

## Using the DocElite Web Interface

### Document Number Prefixes - An Administrator's Perspective

Design teams and other document originators sometimes take the trouble to develop document numbering systems that can help a well informed user narrow down the lists of documents that DocElite presents.

The presentation, or otherwise, of Document Number Prefixes is controlled in two places.

For project wide settings, the defaults, the administrator must access the 'DocElite Presentation Details' form from the 'Other Utilities' menu.



There are two potential settings, located about 2/3rds the way down the form.

The first is the No. Documents to Present before offering 'prefix' option. This is normally 75 – but can be set to any number the administrator chooses. Too low a number will probably result in the option being presented to users too often – even when there are just a few documents to display. Too large a number will prevent the option being displayed at all – if this is what you want, perhaps you should enter 999 in this field.

The second setting is the Length of prefix to use. By default this is set to four characters, but it is perfectly possible to use an length of eight or ten characters.

#### Document Number

- 1443(G20)1234/001
- 1443(G20)1234/002
- 1443(G20)1234/003
- 1443(G21)1234/001
- 1443(G21)1234/002
- 1443(G21)1234/003
- 1443(G45)1234/001
- 1443(G46)1234/001
- 1443(G46)1234/002

If you look at the list of documents above, you can see they all start with **1443**, which would render a four character prefix pretty

useless (as there would only be one, and all the documents would be within it).

In this case it looks like a prefix length of eight or nine characters would work quite well as it would encompass everything up to (and including for nine character prefixes) the closing parenthesis.

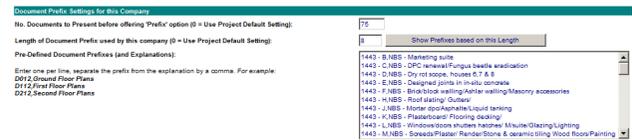
Thus the likely list of prefixes would look like this (for a nine character prefix):

- 1443(G20)
- 1443(G21)
- 1443(G45)
- 1443(G46)

When the settings have been entered, the administrator can save them using the 'Save Details' button at the bottom of the form.

The other place that Document Number Prefixes is controlled in is the 'Project Directory' – on a company by company basis.

To access these settings, the administrator must access the 'Project Directory' then select the company of interest.



The settings in question are quite near the bottom of the form. In this area, there are three things that can be set for a given document originator.

The first is the No. Documents to Present before offering 'prefix' option. If this is set to zero, the project default will be adopted, otherwise the administrator can choose a number to suit.

The second setting is the Length of prefix to use. Again, using zero will result in the project default being adopted. There is a button to the right of the number:



Clicking on this will result in DocElite scanning any documents received from the originator and applying the currently entered prefix length to them – then presenting the user with a list of the actual prefixes like the one below:

Prefix	Description / Explanation
1443 - B	NBS - Marketing suite
1443 - C	NBS - DPC renewal/Fungus beetle eradication
1443 - D	NBS - Dry rot scope, houses 6,7 & 8
1443 - E	NBS - Designed joints in in-situ concrete

In the example, there is a 'Description / Explanation' column which may or may not be completed by DocElite – dependant on the third setting called 'Pre-Defined Document Prefixes (and Explanations):'

This is a large text box, into which the administrator can type each of the prefixes which have a meaningful description or explanation followed by a comma and then the description itself (one prefix per line).



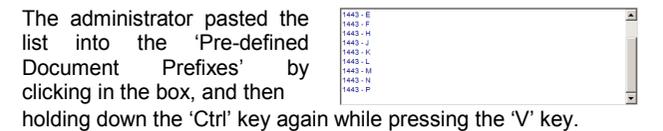
In the example shown above, the administrator actual cut and pasted the prefixes from the list presented when they clicked on the 'Show Prefixes based on this Length' button, then typed in the descriptions as they found them (separating the prefix from the description with a comma)

The administrator can experiment with various prefix lengths, until the list presented is satisfactory.

- Prefix
- 1443 - B
- 1443 - C
- 1443 - D
- 1443 - E
- 1443 - F
- 1443 - G
- 1443 - H
- 1443 - I
- 1443 - J
- 1443 - K
- 1443 - L
- 1443 - M
- 1443 - N
- 1443 - O
- 1443 - P
- 1443 - Q
- 1443 - R
- 1443 - S
- 1443 - T
- 1443 - U
- 1443 - V
- 1443 - W
- 1443 - X
- 1443 - Y
- 1443 - Z

To cut and paste the list, the administrator placed their mouse pointer just before the first one, then held down the left hand button and 'dragged' the pointer over the prefixes of interest.

As they did so, the items became highlighted as shown – when the administrator was ready, they released the mouse button and held down the 'Ctrl' key while pressing the 'C' key.



When the administrator is happy with the results, they can click on the 'Save Company/Individual Details' button to save them.

