USER GUIDE

Version 2026

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About this manual

Typographical Conventions

This manual distinguishes between different types of information using the following conventions:

- Terms taken from the interface itself, such as commands, appear in **bold**.
- Keys appear in small caps, for example: “Press the SHIFT key.”
- Numbered lists mean there is a procedure to follow.
- When the conjunction -or- appears next to a paragraph, it means there is the choice of another procedure for carrying out a given task.
- When a menu command contains submenus, the menu name followed by the command to select appear in bold. Thus, “Go to **File > Open**” means choose the **File** menu, then choose the **Open** command.

This symbol highlights important information on

how a particular command or procedure works.

Following this symbol, you will find hints and tips for optimizing tasks, speeding up commands, and so on.

CHAPTER 1

Introduction

Welcome!

Congratulations! You have just acquired a complete and secure product solution to store barcode labels, trace the history of design modifications and print events, manage label versions, and set up approval workflows.

LABEL ARCHIVE Server and Client applications run on your company's network in conjunction with CODESOFT, and an optional Web module can also be used to provide limited access to external users.

The scalability of this product allows you to also install all components on your PC, and work in standalone mode like a simple desktop application.

LABEL ARCHIVE Modules

The LABEL ARCHIVE package contains several modules: LABEL ARCHIVE Server, LABEL ARCHIVE Client and LABEL ARCHIVE Web module.

LABEL ARCHIVE Server

The LABEL ARCHIVE Server is a centralized database driven through a Windows® service. It establishes the connection with the different data sources, and processes all client requests: Check In, Check Out, Print History, Document Approval, etc. The Server also uses two subsystems to operate: UMSS (User Management System) and MSGS (Messaging System). UMSS and MSGS respectively perform user configuration and messaging functions.

LABEL ARCHIVE Client

The LABEL ARCHIVE Client is an add-in for CODESOFT. When the user invokes LABEL ARCHIVE from CODESOFT, this add-in connects to the Server and checks user rights. If the connection is successful then the user is allowed to perform different document management actions such as Check In and Check Out, and is given access to the centralized label storage database. The actions allowed depend upon the security settings and permissions that have been granted to the group to which the user belongs.

LABEL ARCHIVE Web Module

The LABEL ARCHIVE Web module is a Web application accessible from any Web browser on the Internet or an intranet. Upon successful user Web authentication, this module establishes a connection with LABEL ARCHIVE Server and gives access to limited functions including viewing documents and history records, and approving documents before delivery in production.

How It Works

LABEL ARCHIVE Server typically runs on a server machine. On the internal network, any client station that has CODESOFT and the LABEL ARCHIVE Client add-in can interact with the server at any time. All LABEL ARCHIVE components can also be installed on a single PC. In that case the system works in standalone mode, like a simple desktop application.

Product Description

LABEL ARCHIVE is designed to run on any computer running a supported Windows® operating system.

Your product includes the following components:

- DVD
- complete documentation
- a license agreement
- A Serial Number and password, which allows you to activate the license of LABEL ARCHIVE Server on your server machine

Note

If you have not purchased a license yet, you can still use LABEL ARCHIVE for 30 days. During this trial period you can install as many clients as you want, and the system will accept up to three simultaneous connections to the server. After the trial period you will need to purchase a license. All the work that was done during the trial period is kept in the database, and you can continue it after activation without any disruption.

CHAPTER 2

Using LABEL ARCHIVE

Connecting to LABEL ARCHIVE

To connect to **LABEL ARCHIVE**:

Step 1 Open CODESOFT and click **File > LABEL ARCHIVE**.

A submenu of additional commands appears.

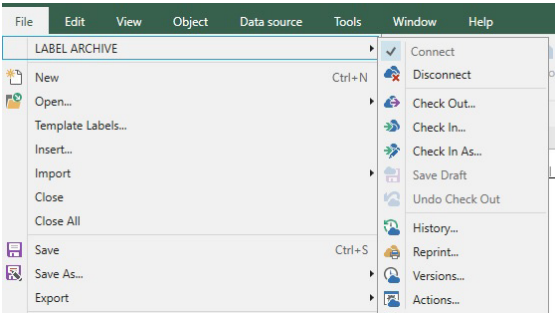

Figure 1 LABEL ARCHIVE Commands in CODESOFT

Step 2 In the **File > LABEL ARCHIVE** submenu, click **Connect**. A connection dialog box is displayed.

Step 3 Enter the user and password that have been defined for LABEL ARCHIVE.

Note

If your user is configured to use Windows Active Directory, you will be automatically logged in when you select Connect.

Once successfully authenticated, the menu items that the user's profile and settings are allowed to use will be enabled.

User Actions List

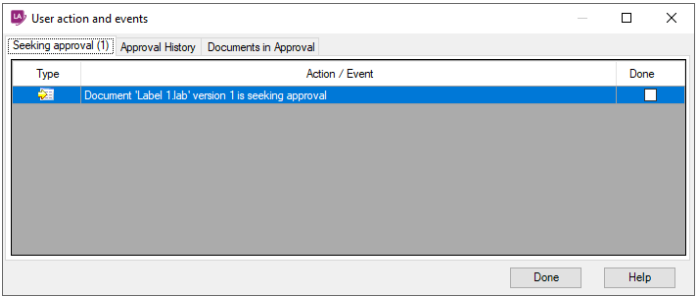

Figure 2 User Actions and Events list

When connecting to LABEL ARCHIVE Server, the system checks in a specific actions list and determines whether there are action entries present for that user. If actions are available, they are displayed in this window.

If you double-click on a given action, different processes may be run depending on the action type:

- **Info Message** — Information type messages are simply checked as **Done**.
- **Seeking Approval** — If the actions list contains a message about a document waiting for approval, you can click on the message to display the Approval window. See **Approval Request** for more information.
- **Document Approved** — This type of notification message is simply checked as **Done**. The message contains the document and the name of the person who has approved it.
- **Approval Denied** — In this type of message, the system displays a dialog box that includes the following:
  - Document details, such as category, document name, and version
  - Date when approval process was started
  - Information about the user who initiated the approval
  - Person who denied the approval
  - Comment about the denial

Messages that are checked as **Done** no longer appear in the window. You can remove the check mark by clicking on the check box in the row.

Version Control

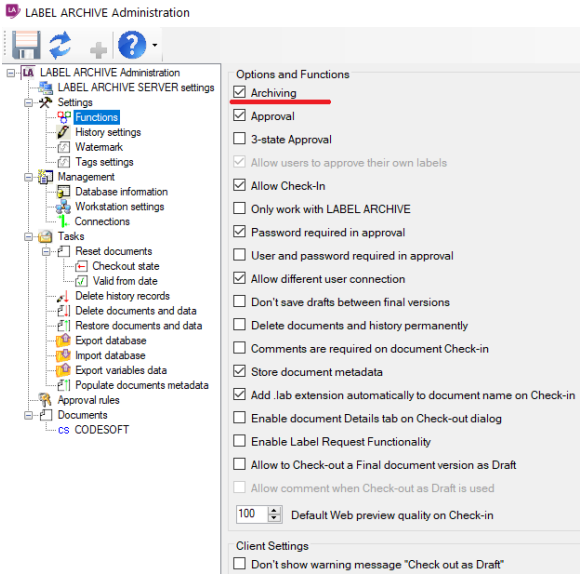

Figure 3 Version Control

To enable version control, launch LABEL ARCHIVE Server and browse to **Console Root** > **LABEL ARCHIVE Server** > **Settings** > **Functions** in the navigation tree.

Enable the **Archiving** setting. (This setting is enabled by default.)

There are two options for version control.

The default option is to increase the label's version number every time the label is checked in. This option stores all drafts of the label as a different version. When the draft is checked in during the approval process, the version number will increase.

The second option for version control only increases the version number once per approved label (Final version). All drafts of the label have the same version number. When the draft is checked in during the approval process, the version number does not change. To enable this option, select the **Don't save drafts between final versions** option in the Options and Functions list.

Check Out

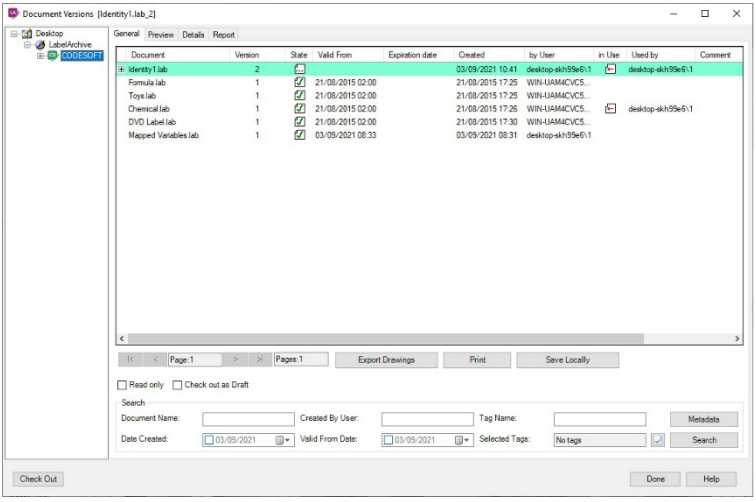

Figure 4 Check Out window

To open the **Check Out** window, click **File > LABEL ARCHIVE > Check Out.**

This window allows checking out a document from the LABEL ARCHIVE Server database. Once a document is checked out, other users will have restricted access, depending upon the category settings.

The left tree pane shows the categories (folders) into which documents are classified. Category settings allow defining different management rules for each category. See the *LABEL ARCHIVE Administrator's Guide* for more information.

When you click on a category in the tree, sub-categories are expanded.

When the **Read Only** check box is enabled, the selected label will open in read-only mode. The user will not be able to make any modifications to the label. When a label is checked out with the **Read Only** check box enabled, multiple users can open the label (even when the **Lock at Check Out** option is enabled in the LABEL ARCHIVE Server Administration settings).

The search pane allows you to enter search criteria to find the label you are looking for. The search supports the wild card character * at both the beginning and end of the search string so the users can search for part of the document name.

The search is done on all sub-folders and pages. You can search using the following fields: **Document Name**, **Valid From Date**, **Date Created**, **Created By User, Tags and Metadata**.

To search by Document Name enter a document name or part of a document name with the wild card character and click the **Search** button.

To search by user, enter a username or part of a username with the wild card character and click the **Search** button. Please note that the workstation name is prefixed to the username. If you don't know the workstation name, add a wild card character to the beginning of the username.

To search by **Date Created** or **Valid From Date**, select the check box and select a date from the calendar. The calendar can be accessed by clicking on the drop down arrow. Click the **Search** button to view the results.

When you click on a column in the grid, the results will be sorted by that column. The arrow that displays indicates if the results are sorted in increasing or decreasing order.

Export drawing shows label details report screen. User can export Document Objects Report right to the file system (PDF, Excel, Word).

Print dublicates CODESOFT printing functionality.

Save Locally stores selected label on disk drive.

The **OK** button opens the selected document in CODESOFT.

The **Cancel** button closes the window without any further action.

The **Help** button opens online help for the current window or tab.

General Tab

To access the Check Out window's **General** tab:

Step 1 Go to **File > LABEL ARCHIVE > Check Out**.

Step 2 In the source tree, select the category containing the desired document.

The **General** tab shows detailed information on the selected document.

This tab shows the list of documents which are stored in the selected category.

By default, document versions in the list are collapsed. When expanding a document to view the different versions of that document, all versions are shown. The most recent version is shown on the top. When selecting a document version from the list, the other tabs (**Preview** tab**, Report** tab) are enabled.

The following column headings are displayed on the **General** tab:

- **First Column** An expand/collapse button is displayed when the document has several versions.
- **Document** The document name.
- **Version** The document version number.
- **State** The document state. Possible states are:

  Final: Approved for production

  In Approval: Seeking approval, after design

  Draft: Under design
- **Created** The date when the document version was created.
- **Valid From** Start date of document validity for printing.
- **Expiration Date** Expiration date of document validity.

- **Created** The date when the document version was created.
- **By User** The name of the user who created the document.
- **In Use** Displays one of the following icons to indicate the usage status:

  Label is checked out by a user

  Label is checked in by a user
- **Used By** The name of the user who has checked the document.
- **Comment** Lists any comments associated with the document.

Note

Only one user can check out a given document. Once a document is checked out, the other users have restricted access to it. The level of restriction is determined at category level, by the Lock at check out setting. To disable the lock at check out, launch LABEL ARCHIVE Server and select Console Root > LABEL ARCHIVE Server > Documents > CODESOFT from the navigation tree and disable the Lock at Check Out option.

Preview Tab

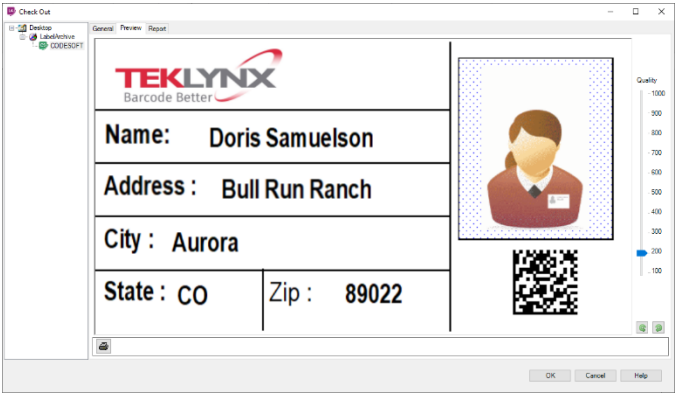

Figure 5 Preview tab in Check Out

Step 1 Go to **File > LABEL ARCHIVE > Check Out**.

Step 2 On the **General** tab, select the document version that you want to preview.

Step 3 Click the **Preview** tab.

The **Preview** tab shows a preview image of the document selected in the **General** tab.

When this tab is activated, the preview is generated for the selected document version. It's possible to adjust image quality by using slider.

Click to print the document preview.

Report Tab

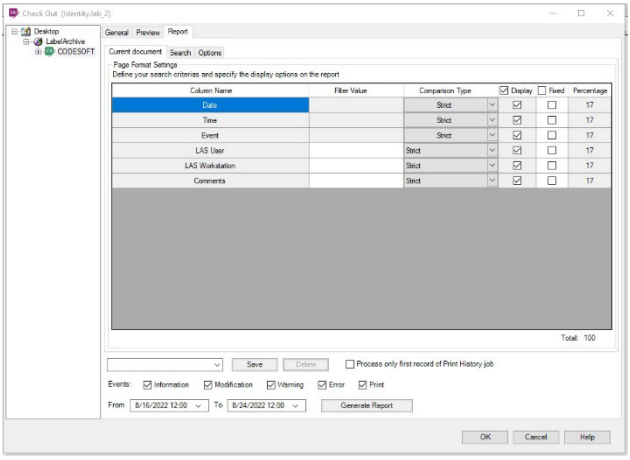

Figure 6 Report tab in Check Out

To access the **Report** tab:

Step 1 Go to **File > LABEL ARCHIVE > Check Out.**

Step 2 On the **General** tab, select the document for which you want to generate a report.

Step 3 Click the **Report** tab.

The **Report** tab displays report options for the document selected in the **General** tab. See the *LABEL ARCHIVE Admin Guide* for more information.

Check In

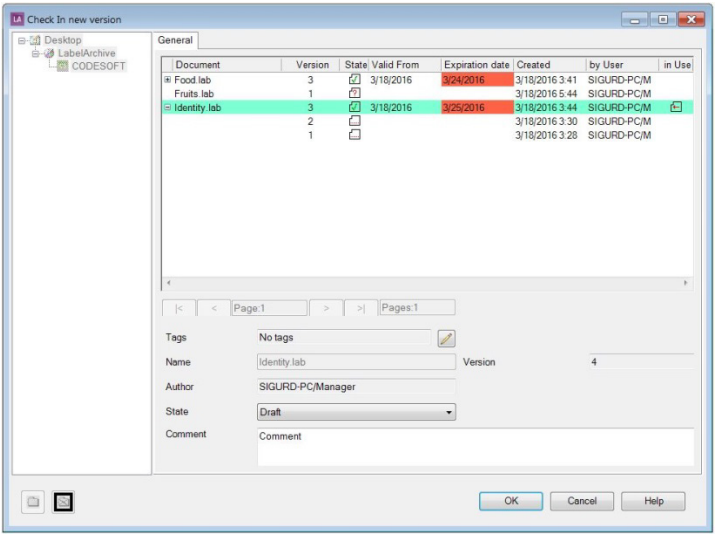

Figure 7 Check In window

To open the **Check In** window, click **File > LABEL ARCHIVE > Check In**.

This window allows checking in new versions of documents that have previously been checked out.

The **OK** button checks the document into LABEL ARCHIVE. Once successfully checked in, this window is automatically closed.

When checking in a new version of a document that is already in LABEL ARCHIVE, the source tree is disabled, the document can only be archived within its current category (folder). The source tree is enabled only in the **Check-In As** function, when you need to choose a different name and category for the document.

The **Cancel** button closes the window without any further action.

The **Help** button opens online help for the current window or tab.

General Tab

To access the Check In window's **General** tab:

Step 1 Check out any document.

Step 2 Go to **File > LABEL ARCHIVE > Check In**.

The **General** tab shows detailed information on the document to be checked in.

- **Name** — The document name.
- **Author** — The name of the user who created or modified the previous document version. Once the new version is checked in, the new user name will be displayed.
- **Version** — The document version number. (If the **Archiving** setting is enabled in LABEL ARCHIVE Administration, the version number is automatically increased from the last version. If the **Don't save drafts between final versions** setting is enabled, the version number will only increment when there is a new Final version.)
- **State** — You can select the desired document state. The global list of possible states in LABEL ARCHIVE is:
  - Draft
  - In Approval
  - Final

  Note

  The list of states allowed by your configuration depends upon the settings which have been defined in LABEL ARCHIVE Administration. If 3-state Approval is OFF, then the In Approval state is not available. If Approval is OFF, then the Draft state is not available. See the *LABEL ARCHIVE Admin Guide* for more information.
- **Valid From** — Start date of document validity for printing.
- **Expiration Date** — Expiration date of document validity.
- **Comment** — Type any comments pertaining to this document version.

- **Valid from Date** Enabled when the document state is set to **Final**. You can enter the date from which the document version is considered valid. Note that this date cannot be backdated.
- **Expiration date** Enabled when the document state is set to **Final**. You can enter the expiration date of document validity.

Check In As

To open the **Check In As** window, click **File > LABEL ARCHIVE > Check In As.** The **Check In As** window also displays when checking in a label that is not already in the LABEL ARCHIVE database.

The **Check In As** window allows you to check in a document using a different name (similar to a typical **Save As** command) and if desired, within a different category.

During **Check In As** the source tree is enabled.

The **OK** button checks the document into LABEL

ARCHIVE. The **Cancel** button closes the window

without any further
action.

The **Help** button opens online help for the current window or tab.

General Tab

To access the **Check In As** window's **General** tab:

Step 1 Check out a document or create a new one.

Step 2 Go to **File > LABEL ARCHIVE > Check In As**.

The **General** tab shows detailed information on the document to be checked in.

This tab shows the list of documents that are stored in the selected category.

The following **Category** buttons are available:

Create a new category.

Delete an existing category, together with its affiliated sub-categories and documents. Sufficient privileges are required to perform such an operation.

- **Name** — The document name, which can be modified.
- **Author** — The name of the user who created or modified this document version.
- **Version** — The document version number. When using **Check In As** to check in a document, the version is automatically set to 1.
- **State** — Select the desired document state. The global list of possible states in LABEL ARCHIVE is:
  - Draft
  - In Approval
  - Final

  Note

  The list of states allowed by your configuration depends upon the settings which have been defined in LABEL ARCHIVE Administration. If 3-state Approval is OFF, then the In Approval state is not available. If Approval is OFF, then the Draft state is not available. See the *LABEL ARCHIVE Administrator's Guide* for more information.
- **Valid From** — Start date of document validity for printing.
- **Expiration Date** — Expiration date of document validity.
- **Comment** — Type any comments pertaining to this document version.
- **Valid from Date** — Enabled when the document state is set to **Final**. You can enter the date from which the document version is considered valid. Note that this date cannot be backdated.
- **Expiration date** — Enabled when the document state is set to **Final**. You can enter the expiration date of document validity.

History

To open the **History** window, click **File > LABEL ARCHIVE > History**.

This window shows all history events for a document version stored in LABEL ARCHIVE.

Done button closes the window without any further action.

Help button opens online help for the current window or tab.

General Tab

To access the **History** window's **General** tab:

Step 1 Go to **File > LABEL ARCHIVE > History**.

Step 2 In the source tree, select the category containing the desired document.

The search pane allows you to enter search criteria to find the label you are looking for. The search supports the wild card character * at both the beginning and end of the search string so the users can search for part of the document name.

The search is done on all sub-folders and pages. You can search using the following fields: **Document Name**, **Valid From Date**, **Date Created**, **Created By User**.

To search by Document Name enter a document name or part of a document name with the wild card character and click the **Search** button.

To search by user, enter a username or part of a username with the wild card character and click the **Search** button. Please note that the workstation name is prefixed to the username. If you don't know the workstation name, add a wild card character to the beginning of the username.
To search by **Date Created** or **Valid From Date**, select the check box and select a date from the calendar. The calendar can be accessed by clicking on the drop down arrow. Click the **Search** button to view the results.

When you click on a column in the grid, the results will be

sorted by that column. The arrow that displays indicates if the results are sorted in increasing or decreasing order.

The **General** tab shows the list of documents which are stored in the selected category.

For information on the column headings displayed on the **General** tab, see the **Check Out** section.

History Tab

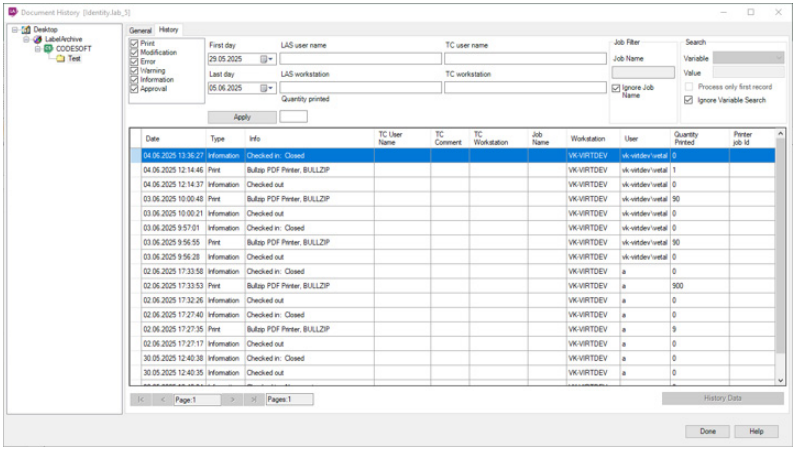

Figure 8 History tab

To access the **History** tab:

Step 1 Go to **File > LABEL ARCHIVE > History**.

Step 2 In the source tree, select the category containing the document, and then click on the desired version.

Step 3 Select the **History** tab to view the events that are linked to the selected document version.

Note

If Don't save drafts between final versions setting is enabled, the version number will only increase when there is a new Final version. With this setting enabled, modifications will still be tracked in the label history.

When the **History writing** setting is enabled in LABEL ARCHIVE Server, the system tracks and keeps a history of events that occur for each document.

The following types of history events can be tracked:

- **Print:** Print events
- **Modification:** Modifications that were made to a document
- **Error:** Error type events
- **Warning:** Warning type events
- **Information:** Information type events
- **Approval:** Approval type events

The **First day** and **Last day** fields allow you to select time boundaries for showing history events.

The **Apply** button launches the history search process.

The **Job Filter** zone allows the user to search a particular label that has been printed by using the **Job Name** assigned to the printed label. This is especially useful if you are using a print management application which may print hundreds or thousands of copies of a same label. Using the **Job Name** filter allows the user to quickly find the specific information desired. Wildcard characters are available.

Search variable area allows the user setting specific **Variable** from dropdown and its **Value** as search criteria. **Ignore Variables Search** checkbox allows bypassing this search feature.

The **Help** button opens online help for the current window or tab.

The event list columns are: **Date:** Event date; **Type:** Type of event; **Info:** Description of the event, when applicable; **Workstation:** Name of the workstation from which the event was initiated

- **User:** User ID of the person who initiated the event
- **Job Name:** The name assigned to the print job

Step 4 Select a Print event and click **History** data. The data that printed on each label of that print event will display in the history data window. (See Figure 8.)

Reprint

To open the Reprint window, click **File > LABEL ARCHIVE > Reprint**.

This window allows you to select a print job history record for a given document version, and to rerun the entire original print job with its former parameters and variable data.

In the **Reprint** window, the source tree is enabled.

The **OK** and **Cancel** buttons simply close the window without any further action.

The **Help** button opens online help for the current window or tab.

General Tab

To access the Reprint window's **General** tab:

Step 1 Go to **File > LABEL ARCHIVE > Reprint**.

Step 2 Select the document from the source tree.

The search pane allows you to enter search criteria to find the label you are looking for. The search supports the wild card character * at both the beginning and end of the search string so the users can search for part of the document name.

The search is done on all sub-folders and pages. You can search using the following fields: **Document Name**, **Valid From Date**, **Date Created**, **Created By User**.

To search by Document Name enter a document name or part of a document name with the wild card character and click the **Search** button.

To search by user, enter a username or part of a username with the wild card character and click the **Search** button. Please note that the workstation name is prefixed to the username. If you don't know the workstation name, add a wild card character to the beginning of the username.

To search by **Date Created** or **Valid From Date**, select the check box and select a date from the calendar. The calendar can be accessed by clicking on the drop down arrow. Click the **Search** button to view the results.

When you click on a column in the grid, the results will be sorted by that column. The arrow that displays indicates if the results are sorted in increasing or decreasing order.

The **General** tab shows the list of documents which are stored in the selected category.

From this tab you must select the document version for which you want to view the print history. Then on the **Print History** tab, select the print history record that you want to reprint. On the **History Data** tab you can view the data that printed on each label of the print job. Finally, on the **Reprint Preview** tab, you can preview and reprint the original document instances.

For information on the column headings displayed on the **General** tab, see the **Check Out** section.

Print History Tab

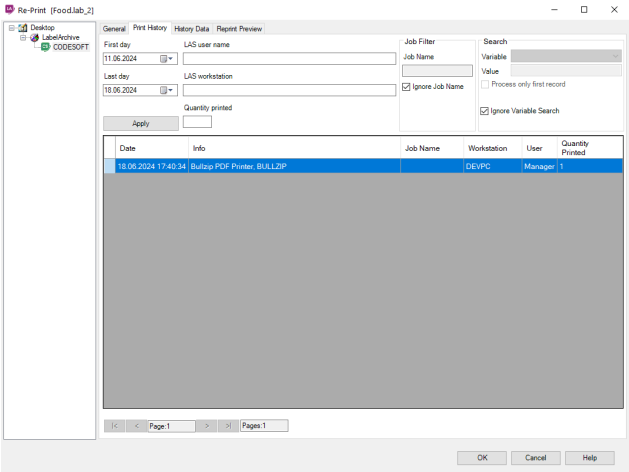

Figure 9 Print History tab in Reprint

To access the **Reprint** window's **Print History** tab:

Step 1 Go to **File > LABEL ARCHIVE > Reprint**.

Step 2 Select the desired document from the source tree.

Step 3 Select the desired document version on the **General** tab.

The **Print History** tab allows reprinting documents from the print history. It is available only if a document is selected. The table shows all print events from the database for the specified period. If no document is selected then a warning message is shown.

The **First day** and **Last day** fields allow you to select time boundaries for showing print events.

The **Job Filter** zone allows the user to search a particular label that has been printed by using the **Job Name** assigned to the printed label. This is especially useful if you are using a print management application which may print hundreds or thousands of copies of a same label. Using the **Job Name** filter allows the user to quickly find the specific information desired. Wildcards characters are accepted. **Search variable** area allows the user setting specific

Variable from dropdown and its **Value** as search criteria. **Ignore**

Variables Search checkbox allows bypassing this search feature.

The event list columns are:

- **Date:** Event date

- **Info:** Description of the print event (with printer name and port)

- **Workstation:** Name of the workstation from which the print event was initiated

- **User:** User ID of the person who initiated the print event

- **Job Name:** The name assigned to the print job.

The **Help** button opens online help for the current window or tab.

History Data Tab

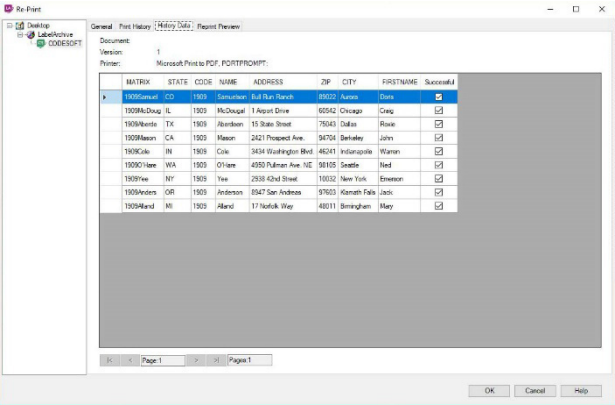

Figure 10 History Data tab in Reprint

To access the **Reprint** window's **History Data** tab:

Step 1 Go to **File > LABEL ARCHIVE > Reprint**.

Step 2 Select the desired document from the source tree.

Step 3 Select the desired document version from the **General** tab.

Step 4 Select the desired print history record from the **Print History** tab.

Step 5 Click **History Data** to visualize data contained into a record from the **Print History** tab.

This tab presents all data contained in a print history record. It shows data which appear in a specific document (Document Name, Document version, Printer used). It is available only if a document is selected. If no document is selected, a warning message appears.

The **Event List** columns are the database's fields which are selected to create a label.

Successful column indicates correct print jobs (set by default).

The **OK** and **Cancel** buttons simply close the window without any further action.

The **Help** button opens online help for the current window or tab.

Reprint Preview Tab

To access the **Reprint** window's **Reprint Preview** tab:

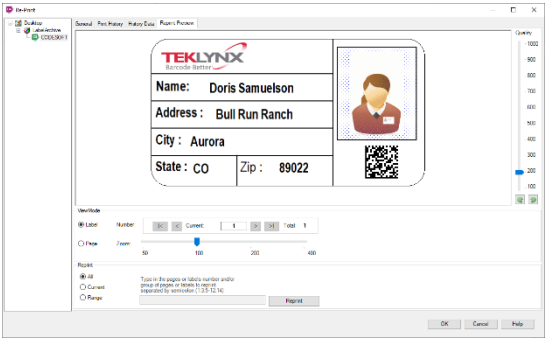

Figure 11 Reprint Preview tab in Reprint

Step 1 Go to **File > LABEL ARCHIVE > Reprint**.

Step 2 Select the desired document from the source tree.

Step 3 Select the desired document version on the **General tab.**

Step 4 Select the desired print history record on the Print History tab.

Step 5 Click **History Data** to visualize data contained into a record from the **Print History** tab.

Step 6 Click **Reprint Preview** to display all labels having been printed in a print job.

The **Reprint Preview** tab gives a preview of the document for the print event selected in the **Print History** tab.

View Mode

Two reprint modes can be selected: per label and per page.

Per label mode: Allows you to display all of the labels printed in the print job one by one.

- A slider allows you to browse the different labels.
- A slider allows you to zoom the label

Per page mode: Allows you to display all of the labels printed on each printed page.

- A slider allows you to browse the different output page and show the exact labels that have been printed on each of them.
- A slider allows you to zoom the entire page.

Reprint

This section allows you to:

- Reprint all pages from the print job,
- Reprint only the current page that is displayed,
- Reprint a range of page using the following syntax: 1;2;5;8-10;50-100.

The **Reprint** button initiates the reprint of the document. It reruns the original print job with its former parameters and variable data.

The **OK** and **Cancel** buttons simply close the window without any further action.

The **Help** button opens online help for the current window or tab.

Versions

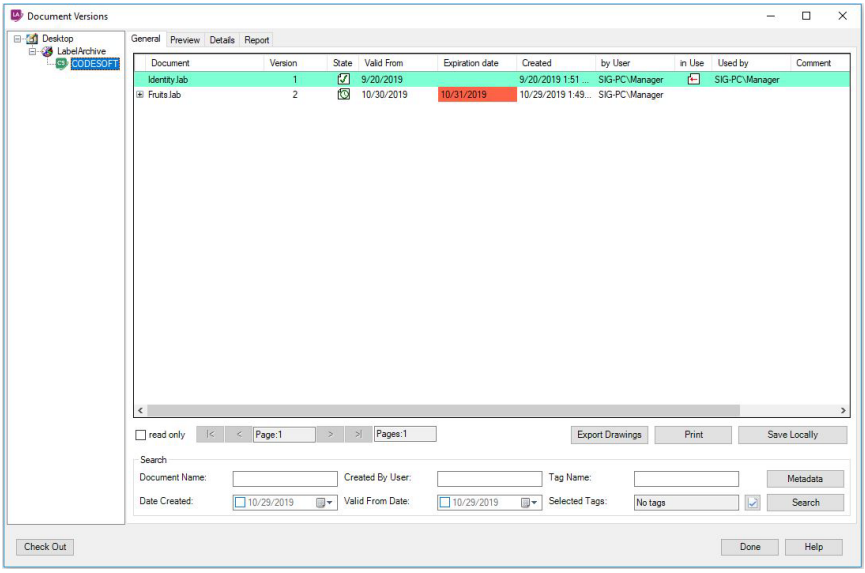

Figure 12 Versions window

To open the **Versions** window, click **File > LABEL ARCHIVE > Versions**.

This window shows the versions history of a document stored in LABEL ARCHIVE.

When the **Read Only** check box is enabled, the selected label will open in read-only mode. The user will not be able to make any modifications to the label. When a label is checked out with the **Read Only** check box enabled, multiple users can open the label (even when the **Lock at Check Out** option is enabled in the LABEL ARCHIVE Server Administration settings).

The search pane allows you to enter search criteria to find the label you are looking for. The search supports the wild card character * at both the beginning and end of the search string so the users can search for part of the

document name.

The search is done on all sub-folders and pages. You can search using the following fields: **Document Name**, **Valid From Date**, **Date Created**, **Created By User, Tags and Metadata.**

To search by Document Name enter a document name or part of a document name with the wild card character and click the **Search** button.

To search by user, enter a username or part of a username with the wild card character and click the **Search** button. Please note that the workstation name is prefixed to the username. If you don't know the workstation name, add a wild card character to the beginning of the username.

To search by **Date Created** or **Valid From Date**, select the check box and select a date from the calendar. The calendar can be accessed by clicking on the drop down arrow. Click the **Search** button to view the results.

When you click on a column in the grid, the results will be sorted by that column. The arrow that displays indicates if the results are sorted in increasing or decreasing order.

Export drawing shows label details report screen. User can export Document Objects Report right to the file system (PDF, Excel, Word).

The **Check Out** button allows you to directly check out the selected document version.

The **Done** button closes the window without any further action.

The **Help** button opens online help for the current window or tab.

Note

In LABEL ARCHIVE, a document may have several versions in Draft state and several versions in Final state, but no more that one version in the In Approval state is allowed. The Don’t save drafts between final versions setting controls when the version numbers are increased. See the Version Control section of this document for more information.

General Tab

To access the **Versions** window's **General** tab:

Step 1 Go to **File > LABEL ARCHIVE > Versions**.

Step 2 Select the desired folder.

For information on the column headings displayed on the **General** tab, see the **Check Out** section.

Preview Tab

To access the **Versions** window's **Preview** tab:

Step 1 Go to **File > LABEL ARCHIVE > Versions**.

Step 2 Select the document version to preview.

Step 3 Select the **Preview** tab.

The **Preview** tab shows the preview of the selected document version. When this tab is activated, the preview is generated.

The **Print** button initiates the print of the document version preview.

Report Tab

To access the **Versions** window's **Report** tab:

Step 1 Go to **File > LABEL ARCHIVE > Versions.**

Step 2 On the **General** tab, select the document version for which you want to generate a report.

Step 3 Click the **Report** tab.

The **Report** tab shows the report options for the document selected on the **General** tab. See the *LABEL ARCHIVE Admin Guide* for more information.

Seeking Approval Request

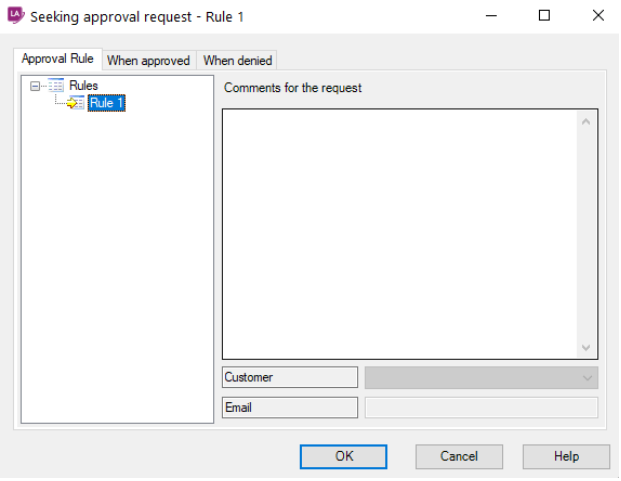

Figure 13 Seeking Approval Request window

The **Seeking Approval Request** window appears if you select the **In Approval** state for a document during Check In or Check In As.

This window allows you to select a predefined rule for the approval workflow and to specify parameters when required. You may set up a list of users and/or user groups who will be notified when the document is approved or when the approval is denied.

The **OK** button confirms all changes done and sends the request to **LABEL ARCHIVE Server**.

The **Cancel** button closes the window without any action. The

Help button opens online help for the current window or tab.

Approval Rule Tab

This tab allows you to select a predefined rule for the approval workflow and to specify required parameters.

The left tree pane shows all predefined rules. When there is a predefined rule for the category, this rule is automatically selected.

The Parameters section on the right side depends on the rule definition. When selecting a node in the rules tree, the right section is updated to show the required settings for the rule.

- **Comments** You can type a comment to be added to the approval request

- **Customer** Subject to approval rule, this edit field allows you to specify the name of the customer who will approve the current document.

- **E-mail** E-mail address of the customer, used in the case of e-mail notification

When Approved and When Denied Tabs

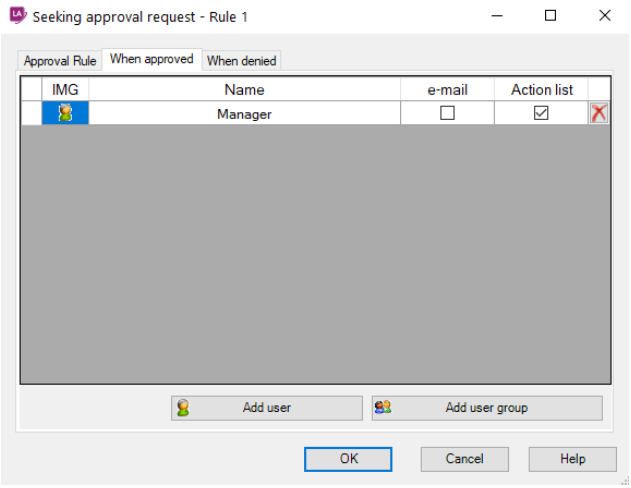

Figure 14 When Approved tab in Seeking Approval Request window

The **When Approved** and **When Denied** tabs can be selected from the **Seeking Approval Request** window, which appears if you select the **In Approval** state for a document during Check In or Check In As.

These tabs allow you to specify a list of users and/or user groups who will be notified when the document is approved or denied. By default, the table displays the name of the user who starts the approval process.

The **E-mail** and **Action** check boxes allow you to specify how the notification message will be delivered.

Note

E-mails can only be sent to single users.

The **Add user** and **Add user group** buttons allow adding users or user groups to the notification list.

Approval Request

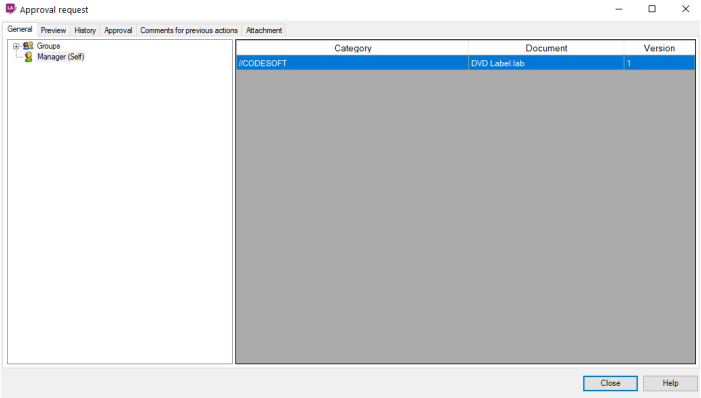

Figure 15 Approval Request window

The **Approval Request** window appears when you click on a **Seeking Approval** event in the actions list (the Actions list pops up at connection time when there are pending actions for the connected user).

This window allows you to select documents seeking approval, preview and print them, view changes history, and approve or deny them.

The left tree pane shows all user groups of which the current user is a member.

The **OK** and **Cancel** buttons close the window without any further action.

The **Help** button opens online help for the current window or tab.

General Tab

This tab gives access to all documents seeking approval. When selecting a node in the left tree pane, all documents in this group are shown in the right grid.

The document list columns are:

- **Category** The folder where the document seeking approval is stored.

- **Document** The name of the document seeking approval.

- **Version** The version number of the document seeking approval.

Preview Tab

This tab shows a preview of the document selected in the **General** tab.

When this tab is activated, a preview is generated for the selected document. It's possible to adjust preview quality via slider.

The **Print** button initiates the print of the preview image.

History Tab

This tab shows all history events from the database for the specified time and selected event types. By default, all event types are selected.

For more information on the **History** tab in the **Approval Request** window**,** see the **History** section.

Approval Tab

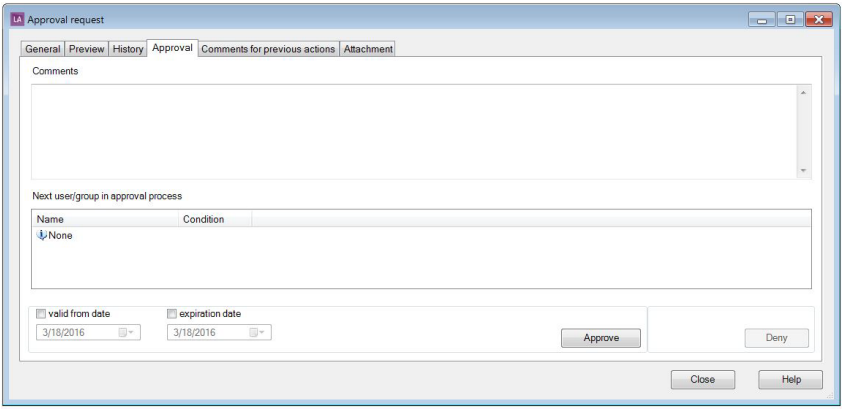

Figure 16 Approval tab in Approval Request window

This tab allows approving or denying a document.

The **Comments** field allows adding a comment to the approval or the denial.

The **Approve** button allows approving the document.

The **Deny** button allows denying the document. (Text must be added in the **Comment** field in order for this button to be activated.)

It possible to set document validity dates in the range between **Valid From** and **Expiration** dates.

Note

If the Password required in approval setting has been enabled in LABEL ARCHIVE Server, then a dialog box will pop up to ask you to confirm your password right before completing the approval/denial process.

Attachment Tab

This tab allows the user attaching document to the approval process. Maximum upload size is 5Mb (parameter in tblSysData).

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