



# **OPTI-D**

**for MindManager®**

## **OPTi-Docs™**

For Mindjet® MindManager®

Document Management add-in for Mindjet MindManager  
versions 6, 7, 8 and 9.

**Olympic Limited**  
**12/1/2010**

## Introduction

OPTi-Docs™ is a Document Management add-in for Mindjet® MindManager® that is compatible with versions Pro 6, Pro 7, 8 and 9. The add-in is intended to be used with localised documents that are stored on a Windows based storage platform either local to the user, i.e. on their PC or stored on an accessible shared drive.

The OPTi-Docs™ user can benefit from the ability to check documents out for editing, taking them out of circulation while the document changes are made. When checking the document back in OPTi-Docs™ stores a copy of the previous revision in a Document History Folder and increments the revision of the document. Documents can be added or checked in as Draft or Approved documents and visual indicators on the map topics and in the OPTi-Docs™ task pane within MindManager® clearly show the OPTi-Docs™ user the document status at all times.

A simple Change Log allows users to see the change history of selected documents within MindManager® and users have quick access to the checked out documents and the revisions in storage as they use OPTi-Docs™.

When documents are no longer required, OPTi-Docs™ allows the user to pull the revision history into the current map as either hyperlinked documents that remain in the Document History Folder or as attachments embedded in the map. Ideal for archiving closed projects/proposals quickly and cleanly while ensuring you maintain your history.

OPTi-Docs™ brings simple, effective management of local documents to MindManager® users and is ideal for managers of projects, quality management systems, human resources and any role where document change history is paramount.

## Installation

Successful installation of OPTi-Docs™ will require the latest build of any of the MindManager versions listed below. The minimum build numbers are as follows:

- MindManager Pro 6 Build 6.2.399
- MindManager Pro 7 Build 7.2.374
- MindManager 8 Build 8.2.319
- MindManager 9 Build 9.1.157

Once installed, you will see the OPTi-Docs™ Task Pane tab which has been added to the MindManager Task Panes collection. If you do not see the Task Pane then please check that the add-in is installed and enabled in the MindManager settings under Add-ins.

## Some Caveats before you start

There are a couple of things to bear in mind when using the OPTi-Docs™ add-in.

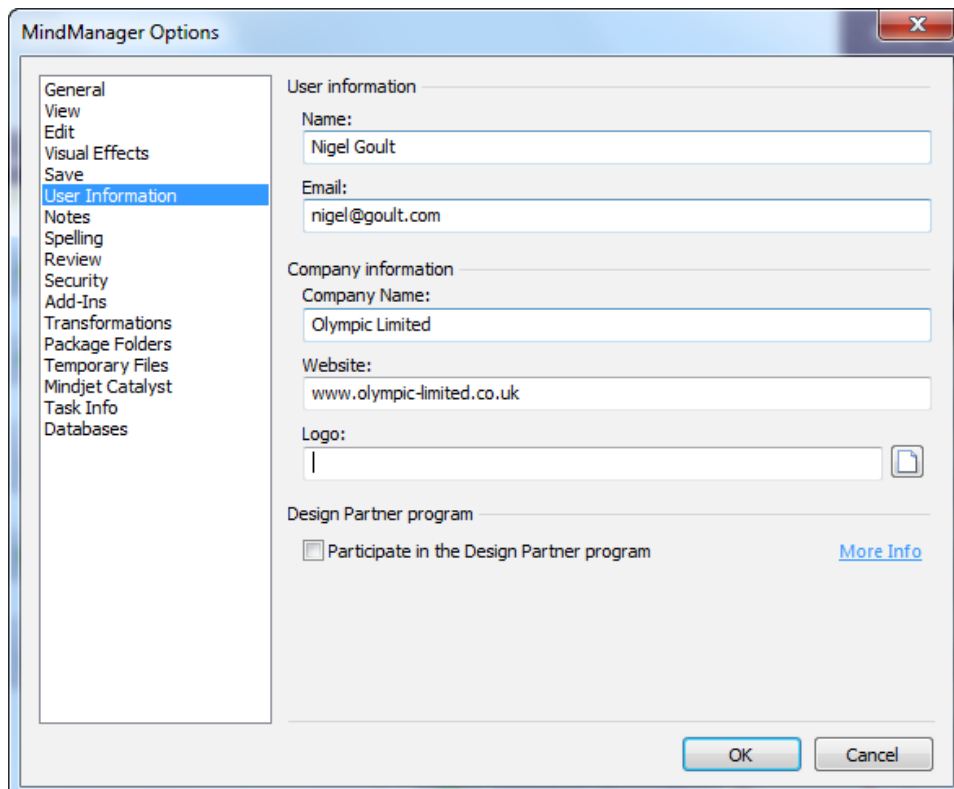
As previously mentioned OPTi-Docs™ works with local documents, it does **NOT** work with documents located on web servers using web urls with prefixes such as http, https, ftp etc. Documents must be accessible on a standard Windows file path.

You must also have **FULL** user permissions on any file you wish to bring into the system and also the location of the Document History Folder for the OPTi-Docs™ to work correctly. If you have reduced permissions on either of these locations then you may encounter problems.

## User Name & Email

OPTi-Docs™ uses the MindManager User Information values for Name and Email which are stored under the MindManager settings. Before starting to use OPTi-Docs™ make sure you have completed these settings to get the most from the application.

To check/change these you will need to access MindManager Options and then select User Information to access the fields as shown below:











## The Interface

The OPTi-Docs™ user interface is made up of three components located within a single OPTi-Docs™ Task Pane.

There is the Command Menu located across the top of the task pane, the Settings panel located just below and the Document Details panel.

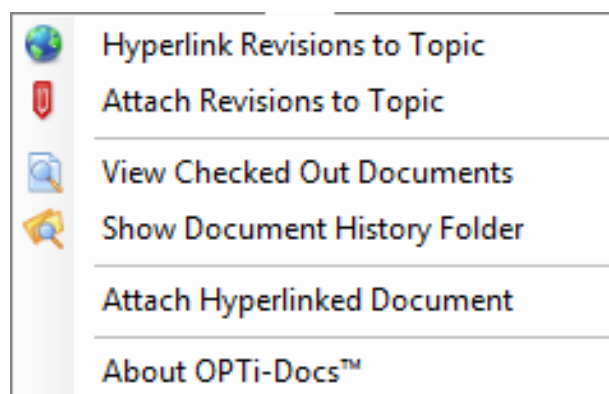


The Command Menu holds the following indicators and commands:

-  **Connection Status of Selected File:** This shows the user whether the document on the selected topic is actually accessible.
-  **Add a New Controlled Document:** Adds a new user selected document into the system or an existing linked document if used on a topic that already containing one.
-  **Remove a Controlled Document:** Removes a document from the system. User has option of deleting/keeping the document history and revisions.
-  **Check Out Controlled Document:** Checks the selected document out and places it in edit mode for the user to make changes.
-  **Check In Controlled Document:** Checks in a changed document updates the document revision and stores a copy of the previous revision.
-  **Edit a Checked Out Document:** Opens a checked out document in its native application on the users system.
-  **Actions/Tools Menu:** Gives access to additional functions and application information.
-  **OPTi-Docs™ Guide:** Provides access to this document within the application.

Depending on the status of the selected topic, only certain commands will be available at certain times.

The Action/Tools Menu contains the following drop down menu options:





**Hyperlink Revisions to Topic:** Creates a new Sub-topic and hyperlinks all current revisions from the Document History Folder to the topic including a txt file with the Change Log contents.



**Attach Revisions to Topic:** Provides the same feature as the Hyperlink Revisions to Topic command but uses map attachments therefore embedding the files with the map.



**View Checked Out Document:** Opens the Checked Out Documents Folder allowing the user to see which documents are currently under check out within the system.



**Show Document History Folder:** Opens the Document History Folder allowing the user to see which documents are controlled by the system and also provides access to previous revisions.

**Attach Hyperlinked Document:** A generic utility to convert a standard hyperlinked document into an attachment on a topic.

**About OPTi-Docs™:** Application version information and check for updates functionality.

The commands and features mentioned above are explained in more detail later in this document under the relevant sections.

The other two areas of the OPTi-Docs™ interface are contained within a MindManager Task Pane called OPTi-Docs™. Once the application is installed you will see the tab for this Task Pane located towards the bottom of the existing MindManager Task Pane Tabs.

The OPTi-Docs™ Task Pane and its contents are shown below:

Cont....

## The OPTi-Docs™ Task Pane:

The screenshot shows the OPTi-Docs™ Document Management interface. At the top, a 'Command Menu' points to the toolbar. The 'Settings' section includes 'Document History Folder Location' (C:\Users\Olympic\My Controlled Docs), 'Document History Folder Usage' (a green progress bar), and 'Storage Limit: 150 Mbytes'. The 'Document Details' section shows 'Filename: 12.4.4.mmap', 'Last Modified: 26/11/2010 09:13:47', 'Current Revision: 2', and 'Status: Approved' by Nigel Goult. A 'Status' icon (a green circle with a white 'D') is also present. The 'Change Log' section lists four entries with timestamps and descriptions of document actions. Callouts identify these elements: 'Document History Folder Location', 'The selected document details', 'The Status of the currently selected document', 'Document History Folder used storage gauge & settings', and 'The Change Log displaying history of selected document'.

Command Menu

Document History Folder Location

Document History Folder used storage gauge & settings

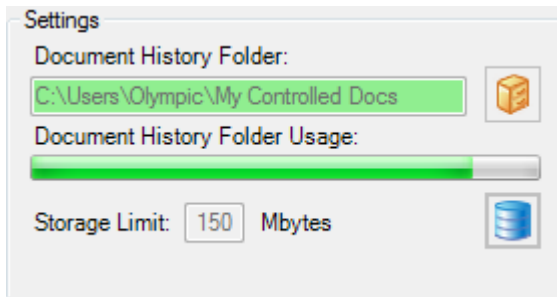
The selected document details

The Status of the currently selected document

The Change Log displaying history of selected document

## The Settings Panel

The Settings Panel contains information on the Document History Folder and allows the user to edit the size in Mbytes that the folder should monitor as the application is used to gauge how much storage space is being used by the system. This provides users with limited storage to see when action is required to either archive or remove historic documents that are perhaps no longer under OPTi-Docs™ control.



The Document History Folder field displays the Path to the current folder assigned to store the document revisions and checked out documents. By default this folder is set to one that is generated when the user installs OPTi-Docs™ and this is located within an OPTi-Docs folder within the user's local settings.

This can be changed to a user defined folder if desired. If the folder is changed it offers users several advantages over opting for the default. First, when a document is added to the system its Document History Folder location is recorded. This means that if another user selects the document under control and they **DO NOT** have access to and are therefore not connected to the Document History Folder for the file they will not be able to perform any actions on the document. They will only be able to see the document Status, (Checked Out, Draft or Approved), and will not be able to check the document out/in, edit the document, open the Document History Folder or open the Checked Out Documents Folder.



This effectively protects the document to some extent from users who are not authorised to amend documents. When this occurs the Status icon located in the Task Pane will have a black cross through it indicating that the selected document cannot be manipulated by the user.

To change the Document History Folder location simply click the icon and then select the new top level location you would like to store the documents. To change the size of the Storage Indicator click the icon to activate the field and then type in your new value. Click the Disk icon to save the settings and update the indicator.

## The Document Details Panel




This Panel displays the details for the controlled document of the selected map topic. The information displayed is:

The **Filename** – the full file name for the current document including file extension

The **Last Modified** date and time – shows the date and time the document was last changed

The **Current Revision** – displays the current revision of the selected document

The **Status** – shows the current status of the document in text and visually by the status indicator. The three possible states for the document status are:

Draft	Approved	Checked Out
		

As mentioned previously, a Status icon with a black cross indicates a file the user is unable to manipulate.

Finally the **Change Log** – shows the check out and check in dates with comments where provided by the author.

When a document is checked out a blue link label will display next to the Status box which, if clicked, will open the default email client on the users system and generate a pre-populated email addressed to the current owner of the document requesting an update on the status of the document.

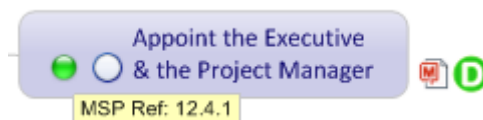
As a document is revised, the Change Log window will display the history of the changes with the most recent action at the top. This Change Log will scroll down as it populates enabling the user to see at a glance what changes have taken place for any selected document.

## Adding a controlled document to your map

You add a controlled document to your map and into the system by running through the following steps:

1. Select the topic within the map you want the controlled document to be linked to. Alternatively you can select a Topic that already contains a hyperlinked document.
2. With the topic selected click the Add Controlled Document command from the Command Menu.
3. If this is a new document the File Browser Dialog will open allowing you to navigate to and select the file you wish to place under control. If you have selected a Topic that already contains a hyperlinked document you will be notified that this existing document is about to be placed under control.
4. Once you have selected the file click the Open command if in the Folder Browser Dialog or OK if using an existing linked document.
5. If everything is OK and the file qualifies for adding into the system, you will be asked to set the document's initial status. Draft is selected by default though you can change this to Approved if desired. Click Ok to continue.
6. If all goes well your document will be added into the system and the Task Pane will refresh showing the properties of the new document.


The Topic will now show an icon displaying the controlled document's status.

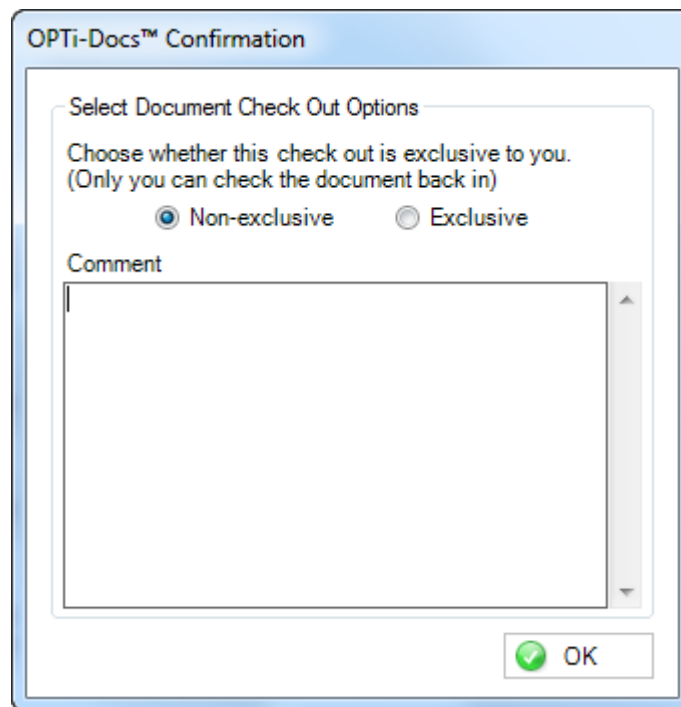


Congratulations! That's your first document added.



## Checking a document out for editing

Once you have some documents in the system you can then try checking them out. To do this, follow the steps below:

1. Select the topic that contains the controlled document you wish to check out.
2. Once selected the Check-out Controlled Document command will become active allowing you to click it. 
3. You will be presented with a dialog as shown below:




You can enter a comment which will show in the Change Log window (optional) and you can choose whether the check-out should be exclusive or not. Basically if you set the check-out to Exclusive then only you will be able to edit the document and check it back in to the system. If the check-out is Non-exclusive any other OPTi-Docs™ user with access to the Document History Folder for the checked-out document will be able to edit and check it back in.

4. The Task Pane will refresh showing the changed status of the document and the Edit Controlled Document command will become active. 
5. Note that the hyperlink to the document will become inactive (broken) while a document is checked out thereby removing it from circulation. 

You can now edit the checked out document.

## Editing checked out document

Once you have a document in a checked out state you can then edit it using the Edit Checked out Document command from the Command Menu. 

Note: You will only be able to edit a checked-out document if one of the following conditions is true:


- The checked-out document is not Exclusive to the person who checked it out
- The checked-out document is Exclusive but you are the person it is exclusive to

This command will essentially open the selected document in its native application, so as long as you have an application installed on your system that can handle the document it will open in writable format within that application.

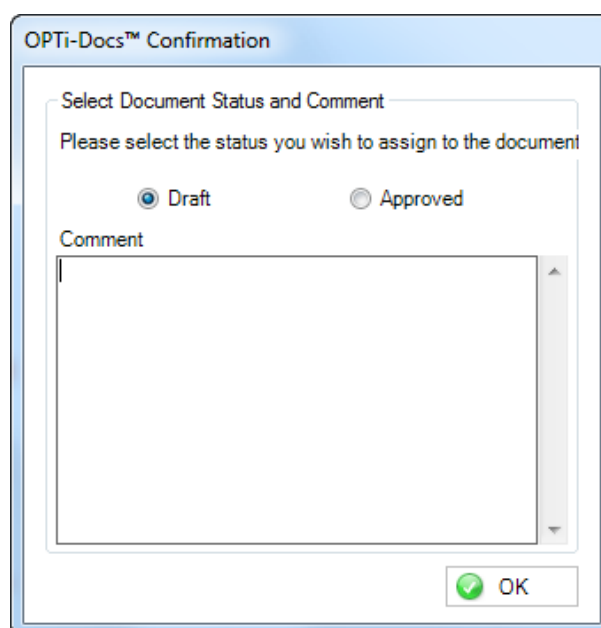
Simply make your changes and then save the document **WITHOUT** renaming it. This is very important as OPTi-Docs™ works with documents from their original name when added to the system. Changing the name of a document while under control will cause problems.

## Checking an edited document in

When you have finished making amendments to your document it is time to check it back into the system so it is placed back under control. Once again, follow the steps below:

1. Select the topic containing the checked out document.
2. Click the Check in Controlled Document command which should now be active. 

You will be presented with the dialog shown below:



The image shows a dialog box titled "OPTi-Docs™ Confirmation". Inside the dialog, there is a section titled "Select Document Status and Comment" with the instruction "Please select the status you wish to assign to the document". Below this, there are two radio button options: "Draft" (which is selected) and "Approved". Underneath the radio buttons is a text area labeled "Comment" with a vertical scrollbar. At the bottom right of the dialog is an "OK" button with a green checkmark icon.

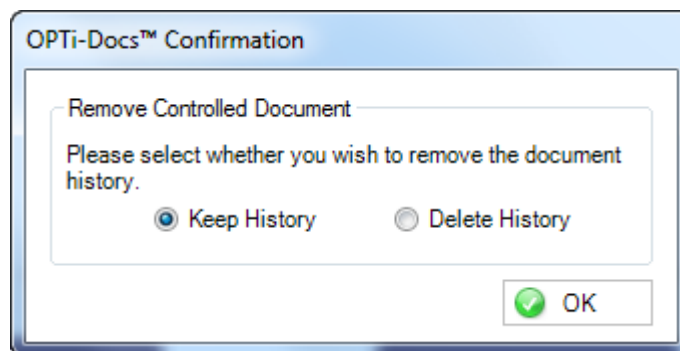
3. You will be asked to choose the status of the document, either Draft (default) or Approved. You will also have the chance to enter comments (optional) about the change. These are displayed in the Change Log window on the Task Pane.
4. When a document is checked in the Task Pane will update to show the new status of the document.

## Removing a controlled document

When the time comes that you no longer need a document to be under control you can remove it from the system to save storage space and generally keep the system clean.

Follow the steps below to remove a document:

1. Select the topic containing the document you wish to remove
2. Click the Remove Controlled Document command from the Command Menu
3. You will then be asked whether you wish to keep or remove the documents revisions and history.




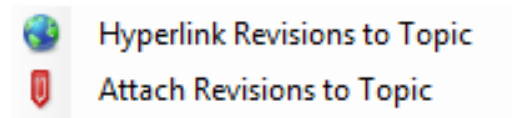
Selecting to keep the history will remove the document from control but will keep the revisions within the Document History Folder. If you select to delete the history all copies other than the current copy will be removed from the Document History Folder.

4. When a document is removed only the controlled document link is removed. The original (last updated) version of the document remains in its original location and hyperlinked to the topic.

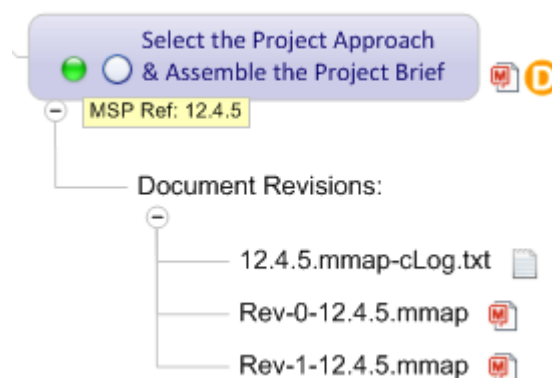
A revision log file is created documenting the Change Log details. This is stored with the revisions in the Document History Folder.

## Adding the document history to your map

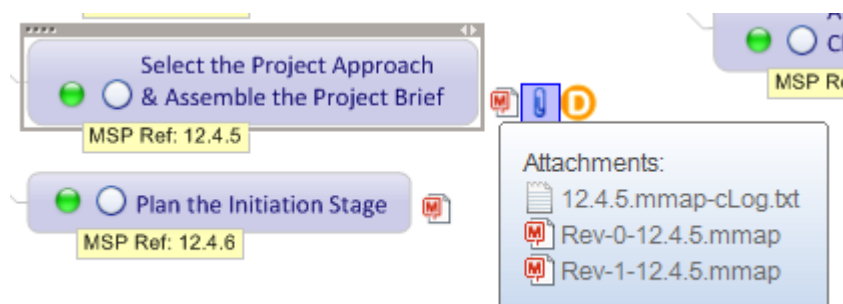
If you need access to the document revisions that have been generated over time or give other users visibility you can use one of the two features located on the Action/Tools command of the Command Menu: 



The Hyperlink Revisions to Topic will add a Document Revision Sub-topic to the currently selected controlled document topic and create a Sub-topic containing a hyperlink for each revision of the document created up to the current date.



The Attach Revisions to Topic will do the same task by adding the revisions up to the current date to the topic. This option enables you to send the map to a user who does not use the add-in and give them access to the revisions.

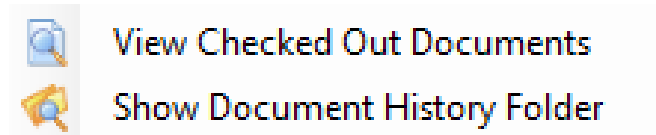


For clarification, hyperlinks simply link to the revisions which reside within the Document History folder, attachments, on the other hand, are embedded into the map which means they are available to users who do not have access to the Document History folder.

## Viewing controlled and checked out documents

The Action/Tools Command provides a quick way to view the documents contained in the Document History Folder or the Checked Out Document Folder at any given time.

Simply select either the Show Checked Out Documents or Show Document History Folder commands to open those folders directly to see their contents.



This is useful if you simply wish to see what documents are currently checked-out and being worked on or which documents are currently being controlled by the OPTi-Docs™ system.

## Known Issues

None at the moment but its early days ;-)

If you do find an issue then please email details to [nigel.goult@olympic-limited.co.uk](mailto:nigel.goult@olympic-limited.co.uk)