Attach Reference Guide

Introduction

Attach helps people work with file attachments stored in Lotus Notes databases. Attach is a "window" into Notes databases so users can find documents and easily access and manage files attached to those documents.

Attach can be run like any Windows application, by launching it from the Windows Desktop or Start menu. In addition, Attach can be configured to open whenever File – Open or File – Save are used in many common Windows applications (see Appendix for a full list of supported applications).

Installation

Attach consists of two components:

1. A configuration database which installs on a Domino server or local client in the Notes\data directory. This database is used by the developer, administrator or even a user to specify the databases users will be able to access. The associated database views and documents used with Attach are also configured in the configuration database.
2. The Attach Portal (a Windows application) that is run on a users' PC to allow access to the databases and views set up in the configuration database.

The installation involves extracting and setting up the configuration database, then installing and using Attach.

System Requirements

Software Requirements

Servers: Domino R4.6 or R5 on any supported platform
Clients   Lotus Notes R4.6 or R5 on Microsoft Windows 95/98/NT/2000

Hardware requirements

Servers: Sufficient to support Domino; no additional requirements for Attach
Clients: Sufficient to support Notes client. Attach requires 10 Megabytes of hard disk space to install and additional disk space equal to the volume of managed files.

Procedure

1. Download and execute ZIP file
2. Read the readme.txt file
3. Extract configuration database to the Notes\data\Aviator directory (aviator\avicfg.nsf) on a server or the local client.
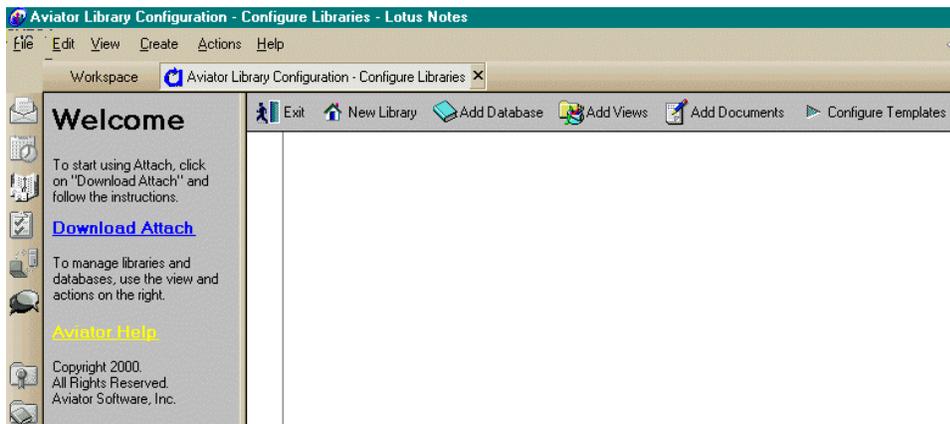4. See setting up the configuration database (below)

Setting up the configuration database

The Attach portal uses the information in the configuration database to give users access to specific databases, views, and documents. Any Notes database and view may be included, but it is prudent to restrict users to a limited set of databases and views depending on the purpose. There are four types of entries that can be created in the configuration database:

1. A Library, which is a grouping of databases available through Attach
2. A Database Profile, which identifies and defines a database to be used
3. A View Profile, which selects and defines one of the available views for a database
4. A Document Profile, which enable users to create new documents through Attach

There is no effective limit to the number of any of these four entry types. A database must be accessible by the users running Aviator Attach. It must be on a server they have access to and they must have at least Reader access. Remote and mobile users can replicate a database to their Local client and define a local configuration database to use it.

The following screen shot shows the configuration database upon first entry:


Click the yellow Aviator Help link in the left-hand pane at any time for quick reference to the configuration database help.

We will Download Attach momentarily, but first let's go through the steps to set up the configuration database.

Step 1. Setting up a Library

A library profile represents a collection of databases. The databases do not have to be on the same server.

1. Click "New Library" in the main view to create a library profile.
2. This form is simply used to name the group of databases and assist users browsing Attach.
3. The library profile document provides guidelines for creating the profile.
4. Enter a name for the Library.
5. Upon "Save and Close" the library is created in the configuration database view (see below).
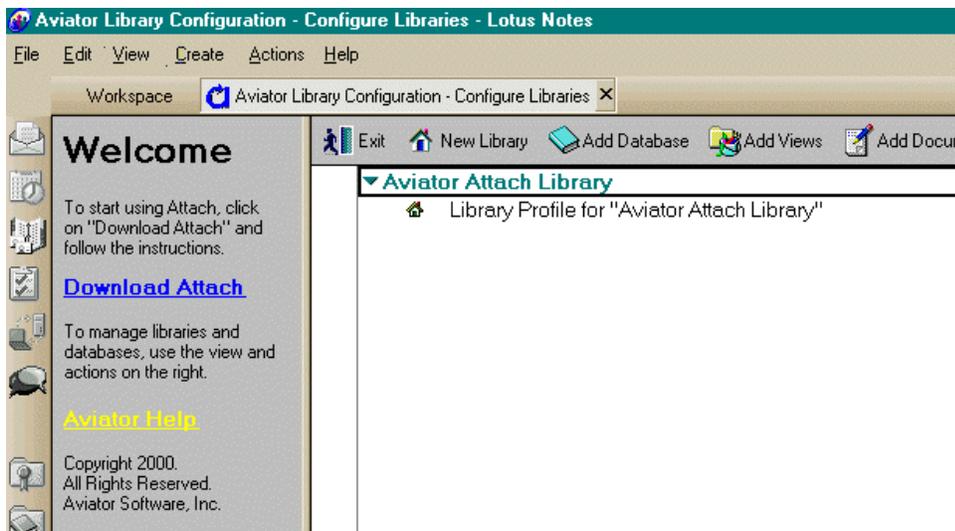
Step 2. Adding Databases to the Library

A database profile represents a Notes database on a Domino server or Local client.

1. Highlight a library profile and click "Add Database" to create a database profile.
2. To create a database profile for a single database, select the server (or leave blank for Local) and enter the database file path (from the Notes Data directory).
3. To create database profiles for all the databases in a specified directory, select the server (or leave blank for Local) and enter the directory path (from the Notes Data directory).
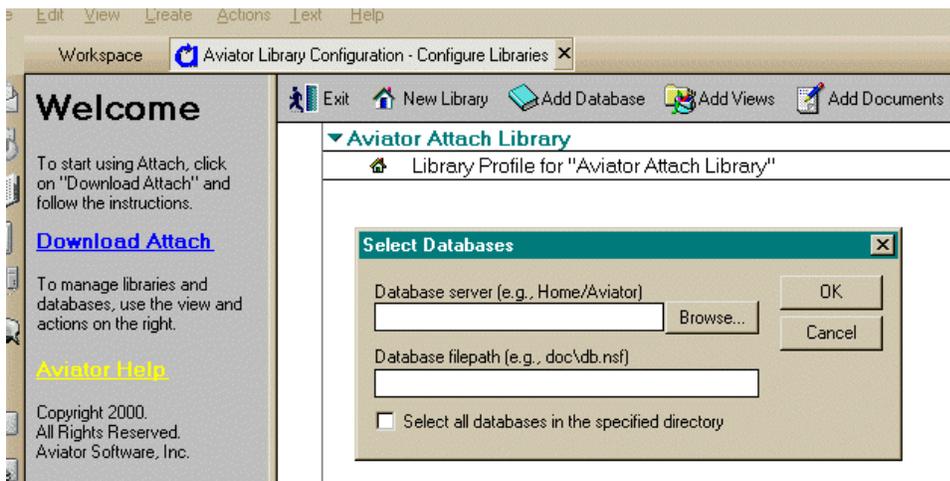
4. Upon clicking OK, the databases are added to the configuration database view (see below).
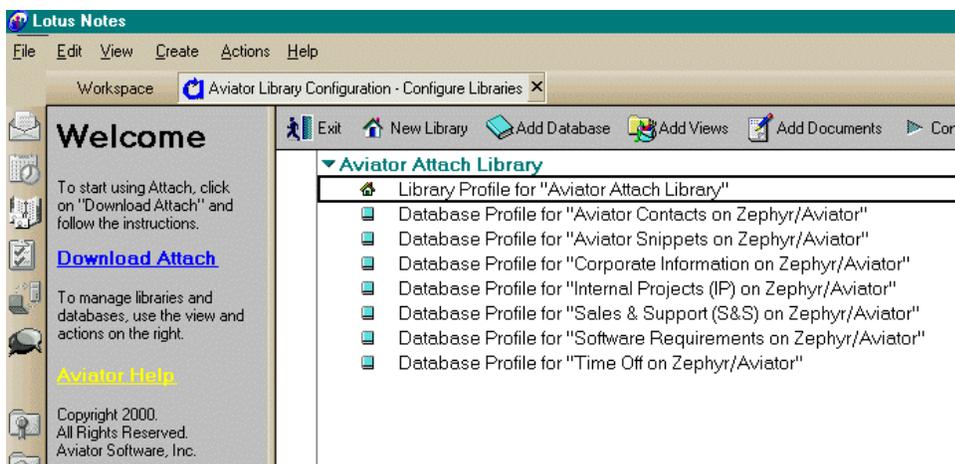
Step 3. Adding Views to the Databases

A view profile represents a view in a Notes database.

1. Highlight on of the database profiles and click "Add Views" to create one or more view profiles.
2. Select one or more views from the list of all the views in the selected Notes database.
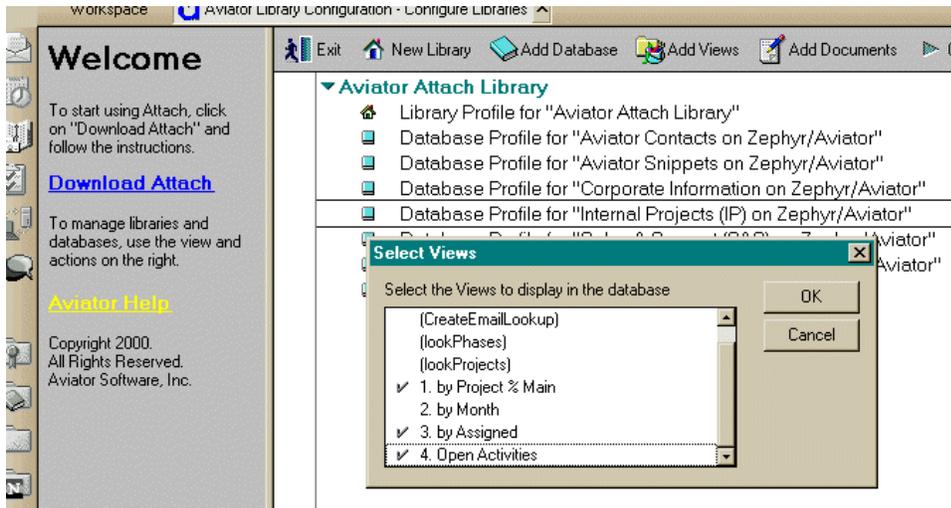
3. Upon clicking OK, the views are displayed in the configuration database view (see below).
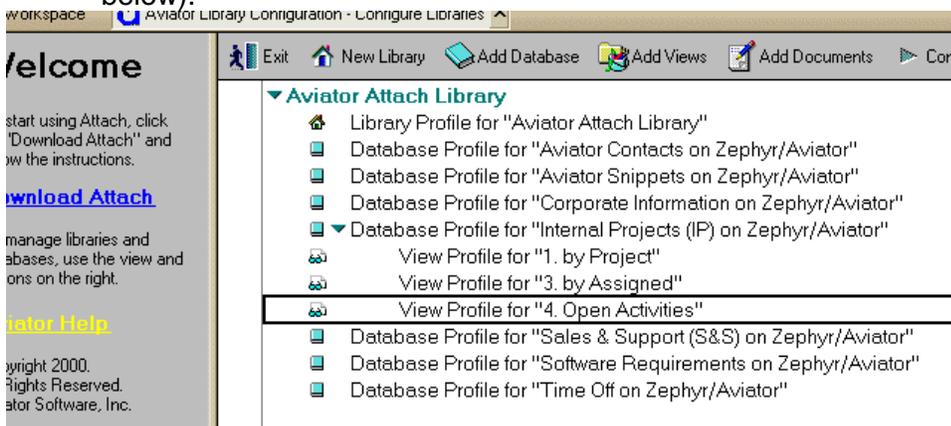
4. The view's title can be modified by double-clicking the view (see below).
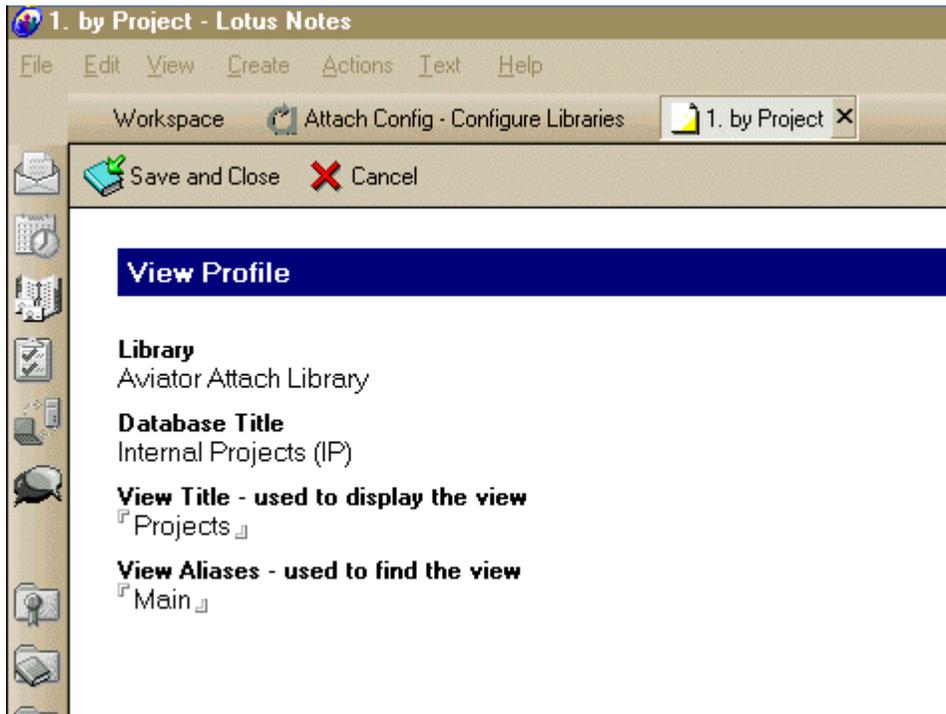
5. View Aliases are used by administrators and designers.
6. Upon Save and Close, the view is updated with the latest title.

Step 4. Adding Documents to the Views

A document profile represents a type of document that can be created in a Notes database. The document profile describes how new documents can be created using Attach and where attachments should be placed.

1. Highlight a database profile and click "Add Documents" to create one or more document profiles.
2. Select one or more forms from the list of all the forms in the selected Notes database.
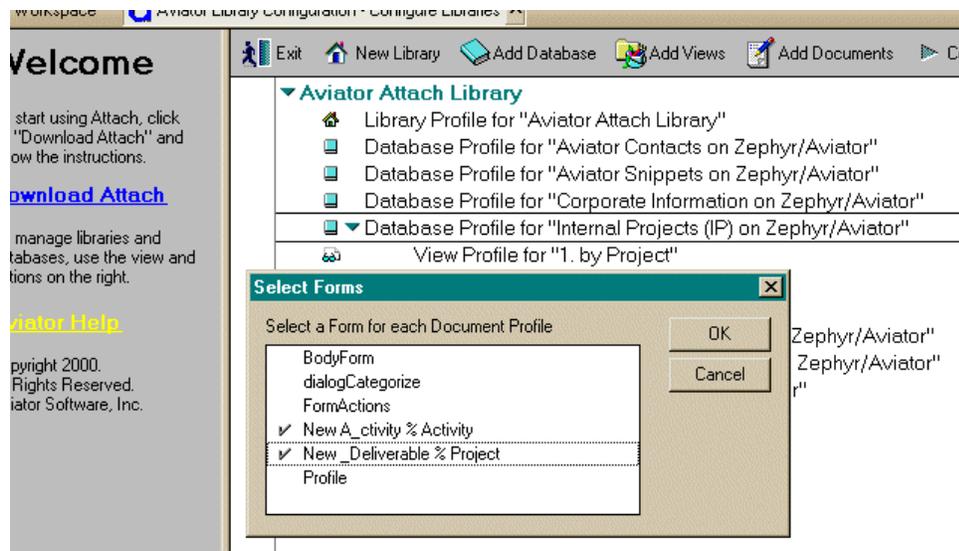
3. Each selected form will produce an associated document profile.
4. Upon clicking OK, the document profiles display in the configuration database view)see below).
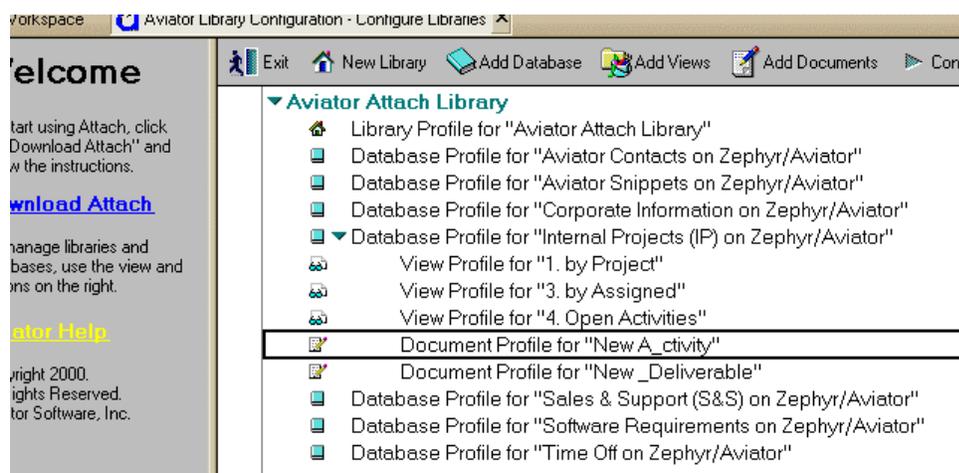
5. To edit the document profile, double-click on the profile.
6. The following form enables restrictions about where and when a document can be created for this database and some other characteristics.

- Rich Text Field - If specified, attachments are placed at the end of this field. If no field is specified, attachments are placed at the bottom of the document
- Document Title - These two required fields specify a prompt for the user when creating a new document and a field name to hold what they type.
- Create document as a response - When checked the new document appears as a response document. Note that a document must have been selected by the user for this create option to succeed.
- Condition for creating - When checked, the document selected when Create New was clicked must have the specified field containing the specified string or creation will fail with the specified error message.

New A_ctivity - Lotus Notes

File   Edit   View   Create   Actions   Text   Help

Workspace   Live avicfg - Configure Libraries   New A_ctivity ✕

Save and Close   🔁 Refresh   ✖ Cancel

Document Profile

Library
Aviator Attach Library

Database Title (Replica Id)
Internal Projects (IP) (072566E20023D7AD)

Profile Name
⌜New Activity⌟

Form Name - used to find the document
⌜Activity⌟▾

Field Preferences

Rich Text Field
Field Name: ⌜ ⌟

Document Title
Field Prompt: ⌜ ⌟
Field Name: ⌜ ⌟

Advanced Preferences

Rules for creating a new document in Attach
1. ☐ Create document as a response
2. ☐ Condition for creating the document

Click the **Refresh** action button to update the selection keywords.

Step 5. Customizing your Databases (optional)

Aviator Attach works with any Notes database without any customization. However, minor customization is required to take advantage of advanced features such as:
- saving launched file attachments directly back to the Notes documents,
- creating new file attachments, renaming, and managing existing attachments

To customize an existing Notes database, copy the following agent from the configuration database into the database you want to customize:

1. (OpenFilesUsingAttach): displays file attachments in the Attach dialog so they can be edited and saved directly back to the Notes document.

The agent should be executed from the Notes Actions menu or from an Action button when there is a document open or a document selected in a view.

Downloading, Installing and Using Aviator Attach

When the Configuration Database is ready for use, the Attach client can be installed on the users' local PCs. Click on the Download Attach link on the left-hand side of the configuration database view. The following screen is presented:
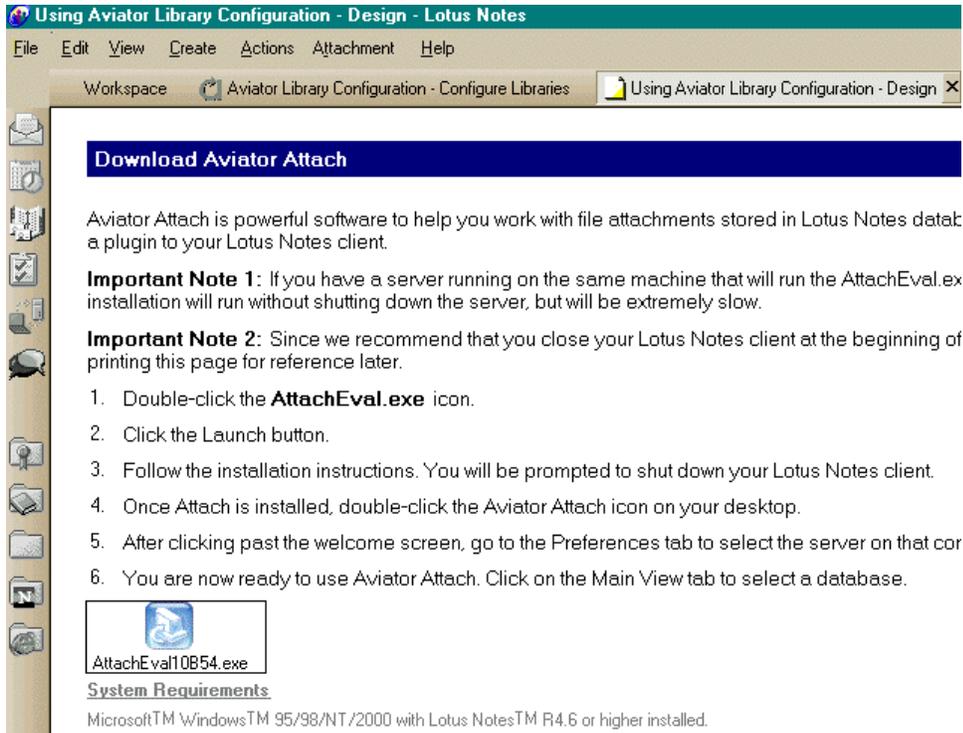
Follow the instructions on this page to install the Attach client.

How to Start Attach

There are 3 ways to start Attach:

1. Double-click the Attach icon on the Windows desktop.
2. Click the Attach icon in the Windows System Tray located at the end of the Windows Task Bar. This option is only available after Attach has been run once.
3. Select File – Open or File – Save As from a compatible Windows application.

When Attach is first opened it will display the following splash screen:

There are four options upon opening Attach:
1. Return to the previous location. This attempts to open the last used database and view and to reposition the display back to the documents last viewed.
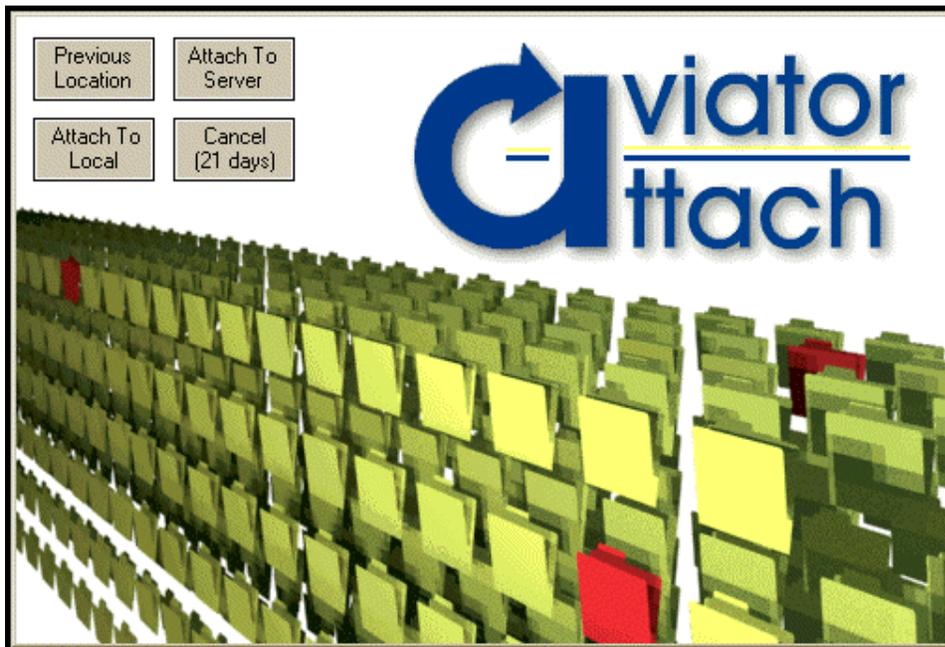2. Use Attach through a configuration database on a server. This opens the last used configuration database on a server and positions the display at the library level.
3. Use Attach through a configuration database on the user's local system. This opens a configuration database on the local system and shows the library level.
4. Cancel Attach. This does not open Attach, but leaves an icon in the system tray for later use. The evaluation version also shows the number of days remaining.

The configuration database gives Attach instructions about which databases it can connect to and which views in the database to make available.

When the Configuration database is found (on a Notes server or Local), Attach will display all the databases it can connect to. Databases are grouped under libraries.

Main View Tab
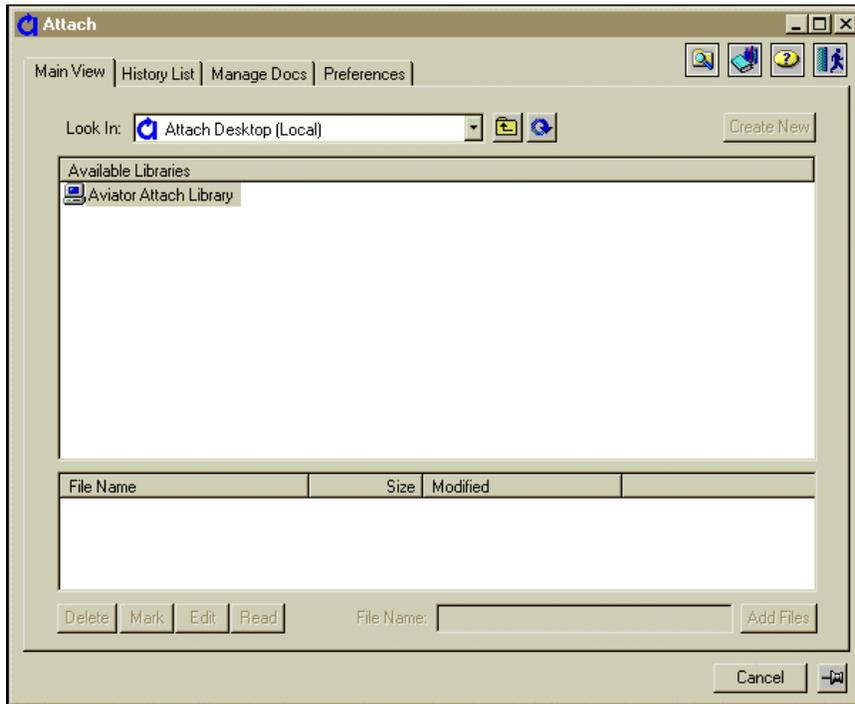
Library Browser

1. Click the "Look In" drop-down list to see the available libraries.
2. Select a library to display the databases it contains.
3. Select a database to see the views it contains.
4. Select a view to see the documents it contains.
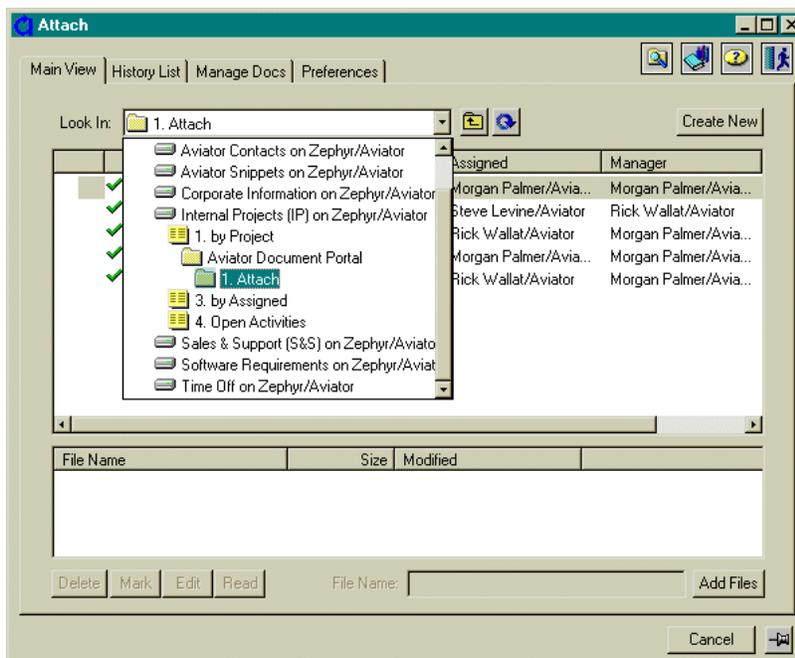
Note. You can also drill-down in the main view by double-clicking an entry.

In Attach, all Notes security is maintained. Attach will warn users attempting to open a database or read a document for which they have insufficient authorization.

Categories in Notes views are displayed as folders in Attach. Double-click a folder to display the sub-folders and documents it contains.

Responses to documents are displayed as an indented list at a level underneath the documents. Double-click a document to display the responses it contains. Responses to responses, etc. are each indented one level for each level of response.

When a document or response is highlighted, the file attachments it contains are displayed in the attachments list.
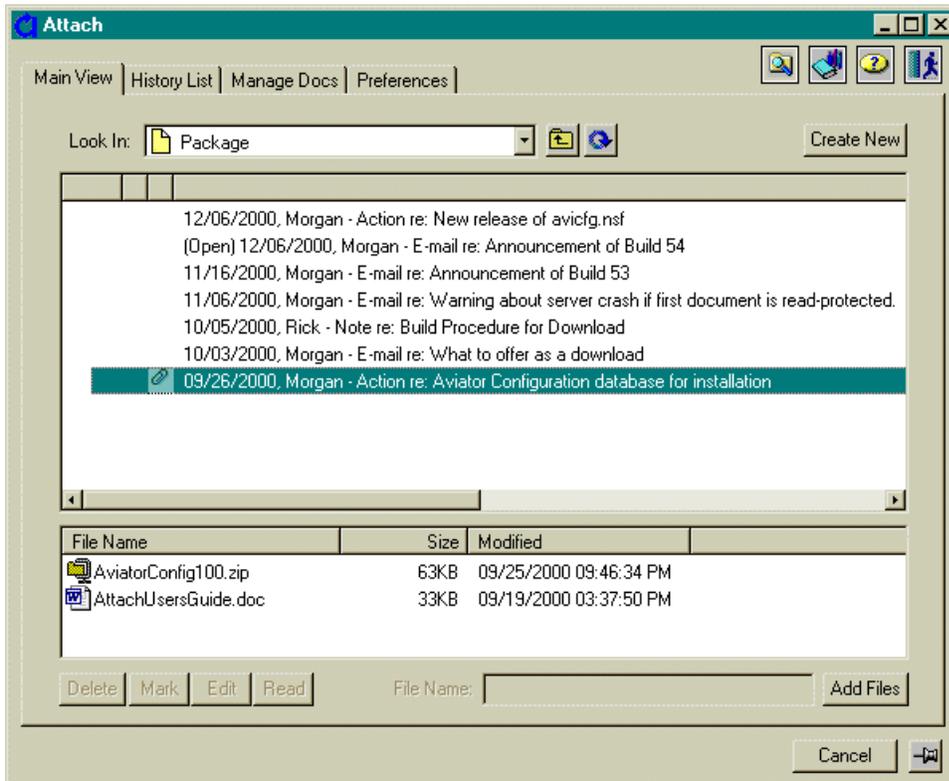
Refresh Button

The refresh button refreshes the current view in the Main View Tab.

File Browser

To open a file attachment in a document:
1. Select a document or response.
2. Select a file attachment.
3. Click Edit or Read.

To add a file attachment to an existing document:
1. Select a document or response.
2. Click Add Files.
3. Select a file or files from a local or shared directory.
4. Click OK.

To rename a file attachment in an existing document:
1. Select a document or response.
2. Select a file attachment.
3. Click the file attachment name again or press F2.
4. Enter the new name.
5. Click outside of the file name, or press Enter.

To delete a file attachment or attachments from an existing document:
1. Select a document or response.
2. Select a file or files.
3. Click Delete.
4. Confirm the deletion.

To open a file attachment for reading:

1. Select a file attachment.
2. Click Read.
3. Saving the file will prompt users to create a new file, or replace the original.

To open a file attachment for editing:

1. Select a file attachment.
2. Click Edit.
3. The file will be saved to its location in the database every time users click Save

To open or save a file attachment from an ODMA-compliant application (MS Word, Corel Wordperfect, etc.):

1. To open a file, from the application, click Open or press Ctrl-O.
2. Attach will launch, and users can access the file they need.

1. To save a file, from the application, click Save or press Ctrl-S.
2. Attach will launch, and users can save the file in the database they choose.

To create a new Notes document:

A new document can be created in Attach any time a database is open which includes a document profile. The Create New button will be disabled (gray) if the current database does not have any document profiles defined.
1. With Attach open, select a database which has document profiles.
2. Click the Create New button in the Main View Tab.
3. Select the type of document to create (Profile Name).
4. Enter a title or name for the new document (varies with each document profile).
5. Browse to add an attachment or attachments (optional).
6. Click OK.
7. The document will be created, the named file or files attached, and Notes will launch and bring users to the new document to complete any necessary fields.
8. Upon Save and Close, the new document is complete and will be accessible through Attach or normal Notes views.

A new document can also be created during a File SaveAs operation within an ODMA-compliant application like MS Word.
1. Create or open a document (in Word for example) and select File-SaveAs.
2. When Attach appears, you may select an existing document, type in a file name, and click Save, OR you can click Create New.
3. Select the type of document to create (Profile Name).
4. Enter a file name for the new attachment.
5. Enter a title or subject for the new document (varies with each document profile).
6. Click OK
7. The document will be created, the new file will be created and attached, and Notes will launch and bring users to the new document to complete any necessary fields.
8. Upon Notes Save and Close, the new document is complete and the user can return to the application.

History List Tab

The History list contains file attachments that have been edited, read, added, renamed, or marked using Attach. They stay in the history list with the most recently used on the bottom of the list until they are cleared or deleted. This list is effectively a Most Recently Used list of all the files that have been accessed with Attach.
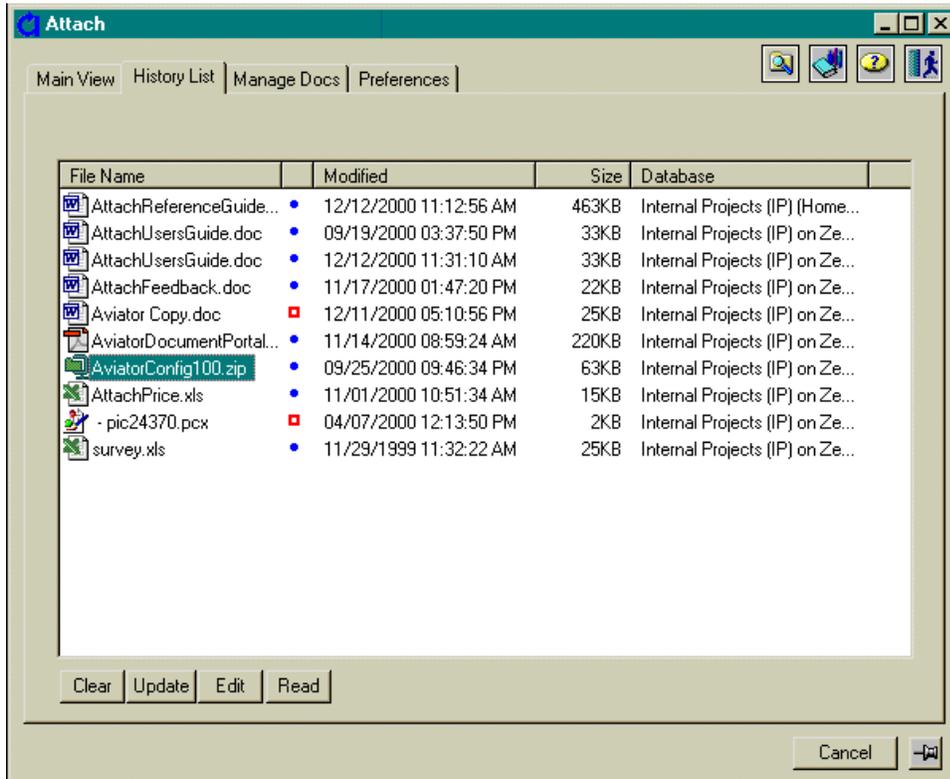
To add a file attachment to History from the Main View tab without having to edit or read it, simply select the file and click the Mark button. This will create a link to the file from the History List.

Users can perform the following actions in the History List:

- Edit or read a file.
- Clear a history entry.
- Update the database with changes to a file if this has not been done automatically.
     a. A blue dot indicates the file is up to date
     b. A red square indicates the file needs to be updated to the database

All files in the History list can be edited and saved, even if the Notes database that contains the file attachment is not accessible. Changes are saved locally and the Notes database can be updated at a later date.

When a file attachment is edited and saved, either from the Main View or from the History list, Attach will attempt to update the Notes database with the changes. If the database is not accessible (e.g., when disconnected from the server), or if the application used to edit the file does not support this feature, Attach will save the changes and the History list will flag the file. Attachments that have not been updated in the Notes database appear with a red square.

There are four ways to update the Notes database with any possible changes:

1. From the History Tab, select the file that needs to be updated, click Update.
2. At any time Attach is in the system (icon appears in system tray) press Ctrl+Alt+U at the same time. A small "Updating" message will appear and all updates will take place.
3. Right click the Attach icon in the system tray and select "Update All". This takes the same action as the previous keystroke option.
4. Set an automatic update interval in the Preferences Tab (see below). Similar to the auto-save feature in MS Word, the update-all action will occur automatically at the interval you select.
5.

Preferences Tab

The Preferences tab of Attach allows the user to:

- Select installed applications for use with Attach. By default, all installed ODMA compliant applications recognized by Attach appear here with their select box checked. To disable Attach for a particular application, uncheck its box (and potentially uncheck the default box as well; see the application notes in the appendix for details.)
- Limit the number of files in the History List.
- Determine how often to automatically update the files in the History List.
- Choose the server on which the configuration database resides.
- Enforce Notes' time activated security ID locking.
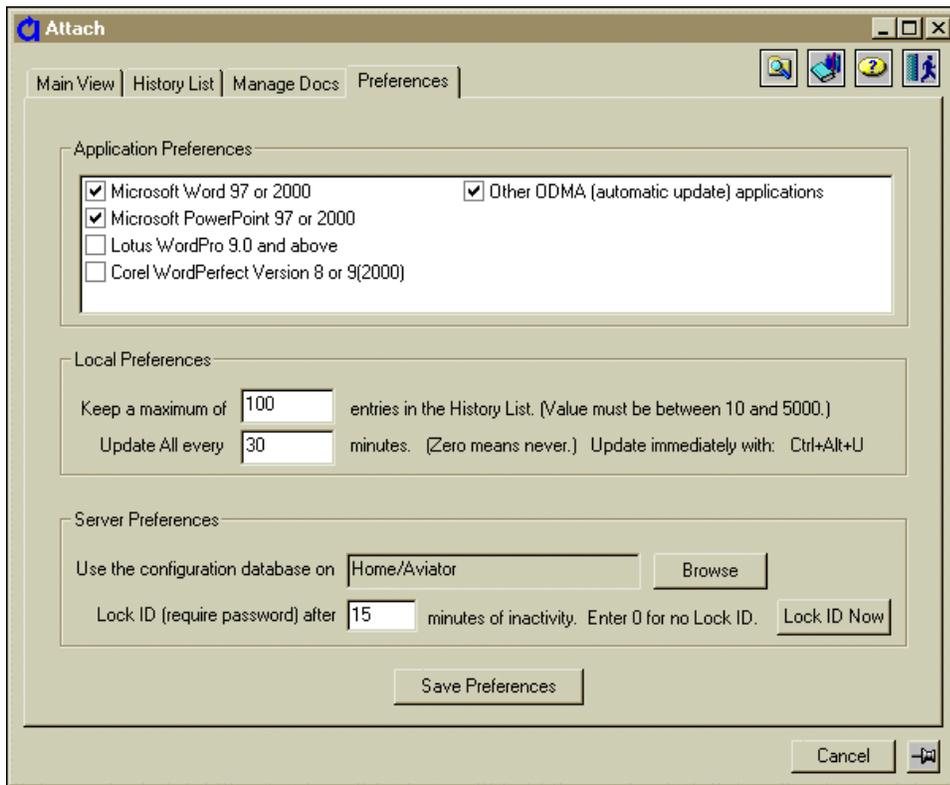
Manage Docs Tab

The Manage Docs tab is currently inactive, but in future versions of Attach users will be able to perform standard document management functions on their files.

Other Attach Functions

Opening Windows Explorer or the File System Dialog

To access files from, or save files into, a file system simply click on the Open File System button. Attach will stay active on the desktop for future access.

Opening the Document in Notes

In addition to file attachments, Notes documents can contain fields and rich text. To edit the fields contained in a Notes document:

1. Select a document or response.
2. Click the Go to Notes button.
3. Edit the Notes document.
4. Modify the fields as needed.
5. Save and close the Notes document.

Closing Attach

To close the Attach window so it does not get in the way, click Cancel.

To close Attach completely, click the Exit Attach button. (This may result in losing the user's current position in the Main View.)

Troubleshooting

Cannot find Attach icon on Windows Desktop or in Start menu.
> If there is no program icon for Attach in either place the installation did not complete properly. Try reinstalling the program and make sure you receive the "Installation Complete" message at the end of the process.

Cannot run Attach from icon.
> If Attach will not run from the icon the installation was not complete. In this case use the "Add/Remove Software" option from the Control Panel to uninstall Attach. Then re-install and try to execute again.

Attach hangs on start up.
> Even when disconnected from the usual server, and even if there is not configuration database defined on the local system, Attach should execute and show at least the History list. If this does not happen, the installation is either incomplete or corrupt. Uninstall Attach from the system and reinstall it.

Password does not work.
> Attach uses its own dialog to gather a password from the user, but then passes it directly to the Notes Client software for validation. If the password does not work, then it's the wrong password for the user ID. Passwords are case sensitive and must be typed exactly. Enter the Notes Client, note the password that must be used, then enter Attach and use exactly the same one.

Cannot connect to a configuration database.
> Check with your system administrator to make sure that a configuration database has been defined that you have access to and that you have an accessible path to the server on which it resides.

Cannot see any servers in Browser button for configuration databases.
> If no servers except Local show up when browsing, your station may be disconnected from the network, or servers that you do have access to may be down. Try again later or contact your system administrator. You should be able to see any server here that is available to you in your Notes Client.

Cannot see any libraries under the Attach Desktop.
> If no libraries appear in the Attach Desktop, then you have selected a configuration database that exists on one of the accessible servers but is completely empty. This database must be configured by administrative personnel to give you access to other databases in the system through Attach.

Cannot open a database.
> If a database that appears in a Library in the Attach Main View will not open, it is either temporarily unavailable on the network, or you do not have sufficient access. Check this same database in your Notes Client and if you have access in Notes but not in Attach, contact your system administrator; something is incorrect in the Attach Configuration Database.

Cannot edit a file in a document.
> There are many reasons why you might not be able to edit a particular file in a document but Attach should give you a warning message about almost all of them. For example, if a file is currently open with an ODMA compatible application like MS Word, no other

action can be taken on that file until that application is finished with it and a warning message is given. If a file on the server is deleted, renamed, or made inaccessible by another user on the network and you attempt to edit it, warning messages are given describing the problem. Another common one is that the application needed to edit that particular file type is not properly registered with the operating system, but again a warning is given. To fix this problem, either install an application which edits this file type, or register an existing application for this file type through Windows Explorer (Select View, Folder Options, File Types and edit or add the file type in question.)

Cannot display a document in Notes from Attach.
After navigating to a particular document in the Main View, or selecting an attachment in the History List, clicking the "Display In Notes" button should take you directly there in Notes. There can be several reasons why this operation might fail. First, the server and database in question must be available. Second, the document must still exist in the database. Finally, the database must be able to be opened in the Notes Workspace with no user interaction needed. Some databases require the user to click through an About screen or an initialization option. If this is the case, the Display In Notes option in Attach will only work if this database is already open in the workspace.

Cannot add or save a file in a document.
In order to add files or save a file to a document, you must have Edit Access to the document. Attach will display all documents that you have Read Access to and you may be misled into believing that you also have Edit Access while you do not.

Cannot create a new document.
The first reason why you might not be able to create a new document is that you lack sufficient access to the database for that operation. If you have access, you must be in the Main View Tab inside a database view at the category or document level. Even at this level, the system administrator must have defined a Document Profile to allow document creation. Then depending on the conditions in the document profile, (a response document needs the correct type of parent document selected for example) you may still not be allowed to create a new document. Check with your system administrator to learn the rules for document creation.

Attach does not open when using File – Open or File – Save in Windows application.
Not all Windows applications use the Open Document Management API and the ones that do not cannot trigger Attach when using File-Open or File-Save. Check the list below for the applications which do follow this standard. If you are having this problem with one of the applications that is on the list, check the Preferences Tab to make sure that the application appears and that it's checkbox is set and also that the Default checkbox is set. If your application does not appear, check the registered file types for this applications files. You should be able to double click one of this application's files in Windows Explorer and have the application launch. Attach relies on this mechanism to find these applications, and if your installation is not standard (perhaps network based) it's possible that the file type registration for your application is not correct.

Cannot unlock a file that was opened for ODMA.
When an ODMA compliant application opens a file through Attach, the file is locked until that application closes the file. If for any reason the file close did not occur, the file is left in a locked state. It will remain locked until either the application finishes the file close operation, or Attach exits completely and is restarted.

Working with Windows Application Software

There are two techniques of working with Attach in Windows Applications, one for ODMA-compliant applications and one for all others. Check the list below for all the ODMA-compliant applications supported by Attach.

ODMA-Compliant Applications

- Microsoft Word 97 & 2000
- Microsoft PowerPoint 97 & 2000
- Microsoft Excel 97 & 2000 (made compliant with additional menu)
- Microsoft Visio 2000
- Corel WordPerfect 8 & 9 (2000)
- Corel Quattro Pro 8 & 9 (2000)
- Corel Presentations 8 & 9 (2000)
- Lotus Word Pro 9 and above (Millennium)
- Lotus Freelance Graphics 9 and above (Millennium)
- Adobe Capture 3.0 and above
- ScanSoft PaperPort

All other Windows applications must use the second technique explained below.

ODMA-Compliant Technique

To edit or read existing file attachments

Open the application normally from the desktop or the Start Menu. When File Open is selected, Attach will be presented for file selection instead of the normal operating system dialog. The Explorer button in attach will revert to the normal file selection if need be. Navigate through attach to the desired attachment, highlight and click Edit or Read. Edit and save normally since all updates are made to the attachment in the database automatically.

Alternatively, open Attach first and navigate to the desired attachment. Highlight the attachment, click Edit or Read from either the Main View Tab or the History Tab and the application will launch. Edit and save normally since all updates are made to the attachment in the database automatically

Alternatively, in a database that has the (OpenFilesUsingAttach) agent installed, navigate to the document containing the desired attachment and run the agent from the actions menu or from a button (depends on design). An attach-like dialog listing the attachments will appear. Select the attachment, click Edit or Read, and the application will launch. Edit and save normally since all updates are made to the attachment in the database automatically

To create a new attachment or a new document or both

Create the new content in your application and select File-SaveAs. Attach will be presented instead of the normal operating system dialog with the New File name field active. To create a new attachment to an existing document, navigate to the desired document, type in a file name, and click Save.

Alternatively, click Create New to go to the New Document panel. Select a document profile, type in a new file name, type in a document name or title (depends on profile) and click Save. This will create both a new document and a new attachment at the current location. (Note that you may create a new document any time it's allowed by using Attach from outside your windows application.)

In either case, you may continue to edit and save and the updates will be automatically made to the database.

Technique for All Other Applications

To edit or read existing attachments

Open Attach first and navigate to the desired attachment. Highlight the attachment, click Edit or Read from either the Main View Tab or the History Tab and the application will launch. Edit and save normally and then trigger an Attach update (use Ctrl+Alt+U or right click the Attach icon in the system tray and select "Update All") This can be done while in your application or after you have finished editing the attachment.

Alternatively, in a database that has the (OpenFilesUsingAttach) agent installed, navigate to the document containing the desired attachment and run the agent from the actions menu or from a button (depends on design). An attach-like dialog listing the attachments will appear. Select the attachment, click Edit or Read, and the application will launch. Edit, save, and trigger an Attach update as described above.

To create a new attachment or a new document or both

Create the new content in your application, select File-SaveAs, and create the new file on the hard drive in the normal way. Open Attach, navigate to the desired document, and click Add Files. Find the newly created file and select it. This will create a new attachment to this document.

Alternatively, after creating and saving your new file, open Attach and click Create New to go to the New Document panel. Select a document profile, type in a document name or title (depends on profile) and then click Add Files. Find the newly created file and select it. Once you click OK on the Create New panel, both a new document and a new attachment are created at the current location.

Known Issues

Display in Notes feature can throw spurious errors in 4.5, 4.6

If Notes Client Version 4.5 or 4.6 is not currently running and the Display-In-Notes feature of Attach is exercised, the Notes Client will activate and open to the correct document. However, along the way it will throw some spurious error messages. If the client is already open no error messages are thrown.

Display in Notes fails when database opens needing user interaction

If a database requires the user to click through a dialog of any kind upon opening, a "Cannot execute specified command" error will occur when attempting to display a document in this database from Attach. If such a database is already open and past the point of needing user interaction, the Display-In-Notes will work correctly.

Multiple instances of application occur when launching files from Attach

When launching multiple files from Attach Main View, History, or from the Notes Client using the Attach dialog, multiple instances of applications may occur. This is completely dependent on the application and cannot be controlled by Attach. Some applications will recognize the existing copy of the application and use it and some will not. For example, MS Word 97 always launches a new application, PowerPoint 2000 always just opens a new window in the current application frame, and MS Word 2000 opens a new independent window, but will give a menu item to switch between windows.

Excel does not bring up Attach when I select File-Open

Excel is not ODMA compliant out of the box. It becomes compliant with the addition of the Add-In supplied during the Attach installation. To use this Add-In and thereby use Attach in an ODMA-Compliant way, you must select the Open command under the Aviator Attach item in the file menu. Further, you must use the Save, Save-As, and Close menu items found here as well.

Microsoft Visio 2000 files do not launch properly in ODMA

Launching Visio 2000 files from Attach does not work exactly the same way as Word or PowerPoint. When files are launched this way from Attach, they will not automatically update back to the Notes database. The file must be updated manually by selecting it in the Attach History list, hitting Ctrl-Alt-U at any time, or selecting Update All from the menu when right clicking the Attach icon in the system tray. When opening a file from within Visio using Attach, the updates will be automatic.