. View is the default.
- **Checkout** – The file is checked-out. The user is not prompted.
- **Download** – The file is downloaded for view only. The user is not prompted.
- **Quick Look** – The file is opened for viewing in Apple's Quick Look application. The user is not prompted.
- **Ignore** – Disables double click.

Ask on File Overwrite:

Controls the DocMoto Client's behaviour when a user attempts to check-out or download a file that already exists on the user's local computer.

- **Always** – The Client will always prompt the user.
- **Only if Writeable** – The Client will only prompt the user if the local copy is writable. Otherwise the local file will be overwritten.
- **Never** – The user is never prompted and any local copy will always be overwritten.

Run Default Application on File Download:

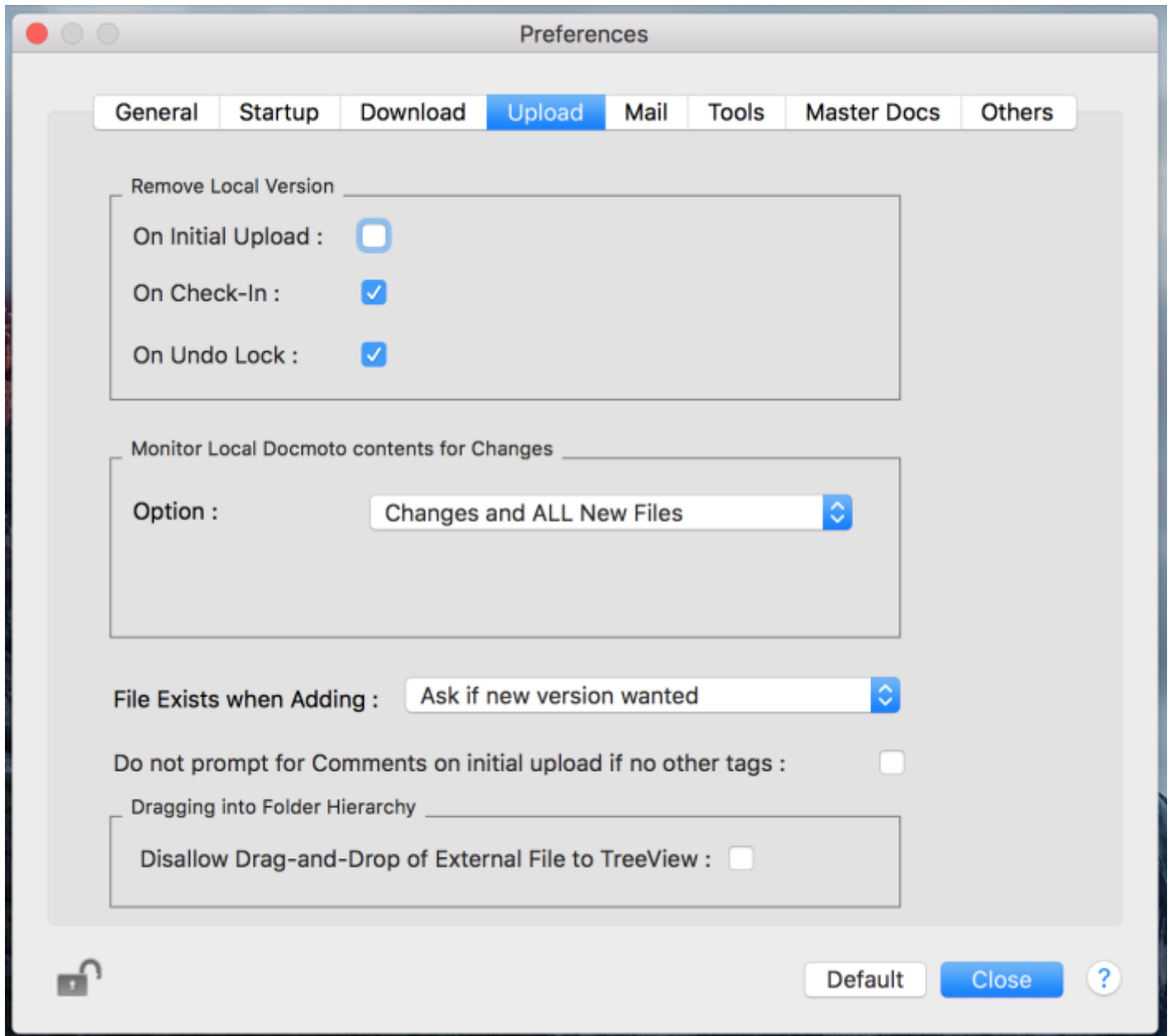
When selected DocMoto will open the default application associated with the file when the user double clicks the file.

Download Uncontrolled Copies:

Provides a couple of options for downloading uncontrolled files from the DocMoto repository. Files that are downloaded instead of being checked-out are considered to be "uncontrolled".

- **Allow via menu option** – When selected adds the option for users to download a file. For most cases users, should use Quick Look to view to a file.
- **Allow via drag and drop** – When selected allows a user to drag a file out of DocMoto.

Upload (tab):



Remove Local Version:

Controls the DocMoto Client behaviour with regard to files held on the user's computer. DocMoto must hold a local copy of a file whenever a user wishes to view or edit it. By using these settings, the conditions under which such copies remain on the user's computer can be carefully controlled.

- **On Initial Upload** – Removes the file from the user's computer once it has been successfully added to the DocMoto repository.
- **On Check-In** – The file is removed from the user's computer when they check it back in.
- **On Undo Lock** – The file is removed from the user's computer if they remove the lock on a file they have checked-out for editing.

Monitor Local DocMoto contents for Changes:

DocMoto can be configured to monitor the “local” file cache (the folder on the user’s machine where DocMoto downloads files) for changes. These changes can include modifications to files that have been checked-out as well as new files that have been added to the cache folder (generally as the result of a “Save As” operation).

- **Do NOT Monitor** – No monitoring of the local cache folder.
- **Changes to Checked Out File Only** – The user will be prompted when a checked-out file is modified.
- **Changes and ALL New Files** – The user will be prompted when a checked-out files is modified or a new file is added.
- **Changes and Matching New Files...**- The user will be prompted when a checked-out file is modified or a new file is added. Only new files that match the **Include List** will be included.
- **Changes and New Files EXCEPT...** - The user will be prompted when a checked-out file is modified or a new file is added. Any new files that match the **Exclude List** will not be included.

To prevent the file monitor prompting the user for changes to unwanted files (such as temporary files produced by word processors etc) DocMoto supports an **Include List** and **Exclude List**.

Rules for including and excluding files using Include and Exclude lists

1. Multiple entries can be added to a list by separating them with a comma, e.g. file1.tmp,file2.tmp
2. The star symbol (*) can be used as a wild card character. E.g. *.tmp will match all files with a .tmp extension. file*.tmp will match file1.tmp or file2.tmp.
3. Matches are NOT case sensitive. E.g. *.TMP and *.tmp will match the same results.

Files Exists when Adding:

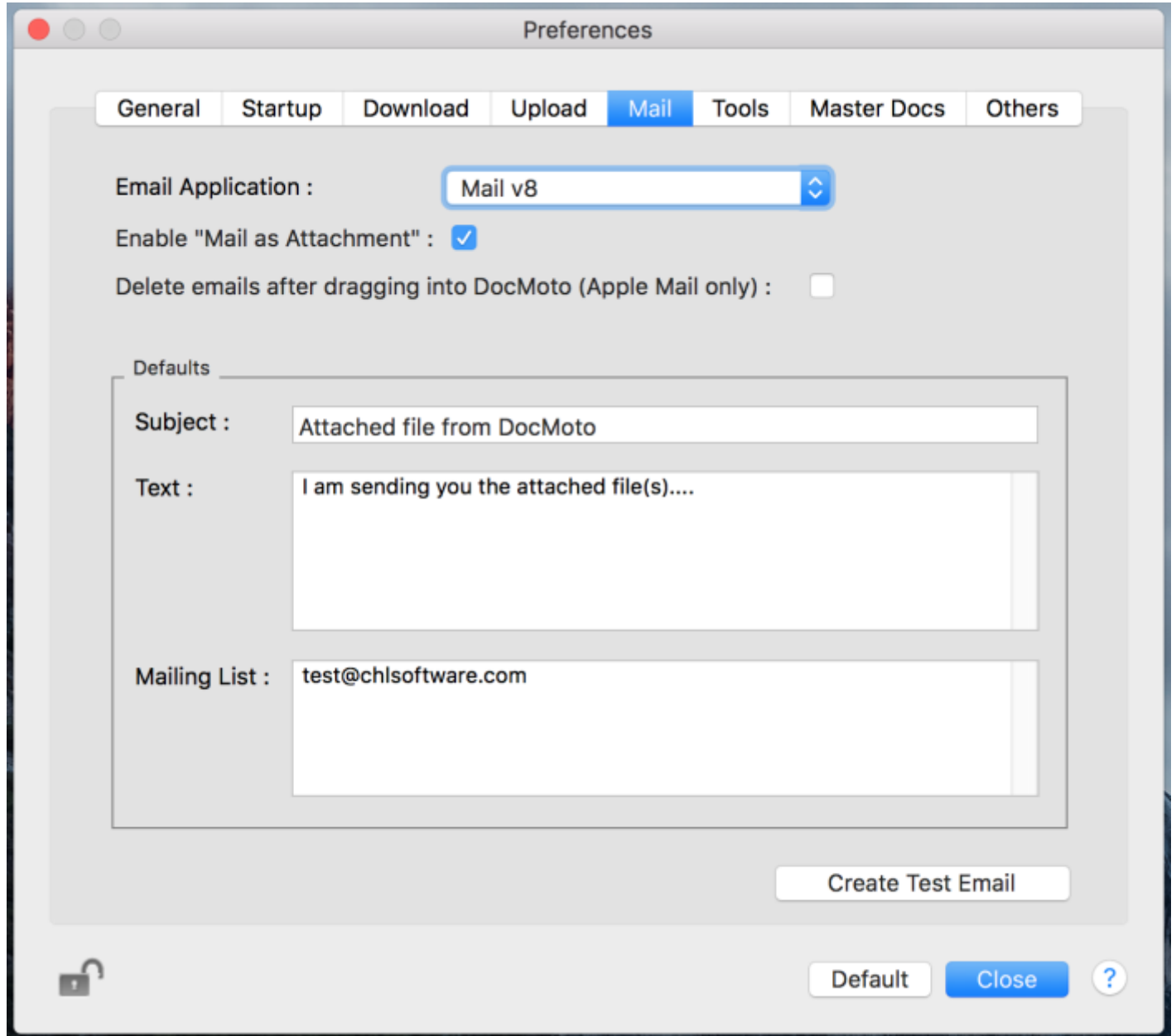
Controls the behaviour when a file with the same name as an existing file is added to a DocMoto repository folder.

- **Ask if new version wanted** – Asks the user if they want the file to be considered as a new version of the existing file.
- **Never add a new version** – Doesn’t allow the user to add the file.
- **Append new version without asking** – Treats the new file as a new version of the existing file but does not warn the user.

Do not prompt for Comments:

When selected DocMoto will not prompt a user for comments when adding files. This setting only applies to the initial upload and if no other tags are required.

Mail (tab):



Email Application:

Controls the email application called when a user selects a file for attachment to an email.

Note: Only Apple Mail, Postbox and Microsoft Outlook are currently supported as mail applications.

Enable “Mail as Attachment”:

When selected adds a menu item which allows users to create a new email with the selected files being added as attachments.

Delete emails after dragging into DocMoto (Apple Mail only):

When selected DocMoto will delete an email from the mail client after it has been successfully uploaded. This is supported for Apple Mail only.

Defaults:

Controls the default values added when a mail is created from within DocMoto. These values can be overridden at an individual folder level using tags.

- **Subject** – The default subject.
- **Text** – The default text.

Mailing List:

Controls the optional list of mail recipients offered when an email is created.

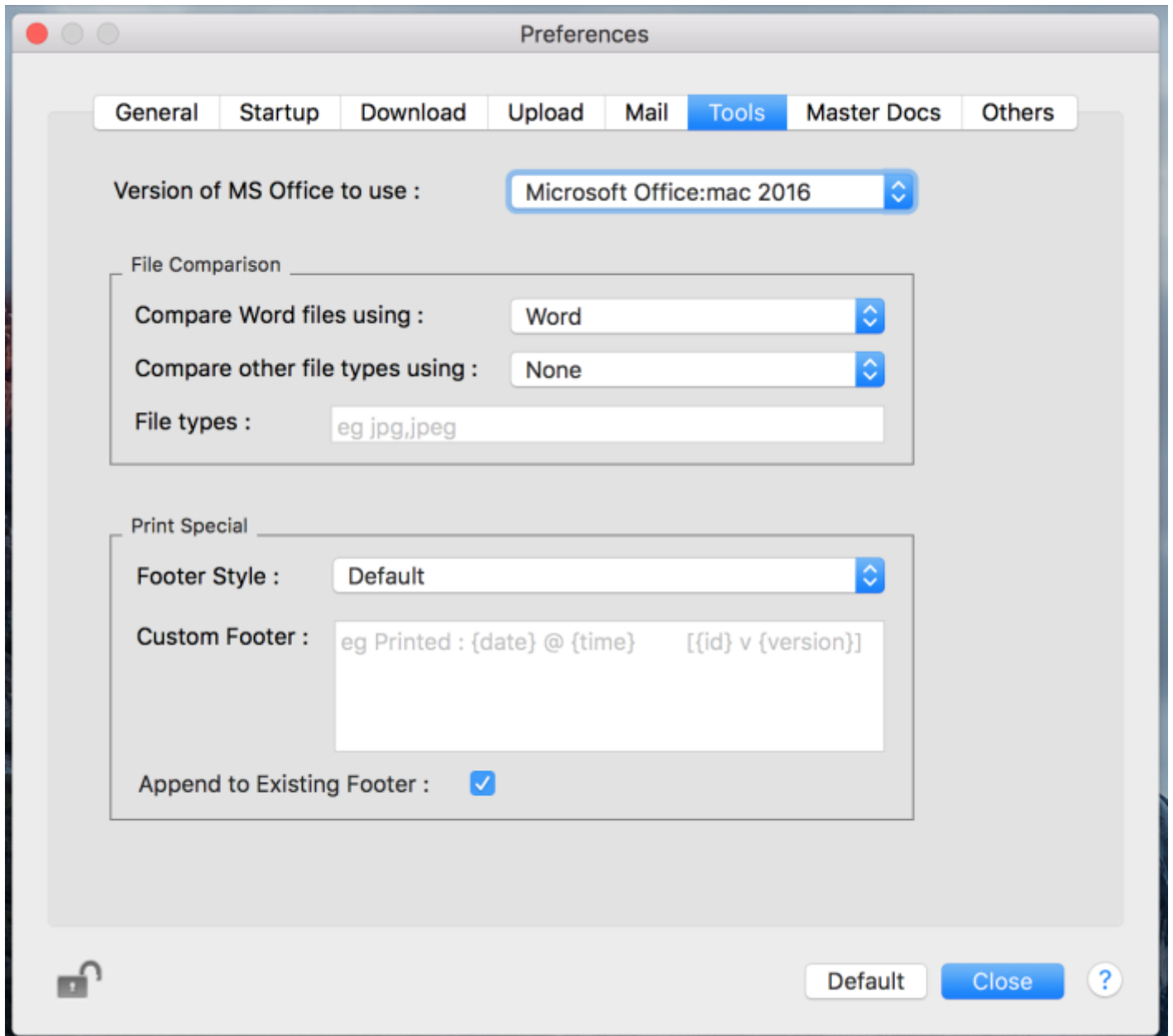
Multiple entries can be added, either separated by a comma or by entry on a new line.

Create Test Email:

Used to test the email settings.

If, when pressed, the test email does not have a “green tick” icon then the test was unsuccessful.

Tools (tab)



The DocMoto Client performs some actions by calling out to external applications such as MS Word.

Version of MS Office to use:

Controls the version of MS Office chosen by DocMoto to perform comparisons.

It is possible for one or more versions of MS Office to be installed simultaneously on a Mac. This can lead to issues.

You should use this preference to force the version of MS Office used by DocMoto.

- **None** – Select this if either you do not have MS Office installed on your Mac, or you wish to use an alternative product (such as Kaleidoscope) for document comparison. **Note:** Selecting this option will disable "Print Special".

- **Let DocMoto Choose** – DocMoto automatically selects the version of DocMoto to use.
- **Microsoft Office:2008** – DocMoto will select Microsoft Office 2008
- **Microsoft Office:2011** – DocMoto will select Microsoft Office 2011
- **Microsoft Office:2016** – DocMoto will select Microsoft Office 2016 (includes Office 365)

File Comparison:

Controls the application used by DocMoto to perform file comparisons.

Compare Word files using:

- **None** – Select if you do not have either Microsoft Office or Black Pixel’s Kaleidoscope installed on your Mac.
- **Let DocMoto Choose** – DocMoto will automatically chooses the comparison application to use. If Black Pixel’s Kaleidoscope is installed this will be taken as first choice over MS Office.
- **Word** – DocMoto will select Microsoft Word.
- **Kaleidoscope** – DocMoto will select Black Pixel’s Kaleidoscope.

Compare other file types using:

Use this preference if you have Black Pixel’s Kaleidoscope installed on your Mac and would like to use it to compare other file types other than Microsoft Word documents.

Note: For the latest file types that Kaleidoscope can compare you should check your Kaleidoscope product documentation.

- **None** – Select if you do not have Black Pixel’s Kaleidoscope installed on your Mac.
- **Kaleidoscope** – DocMoto will use Black Pixel’s Kaleidoscope.

File Types: A comma separated list of file extensions for file types you want to compare using Black Pixel’s Kaleidoscope.

Print Special:

Use this preference to control the format of footer information applied to Microsoft Word documents when printed using the “Print Special” menu item.

Note: Print special requires Microsoft Office 2011 or a later version to be installed on your Mac.

Footer Style:

- **None** – No information will be added to a document’s footer.
- **Default** – The default format for the footer will be chosen.

The default format is **Printed: {DATE} @ {TIME} [{ID} v {VERSION}]** plus a page number (page numbers are always printed on the right).

e.g. **Printed 26/11/2013 @ 16:16 [37516A30-F64A-461B-80B0-EB51F0CA7862 v 1] 1**

{DATE} – The current date in local format.

{TIME} – The current time in 24-hour format.

{ID} – The unique global identifier applied to the document when stored in DocMoto.

{VERSION} – The version of the file being printed.

- **Custom** – Uses the definition in “Custom Footer” to create the footer information.
- **Custom With Page Number** – Uses the definition in “Custom Footer” and appends a page number.

Append to Existing Footer: When selected results in the additional footer information being appended to any existing footer text.

If not selected any existing footer information will be replaced at print time.

Custom Formatting:

The text applied to the footer can be customised. Plain text can be entered “as is” and parameters are signified using curly brackets e.g. {}.

Microsoft Word Fields – Standard Word fields such as DATE, TIME and PAGE are supported. E.g. “Printed on {DATE} at {TIME}” produces a footer “Printed on 26/11/2013 at 13:15”.

DocMoto Fields – The following DocMoto fields are supported.

- **ID** – The global unique identifier applied to a file by DocMoto at the point of entry to the repository.
- **VERSION** – The version of the document.
- **TAG:<DocMoto internal tag name>** - A tag’s internal name can be found under “Advanced” within the tags’s definition in Tag Manager.

E.g.1. Document Name {TAG:DAV:/displayname} produces “Document Name myDoc.docx”.

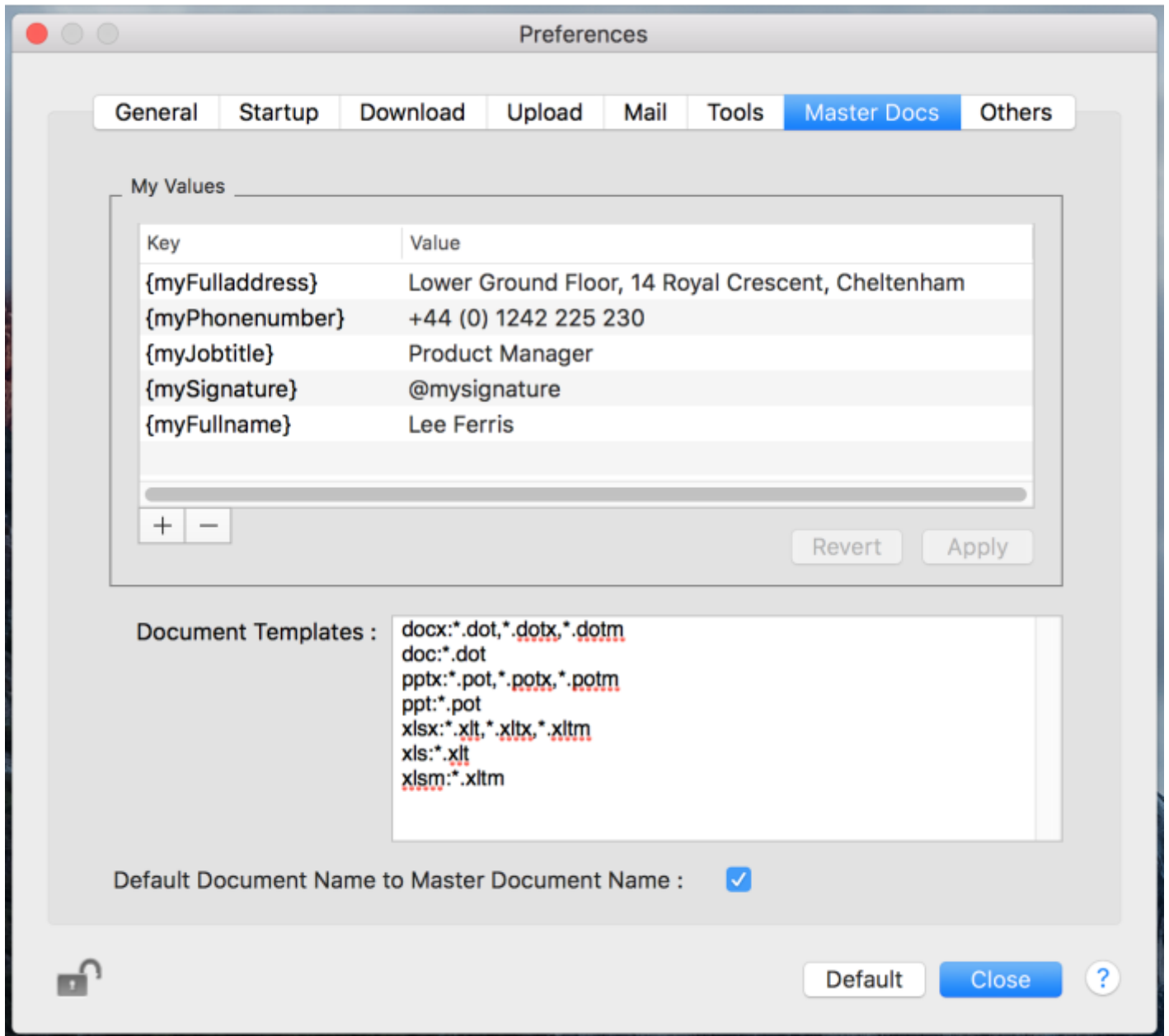
E.g.2. Document Status {TAG:DMUSER:/Status} produces “Document Status Final”.

Date formatting and other masks – Word fields can be formatted as within Word.

E.g. Printed on {TIME \@“d-MMMM-yyyy @ h:mm\”} produces “Printed on 1-Dec-2013 @ 9:05”

See Microsoft Word documentation for a complete explanation of format options.

Master Docs



My Values:

Microsoft Word merge fields to be used when creating a docx from Master Documents. Values beginning **{my...}** take precedence over values assigned to folders.

Note: Values are only saved on selecting the **Apply** button.

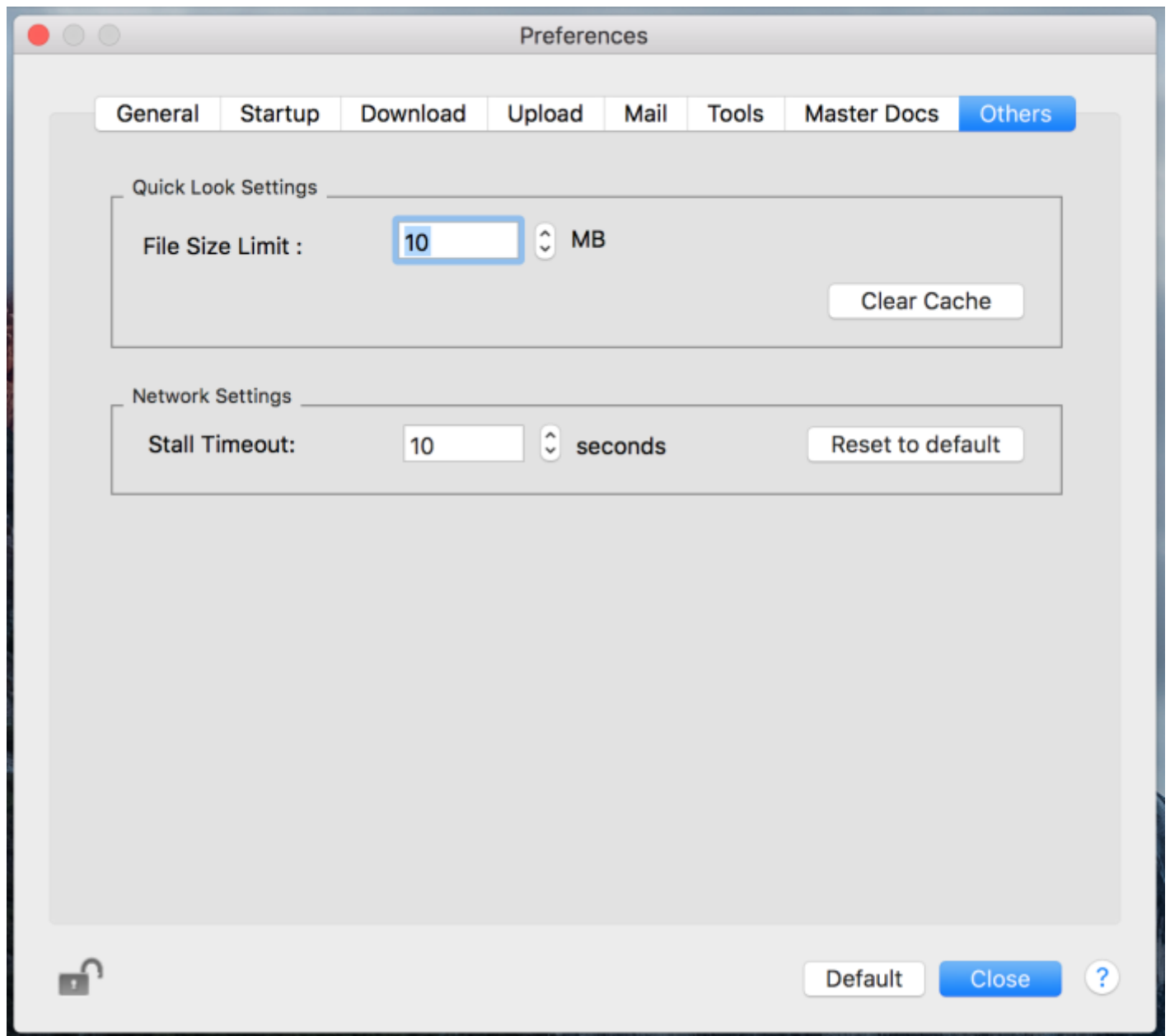
Document Templates:

Contains a list of application document templates with their associated file extensions. Each row contains the relationship between the final document extension and the source template files and controls the file extension types that will be offered to the user by MS Office when creating a file.

Default Document Name to Master Document Name:

Results in new documents taking the name of the master document by default.

Others



Quick Look Settings:

Controls the behaviour of Quick Look. This is necessary as Quick Look retrieves files from the DocMoto Server as part of the display process. Files retrieved by Quick Look cache on the client computer.

- **File Size Limit** – The maximum file size that the Quick Look will attempt to load. Setting this value appropriately ensures minimal load stress on the DocMoto Server.
- **Clean Cache** – Removes all files from the DocMoto Quick Look cache.